

Tourist Profile - Year Report 2013



Tourism

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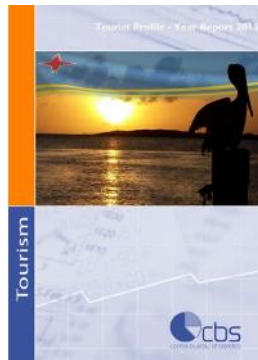


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**CENTRAL BUREAU OF STATISTICS
ORANJESTAD, November, 2014**

PREFACE

The Tourist Profile presents results of the Tourist Survey done in 2013, executed by the Central Bureau of Statistics Aruba, together with survey results of previous years. It includes data from other sources as well, e.g. the Aruba Tourism Authority, (formerly) Cruise Tourism Authority, Department of Immigration at the International Airport of Aruba, the Central Bank of Aruba, the Tax department (SIA) and the Caribbean Tourism Organization.

Tourism proved to be the main economic activity on the island. This is reason enough for the Central Bureau of Statistics, in cooperation with other institutions, to conduct surveys, mainly to measure fluctuations of tourist expenditures, satisfaction levels and shifts within demographical market segment of the tourism industry. In the System of National Accounts framework, which is also the basis for a Tourism Satellite Account (TSA) this data is very important for estimating the impact of the tourism industry on the islands total economy and the necessity for such data exists for various vital purposes.

The Central Bureau of Statistics (CBS) published the results of several surveys over the years since 1996. The realization of the Tourist Survey for the year 2013 was possible thanks to the cooperation and excellent work of the interview-team and the Central Bureau of Statistics Tourism department, which consist of Marleen Barendregt-Croes, Mary Geerman M.A., Cheryl Feliciano MSc. and Louissette Christiaans-Yarzagaray MSc. (head of the department). Special thanks goes to all other Central Bureau of Statistics staff, principally Marjolene van der Biezen-Marques B.A. and Richard Werleman for their cooperation (technical) during the work process. Most of the results of the Tourist Survey is also available on the CBS website on a quarterly and on a yearly basis.

In the year 2010 the CBS switched to a digital capturing system with the help of laptop/tablets which replaced the scanning process and the data-entry system. Initially the visitor survey was chosen as a pilot project prior to the Census 2010. Since then the CBS switched the data collection method to a digital system. The software called CSPro was used, a program specially designed for the editing of databases. The technical assistant that helped the Tourism department with the set-up of this new system was Dr. Frank Eelens and for this we are gracefully thankful for all his support and assistance.

A special thanks also to all the data-suppliers and supporters who contributed in any way to this publication. A word of thanks goes also to the hotels and AHATA for their cooperation and would like to encourage continuing with this cooperation in the future! Last but not least, a word of thanks goes to the Aruba Airport Authority and the U.S. Department of Immigration and Customs for allowing our interview-team to conduct the survey in departure halls of the “Aeropuerto Internacional Reina Beatrix.

The Central Bureau of Statistics hopes that the Tourist Profile Year Report 2013 and all the previously published report can provide all the users with relevant and necessary information. For any other information that you might need, feedback, comment or for any further information, feel free to contact us. This publication will also be available to the general public and will also be uploaded on the website of the CBS (<http://www.cbs.aw>).

Drs. Martijn Balkestein

Director of the Central Bureau of Statistics Aruba



FOREWORD

In the present and former publications the CBS used the macro-economic indicator “Total tourism expenditure”. This concept has been used as an indicator and is presented as an estimated macro-economic variable.

One of the monetary indicators published by the CBS is the average daily expenditure in Aruba, which is the total consumption expenditure made by a stayover visitor (during his/her stay in Aruba) or on behalf of a visitor for and during his/her trip and stay at a destination. This information is presented by quarter and also a year figure is presented at the conclusion of each year.

To get a better and a macro level image of the visitor expenditures in Aruba, the **average daily expenditure** is multiplied by the average length of stay of the visitors and by the number of corresponding stayover visitors. The result is an estimate of **tourism expenditures in Aruba** which indicates the amount of money all visitors left behind in Aruba during their stay in Aruba in a certain quarter or year. To bring this figure to a higher stage (a macro total), a total tourism expenditure is estimated. This **estimated total tourism expenditure** is all the travel related expenditures made by stayover visitors, before, during, and immediately after a trip, which is the tourism expenditure in Aruba plus an **estimated accommodation calculation portion only** of the pre-paid packages up to now. Other components of the pre-paid package expenditures (e.g. F&B and tours) are still not included in the estimated total tourism expenditure. The CBS is beginning the process of calculating the remaining portion of (pre-paid) expenditures with the help of technical assistance which will take place during the Technical missions of the UNWTO (TSA missions) in order to reach to a complete image of all expenditures related to tourism corresponding to the total economy of Aruba.

Total tourism expenditure measures the total amount of money tourists visiting Aruba in a certain period spent in that time on tourism related goods and services. The amount of money value stayover visitors spent on tourism related goods and services should ideally be equal to goods and services sold in a certain period of time.

The total tourism expenditure of the CBS is measured on an accrual basis. Accrual accounting records flows at the time economic value is created, transformed, exchanged, transferred or extinguished. This means that flows which imply a change of ownership are entered when ownership passes, services are rendered when provided, output at the time products are created and intermediate consumption when materials and supplies are being used. The System of National Accounts (SNA) favors accrual accounting because:

- (a) The timing of accrual accounting is in full agreement with the way economic activities and other flows are defined in the System. This agreement allows one, for instance, to evaluate the profitability of productive activities correctly (i.e., without the disturbing influence of leads and lags in cash flows) and to calculate a sectors net worth correctly at any point in time;
- (b) Accrual accounting can be applied to non-monetary flows

The Central Bank of Aruba (CBS), on the other hand, measures the tourism receipts. A comparative analysis shows that the concepts of tourism receipts and total tourism expenditure are not identical nor are their methodologies the same. Differences in approach and operational definitions of the two concepts leads to differences in the figures measured. It is therefore methodologically not appropriate to equalize tourism receipts and tourism expenditure with each other, without indicating the difference between these two concepts. It is strongly recommended to users to clearly **distinguish tourism receipt from tourism expenditure**. For supplementary information please refer to the methodology which is available upon request.

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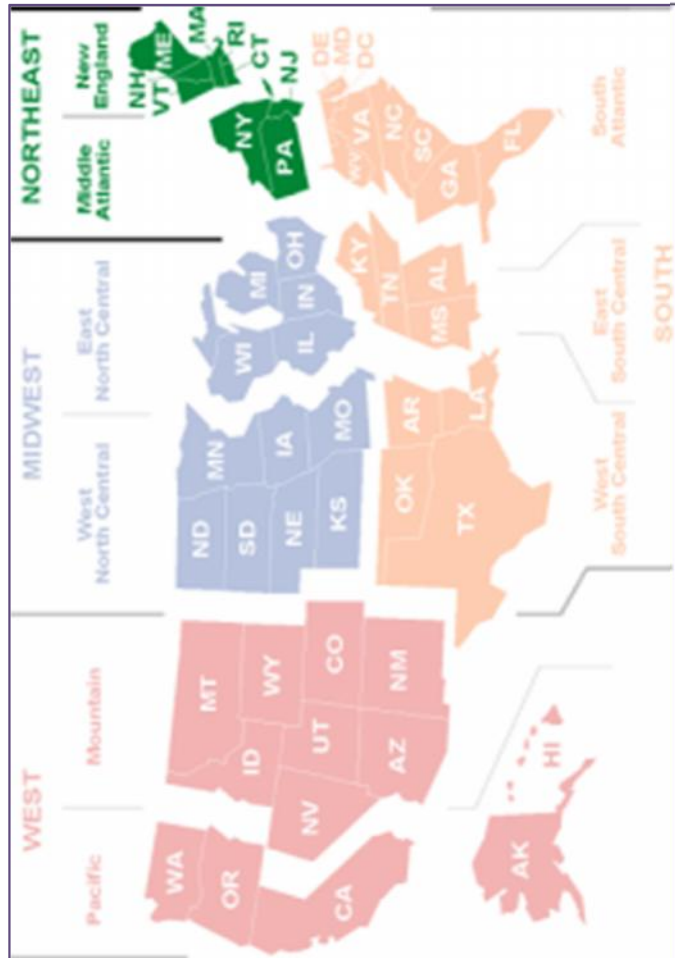
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TOURISM INDICATOR SHEET FOR 2013

	2013	% change
Stayover Visitors	979,256	8.3
Cruise Passengers	688,568	18.2
Total number of Visitors	1,667,824	12.2
Total Visitors Nights	7,126,771	3.2
First Time Visitors (in rel. %)	40.8	-12.1
Repeat Visitors (in rel. %)	59.1	10.3
Visitors that stayed in Hotels (in rel. %)	59.0	-2.2
Visitors that stayed in Timesahres (in rel. %)	27.0	6.3
Visitors that came with a Pre-paid Package (in rel. %)	54.8	-4.0
Visitors that came with an All Inclusive Package (in rel. %)	43.7	-4.8
Average Daily Expenditure spent in Aruba per person (in US\$)*	90.32	6.7
Average Expenditure spent in Aruba per person (in US\$)*	670.17	5.0
Total Tourism Expenditure in Aruba (in US\$)*	656,272,302	13.8
Estimated Total Tourism Expenditure (in US\$)*	924,871,936	8.2
Total Tourism Receipts (in US\$)	1,495,363	7.0
Total Occupancy (in %)	77.5	-1.9
Hotel Occupancy (in %)	76.2	-3.2
Timeshare Occupancy (in %)	79.2	-0.3
Total Average Daily Rate (ADR) (in US\$)	208.20	6.7
Hotel Average Daily Rate (ADR) (in US\$)	214.14	6.8
Timeshare Average Daily Rate (ADR) (in US\$)	166.09	5.5
Total Revenue per Available Room (Revpar) (in US\$)	98.60	7.7
Hotel Revenue per Available Room (Revpar) (in US\$)	163.12	3.4
Timeshare Revenue per Available Room (Revpar) (in US\$)	21.21	8.4
Total Occupied Rooms Nights	2,096,089	0.4
Total Room Revenues (in US\$)	266,551,294	10.2
Total Lodging Taxes (in US\$)	36,270,391	6.7
Total Casino (Gambling) Taxes (in US\$)	13,659,777	21.7

* Expenditure results are only relevant for Stayover visitors and excludes Cruise visitors



The United States of America

INTRODUCTION

The travel and tourism industry is the economic lifeblood of many countries, especially islands around the world. Tourism is the second biggest industry in terms of the people it employs. Tourism is a human circulation and is considered as consumption. Tourism movements are increasingly of interest as economic, social and cultural events, which annually and on a country basis make one destination more popular than the other. Tourism is an important factor for increasing employment and interaction between communities and bringing financial support to economies.

Analyzing and examining the differences in tourism demand in certain periods is of key importance. The aim of this research is to examine the profiles and expectations of visitors coming to Aruba. This report provides vital information on the changing tourism environment in Aruba and it provides key statistics of mostly the stay-over visitors. It presents survey results of the Tourism Survey by the Central Bureau of Statistics carried out under the **stayover visitors** plus the supply and use of accommodation by visitors along with a wide range of visitor related numbers including stayover visitor's expenditure patterns.

The following presents a short analysis together with corresponding graphs which include trends, comparisons and percentage changes of what the Central Bureau of Statistics (CBS) considers the most important tourism indicators. It gives a general view of how tourism developed in the year 2013 compared to the year 2012 and previous years. In some cases it compares year figures starting from the year 2005. Several other graphs are presented in this section in order to better illustrate significant patterns (trends) in the tourism industry over the last years.

1. HIGHLIGHTS IN TOURISM 2013

Stayover Visitors and Visitors Nights

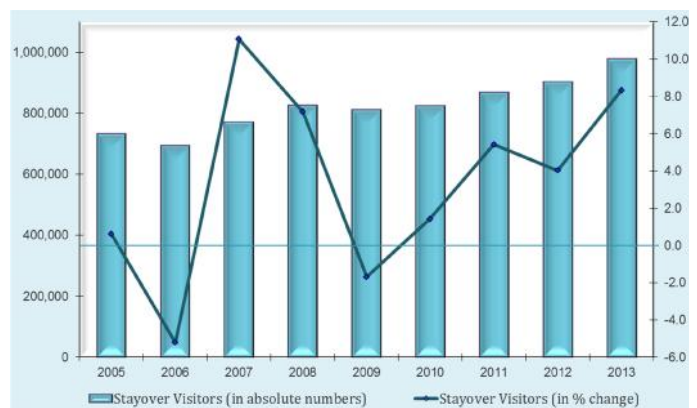
This section presents graphs related to the total number of stayover visitors and their percentage change. Other graphs are related to different mayor visitors markets to Aruba. The following graphs present number of stayover visitors and visitor nights in absolute figures from the years 2005 until 2013, together with their respective percentage changes.

Graph 1 presents the stayover visitors and the percentage change compared to the previous years. In the year 2013, Aruba experienced a significant increase in the number of stayover visitors of 8.3% compared to the year before. Aruba reached a total of 979.256 stayover visitors which is the highest number ever recorded. The total number of stayover visitors increased in all quarters of the year 2013 compared to 2012.

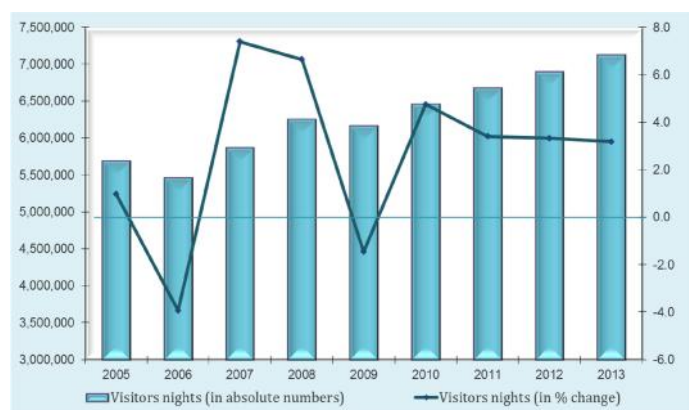
The 4th quarter of 2012 experienced the highest increase which increased with 15.9% compared to the 4th quarter of 2012. The second quarter of 2013 experienced the lowest increase which was 4.2% compared to 2012.

Graph 2 indicates the total number of visitor nights and its percentage change over the years. This

Graph 1. Total number of stayover visitors



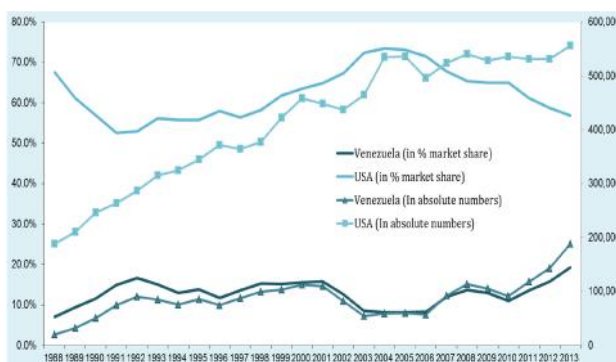
Graph 2. Total number of visitor nights



indicator experienced increases in all the quarters of 2013 compared to the previous year. In 2013 Aruba had a total of 7,126,771 visitor nights. This represents an increase of 3.2% compared to the year 2012 which was caused mainly by the fact that the 4th quarter experienced the highest increase of 8.9% compared to the same quarter of the previous year. The 2nd and 3rd quarters of 2013 experienced the lowest increases which were 0.6% and 0.7% compared to the year 2012.

Graph 3 shows how the two major markets, which are the markets of the U.S. and Venezuela, fluctuate during the years 1988 to 2013, in absolute numbers and in percentage of share of the total market. These two markets represent about 76% of Aruba's total visitors' market in 2013 which increased with 1.9% compared to the previous year. This indicates that Aruba is still very reliant on the U.S. and Venezuelan market. The graph also illustrates that the share of the U.S. market and the share of the market of Venezuela still moves interchangeably meaning when the U.S. market share decreases the market of Venezuela increases and the other way around. In 2013, the market of Venezuela had a market share of 19.2% which is 21.2% more than 2012 while the U.S. market had a share of 56.8% to the total stayover visitors' market which decreased with 3.3% compared to the previous year.

Graph 3. Market share of Venezuela & the U.S. to the total stayover visitors market (in %)

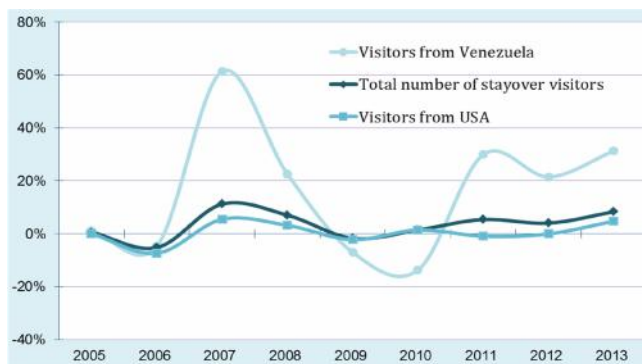


Since the year 2000 up to now, the visitors from the USA and Venezuela together reached total market shares between 74.6% and 81.6%. In 2012 the market shares of the US and Venezuelan market together reached its lowest share since 1998 which was 74.6% and its highest percentage share was reached in the year 2004, reaching 81.6%

Graph 4 shows the relative percentage growth of the total stayover visitors to Aruba, the U.S. market and the market of Venezuela. The U.S. market experienced an increase of 4.8% in 2013 compared

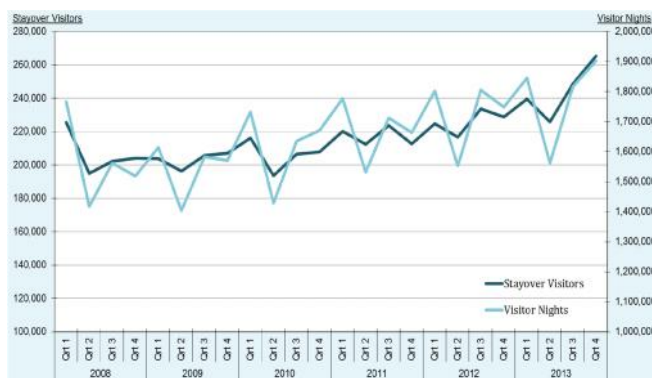
to the former year and the market of Venezuela experienced a substantial increase of 31.3% compared to 2012. In the graph all these tendencies are visible from the year 2005 onwards. Of the three variables presented in the graph below, it is noticeable that the market of Venezuela fluctuates drastically compared to the total stayover's market and the U.S. Market has a very similar tendency to the total stayover's market.

Graph 4. Total stayover visitors market, the market of Venezuela & the U.S. market (in % change)



Graph 5 displays the total number of stayover visitors and the total number visitor nights by quarter in absolute numbers from the year 2008 up to 2013. In this graph seasonal patterns for these two indicators are noticeable. Usually these two indicators move more or less in the same direction even though stayover visitors show a gentler tendency starting from the year 2008 while visitor nights display a steeper seasonal tendency.

Graph 5. Quarterly stayover visitors & visitor nights

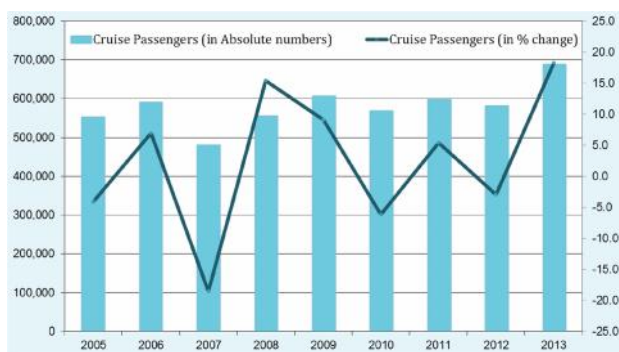


Cruise Passengers and Cruise Calls.

The following graph shows the total number of cruise passengers in absolute numbers and in percentage change for a range of 9 years starting from the year 2005. Year 2013 experienced an significant increase of 18.2% in number of cruise

passengers compared to 2012 after experiencing a decrease of 2.9% in 2012 compared to the prior year. In 2013 Aruba welcomed a total of 688,568 cruise passengers. It can be stated that the number of cruise passengers in 2013 is the highest number ever recorded in the history cruise passengers in Aruba. The second highest number of cruise passengers reached was 606,768 in the year 2009.

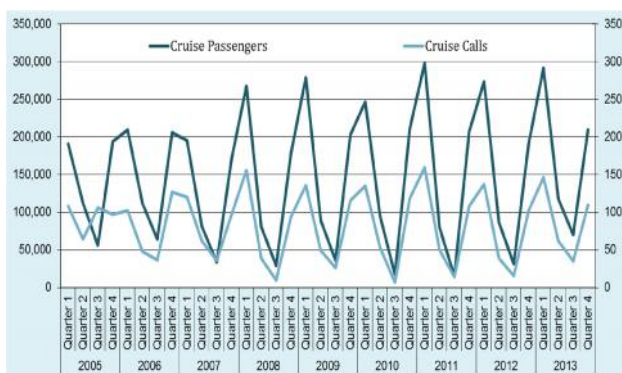
Graph 6. Total number of cruise passengers



The next graph notes the absolute number of cruise passengers and the total number of cruise calls by quarter starting from the year 2005 until 2013. Both, the total number of cruise passengers and the total number of cruise calls reflect very constant patterns and move mostly in the same direction. This is mostly indicates the constant seasonal patterns which is very evident for both indicators.

Aruba received 20.1% more cruise calls in 2013 compared to the year before reaching a total of 353 cruise calls. This represents 59 more cruise ships which visited our island in 2013. Aruba also received an additional 106,255 cruise passengers in 2013.

Graph 7. Total number of cruise passenger & number of cruise calls by quarter

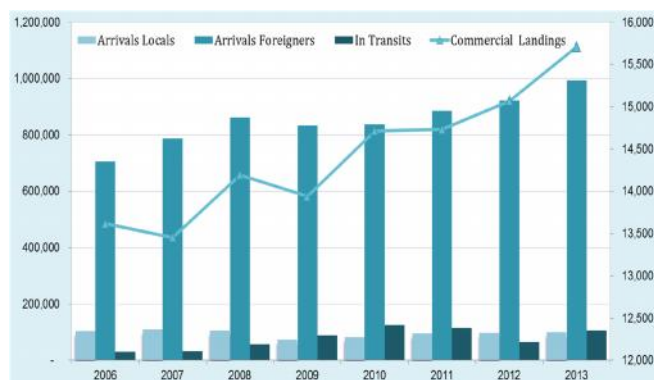


Airport Traffic and Total Landings.

This section presents data of the immigration department at the international airport of Aruba. The most important data regarding the airport

traffic are presented which are the total local arrivals, the total foreign arrivals, the in transit passengers and the total number of commercial landings at the airport of Aruba.

Graph 8. Total arrivals & total commercial landings



Graph 8 presents four indicators: foreign and local arrivals, commercial landings and in transit passengers starting from the year 2006 up to the year 2013 at the airport of Aruba. In the following graph (graph 9) the same indicators are visible but now in quarterly movements of both foreign and local arrivals and commercial landings.

The total number of foreigner arrivals is an indicator which is used to correlate to the total number of stayover visitors. Basically these two numbers should be about equal considering that both measure foreign visitors entering Aruba by air. Take into consideration that the airport counts the number of people arriving and departing from the airport which can represent discrepancies in time registration between the recorded stayover visitors and the foreign arrivals to Aruba.

Aruba received 7.8% more foreigner arrivals in 2013 compared to 2012 while stayover visitors increased with 8.3%. The total foreign departures at the airport of Aruba increased with 7.4% in 2013 compared to 2012. Total arrivals at the airport, foreigners and locals together, reached a total of 1,093,251 in 2013 while the total departures were 1,097,841. The total number of local arrivals at the airport increased with 0.5% in 2013 compared to the year before while total local departures in 2013 dropped with 3.6%. In transit passengers, on the other hand, inclined to a total of 105,518 in 2013 while the number of registered in transit passengers in the year 2012 was 65,033.

The traffic at the airport of Aruba was higher in the year 2013 thanks mostly to more foreign visitors

while the volume of local people using the airport for travelling purposes contributed little to this higher flow.

The following chart also illustrates the number of commercial landings which experienced an increase of 4.2% in 2013 compared to 2012. This increase was mainly caused by an ample increase in the 4th quarter of 2013 of 14.5%. Aruba received a total of 15,710 commercial landings in 2013 while Aruba also received a total of 5,998 non-commercial landings registered at the airport. The non-commercial landing increased with 9.6% in 2013 compared to 2012.

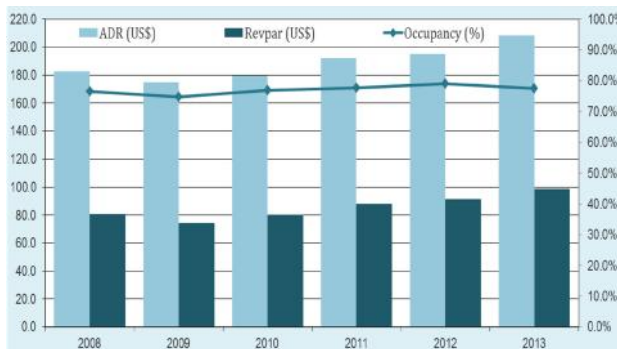
Graph 9. Arrivals & commercial landings at the airport



Hotel Related Indicators.

The next section presents information regarding the accommodation sector in Aruba, mostly of hotels and timeshares but also the total of the two which represents the total accommodation industry. The accommodation related statistics presented are the occupancy rate in percentages (Occ. %), average daily rates (ADR) in US dollars and revenue per available room (Revpar) in US dollars.

Graph 10. Occupancy rates, ADR & Revpar (total)



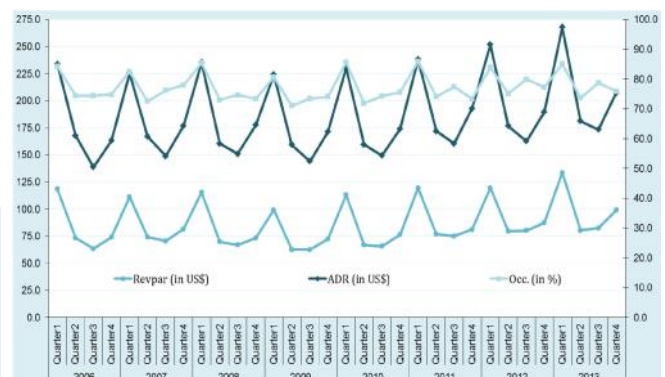
Of the hotel related indicators, it can be observed that while Revpar and ADR experienced increases in the year 2013 compared to 2012, the occupancy

rate declined. The ADR for 2013 was US\$208.20 which corresponds with a 6.7% increase compared to the previous year and Revpar was US\$98.60 which also represents an increase of 7.7%. Occupancy, on the hand, declined with 1.9% in 2013 compared to the year before reaching an occupancy rate of 77.5%. In 2012 the occupancy was 79.0% which was 1.7% higher than the year earlier. The ADR for 2012 was US\$195.07 which was 1.6% more than the year before and Revpar was US\$91.57 which also represents an increase of 3.8%.

Occupancy rates experienced drops during the last three quarters of 2013 compared to 2012 of 1.9% 1.5% and 1.7% respectively, except for the 1st quarter which increased with 1.4%. In the graph below, the total occupancy rate, the total ADR and the total Revpar are illustrated per quarter, which is the total for hotels and timeshares together, from the year 2004 until 2013.

The increase in total ADR in the year 2013 was mainly due to increases in ADR in all the quarters of the year 2013. Increases in the ADR were 6.4%, 2.6%, 6.6% and 9.4% respectively for the 1st to the 4th of 2013 compared to the previous year. In the 1st quarter of 2013 the ADR was US\$ 267.89 which was the highest ADR in the year 2013 and in 2012. All the ADR's recorded in the year 2013 were the highest ADRs ever recorded by the CBS since 1996 for their respective quarters, except for the 4th quarter which highest ADR recorded was in the corresponding quarter of the year 2012.

Graph 11. Occupancy, ADR & Revpar by quarter



Revpar, which also increased in 2013, also experienced increments in all the four quarters of 2013. Drastic increases were seen in the 1st and in the 4th quarters of 2013 of 11.7% and 13.7% representing a Revpar of US\$133.59 and US\$99.20 respectively. In the 2nd quarter of 2013 total Revpar was US\$82.25 which is 1.0% more than the 2nd quarter of 2012 and in the 3rd quarter it reached

US\$82.44 which was 2.9% more than the year before. What can also be seen from the above graph is that ADR and Revpar reveal very regular patterns which also indicate the regular seasonal trend of the tourism industry in Aruba. The occupancy trend, while also revealing the seasonal influence, it shows less sharp increases and less abrupt drops compared to the trends of the ADR and the Revpar.

Based on the information received from the hotels, Aruba registered a total of US\$266.55 million in total room revenues and the industry registered almost 2.1 million occupied room nights in 2013. In the year before Aruba registered a total of US\$241.94 in total room revenues and almost 2.04 million occupied room nights.

The next 3 graphs show the occupancy rates, ADR and Revpar for hotels, timeshares and the total industry, which is the total of hotels and timeshare together, in separate graphs on a yearly basis starting from the year 2004.

Graph 12. Occupancy of hotels, timeshares and total

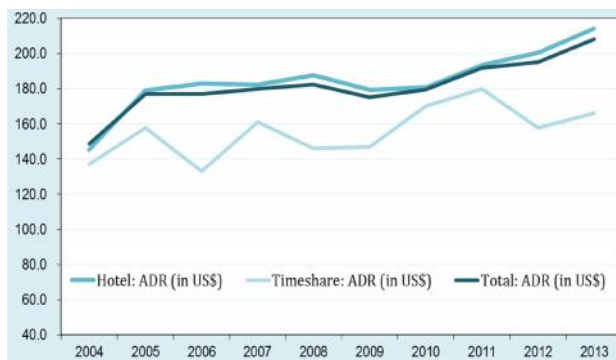


The occupancy trend shows that since the year 2006 until 2013 timeshare rooms have a higher occupancy than the hotels. Timeshares ended the year 2013 with an average occupancy of 79.2% while hotels had an occupancy rate of 76.2%. Hotels experienced a fall of 3.2% while timeshare experienced a drop of 0.3% in 2013 compared to the year before.

The ADR of the hotels and the total industry ADR reflect almost the same trends, moving in the same direction and are almost at the same level while the ADR of the timeshares is at a lower level compared to the other two components. Hotels had an ADR of US\$214.14 in 2013 which was 6.8% higher than the previous year. Timeshare had an ADR of US\$166.09 in 2013, indicating a growth of 5.5% compared to 2012. The total ADR in 2013 experienced an increase

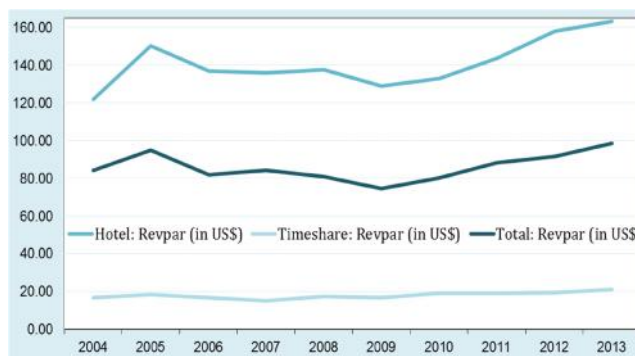
of 6.7% compared to the year before reaching US\$208.20.

Graph 13. ADR of hotels, timeshare and total



Revpar of the timeshares is traditionally at a very lower level compared to hotels since most timeshare rooms are already sold and only the remaining inventory is available to be rented out (transient rooms) as hotel rooms. The Revpar of hotels in 2013 was US\$163.12 which experienced an upturn of 3.4% compared to the year before. Timeshare, on the other hand, had a Revpar of US\$21.21 in 2013 which represents an increase of 8.4% compared to the year 2012.

Graph 14. Revpar of hotels, timeshares and total

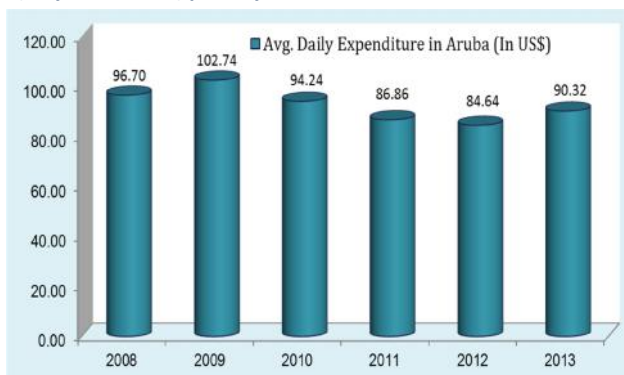


Tourism Related Expenditures.

Tourism related expenditure indicators are also presented in this section which is very significant tourism indicators since our economy is very reliant on tourism. The indicators include the average daily tourism expenditures (ADEX) that took place in Aruba per stayover visitor, the total tourism expenditures that took place in Aruba, estimated total tourism expenditures calculated by the CBS besides the total tourism receipts reported by the Central Bank of Aruba all in US\$.

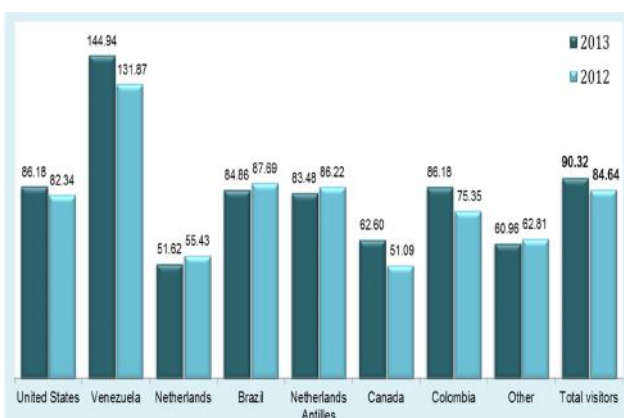
The tourism expenditures reported by the CBS are expenditures that took place in Aruba which indicate the amount of money stayover visitors left behind during their entire stay in Aruba, except for the Estimated Total Tourism Expenditures which include the accommodation component of pre-paid package expenses.

Graph 15. Average daily expenditure in Aruba per person (stayover visitor) per day



Graph 15 presents the average daily expenditure in Aruba (ADEX) for the years 2008 until 2013. The average daily expenditure is the average spend per stayover visitor per day while in Aruba in US dollars. Looking at the six years presented, it can be observed that in the year 2009 the average daily expenditure was the highest among the years presented reaching an average of US\$102.74. In 2013 the ADEX was US\$90.32 per person per day which is an increase of 6.7% compared to the year before. In 2012 the stayover visitors spend an average of US\$84.84 per person per day while in Aruba which dropped with 2.6% compared to 2011.

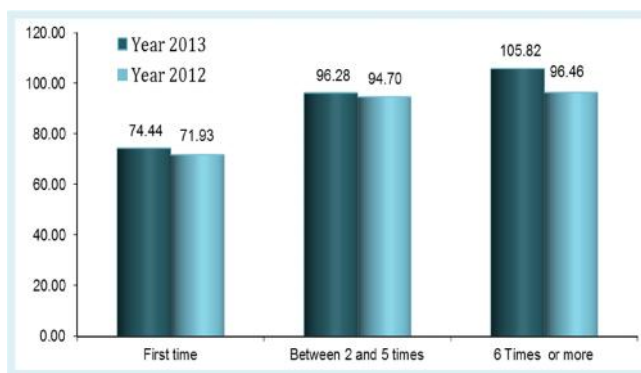
Graph 16. Average daily expenditure by place of residence



Graph 16 illustrates the average daily expenditure of the different stayover visitors markets separately. It can be observed that the stayover visitors from Venezuela spend more money in Aruba on average

than the other markets per person per day. They spent an average of US\$144.94 per person per day in 2013 followed by the market of the USA and Colombia, where both spend an average of US\$86.18 per person per day. Visitors from Venezuela spend 60.5% more than the average expenditure of the total stayover visitors' market.

Graph 17. Average daily expenditure by number of visits

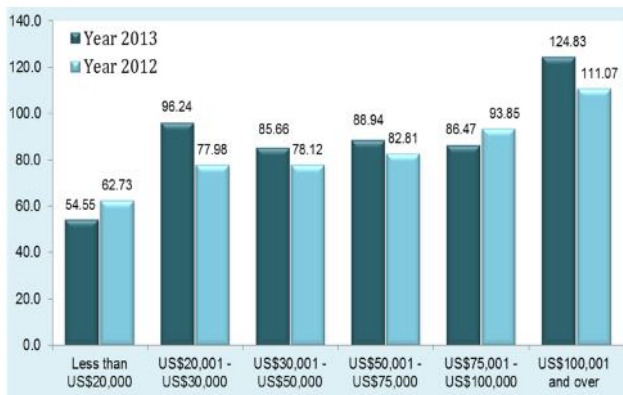


The above graph (17) shows the average daily expenditure again but this time by the number of visits of the stayover visitors for the years 2012 and 2013. It is very evident that visitors who travelled between 2 and 5 times and visitors who travelled 6 times or more to Aruba, spend more on average than visitors who travel to Aruba for the first time. Stayover visitors who came to Aruba between 2 and 5 times spend an average of US\$96.28 per person per day in 2013 which increased with 1.7% compared to the year before. Visitors who visited Aruba 6 times and more spend the highest average among the category. They spend an average of US\$105.82 on the island which increased with 9.7% compared to 2012. Visitors who came to Aruba for the first time in 2013 spend US\$74.44 on average while first time visitors in 2012 spend an average of US\$71.93 per person per day in Aruba. First time visitors' average expenditure in 2013 was 3.5% higher than in 2012.

In graph 18, the average daily expenditure is presented by the different denominations of household income categories indicated by the interviewed stayover visitors in 2013 and 2012. It can be observed that stayover visitors with the income group of US\$100,001 and more spend on average significantly more per person per day on the island compared to all the other income groups. Visitors with an income higher than US\$100,001 spend an average of US\$124.83 per person per day followed by the visitors group with a household income between US\$20,001 and US\$30,000 who spend an average of US\$96.24 per person per day

and the visitors group with a household income between US\$50,001 and US\$750,000 who spend an average of US\$88.94 per person per day.

Graph 18. Average daily expenditure by income level



Usually the higher the income levels the higher the average expenditure of the stayover visitors indicating a very evident correlation between household income and average expenditures in Aruba of the stayover visitors. However, this pattern experienced a turnaround in 2013. It might be, among other things, due to the fact that a significant fraction of stayover visitors from Venezuela (almost 70% in 2013) have a household income below US\$50,000.

The next graph (19) points to the total tourism expenditures made in Aruba by place of residence of the stayover visitors in 2013 and 2012. The total tourism expenditures encompasses the average daily expenditures times the average length of stay of the visitors times the number of visitors from the respective markets. The fact that the market of the US is Aruba's largest market is reflected in the total tourism expenditures as well which can be observed in the graph below. It can be therefore concluded that Aruba's biggest economic contributor related to tourism exports is the market of the USA followed by the market of Venezuela.

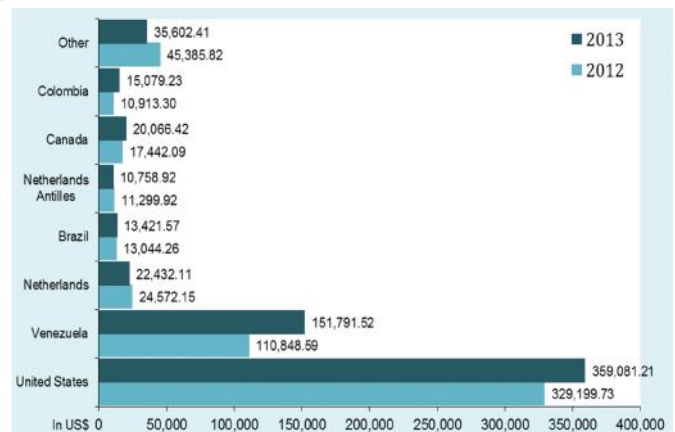
In 2013 Aruba received around US\$359.1 million from the visitors from the USA while they were in Aruba, which is 9.1% more than the previous year. In 2012 Aruba received almost US\$329.2 million from the stayover visitors from the USA.

From the visitors of Venezuela, Aruba received about US\$ 151.8 million in 2013 while in Aruba and in 2012 this amounted in US\$110.8 million representing an increase of 36.9% in 2013 compared to 2012. The total tourism expenditures made in Aruba by stayover visitors reached almost US\$656.3

million in 2013. This amount represents a 13.8% increase in total tourism expenditures in Aruba compared to the year before which was almost US\$576.9 million.

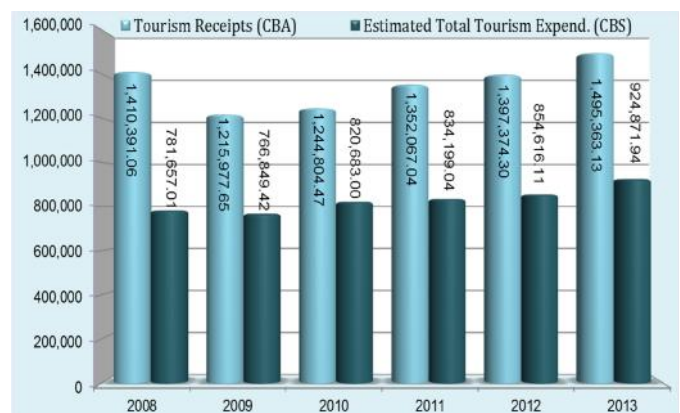
Other markets as Colombia, Canada and Brazil also experienced increases in 2013 compared to 2012 of 38.2%, 15.0% and 2.9% respectively while the markets of the (former) Netherlands Antilles and the Netherlands decreased with 8.7% and 4.8% respectively. The market of Colombia and Canada increased significantly in 2013 reaching total tourism expenditures in Aruba of almost US\$15.1 and US\$20.1 respectively.

Graph 19. Total Tourism expenditure in Aruba by country (x 1000)



Graph 20 illustrates the estimated total tourism expenditures reported by the CBS and the total tourism receipts of the Central Bank of Aruba (CBA) for the years 2008 until 2013. The two indicators are two different types of monetary indicators with two entirely different methodologies and system of collection.

Graph 20. Estimated total tourism expenditure (CBS) & total tourism receipts (CBA)



These two indicators are presented together since most of the time they are associated to each other. Estimated total tourism expenditure indicates all travel related expenditures made by stayover visitors, before, during and immediately after a trip (demand side). It also includes the accommodation portion (imputed and calculated) of a pre-paid package of the stayover visitors. Other components of pre-paid packages are not included at this point.

Tourism receipts, on the other hand, include all transactions made in foreign exchange currencies registered by the local banks (balance of payments) under the supervision of the Central Bank of Aruba (supply side). This implies that the tourism receipts capture all kinds of activities, both from the stayover-, cruise-, and in-transit visitors among other foreign exchange activities.

The year 2013 reflects that Aruba received an estimated total tourism expenditure of almost US\$925 million from the stayover visitors which is an increase of 8.2% compared to the year before. Tourism receipts experienced an increase of 7.0% in 2013 compared to 2012, reaching a total of US\$1,495.4 million. The estimated total tourism expenditure increased with 18.4% in the 4th quarter of 2013 compared to 2012, which is the highest increase among the four quarters. The 2nd quarter experienced the lowest increase among the four quarters, which was 1.9% compared to the year before. Tourism receipts also reflected increases in all the four quarters of 2013. Tourism receipts also experienced the highest increase among the four quarters in the 4th quarter of 2013 which was 10.6% higher compared to the year before.

For more information regarding the methodology of these two indicators, please contact the CBS or the CBA or refer the (online) web page of the CBS.

A Short Analysis of the Survey Results & Trends

The CBS conducts Tourist Surveys every 3rd Saturday of the month with a duration of one week every month in the departure Hall of the Queen Beatrix International Airport for almost 20 years now. Over a little more than 4,500 surveys are undertaken representing almost 10,000 stayover visitors.

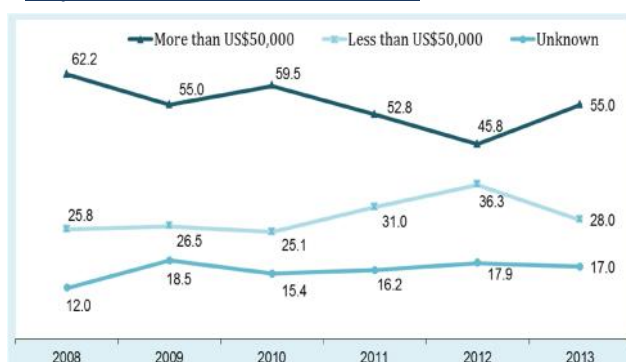
Beside the already presented data of tourism expenditures, which is information extracted from the visitor's survey results, the following graphs and analysis also presents the most important observed

trends for the year 2013 compared to previous years based on the Visitors Survey's results executed by the Central Bureau of Statistics (CBS).

Graph 21 displays the household income of the stayover visitors coming to Aruba separated into visitors with a yearly household income higher than US\$50,000 and visitors with a yearly household income below US\$50,000 for the last six years.

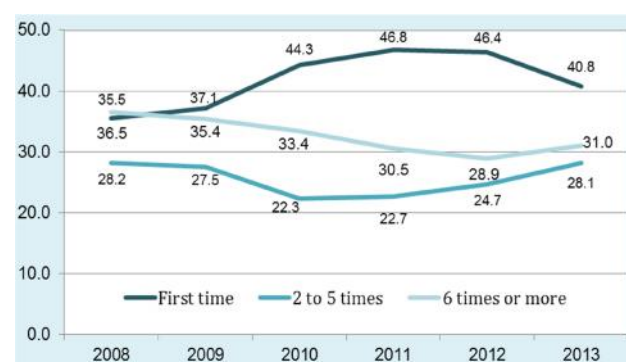
In the year 2013, 55.0% of the stayover visitors reported to have a yearly household income above US\$ 50.000 or more while 28.0% responded to have a household income less than US\$ 50.000.

Graph 21. Household Income of visitors



The number of stayover visitors with a household income over US\$50,000 in 2013 rose with 20.1% compared to the year before while the one with a household income below US\$50,000 dropped with almost 23%. It is important to mention that historically the question regarding household income is the question with the highest percentage of non-response, which dropped a little in 2013 compared to the past year, reaching 17.0%.

Graph 22. Number of visits to Aruba



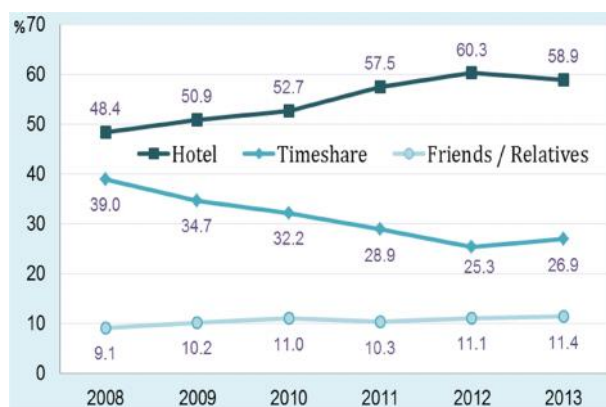
Graph 22 points out to the number of times stayover visitors have come to Aruba. The graph shows an increasing trend for visitors who visited Aruba 2 to 5 times. The number of repeating visitors who came 6

times or more experienced an incline compared to the previous 3 years presented.

Mainly it can be concluded that the trend of visitors who visited Aruba for the first time in 2013 declined after 5 continuous years of inclining while visitors coming to Aruba 6 times or more had just the opposite tendency.

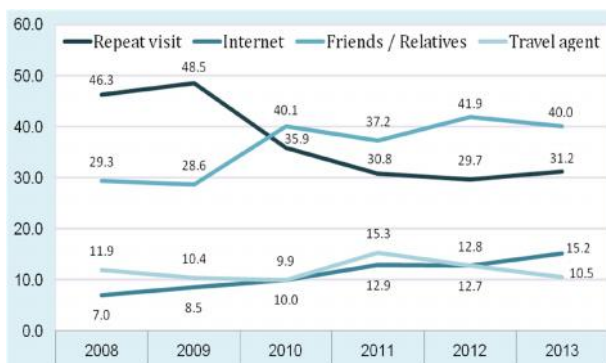
The type of accommodation used by the stayover visitors is also presented in this section in Graph 23. Only the three main categories of types of accommodation used by the visitor in the period 2008 till 2013 are presented.

Graph 23. Type of accommodation visitors used 2011



The number of visitors staying in timeshare rooms increased from 25.4% in 2012 to 27.0% (with 6.3%) in 2013; this after the number of visitors staying in timeshare rooms decreased for 5 consecutive years from 2008 to 2012. Visitors staying in hotels on the other hand, dropped a little from a share of 60.3% in 2012 to 59.0% in 2013. Visitors staying in hotels, contrary to visitors staying in timeshare, dropped for the first time after experiencing 5 consecutive years of increases since 2008.

Graph 24. Most important source of information used



Graph 24 shows which source of information was the most important source used by the visitors

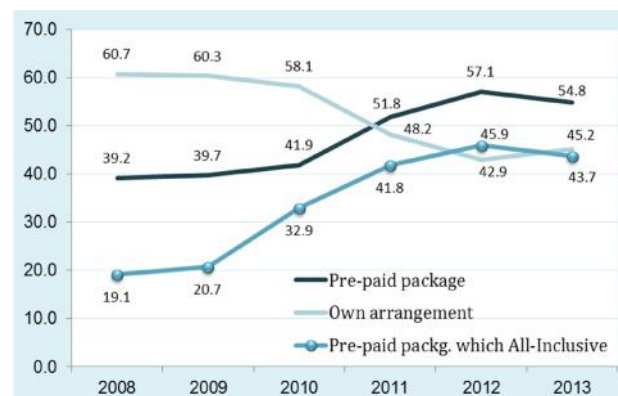
before making a decision to come to Aruba. Only the results for the categories with the highest response are presented. Of all the interviewed visitors, 40.0% indicated in 2013 that they came to Aruba based on “friends and relatives” as their source of information. This source of information experienced a decrease of 4.5% based on the response visitors gave in 2013 compared to 2012.

The next most significant source used by the visitors is their own experience based on repeat visits to Aruba. The result of visitors that responded “repeat visit” is experienced an increase from 29.7% in 2012 to 31.2% in 2013. Remarkable was the fact that visitors who responded “repeat visit” was almost 48.5% in 2009 but most probably visitors who responded “friends and relatives” together with visitors who responded “internet” replaced the gap.

The percentage of stayover visitors who responded “internet” as a source of information used, increased significantly from 12.7% in 2012 to 15.2% in 2013. Survey results indicate that visitors using “internet” as a source more than doubled increasing from 7.0% share in 2008 to 15.2% share in 2013.

Another significant source used is “travel agents”. In 2013, 10.5% of the stayover visitors used travel agents as a source before making a decision to visit Aruba which is an 18.0% drop compared to the year before and after also experiencing a decline of 16.3% in 2012 compared to 2011. In 2011, 15.3% of the visitors used travel agencies as a source.

Graph 25. Travel arrangement of the visitors



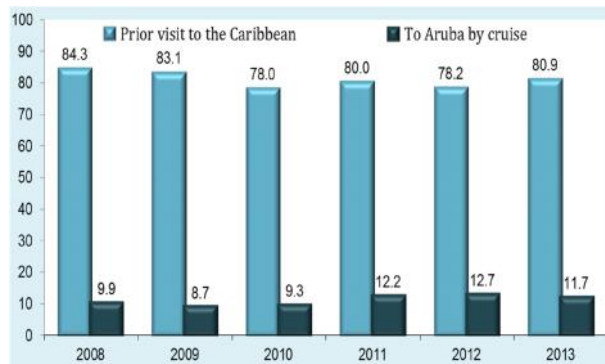
Graph 25 shows the results of the visitors who made their own travel arrangements and of visitors who bought a package deal to come to Aruba. This graph also shows the results of stayover visitors who travelled with a package which was an all-inclusive package.

Little over 45.0% of all the interviewed visitors in 2013 made their own travel arrangements, which rose with 5.4% compared to the year before. The trend of visitors who make their own travel arrangements has been declining for 6 consecutive years starting from 2007.

On the other hand, visitors coming with a pre-paid package to Aruba dropped from 57.1% in 2012 to 54.8% in 2013 (4.0%). Visitors coming with a pre-paid package decreased after experiencing increases for 6 consecutive years also starting from 2007.

Of all the interviewed visitors in 2013, while 54.8% came with a pre-paid package, 43.7% came with an all-inclusive package. In 2012, 57.1% of the stayover visitors came with a pre-paid package and 45.9% of the visitors came with an all-inclusive package. Visitors who came with an all-inclusive pre-paid package declined with 4.8% in 2013 compared to 2012 after it experienced an incline of 9.8% in 2012 compared to the year before.

Graph 26. Visitors who have been to Aruba by Cruise

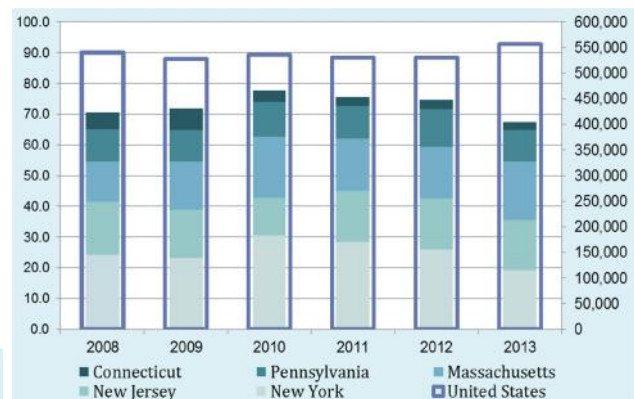


The above graph illustrates the percentage of stayover visitors who have been to Aruba before with a cruise ship prior to this visit to Aruba. Of all interviewed visitors in 2013, 11.7% came to Aruba

previously by cruise which is 7.9% less than the previous year. In 2012, 12.7% of the stayover visitors came to Aruba previously by cruise which represented a 4.1% increase.

The last graph, displays the number of stayover visitors from the most significant states of the USA in relative percentage to the total number of stayover visitors from the US from 2008 until 2013, while at the same time displaying the total number of stayover visitors from the USA in absolute numbers.

Graph 27. Visitor by the major States of the USA



The states of New York, New Jersey, Connecticut Massachusetts and Pennsylvania are the most significant states contributing to the total stayover visitors' market and all these states are located in the Northeast of the USA.

These five states in the Northeast represent 67.5% of all the total stayover visitors from the USA in 2013 which dropped with 9.6% compared to 2012. These 5 states encompass 74.7% of the total stayover visitors from the USA in 2012 which was 1.1% lower compared to the year before.

Not all the results of the survey could be presented in this section of the publication. Multiple and infinite analysis can still be extracted from the survey's database. The CBS can only do this on a request basis. For additional information presented in table form refer to the following section of the publication. Only the most basic results of the survey are presented in the next section in table form.

Tables of Year Results

2. TOURISM IN ARUBA

2.1 NUMBER OF STAYOVER VISITORS BY PLACE OF RESIDENCE

	Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	% change 12/11	% change 13/12
Total Visitors	812,623	824,330	868,973	903,934	979,256	4.0	8.3
United States	528,223	535,753	531,130	530,950	556,294	0.0	4.8
Venezuela	105,063	90,709	117,838	143,201	188,020	21.5	31.3
Netherlands	41,211	40,294	40,068	39,973	37,788	-0.2	-5.5
Netherlands Antilles	21,536	23,363	25,773	27,361	26,682	6.2	-2.5
Colombia	15,685	15,004	16,703	18,127	19,485	8.5	7.5
Brazil	10,594	20,235	22,413	21,070	23,293	-6.0	10.6
Canada	33,856	37,643	40,487	45,887	44,338	13.3	-3.4
Argentina	5,486	6,365	10,326	12,865	15,574	24.6	21.1
Germany	3,357	3,568	3,493	4,054	3,841	16.1	-5.3
Rest of Europe	11,742	13,889	15,841	16,673	19,645	5.3	17.8
So - Cent. America	4,723	4,343	5,073	5,387	6,343	6.2	17.7
United Kingdom	11,512	14,530	13,870	13,712	9,315	-1.1	-32.1
Surinam	3,651	3,556	4,220	5,117	6,253	21.3	22.2
Rest of the World	15,984	15,078	21,738	19,557	22,385	-10.0	14.5

Source: Aruba Tourism Authority (ATA)

2.2 CRUISE PASSENGERS

	Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	% change 12/11	% change 13/12
Number of passengers	606,768	569,424	599,973	582,313	688,568	-2.9	18.2
Number of calls	327	314	332	294	353	-11.4	20.1
Number of crew members	254,709	235,869	249,752	233,327	277,942	-6.6	19.1
Avg. no. of passengers / ship	1,856	1,813	1,807	1,981	1,951	9.6	-1.5

Source: Aruba Tourism Authority (ATA) & Cruise Tourism Authority N.V. - Aruba

2.3 TOTAL NUMBER OF VISITORS

	Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	% change 12/11	% change 13/12
Total stayover visitors	812,623	824,330	868,973	903,934	979,256	4.0	8.3
Total cruise visitors	606,768	569,424	599,973	582,313	688,568	-2.9	18.2
Total number of visitors	1,419,391	1,393,754	1,468,946	1,486,247	1,667,824	1.2	12.2

Source: Aruba Tourism Authority (ATA) & Cruise Tourism Authority N.V. - Aruba

2.4 AVERAGE LENGTH OF STAY BY PLACE OF RESIDENCE OF VISITORS TO ARUBA (In days)

	Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	% change 12/11	% change 13/12
United States	7.6	7.5	7.5	7.5	7.5	0.7	-0.5
Venezuela	5.7	5.9	5.8	5.9	5.6	0.9	-5.1
Netherlands	12.8	12.5	11.4	11.1	11.5	-3.1	3.7
Brazil	6.2	6.6	7.0	7.1	6.8	1.4	-3.8
Netherlands Antilles	5.1	4.9	5.0	4.8	4.8	-3.4	0.8
Canada	8.0	7.7	7.7	7.4	7.2	-2.9	-2.8
Colombia	7.8	9.0	7.4	8.0	9.0	7.8	12.4
Other	10.5	9.7	8.9	9.3	9.0	5.2	-3.2
Avg. length of stay	7.7	7.7	7.5	7.5	7.4	0.3	-1.6

Source: Tourist Survey - Central Bureau of Statistics - Aruba

2.5 NUMBER OF VISITOR NIGHTS BY PLACE OF RESIDENCE (* 1,000)

	Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	% change 12/11	% change 13/12
Total Visitor Nights	6,034.59	6,325.37	6,685.78	6,907.14	7,126.77	3.3	3.2
United States	3,888.87	3,951.90	3,920.13	3,915.34	4,005.87	-0.1	2.3
Venezuela	612.03	670.16	772.86	903.55	1,056.84	16.9	17.0
Netherlands	515.66	494.04	472.20	482.88	468.81	2.3	-2.9
Netherlands Antilles	113.35	119.82	125.28	139.66	125.84	11.5	-9.9
Colombia	128.74	145.02	169.48	172.65	171.91	1.9	-0.4
Brazil	67.94	127.29	141.57	133.56	154.01	-5.7	15.3
Canada	295.18	325.14	345.58	390.28	376.90	12.9	-3.4
Argentina	46.07	53.28	86.82	111.98	131.88	29.0	17.8
Germany	39.52	37.78	37.82	41.49	37.16	9.7	-10.4
Rest of Europe	121.86	155.34	170.36	182.66	209.36	7.2	14.6
So - Cent. America	27.92	32.60	32.42	35.81	41.16	10.5	14.9
United Kingdom	145.34	183.83	162.80	161.57	108.69	-0.8	-32.7
Surinam	32.11	29.18	36.17	39.56	43.03	9.4	8.8
Rest of the World	138.32	137.64	212.28	196.14	195.31	-7.6	-0.4

Source: Aruba Tourism Authority (ATA)

2.6 AIRPORT TRAFFIC / NUMBER OF PASSENGERS TRAVELING BY AIR

	Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	% change 12/11	% change 13/12
Arrived	906,644	919,281	980,544	1,020,731	1,093,251	4.1	7.1
Local Arrivals	73,106	81,721	95,418	98,753	99,281	3.5	0.5
Foreign Arrivals	833,538	837,560	885,126	921,978	993,970	4.2	7.8
Departed	924,282	939,359	992,501	1,034,814	1,097,841	4.3	6.1
In transit	88,476	125,531	115,976	65,033	105,518	-43.9	62.3
Total Traffic	1,919,402	1,984,171	2,089,021	2,120,578	2,296,610	1.5	8.3

Source: Aruba Airport Authority N.V. (AAA) & Department of Immigration - International Airport of Aruba

2.7 AIRCRAFT LANDINGS

	Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	% change 12/11	% change 13/12
Commercial landings	13,941	14,715	14,732	15,071	15,710	2.3	4.2
Non-commercial landings	4,998	4,382	4,493	5,472	5,998	21.8	9.6
Total	18,939	19,097	19,225	20,543	21,708	6.9	5.7

Source: Aruba Airport Authority N.V. (AAA) & Department of Immigration - International Airport of Aruba

2.8 STAYOVER VISITORS BY CARRIER

	Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	% change 12/11	% change 13/12
Air Canada	0	425	6,972	7,235	7,258	3.8	0.3
Air Tran Air	0	1,258	28,273	51,569	59,774	82.4	15.9
Aires	748	294	0	0	432	-	-
American Airlines	123,844	120,106	106,187	86,530	75,909	-18.5	-12.3
Arkefly	14,945	13,962	16,208	16,188	14,884	-0.1	-8.1
Aruba Airlines	0	0	2	2	18,588	0.0	-
Atlas Air	0	0	1,307	14	32	-98.9	128.6
Avianca	21,410	23,105	27,045	26,535	30,816	-1.9	16.1
Aserca	15,727	14,436	16,595	24,174	35,074	45.7	45.1
Avior	17,456	7,575	6,550	5,888	8,704	-10.1	47.8
Charters	51,107	59,096	48,389	43,255	42,807	-10.6	-1.0
Continental	85,158	96,801	92,873	17,968	0	-80.7	-100.0
Copa Airlines	10,833	10,665	14,070	22,756	28,891	61.7	27.0
Cruiseship	765	2,114	2,252	40	9	-98.2	-77.5
DAE	25,205	20,978	15,914	20,544	382	29.1	-98.1
DCE	0	0	0	0	11,422	-	-
Delta	82,873	76,336	70,285	67,119	101,110	-4.5	50.6
Gol		8,606	14,678	13,259	12,278	-9.7	-7.4
Insel	11,657	20,123	35,260	38,877	45,025	10.3	15.8
Jet Blue	106,664	116,635	125,982	133,119	137,786	5.7	3.5
Laser	0	0	2,920	15,812	16,494	441.5	4.3
Miami Air	0	0	3,206	668	631	-79.2	-5.5
Private airplanes	3,937	8,741	8,825	12,790	12,830	44.9	0.3
Suriname Airways	4,682	5,241	6,106	5,303	6,043	-13.2	14.0
KLM	5,097	6,531	11,640	26,218	23,792	125.2	-9.3
La Venezolana	44,050	31,814	35,545	23,525	18,496	-33.8	-21.4
Martinair	21,093	21,925	13,913	3	0	-100.0	-100.0
Perla Airlines	0	0	1,428	375	0	-73.7	-100.0
Santa Barbara	628	0	0	0	0	-	-
Spirit Airlines	5,159	4,743	6,011	4,925	5,902	-18.1	19.8
Sunwig airlines	0	0	1,193	13,040	15,197	993.0	16.5
TAP	0	0	283	0	0	-100.0	-
Tam	0	0	2,797	257	0	-90.8	-100.0
Tiara	21,232	25,841	29,429	38,769	54,980	31.7	41.8
United Airways	22,954	23,770	22,076	94,819	103,482	329.5	9.1
US Airways	114,603	102,549	94,268	91,574	88,469	-2.9	-3.4
Varig	794	655	0	136	0	-	-100.0
Other	0	5	489	648	1,759	-	-
Total Visitors	812,623	824,330	868,973	903,934	979,256	4.0	8.3

Source: Aruba Tourism Authority (ATA)

3. VISITOR'S PROFILE

3.1. CHARACTERISTICS OF THE VISITORS

3.1.1 AGE GROUPS OF THE VISITORS (In Percentages)

	Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	% change 12/11	% change 13/12
Under 20 yrs	0.5	0.6	0.8	2.2	1.8	175.0	-18.2
20 - 29 yrs	8.5	9.2	6.2	8.4	6.2	35.5	-26.2
30 - 39 yrs	17.2	20.3	23.2	25.2	23.5	8.6	-6.7
40 - 49 yrs	25.3	24.3	26.7	29.8	34.0	11.6	14.1
50 - 64 yrs	33.9	32.4	30.3	24.4	23.6	-19.5	-3.3
Over 65 yrs	14.5	13.2	12.7	10.1	10.9	-20.5	7.9
Total	100%	100%	100%	100%	100%		

Source: Tourist Survey - Central Bureau of Statistics - Aruba

3.1.2 YEARLY HOUSEHOLD INCOME OF THE VISITORS (In Percentages)

	Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	% change 12/11	% change 13/12
Less than US\$20,000	5.9	5.3	6.8	7.0	5.1	2.9	-27.1
US\$20,001 - US\$30,000	5.9	5.5	8.0	9.0	6.3	12.5	-30.0
US\$30,001 - US\$50,000	14.7	14.3	16.2	20.3	16.6	25.3	-18.2
US\$50,001 - US\$75,000	27.9	30.0	25.0	21.7	25.0	-13.2	15.2
US\$75,001 - US\$100,000	13.1	15.3	12.7	11.6	15.9	-8.7	37.1
US\$100,001 and over	14.0	14.2	15.1	12.5	14.1	-17.2	12.8
Unknown	18.5	15.4	16.2	17.9	17.0	10.5	-5.0
Total	100%	100%	100%	100%	100%		

Source: Tourist Survey - Central Bureau of Statistics - Aruba

3.1.3 OCCUPATION OF THE VISITORS (In Percentages)

	Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	% change 12/11	% change 13/12
Legislators, senior officials and managers	13.7	13.5	14.5	12.3	10.9	-15.2	-11.4
Professionals	18.0	18.7	18.9	19.7	23.2	4.2	17.8
Technicians and associate professionals	15.8	11.7	6.5	6.9	7.7	6.2	11.6
Clerks	6.4	4.9	7.3	6.8	6.7	-6.8	-1.5
Service workers, shop & market sales workers	5.2	4.2	4.8	6.9	6.5	43.8	-5.8
Not economically active (Retired)	35.4	42.3	44.1	42.6	41.0	-3.4	-3.8
Skilled agricultural and fishery workers	2.9	0.2	0.2	0.1	0.2	-50.0	100.0
Craft and related trades workers	1.3	2.1	1.6	2.0	1.8	25.0	-10.0
Plant and machine operators and assemblers	0.8	0.9	0.7	1.0	0.6	42.9	-40.0
Elementary occupations	0.3	1.5	0.9	1.2	1.1	33.3	-8.3
Armed forces	0.3	0.1	0.1	0.2	0.1	100.0	-50.0
Unknown	0.0	0.0	0.4	0.3	0.2	-25.0	-33.3

Source: Tourist Survey - Central Bureau of Statistics - Aruba

3.1.4 METHOD VISITORS USED TO BOOK A TRIP (In Percentages)

	Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	% change 12/11	% change 13/12
In person in General	17.4	19.7	26.6	29.3	22.1	10.2	-24.6
By telephone in General	24.3	20.6	13.6	10.7	13.5	-21.3	26.2
Travel Agent (In Pers/Tel.)	25.0	21.2	24.9	26.8	22.5	7.6	-16.0
Tour Operator (In Pers/Tel.)	0.8	0.8	0.2	0.3	0.1	50.0	-66.7
Hotel Direct (In Pers/Tel.)	1.2	3.6	3.4	3.9	2.8	14.7	-28.2
Airline Direct (In Pers.Tel.)	14.7	16.7	12.5	10.1	7.7	-19.2	-23.8
Online in General	55.2	53.5	55.8	55.9	62.7	0.2	12.2
On-Line Tour Operator	21.9	22.2	28.0	29.5	30.4	5.4	3.1
On-Line Hotel Direct	7.7	6.7	4.0	3.5	4.5	-12.5	28.6
On-Line Airline Direct	24.8	24.0	19.4	15.5	17.8	-20.1	14.8
Other	7.1	7.4	8.9	11.3	14.7	27.0	30.1

Source: Tourist Survey - Central Bureau of Statistics - Aruba

3.1.5 VISITORS THAT HAVE BEEN TO ARUBA BY CRUISE AND VISITOR THAT HAVE BEEN TO THE CARIBBEAN PRIOR TO THIS VISIT (In Percentages)

		Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	% change 12/11	% change 13/12
To Aruba by cruise	Yes	8.7	9.3	12.2	12.7	11.7	4.1	-7.9
	No	91.3	90.6	87.8	87.3	88.3	-0.6	1.1
Prior visit to the Caribbean	Yes	83.1	78.0	80.0	78.2	80.9	-2.3	3.5
	No	16.9	22.0	19.9	21.8	19.1	9.5	-12.4

Source: Tourist Survey - Central Bureau of Statistics - Aruba

3.2. BEHAVIOR OF THE VISITORS

3.2.1 NUMBER OF VISITS TO ARUBA (In Percentages)

		Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	% change 12/11	% change 13/12
	First time	37.1	44.3	46.8	46.4	40.8	-0.9	-12.1
	2 to 5 times	27.5	22.3	22.7	24.7	28.1	8.8	13.8
	6 times or more	35.4	33.4	30.5	28.9	31.0	-5.2	7.3
	Total	100%	100%	100%	100%	100%		

Source: Tourist Survey - Central Bureau of Statistics - Aruba

3.2.2 PURPOSE OF VISIT (In Percentages)

		Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	% change 12/11	% change 13/12
	Vacation	90.6	90.3	90.3	90.4	90.2	0.1	-0.2
	Honeymoon	2.7	2.6	2.5	2.7	2.2	8.0	-18.5
	Visit friends / relatives	3.6	4.4	4.7	4.5	4.8	-4.3	6.7
	Business / leisure	1.0	0.7	0.6	0.7	0.5	16.7	-28.6
	Other ¹⁾	1.0	0.8	0.8	0.7	1.0	-12.5	42.9
	Business only / Convention	0.3	0.6	0.5	0.5	0.5	0.0	0.0
	Wedding	0.3	0.4	0.3	0.4	0.5	33.3	25.0
	Events/Festivals	0.5	0.1	0.1	0.1	0.2	0.0	100.0
	Total	100%	100%	100%	100%	100%		

Source: Tourist Survey - Central Bureau of Statistics - Aruba

¹⁾ Other also include incentive and golf

3.2.3 TYPE OF ACCOMMODATION USED BY THE VISITORS (In Percentages)

		Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	% change 12/11	% change 13/12
	Hotel	50.9	52.7	57.5	60.3	58.9	4.9	-2.3
	Timeshare	34.7	32.2	28.9	25.3	26.9	-12.5	6.3
	Guest house/Apartment	3.1	2.5	2.3	2.4	1.9	4.3	-20.8
	Friends / Relatives	10.2	11.0	10.3	11.1	11.4	7.8	2.7
	Own House	0.6	0.8	0.6	0.5	0.4	-16.7	-20.0
	Other	0.6	0.7	0.4	0.4	0.5	0.0	25.0
	Total	100%	100%	100%	100%	100%		

Source: Tourist Survey - Central Bureau of Statistics - Aruba

3.2.4 TRAVEL ARRANGEMENT OF THE VISITORS - ALL-INCLUSIVE PACKAGES (In Percentages)

		Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	% change 12/11	% change 13/12
	Pre-paid package	39.7	41.9	51.8	57.1	54.8	10.2	-4.0
	Own arrangement	60.3	58.1	48.2	42.9	45.2	-11.0	5.4
	Total	100%	100%	100%	100%	100%		
	Pre-paid packg. which All-Inclusive	20.7	32.9	41.8	45.9	43.7	9.8	-4.8

Source: Tourist Survey - Central Bureau of Statistics - Aruba

3.2.5 SINGLE MOST IMPORTANT SOURCE OF INFORMATION IN MAKING A DECISION TO VISIT ARUBA (In Percentages)

	Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	% change 12/11	% change 13/12
Friends / Relatives	28.6	40.1	37.2	41.9	40.0	12.6	-4.5
Travel agent	10.4	9.9	15.3	12.8	10.5	-16.3	-18.0
Newspaper / magazine	0.6	0.4	0.5	0.0	0.2	-100.0	0.0
Television ad / Radio ad	0.0	0.1	0.2	0.0	0.1	-100.0	0.0
Tourist board	0.1	0.0	0.0	0.0	0.0	0.0	0.0
Other	1.5	1.8	1.4	1.4	1.1	0.0	-21.4
Repeat visit	48.5	35.9	30.8	29.7	31.2	-3.6	5.1
Cruise	0.7	0.8	0.8	0.5	0.7	-37.5	40.0
Internet	8.5	10.0	12.9	12.7	15.2	-1.6	19.7
Business	1.1	1.0	0.9	1.0	1.1	11.1	10.0
Total	100%	100%	100%	100%	100%		

Source: Tourist Survey - Central Bureau of Statistics - Aruba

3.2.6. USERS OF TIMESHARE PROPERTIES: OWNERS VS. NON-OWNERS (In Percentage of total timeshare users)

	Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	% change 12/11	% change 13/12
Owner	61.4	62.1	63.7	64.9	64.4	1.9	-0.8
<i>Non-timeshare owner:</i>							
Non-owner: Transient (Walk-in)	5.8	3.3	3.1	3.8	3.3	22.6	-13.2
Non-owner: Exchange	15.1	11.4	14.4	9.8	13.3	-31.9	35.7
Non-owner: Other	17.5	23.2	18.8	21.6	19.0	14.9	-12.0
Total Timeshare user	100%	100%	100%	100%	100%		

Source: Tourist Survey - Central Bureau of Statistics - Aruba

3.2.7 TYPE OF FLIGHT USED BY THE VISITORS (In Percentages)

	Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	% change 12/11	% change 13/12
Charter	2.7	5.0	2.3	3.3	1.9	43.5	-42.4
Scheduled	97.3	94.9	97.7	96.7	98.1	-1.0	1.4
Total	100%	100%	100%	100%	100%		

Source: Tourist Survey - Central Bureau of Statistics - Aruba

3.2.A. CHARACTERISTICS OF THE VISITORS FROM THE U.S.A.

3.2.A.1 VISITORS FROM THE UNITED STATES BY THE MAJOR STATES (In Percentages)

	Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	% change 12/11	% change 13/12
United States	528,223	535,753	531,130	530,875	556,294	-0.05	4.8
New York	23.3	30.5	28.5	25.9	19.2	-9.0	-26.0
New Jersey	15.6	12.3	16.5	16.7	16.3	0.8	-1.9
Massachusetts	15.7	19.8	17.1	16.8	19.1	-1.6	13.6
Pennsylvania	10.4	11.4	10.8	12.3	10.3	14.6	-16.4
Connecticut	6.8	3.7	2.7	3.0	2.6	10.6	-13.2
Ohio	1.4	2.9	1.5	1.3	1.1	-11.6	-17.1
Maryland	1.5	0.7	1.2	1.0	3.4	-16.5	258.3
Michigan	1.1	1.1	0.9	0.6	0.7	-30.0	3.2
Illinois	3.8	2.3	4.3	4.3	4.1	1.2	-6.3
Florida	3.1	3.2	2.1	2.7	2.9	27.9	9.0
North Carolina	1.7	0.7	2.9	1.3	2.8	-55.8	118.3
New Hampshire	1.8	1.3	0.8	0.9	1.2	11.3	37.1
Other States	14.3	10.1	10.9	13.2	16.4	21.1	24.2

Source: Tourist Survey - Central Bureau of Statistics - Aruba

3.2.A.2 NUMBER OF VISITS OF VISITORS FROM THE UNITED STATES TO ARUBA (In Percentages)

	Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	% change 12/11	% change 13/12
First time	37.1	44.3	46.8	44.1	39.0	-5.8	-11.6
2 to 5 times	27.5	22.3	22.7	24.3	27.8	7.0	14.4
6 times or more	35.4	33.4	30.5	31.6	33.2	3.6	5.1
Total	100%	100%	100%	100%	100%		

Source: Tourist Survey - Central Bureau of Statistics - Aruba

3.3. SATISFACTION OF THE VISITORS

3.3.1 AGREEMENT OR DISAGREEMENT OF THE VISITORS WITH THE FOLLOWING STATEMENTS (In %)

	Strongly Agree	Agree	Neither	Disagree	Strongly Disagree	Don't know
2012						
Aruba is a safe place to visit	66.6	32.6	0.2	0.0	0.0	0.4
People are friendly/hospitable	49.3	49.4	1.3	0.0	0.0	0.0
Aruba is clean	21.4	70.0	6.5	1.6	0.4	0.2
Aruba has nice beaches	77.8	22.2	0.0	0.0	0.0	0.0
Aruba has pleasant weather	45.5	53.1	1.2	0.1	0.0	0.0
Aruba has good attractions	17.5	76.5	3.6	0.1	0.0	2.3
Aruba has good nightlife	12.6	58.3	8.2	0.5	0.1	20.3
Aruba has good hotels	37.2	59.7	0.3	0.0	0.0	2.8
Aruba is expensive	8.4	44.6	32.4	12.9	0.1	1.6
2013						
Aruba is a safe place to visit	63.9	35.8	0.0	0.0	0.0	0.2
People are friendly/hospitable	47.0	51.8	1.0	0.2	0.0	0.0
Aruba is clean	15.7	79.7	3.4	0.6	0.4	0.1
Aruba has nice beaches	72.0	27.9	0.0	0.0	0.0	0.0
Aruba has pleasant weather	36.5	63.1	0.3	0.0	0.0	0.0
Aruba has good attractions	12.1	84.8	1.2	0.0	0.0	1.9
Aruba has good nightlife	7.3	66.8	8.9	1.1	0.0	15.9
Aruba has good hotels	19.7	78.3	0.2	0.0	0.0	1.7
Aruba is expensive	12.9	49.4	28.5	7.6	0.1	1.4

Source: Tourist Survey - Central Bureau of Statistics - Aruba

3.3.2 RATING OF SERVICE RELATED TO THE FOLLOWING:

	Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	% change 12/11	% change 13/12
<u>ACCOMMODATION</u>							
Excellent	71.9	75.0	77.6	76.7	76.0	-1.2	-0.9
Good	22.7	21.2	20.3	22.1	23.3	8.9	5.4
Average	4.2	1.8	0.8	0.6	0.6	-25.0	0.0
Poor	0.3	0.2	0.0	0.0	0.0	-	-
Unknown / n.a.	0.8	0.0	1.3	0.6	0.1	-53.8	-83.3
Total	100%	100%	100%	100%			
<u>MEALS & DRINKS</u>							
Excellent	69.6	68.6	70.9	64.4	58.9	-9.2	-8.5
Good	25.9	29.5	27.4	33.6	39.8	22.6	18.5
Average	3.7	1.6	1.5	2.0	1.3	33.3	-35.0
Poor	0.4	0.2	0.0	0.0	0.0	-	-
Unknown / n.a.	0.4	0.2	0.1	0.0	0.0	-	-
Total	100%	100%	100%	100%	100%		
<u>LOCAL TRANSPORTATION</u>							
Excellent	43.1	46.6	51.8	41.4	31.2	-20.1	-24.6
Good	37.3	44.1	41.7	50.9	62.4	22.1	22.6
Average	2.3	0.9	0.5	0.7	0.4	40.0	-42.9
Poor	0.0	0.1	0.0	0.0	0.0	-	-
Unknown / n.a.	17.3	8.2	6.0	6.9	6.0	15.0	-13.0
Total	100%	100%	100%	100%	100%		
<u>SHOPPING</u>							
Excellent	45.0	44.4	51.2	35.9	23.9	-29.9	-33.4
Good	41.4	46.0	43.7	56.3	69.8	28.8	24.0
Average	3.6	1.8	1.1	2.7	2.2	145.5	-18.5
Poor	0.1	0.1	0.0	0.1	0.1	-	0.0
Unknown / n.a.	10.0	7.8	3.9	5.0	3.9	28.2	-22.0
Total	100%	100%	100%	100%	100%		
<u>ENTERTAINMENT / RECREATION</u>							
Excellent	49.9	46.5	48.6	37.3	24.2	-23.3	-35.1
Good	30.7	43.6	46.6	56.5	70.1	21.2	24.1
Average	2.3	1.0	0.7	0.8	0.7	14.3	-12.5
Poor	0.2	0.2	0.0	0.0	0.0	-	-
Unknown / n.a.	16.9	8.8	4.1	5.4	5.1	31.7	-5.6
Total	100%	100%	100%	100%	100%		
<u>QUALITY OF SERVICE</u>							
Excellent	74.7	71.7	68.8	61.9	55.0	-10.0	-11.1
Good	21.2	26.1	30.4	36.9	44.2	21.4	19.8
Average	2.8	1.6	0.7	1.0	0.7	42.9	-30.0
Poor	0.4	0.1	0.0	0.0	0.1	-	-
Unknown / n.a.	0.9	0.4	0.1	0.2	0.1	100.0	-50.0
Total	100%	100%	100%	100%	100%		

Source: Tourist Survey - Central Bureau of Statistics - Aruba

3.3.3 RATING FROM 1 TO 10 OF OVERALL VISIT TO ARUBA:

	Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	% change 12/11	% change 13/12
5 -	0.3	0.0	0.0	0.0	0.0	-	-
6 -	0.7	0.7	0.2	0.3	0.1	50.0	-66.7
7 -	3.9	3.9	2.0	2.6	1.1	30.0	-57.7
8 -	26.2	17.1	13.3	19.4	17.6	45.9	-9.3
9 -	38.3	43.3	51.0	50.7	54.2	-0.6	6.9
10 -	30.4	34.4	33.2	27.0	26.8	-18.7	-0.7
Mean	8.92	9.06	9.14	9.01	9.05	-1.4	0.4

Source: Tourist Survey - Central Bureau of Statistics - Aruba

3.3.4 PLACES VISITED BY THE VISITORS WHILE IN ARUBA IN 2010 (In %)

	Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	% change 12/11	% change 13/12
Visit museum	n.a.	3.3	3.3	9.1	5.0	175.8	-45.1
Visit Historical buildings	n.a.	14.8	17.9	22.5	24.8	25.7	10.2
Visit Historical sites	n.a.	18.8	38.7	39.5	42.6	2.1	7.8
Visit Art galleries	n.a.	1.5	1.5	3.7	3.4	146.7	-8.1
Took cultural tours	n.a.	2.2	1.5	2.6	3.3	73.3	26.9
Attended festival or concert	n.a.	11.3	14.3	22.7	22.0	58.7	-3.1
Visit beaches	n.a.	95.1	95.7	96.5	96.9	0.8	0.4
Visit center of Oranjestad	n.a.	91.4	91.7	85.5	92.9	-6.8	8.7
Visit Franse Pas	n.a.	9.4	5.1	17.7	15.6	247.1	-11.9
Visit Restaurants outside the hotel	n.a.	67.9	60.1	59.0	62.6	-1.8	6.1
Saw Hotels shows	n.a.	13.1	19.0	23.5	19.9	23.7	-15.3
Made Island tour	n.a.	46.6	61.8	62.6	60.4	1.3	-3.5
Visit National park	n.a.	38.4	36.1	37.2	29.7	3.0	-20.2
Visit North Coast	n.a.	47.2	58.3	61.1	59.6	4.8	-2.5
Architecture	n.a.	10.0	9.1	37.0	40.2	306.6	8.6
Visit rock formation	n.a.	36.3	44.5	46.3	38.9	4.0	-16.0
Visit San Nicolas	n.a.	40.4	55.5	62.4	56.9	12.4	-8.8
Visit shopping malls	n.a.	86.6	92.9	89.7	90.0	-3.4	0.3
Other	n.a.	9.1	10.6	10.6	11.5	0.0	8.5

Source: Tourist Survey - Central Bureau of Statistics - Aruba

3.3.5 RATING OF VALUE FOR MONEY OF THE FOLLOWING:

	Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	% change 12/11	% change 13/12
<u>ACCOMMODATION</u> ¹⁾							
Excellent	34.6	7.4	4.1	9.7	10.1	136.6	4.1
Good	46.9	17.4	15.9	13.8	16.7	-13.2	21.0
Average	6.9	0.7	0.5	0.5	0.3	0.0	-40.0
Poor	0.4	0.2	0.0	0.0	0.0	-	-
Unknown / n.a.	11.2	74.2	79.5	75.9	72.9	-	-
Total	100%	100%	100%	100%	100%		
<u>MEALS & DRINKS</u>							
Excellent	21.4	14.1	11.2	14.0	11.4	25.0	-18.6
Good	58.9	59.1	57.0	49.9	56.4	-12.5	13.0
Average	15.7	4.1	4.2	4.6	2.4	9.5	-47.8
Poor	0.6	0.5	0.3	0.2	0.0	-33.3	-100.0
Unknown / n.a.	3.4	22.3	27.3	31.3	59.8	14.7	91.1
Total	100%	100%	100%	100%	100%		
<u>LOCAL TRANSPORTATION</u>							
Excellent	23.3	14.8	14.5	13.3	9.7	-8.3	-27.1
Good	53.1	43.6	45.8	45.0	45.6	-1.7	1.3
Average	4.5	1.6	1.5	1.6	0.8	6.7	-50.0
Poor	0.2	0.1	0.2	0.0	0.0	-	-
Unknown / n.a.	18.9	39.9	37.9	40.0	43.9	5.5	9.8
Total	100%	100%	100%	100%	100%		
<u>SHOPPING</u>							
Excellent	26.8	16.0	21.2	13.3	9.7	-37.3	-27.1
Good	51.5	56.9	60.1	64.5	74.8	7.3	16.0
Average	9.5	3.4	2.8	5.5	3.0	96.4	-45.5
Poor	0.4	0.1	0.2	0.3	0.1	50.0	-66.7
Unknown / n.a.	11.8	23.6	15.7	16.3	12.4	3.8	-23.9
Total	100%	100%	100%	100%	100%		
<u>ENTERTAINMENT / RECREATION</u>							
Excellent	11.3	17.4	20.9	13.9	7.6	-33.5	-45.3
Good	46.5	46.8	57.8	63.5	68.1	9.9	7.2
Average	7.5	2.7	1.6	2.8	1.4	75.0	-50.0
Poor	0.2	0.2	0.1	0.1	0.0	-	-
Unknown / n.a.	34.4	33.0	19.6	19.8	22.9	1.0	15.7
Total	100%	100%	100%	100%	100%		
<u>QUALITY OF SERVICE</u>							
Excellent	38.2	42.3	35.9	37.0	29.9	3.1	-19.2
Good	53.0	52.1	61.0	60.4	67.7	-1.0	12.1
Average	3.6	2.6	1.7	2.0	1.6	17.6	-20.0
Poor	0.3	0.0	0.1	0.1	0.1	0.0	0.0
Unknown / n.a.	5.0	3.0	1.4	0.5	0.7	-64.3	40.0
Total	100%	100%	100%	100%	100%		

Source: Tourist Survey - Central Bureau of Statistics - Aruba

1) The results presented for 2010 to 2013 for accommodation are only based on responses of visitors with a valid amount for expenditures on accommodation during their visit in Aruba or prior to visiting Aruba. This was not applied in the previous years.

4.0. MONEY ASPECTS OF THE VISITORS

4.1 AVERAGE DAILY EXPENDITURE SPENT IN ARUBA PER CATEGORY ¹⁾ (In US\$)

	Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	% change 12/11	% change 13/12
Accommodation ²⁾	20.35	16.85	9.68	8.79	10.48	-9.2	19.2
Food & beverage	25.64	24.82	20.71	19.49	21.52	-5.9	10.4
Groceries / sundries	4.45	4.40	3.31	3.19	3.54	-3.7	11.0
Entertainment / recreation	9.85	7.56	8.34	8.01	7.43	-4.0	-7.3
Taxis	3.19	3.36	4.16	3.20	3.32	-23.1	3.8
Car rental	5.80	5.78	5.05	5.27	5.91	4.3	12.2
Public transportation	0.23	0.21	0.22	0.20	0.17	-10.0	-15.7
Tax free shopping	2.13	2.10	2.30	2.54	2.63	10.3	3.5
Shopping	21.11	18.81	19.81	20.83	23.36	5.1	12.2
Casinos	8.13	9.44	12.62	12.52	11.30	-0.8	-9.8
Internet/Telephone	0.17	0.25	0.17	0.16	0.10	-9.2	-39.9
Other ³⁾	1.69	0.66	0.49	0.45	0.57	-8.6	27.4
Avg. Daily Expend. in Aruba (In US\$)	102.74	94.24	86.86	84.64	90.32	-2.6	6.7

Source: Tourist Survey - Central Bureau of Statistics - Aruba

Notes : (Note 1 apply to all expenditures mentioned in the tables regarding expenditures)

1) The expenditures above mentioned are expenditures that were made while the visitors were IN ARUBA, excluding anything spent on pre-paid package outside of Aruba.

2) The expenditure category "accommodation" does not include any expenses made on a pre-paid package for accommodation.

3) The expenditures belonging to the category "other" also includes expenditures which are unknown or that that could not be specified by the interviewed visitors. For this reason the amount does not represent expenditures belonging to the category "other" only.

4.2 AVERAGE DAILY EXPENDITURE SPENT IN ARUBA BY PLACE OF RESIDENCE ¹⁾ (In US\$)

	Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	% change 12/11	% change 13/12
United States	99.84	93.83	86.27	82.34	86.18	-4.6	4.7
Venezuela	160.50	145.67	141.27	131.87	144.94	-6.7	9.9
Netherlands	61.24	53.18	44.93	55.43	51.62	23.4	-6.9
Brazil	126.22	83.97	88.68	87.69	84.86	-1.1	-3.2
Netherlands Antilles	90.44	78.00	68.75	86.22	83.48	25.4	-3.2
Canada	60.12	52.36	54.97	51.09	62.60	-7.1	22.5
Colombia	119.77	89.06	74.80	75.35	86.18	0.7	14.4
Other	69.56	71.08	70.17	62.81	60.96	-10.5	-3.0
Total visitors	102.74	94.24	86.86	84.64	90.32	-2.6	6.7

Source: Tourist Survey - Central Bureau of Statistics - Aruba

4.3 AVERAGE DAILY EXPENDITURE SPENT IN ARUBA BY PURPOSE OF VISIT (In US\$) ¹⁾

	Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	% change 12/11	% change 13/12
Vacation	103.12	94.96	86.36	84.80	90.87	-1.8	7.2
Honeymoon	95.51	82.25	87.61	76.25	74.18	-13.0	-2.7
Visit friends / relatives	63.75	45.46	52.85	58.72	55.38	11.1	-5.7
Other	112.93	138.86	70.77	79.40	113.36	12.2	42.8
Business & leisure	177.03	230.27	172.86	199.48	213.87	15.4	7.2
Business Only / Convention ²⁾	203.51	202.66	131.38	190.50	155.27	45.0	-18.5
Wedding ²⁾	82.41	52.81	53.93	68.01	149.95	26.1	120.5

Source: Tourist Survey - Central Bureau of Statistics - Aruba

1) Expenditures belonging to the categories Incentives and Golf are based on a very small sample and therefore has been left out.

2) The expenditure belonging to the category "Other", "Business Only / Convention" and "Wedding" are based on a small sample and therefore may not be very representative.

4.4 AVERAGE DAILY EXPENDITURE SPENT IN ARUBA BY NUMBER OF VISITS TO ARUBA ¹⁾ (In US\$)

	Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	% change 12/11	% change 13/12
First time	89.19	77.92	77.96	71.93	74.44	-7.7	3.5
Between 2 and 5 times	103.19	99.49	89.93	94.70	96.28	5.3	1.7
6 Times or more	116.57	112.70	98.22	96.46	105.82	-1.8	9.7

Source: Tourist Survey - Central Bureau of Statistics - Aruba

4.5 AVERAGE DAILY EXPENDITURE SPENT IN ARUBA BY YEARLY HOUSEHOLD INCOME LEVEL ¹⁾ (In US\$)

	Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	% change 12/11	% change 13/12
Less than US\$20,000	71.50	57.33	61.04	62.73	54.55	2.8	-13.0
US\$20,001 - US\$30,000	118.44	89.78	72.64	77.98	96.24	7.4	23.4
US\$30,001 - US\$50,000	87.17	90.83	69.19	78.12	85.66	12.9	9.7
US\$50,001 - US\$75,000	90.45	91.10	78.72	82.81	88.94	5.2	7.4
US\$75,001 - US\$100,000	115.28	103.49	92.54	93.85	86.47	1.4	-7.9
US\$100,001 and over	134.06	118.41	122.48	111.07	124.83	-9.3	12.4

Source: Tourist Survey - Central Bureau of Statistics - Aruba

4.6 AVERAGE DAILY EXPENDITURE SPENT IN ARUBA BY TRAVEL ARRANGEMENT¹⁾ (In US\$)

	Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	% change 12/11	% change 13/12
Package deal	68.44	63.05	70.42	71.01	75.30	0.9	6.0
Own arrangements	125.41	117.38	104.51	102.78	108.54	-1.7	5.6
Avg. Daily Expend. in Aruba (In US\$)	102.74	94.24	86.86	84.64	90.32	-2.6	6.7
Pre-paid packages - All-Inclusive	48.71	49.73	53.65	55.97	57.86	4.3	3.4
Pre-paid packg. - Not All-Inclusive	-	113.88	141.30	132.55	143.52	-6.2	8.3

Source: Tourist Survey - Central Bureau of Statistics - Aruba

4.7 HOW MANY PERSONS DOES THE EXPENDITURE COVER

	Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	% change 12/11	% change 13/12
Adults	9,501	9,165	9,102	9,076	9,081	-0.3	0.1
Children	942	750	762	714	576	-6.3	-19.3
Total	10,443	9,915	9,864	9,790	9,657	-0.8	-1.4

Source: Central Bureau of Statistics - Aruba

4.8 HOTEL RELATED STATISTICS

	Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	% change 12/11	% change 13/12
<u>Hotel :</u>							
Occupancy	72.0%	73.5%	74.5%	78.7%	76.2%	5.6	-3.2
Average Daily Rate	\$179.21	\$180.75	\$193.37	\$200.54	\$214.14	3.7	6.8
Revenue per available room	\$129.04	\$132.77	\$143.42	\$157.83	\$163.12	10.0	3.4
<u>Timeshare :</u>							
Occupancy	77.3%	80.6%	82.0%	79.4%	79.2%	-3.2	-0.3
Average Daily Rate	\$147.00	\$170.14	\$179.94	\$157.46	\$166.09	-12.5	5.5
Revenue per available room	\$16.71	\$19.02	\$19.07	\$19.57	\$21.21	2.6	8.4
<u>Total :</u>							
Occupied Room Nights	2,023,885	2,043,945	2,039,162	2,088,247	2,096,089	2.4	0.4
Occupancy	74.7%	76.8%	77.7%	79.0%	77.5%	1.7	-1.9
Average Daily Rate	\$175.00	\$179.53	\$192.00	\$195.07	\$208.20	1.6	6.7
Revenue per available room	\$74.46	\$80.27	\$88.18	\$91.57	\$98.60	3.8	7.7
Total Room Revenue	201,612,845	213,510,993	231,545,203	241,938,862	266,551,294	4.5	10.2

Source: Central Bureau of Statistics - Aruba

4.9 AVERAGE EXPENDITURE PER PERSON PER TRIP BY THE MAJOR MARKETS¹⁾ (In US\$)

	Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	% change 12/11	% change 13/12
United States	757.79	707.48	645.30	620.02	645.49	-3.9	4.1
Venezuela	906.83	852.17	822.19	774.08	807.32	-5.9	4.3
Netherlands	780.81	662.09	514.00	614.72	593.63	19.6	-3.4
Brazil	778.78	556.72	617.21	619.09	576.21	0.3	-6.9
Netherlands Antilles	456.72	382.20	341.00	412.99	403.23	21.1	-2.4
Canada	479.76	401.60	421.07	380.11	452.58	-9.7	19.1
Colombia	934.21	797.98	554.27	602.05	773.89	8.6	28.5
Other	727.60	692.32	623.11	586.65	551.04	-5.9	-6.1
Total visitors	793.15	723.76	653.19	638.19	670.17	-2.3	5.0

Source: Tourist Survey - Central Bureau of Statistics - Aruba

4.10 TOURISM EXPENDITURE IN ARUBA BY THE MAJOR MARKETS¹⁾ (In 1,000 US dollars)

	Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	% change 12/11	% change 13/12
United States	400,279.78	379,033.57	342,737.98	329,199.73	359,081.21	-4.0	9.1
Venezuela	95,273.75	77,299.44	96,885.39	110,848.59	151,791.52	14.4	36.9
Netherlands	32,177.96	26,678.29	20,594.92	24,572.15	22,432.11	19.3	-8.7
Brazil	8,250.37	11,265.25	13,833.59	13,044.26	13,421.57	-5.7	2.9
Netherlands Antilles	9,835.96	8,929.34	8,788.59	11,299.92	10,758.92	28.6	-4.8
Canada	16,242.67	15,117.47	17,047.87	17,442.09	20,066.42	2.3	15.0
Colombia	14,653.02	11,972.86	9,257.94	10,913.30	15,079.23	17.9	38.2
Other	41,076.52	42,459.24	46,459.67	45,385.82	35,602.41	-2.3	-21.6
Total visitors	644,534.208	596,619.719	567,602.041	576,877.662	656,272.302	1.6	13.8

Source: Tourist Survey - Central Bureau of Statistics - Aruba

4.11 TOURISM EXPENDITURE IN ARUBA BY YEARLY HOUSEHOLD INCOME LEVEL OF THE VISITORS¹⁾ (In 1,000 US dollars)

	Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	% change 12/11	% change 13/12
Less than US\$50,000	170,803.46	149,751.55	175,961.83	209,406.59	183,756.24	19.0	-12.2
More than US\$50,000	354,497.74	354,988.73	299,702.73	264,209.97	360,949.77	-11.8	36.6
Unknown	119,240.15	91,879.44	91,954.25	103,261.10	111,566.29	12.3	8.0
Total	644,541.35	596,619.72	567,618.81	576,877.66	656,272.30	1.6	13.8

Source: Tourist Survey - Central Bureau of Statistics - Aruba

4.12 LODGING TAX (In 1,000 US dollars)

	Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	% change 12/11	% change 13/12
Quarter 1	5,960,950	6,359,218	10,139,106	10,840,223	11,149,721	6.9	2.9
Quarter 2	3,310,592	5,522,346	8,903,911	8,717,877	9,324,022	-2.1	7.0
Quarter 3	2,748,603	5,353,631	7,295,531	7,538,547	7,831,285	3.3	3.9
Quarter 4	3,065,922	6,117,877	6,425,698	6,907,821	7,965,363	7.5	15.3
Total	15,086,067	23,353,073	32,764,246	34,004,469	36,270,391	3.8	6.7

Source: Tax collector's office

4.13 CASINO TAX (In 1,000 US dollars)

	Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	% change 12/11	% change 13/12
Quarter 1	5,965,106	6,359,218	3,841,341	4,289,385	4,501,117	11.7	4.9
Quarter 2	4,789,268	3,160,894	3,053,631	3,240,782	3,388,827	6.1	4.6
Quarter 3	4,391,620	2,416,201	2,658,101	1,569,274	2,830,168	-41.0	80.3
Quarter 4	3,705,028	2,692,737	2,810,056	2,124,022	2,939,665	-24.4	38.4
Total	18,851,022	14,629,050	12,363,129	11,223,464	13,659,777	-9.2	21.7

Source: Tax collector's office

4.14 TOURISM RECEIPTS (In 1,000,000 US dollars)

	Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	% change 12/11	% change 13/12
Quarter 1	347.77	360.84	386.87	407.09	432.85	5.2	6.3
Quarter 2	270.17	289.39	326.70	324.64	347.15	-0.6	6.9
Quarter 3	283.85	279.55	311.90	322.01	335.47	3.2	4.2
Quarter 4	314.19	315.03	326.59	343.63	379.89	5.2	10.6
Total	1,215.978	1,244.804	1,352.067	1,397.374	1,495.363	3.4	7.0

Source: Central Bank of Aruba

4.14A AVERAGE TOURISM RECEIPTS (TOURISM RECEIPTS DIVIDED BY STAYOVER VISITORS - In US dollars)

	Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	% change 12/11	% change 13/12
Quarter 1	1,706.51	1,669.65	1,757.75	1,812.13	1,806.22	3.1	-0.3
Quarter 2	1,376.88	1,493.89	1,537.50	1,498.16	1,537.90	-2.6	2.7
Quarter 3	1,380.53	1,353.03	1,393.86	1,377.99	1,349.38	-1.1	-2.1
Quarter 4	1,517.79	1,515.37	1,536.03	1,501.15	1,432.10	-2.3	-4.6
Total	1,496.36	1,510.08	1,555.94	1,545.88	1,527.04	-0.6	-1.2

Source: Central Bank of Aruba

4.15 ESTIMATED TOTAL TOURISM EXPENDITURE¹⁾ (In 1,000 US dollars)

	Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	% change 12/11	% change 13/12
Quarter 1	213,484.63	237,830.01	209,220.34	236,710.22	251,659.52	13.1	6.3
Quarter 2	164,580.84	183,816.37	213,109.22	194,669.25	198,423.34	-8.7	1.9
Quarter 3	189,556.32	207,892.81	203,560.23	206,954.82	218,745.24	1.7	5.7
Quarter 4	199,227.63	191,143.81	208,309.25	216,281.82	256,043.83	3.8	18.4
Total	766,849.422	820,683.000	834,199.042	854,616.106	924,871.936	2.4	8.2

Source: Tourist Survey - Central Bureau of Statistics - Aruba

¹⁾ For further explanation on estimated total tourism expenditure refer to methodology which is available upon request at the CBS

4.16 MARKETING EXPENSES OF THE ARUBA TOURISM AUTHORITY (A.T.A.) (In US dollars)

	Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	% change 12/11	% change 13/12
North America	17,415,803	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Latin America	2,089,968	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Europe	3,581,129	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Carib/RZA	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Aruba	2,131,054	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Total	25,217,954	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.

Source: Aruba Tourism Authority (ATA)

n.a. = not available (not reported)

5.0. MARKET SHARES IN THE CARIBBEAN

5.1 TOURIST ARRIVALS IN THE CARIBBEAN BY DESTINATION (In thousands)

	Year 2009	% share	Year 2010	% share	Year 2011	% share	Year 2012	% share	Year 2013	% share
Caribbean	18,201.2	100.0	19,045.1	100.0	19,504.3	100.0	20,234.8	100.0	19,452.5	100.0
Anguila	57.9	0.3	62.0	0.3	65.8	0.3	64.7	0.3	69.1	0.4
Antigua / Barbuda	234.4	1.3	229.9	1.2	241.3	1.2	246.9	1.2	243.9	1.3
Aruba	812.6	4.5	824.3	4.3	869.0	4.5	903.9	4.5	979.3	5.0
Bahamas	1327.0	7.3	1,370.1	7.2	1,346.4	6.9	1,421.3	7.0	1,363.5	7.0
Barbados	518.6	2.8	532.2	2.8	567.7	2.9	536.3	2.7	508.5	2.6
Belize	232.2	1.3	241.9	1.3	250.3	1.3	277.1	1.4	294.2	1.5
Bermuda	235.9	1.3	232.3	1.2	236.0	1.2	232.1	1.1	236.3	1.2
Br. Virgin Island	308.8	1.7	330.3	1.7	337.8	1.7	351.4	1.7	355.7	1.8
Cayman Island	272.0	1.5	288.3	1.5	309.1	1.6	321.7	1.6	345.4	1.8
Cuba	2,429.8	13.3	2,531.7	13.3	2,716.3	13.9	2,838.2	14.0	2,851.3	14.7
Curacao	367.0	2.0	341.7	1.8	390.3	2.0	419.6	2.1	440.0	2.3
Dominica	74.9	0.4	76.5	0.4	75.5	0.4	78.1	0.4	78.3	0.4
Dom. Republic	3,992.3	21.9	4,124.5	21.7	4,306.4	22.1	4,562.6	22.5	4,689.8	24.1
Grenada	113.4	0.6	110.5	0.6	118.3	0.6	112.3	0.6	116.5	0.6
Guyana	141.1	0.8	151.9	0.8	156.9	0.8	176.6	0.9	165.8	0.9
Haiti	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	419.7	2.2
Jamaica	1,831.1	10.1	1,921.7	10.1	1,915.8	9.8	1,986.1	9.8	2,008.4	10.3
Martinique	443.2	2.4	476.5	2.5	496.5	2.5	487.4	2.4	489.7	2.5
Mexico (Cancun)	1,891.4	10.4	2,106.5	11.1	1,940.7	9.9	1,826.1	9.0	n.a.	n.a.
Montserrat	6.3	0.0	6.0	0.0	5.4	0.0	7.3	0.0	7.2	0.0
Puerto Rico	1,300.8	7.1	1,369.2	7.2	1,448.7	7.4	1,569.5	7.8	1,588.7	8.2
St. Maarten	440.2	2.4	443.1	2.3	424.3	2.2	456.7	2.3	467.3	2.4
St. Kitts / Nevis	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	101.0	0.5
St. Lucia	278.5	1.5	305.9	1.6	312.4	1.6	306.8	1.5	318.6	1.6
St. Vincent and Grenadines	75.4	0.4	72.5	0.4	73.9	0.4	74.4	0.4	71.7	0.4
Suriname	150.4	0.8	204.3	1.1	220.5	1.1	240.0	1.2	249.1	1.3
Turks / Caicos	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	290.6	1.5
U.S. Virgin Islands	666.1	3.7	691.2	3.6	679.0	3.5	737.7	3.6	703.0	3.6

Source: Caribbean Tourism Organization - C.T.O. (CTO Statistical Report)

n.a. = data not available

5.2 CRUISE PASSENGER ARRIVALS TO THE CARIBBEAN BY DESTINATION (In thousands)

	Year 2009	% share	Year 2010	% share	Year 2011	% share	Year 2012	% share	Year 2013	% share
Caribbean	18,890.90	100.0	20,071.81	100.0	20,616.70	100.0	21,187.38	100.0	21,998.63	100.0
Antigua / Barbuda	712.79	3.8	557.64	2.8	606.49	2.9	551.16	2.6	534.0	2.4
Aruba	606.77	3.2	569.43	2.8	599.89	2.9	582.31	2.7	688.6	3.1
Bahamas	3,255.78	17.2	3,809.81	19.0	4,161.27	20.2	4,434.16	20.9	4,709.2	21.4
Barbados	635.21	3.4	664.75	3.3	619.05	3.0	517.44	2.4	570.3	2.6
Belize	705.22	3.7	764.63	3.8	724.54	3.5	640.73	3.0	677.4	3.1
Bermuda	318.53	1.7	347.93	1.7	415.96	2.0	378.26	1.8	320.1	1.5
Bonaire	213.19	1.1	n.a.	n.a.	n.a.	n.a.	108.47	0.5	96.82	0.4
Br. Virgin Island	530.33	2.8	501.45	2.5	484.72	2.4	390.58	1.8	367.4	1.7
Cayman Island	1,520.37	8.0	1,597.84	8.0	1,401.50	6.8	1,507.37	7.1	1,375.9	6.3
Curacao	423.09	2.2	383.04	1.9	400.92	1.9	431.56	2.0	610.2	2.8
Dominica	532.35	2.8	517.98	2.6	341.50	1.7	266.55	1.3	230.6	1.0
Dom. Republic	496.73	2.6	352.54	1.8	347.91	1.7	338.17	1.6	423.9	1.9
Grenada	342.85	1.8	333.29	1.7	309.57	1.5	242.45	1.1	197.3	0.9
Haiti	439.06	2.3	330.64	1.6	596.56	2.9	609.93	2.9	643.6	2.9
Jamaica	922.35	4.9	909.62	4.5	1,125.48	5.5	1,320.08	6.2	1,288.2	5.9
Martinique	69.75	0.4	74.64	0.4	41.14	0.2	93.52	0.4	103.8	0.5
Mexico (Conzumel)	2,221.73	11.8	2,911.15	14.5	2,871.10	13.9	2,739.71	12.9	2,751.2	12.5
Puerto Rico	1,179.02	6.2	1,191.06	5.9	1,124.44	5.5	1,051.72	5.0	1,176.3	5.3
St. Lucia	699.31	3.7	670.04	3.3	630.30	3.1	571.89	2.7	594.1	2.7
St. Maarten	1,215.15	6.4	1,512.62	7.5	1,656.16	8.0	1,753.215	8.3	1,779.4	8.1
St. Vincent and Grenadines	149.46	0.8	110.96	0.6	88.93	0.4	77.00	0.4	83.0	0.4
Trinidad / Tobago	119.60	0.6	101.80	0.5	60.28	0.3	676.65	3.2	778.9	3.5
U.S. Virgin Islands	1,582.26	8.4	1,858.95	9.3	2,008.99	9.7	1,904.47	9.0	1,998.6	9.1

Source: Caribbean Tourism Organization - C.T.O. (CTO Statistical Report)

5.3 TOURIST ARRIVALS FROM THE UNITED STATES (In thousands)

	Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	% change 12/11	% change 13/12
TOTAL Caribbean	8,602.5	9,049.2	8,873.7	9,109.2	7,448.7	2.7	-18.2
Anguilla	34.1	38.9	42.8	41.8	45.5	-2.4	8.9
Antigua and Barbuda	82.1	81.5	84.8	93.2	88.8	9.9	-4.7
Aruba	528.2	535.8	531.1	531.0	556.3	0.0	4.8
Bahamas	1068.7	1095.3	1054.7	1,121.2	1,065.4	6.3	-5.0
Barbados	122.3	135.0	142.4	130.8	120.6	-8.2	-7.8
Belize	139.6	145.1	156.3	176.6	183.5	13.0	3.9
Bermuda	172.7	166.0	172.9	168.2	171.2	-2.7	1.8
Cancun (Mexico)	1503.2	1661.8	1443.7	1348.8	n.a.	-6.6	n.a.
Cayman Islands	215.0	228.5	242.9	253.2	265.4	4.2	4.8
Curacao	36.0	48.7	62.4	61.5	61.5	-1.4	0.0
Dominica	18.2	19.3	17.8	19.0	18.0	6.5	-4.9
Dominican Republic	1148.5	1226.4	1286.2	1,456.6	1,587.4	13.3	9.0
Grenada	21.1	20.0	35.9	25.2	30.6	-29.8	21.4
Guyana	76.2	82.2	83.3	98.6	69.3	18.4	-29.7
Jamaica	1172.8	1242.9	1225.6	1257.7	1271.3	2.6	1.1
Montserrat	1.6	1.1	1.5	2.0	1.8	28.0	-9.1
Puerto Rico	1173.2	1231.7	1302.7	1421.9	1444.6	9.2	1.6
St. Lucia	98.7	129.1	122.4	115.1	128.3	-6.0	11.5
St. Kitts & Nevis	n.a.	n.a.	n.a.	n.a.	65.6	n.a.	n.a.
St. Maarten	240.4	236.4	219.2	238.5	246.2	8.8	3.2
St. Vincent and Grenadines	20.2	21.6	21.2	21.5	20.1	1.4	-6.3
Suriname	5.0	5.1	7.8	8.0	7.3	2.9	2.9
US Virgin Islands	724.9	696.9	616.2	519.0	n.a.	-15.8	n.a.

Source: Caribbean Tourism Organization - C.T.O. (CTO Statistical Report)

n.a. = data not available

Tables of Quarterly Results for 2012 & 2013

2. TOURISM IN ARUBA

2.1 NUMBER OF STAYOVER VISITORS BY PLACE OF RESIDENCE

	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012	Qtr.1 2013	Qtr. 2 2013	Qtr. 3 2013	Qtr. 4 2013
Total Visitors	224,650	216,691	233,681	228,912	239,644	225,731	248,614	265,267
United States	144,409	137,579	125,310	123,652	147,474	143,704	133,392	131,730
Venezuela	22,713	28,332	47,776	44,380	32,174	29,404	55,271	71,171
Netherlands	10,405	9,264	10,659	9,645	8,975	9,537	9,699	9,577
Netherlands Antilles	5,162	7,747	7,206	7,246	5,065	6,996	7,526	7,095
Colombia	3,379	4,520	4,259	5,969	3,714	5,112	4,279	6,380
Brazil	5,415	4,124	6,014	5,517	4,944	4,762	6,932	6,655
Canada	17,500	7,783	7,505	13,099	16,830	8,285	7,588	11,635
Argentina	3,426	2,751	3,783	2,905	4,670	3,332	4,368	3,204
Germany	980	923	1,117	1,034	816	857	930	1,238
Rest of Europe	5,319	2,345	2,943	6,066	7,323	2,685	3,117	6,520
So - Cent. America	999	1,215	1,463	1,710	1,222	1,400	1,686	2,035
United Kingdom	534	4,447	6,917	1,814	648	3,034	4,210	1,423
Surinam	771	1,470	1,565	1,311	1,415	1,776	1,589	1,473
Rest of the World	3,638	4,191	7,164	4,564	795	961	894	989

Source: Aruba Tourism Authority (ATA)

2.2 CRUISE PASSENGERS

	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012	Qtr.1 2013	Qtr. 2 2013	Qtr. 3 2013	Qtr. 4 2013
Number of passengers	273,779	86,422	31,195	190,917	291,659	117,722	69,998	209,189
Number of calls	137	39	16	102	146	62	35	110
Number of crew members	109,069	33,727	11,426	79,105	116,737	48,725	26,080	86,400
Avg. no. of passengers/ship	1,998	2,216	1,950	1,872	1,998	1,899	2,000	1,902

Source: Aruba Tourism Authority (ATA) & Cruise Tourism Authority N.V. - Aruba

2.3 TOTAL NUMBER OF VISITORS

	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012	Qtr.1 2013	Qtr. 2 2013	Qtr. 3 2013	Qtr. 4 2013
Total stayover visitors	224,650	216,691	233,681	228,912	239,644	225,731	248,614	265,267
Total cruise visitors	273,779	86,422	31,195	190,917	291,659	117,722	69,998	209,189
Total number of visitors	498,429	303,113	264,876	419,829	531,303	343,453	318,612	474,456

Source: Aruba Tourism Authority (ATA) & Cruise Tourism Authority N.V. - Aruba

2.4 AVERAGE LENGTH OF STAY BY PLACE OF RESIDENCE OF VISITORS TO ARUBA (In days)

	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012	Qtr.1 2013	Qtr. 2 2013	Qtr. 3 2013	Qtr. 4 2013
United States	7.8	7.6	7.3	7.4	7.7	7.6	7.4	7.2
Venezuela	6.0	5.7	6.3	5.4	6.3	4.9	5.7	5.4
Netherlands	11.0	11.1	11.8	10.5	11.2	11.4	12.1	11.2
Brazil	7.3	6.8	7.2	6.8	6.8	6.5	6.8	7.0
Netherlands Antilles	5.2	4.5	5.0	4.6	5.7	4.1	4.9	4.8
Canada	7.7	7.3	7.6	7.0	7.5	7.0	7.3	7.0
Colombia	8.3	7.5	9.2	7.4	11.7	10.2	6.5	7.8
Other	10.1	8.5	9.1	9.9	10.4	8.4	9.6	7.8
Avg. length of stay	7.9	7.5	7.5	7.3	7.9	7.4	7.4	7.0

Source: Tourist Survey - Central Bureau of Statistics - Aruba

2.5 NUMBER OF VISITOR NIGHTS BY PLACE OF RESIDENCE (* 1,000)

	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012	Qtr.1 2013	Qtr. 2 2013	Qtr. 3 2013	Qtr. 4 2013
Total Visitors	1,802.60	1,552.36	1,804.38	1,747.81	1,845.66	1,561.30	1,817.06	1,902.75
United States	1128.21	956.91	905.06	925.15	1130.21	981.31	929.75	964.61
Venezuela	147.06	154.78	334.86	266.85	174.29	140.05	351.94	390.55
Netherlands	123.90	109.67	132.23	117.09	116.68	115.60	122.13	114.40
Netherlands Antilles	24.43	37.50	40.50	37.23	20.87	30.57	40.74	33.66
Colombia	32.72	41.80	36.83	61.30	30.88	42.63	38.28	60.11
Brazil	33.33	25.90	38.71	35.62	32.11	30.59	46.09	45.22
Canada	153.72	60.43	63.24	112.90	148.55	63.99	61.97	102.40
Argentina	28.94	23.59	34.20	25.26	39.44	27.96	38.64	25.85
Germany	9.33	9.40	12.39	10.36	8.42	7.90	8.99	11.86
Rest of Europe	62.27	22.83	29.36	68.21	81.56	25.45	30.94	71.41
So - Cent. America	6.28	7.95	9.83	11.76	7.81	8.43	12.23	12.69
United Kingdom	5.28	52.22	84.32	19.75	6.47	35.50	51.90	14.82
Surinam	6.36	9.91	13.56	9.73	9.41	10.83	12.36	10.43
Rest of the World	40.79	39.47	69.30	46.59	38.96	40.51	71.10	44.74

Source: Aruba Tourism Authority (ATA)

2.6 AIRPORT TRAFFIC / NUMBER OF PASSENGERS TRAVELING BY AIR

	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012	Qtr.1 2013	Qtr. 2 2013	Qtr. 3 2013	Qtr. 4 2013
Arrived	251,771	244,272	265,218	259,470	262,972	254,392	280,153	295,734
Foreign Arrivals	231,655	220,662	235,681	233,980	242,852	229,852	251,202	270,648
Local Arrivals	20,116	23,610	29,537	25,490	20,120	25,124	28,951	25,086
Departed	259,460	249,600	276,063	249,691	272,480	255,219	288,224	281,918
In transit	16,463	15,060	16,325	17,185	20,465	22,411	28,665	33,977
Total Traffic	527,694	508,932	557,606	526,346	555,917	532,022	597,042	611,629

Source: Aruba Airport Authority N.V. (AAA) & Department of Immigration - International Airport of Aruba

2.7 AIRCRAFT LANDINGS

	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012	Qtr.1 2013	Qtr. 2 2013	Qtr. 3 2013	Qtr. 4 2013
Commercial landings	3,774	3,698	3,802	3,797	3,960	4,004	3,837	3,909
Non-commercial landings	1,253	1,267	1,481	1,471	1,492	928	1,455	2,123
Total	5,027	4,965	5,283	5,268	5,452	4,932	5,292	6,032

Source: Aruba Airport Authority N.V. (AAA) & Department of Immigration - International Airport of Aruba

2.8 STAYOVER VISITORS BY CARRIER

	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012	Qtr.1 2013	Qtr. 2 2013	Qtr. 3 2013	Qtr. 4 2013
American Airlines	20,898	23,999	22,316	19,317	18,789	19,985	19,014	18,121
Avianca	5,072	5,939	7,584	7,940	6,896	7,637	8,312	7,971
KLM	6,626	5,893	7,191	6,508	6,134	5,408	5,271	6,979
Private	2,964	2,758	3,242	3,826	3,436	1,980	2,966	4,448
Suriname Airways	1,104	1,321	1,510	1,368	1,110	1,542	1,428	1,963
Aserca	3,480	5,314	7,885	7,495	6,150	7,085	10,245	11,594
Cruiseship	26	1	8	5	4	0	5	0
Charter	11,412	7,635	12,864	11,344	10,924	6,272	9,658	15,953
Continental	17,965	3	0	0	0	0	0	0
Delta Airline	17,243	16,376	15,369	18,131	23,998	24,737	25,947	26,428
Us Airways	25,681	25,401	20,156	20,336	25,741	24,454	18,619	19,655
United Airlines	17,154	28,691	25,576	23,398	30,927	25,681	23,780	23,094
Avior	779	1,519	1,683	1,907	1,042	1,194	1,851	4,617
Varig	0	0	136	0	0	0	0	0
Arkeflight	4,500	3,894	3,875	3,919	3,351	4,033	3,801	3,699
Dutch Antilles Express	119	262	180	272	204	65	113	0
Dutch Caribbean Express	3,249	4,643	6,551	5,268	4,433	4,338	2,651	0
Insel Air	7,868	9,671	11,071	10,267	9,086	9,682	12,805	13,452
Jet Blue	36,197	30,697	33,293	32,932	37,858	32,810	34,225	32,893
Martin Air	2	1	0	0	0	0	0	0
Tiara Air	6,521	7,687	11,205	13,356	10,529	12,170	15,671	16,610
Copa Airline	4,801	4,988	6,688	6,279	5,758	6,139	8,494	8,500
Spirit Airlines	977	1,290	1,301	1,357	1,332	1,510	1,571	1,489
Venezolana Airlines	3,689	4,528	8,194	7,114	4,353	3,366	5,863	4,914
Gol Transportes Aereos	3,171	3,329	3,763	2,996	2,104	2,437	3,686	4,051
Air Canada	2,697	1,360	1,406	1,772	2,748	1,409	1,435	1,666
Air Tran Airways	13,585	13,094	11,864	13,026	13,561	15,768	15,579	14,866
Laser	2,530	3,251	5,959	4,072	2,879	1,883	6,919	4,813
Sunwing Airlines	3,479	2,673	2,399	4,489	5,717	2,923	2,609	3,948
Other	861	473	412	218	580	1,223	6,096	13,543
Total	224,650	216,691	233,681	228,912	239,644	225,731	248,614	265,267

Source: Aruba Airport Authority N.V. (AAA) & Department of Immigration - International Airport of Aruba

3.1. CHARACTERISTICS OF THE VISITORS

3.1.1 AGE GROUPS OF THE VISITORS (In Percentages)

	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012	Qtr.1 2013	Qtr. 2 2013	Qtr. 3 2013	Qtr. 4 2013
Under 20 yrs	0.5	2.4	3.6	2.4	1.6	1.2	2.9	1.2
20 - 29 yrs	6.6	10.8	9.1	6.9	6.0	6.2	6.0	6.6
30 - 39 yrs	23.7	25.3	26.3	25.4	26.0	25.2	22.6	20.2
40 - 49 yrs	27.7	25.9	30.7	34.7	33.9	35.9	32.3	33.9
50 - 64 yrs	29.0	24.3	22.8	21.5	22.5	22.6	24.2	25.1
Over 65 yrs	12.4	11.2	7.5	9.1	9.9	8.8	11.9	13.1
Total	100%	100%	100%	100%	100%	100%	100%	100%

Source: Tourist Survey - Central Bureau of Statistics - Aruba

3.1.2 YEARLY HOUSEHOLD INCOME OF THE VISITORS (In Percentages)

	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012	Qtr.1 2013	Qtr. 2 2013	Qtr. 3 2013	Qtr. 4 2013
Less than US\$20,000	5.3	5.9	9.2	7.5	4.2	4.1	7.3	5.1
US\$20,001 - US\$30,000	6.9	7.6	12.8	8.7	6.0	7.8	6.7	4.6
US\$30,001 - US\$50,000	20.4	20.1	21.6	19.0	15.4	16.7	20.2	14.3
US\$50,001 - US\$75,000	26.0	21.2	18.3	21.4	26.4	26.5	24.6	22.5
US\$75,001 - US\$100,000	11.0	9.2	12.8	13.4	17.0	17.3	13.6	15.6
US\$100,001 and over	14.2	14.8	9.5	11.4	15.6	11.3	13.4	16.1
Unknown	16.1	21.2	15.8	18.6	15.4	16.3	13.2	21.8
Total	100%	100%	100%	100%	100%	100%	100%	100%

Source: Tourist Survey - Central Bureau of Statistics - Aruba

3.1.3 OCCUPATION OF THE VISITORS (In Percentages)

	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012	Qtr.1 2013	Qtr. 2 2013	Qtr. 3 2013	Qtr. 4 2013
Legislators, senior officials and managers	13.3	11.3	11.2	13.2	11.9	9.6	11.4	10.8
Professionals	17.4	18.1	22.0	21.4	21.9	25.3	22.4	23.2
Technicians and associate professionals	7.3	6.6	6.7	6.9	6.9	7.5	8.5	7.8
Clerks	6.7	7.3	5.8	7.4	6.5	7.9	6.2	6.1
Service workers, shop & market sales workers	6.5	7.6	6.8	6.8	8.0	7.4	4.9	6.0
Not economically active (Retired)	44.1	44.2	42.4	39.8	40.1	37.2	43.6	43.0
Skilled agricultural and fishery workers	0.0	0.4	0.1	0.0	0.2	0.3	0.3	0.3
Craft and related trades workers	2.0	2.1	2.4	1.7	2.5	2.2	1.2	1.2
Plant and machine operators and assemblers	1.1	0.7	1.0	1.2	0.5	0.8	0.4	0.5
Elementary occupations	1.2	1.3	1.0	1.2	1.4	1.5	0.9	0.6
Armed forces	0.1	0.1	0.3	0.0	0.0	0.1	0.1	0.2
Unknown	0.3	0.1	0.4	0.4	0.2	0.3	0.2	0.3

Source: Tourist Survey - Central Bureau of Statistics - Aruba

3.1.4 METHOD VISITORS USED TO BOOK A TRIP (In Percentages)

	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012	Qtr.1 2013	Qtr. 2 2013	Qtr. 3 2013	Qtr. 4 2013
In person in General	27.4	26.5	36.1	27.2	30.2	19.1	23.4	15.7
By telephone in General	9.6	11.4	9.0	12.7	16.5	13.0	11.9	12.4
Travel Agent (In Pers/Tel.)	69.8	71.1	68.3	75.4	68.8	73.1	74.0	79.0
Tour Operator (In Pers/Tel.)	1.8	0.5	0.2	0.7	0.2	0.3	0.3	0.7
Hotel Direct (In Pers/Tel.)	12.2	11.2	10.1	8.0	13.2	9.4	9.1	3.4
Airline Direct (In Pers.Tel.)	25.9	27.2	30.2	30.2	29.9	25.6	23.1	20.3
Online in General	54.7	57.3	51.7	48.0	57.1	67.5	61.1	65.2
On-Line Tour Operator	45.3	42.7	48.3	52.0	42.4	48.0	54.9	48.6
On-Line Hotel Direct	6.3	6.0	8.5	4.2	13.2	9.4	9.1	3.4
On-Line Airline Direct	28.8	27.0	28.0	27.9	29.9	25.6	23.0	20.3
Other	8.3	4.8	3.2	12.1	0.0	0.4	3.6	6.7

Source: Tourist Survey - Central Bureau of Statistics - Aruba

3.1.5 VISITORS THAT HAVE BEEN TO ARUBA BY CRUISE AND VISITOR THAT HAVE BEEN TO THE CARIBBEAN PRIOR TO THIS VISIT (In Percentages)

		Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012	Qtr.1 2013	Qtr. 2 2013	Qtr. 3 2013	Qtr. 4 2013
To Aruba by cruise	Yes	13.2	13.7	13.3	10.6	15.2	10.7	11.5	9.4
	No	86.8	86.3	86.7	89.4	84.8	89.3	88.5	90.6
Prior visit to the Caribbean	Yes	80.9	79.6	76.7	75.5	82.4	81.3	82.4	77.4
	No	19.1	20.4	23.3	24.5	17.6	18.7	17.6	22.6

Source: Tourist Survey - Central Bureau of Statistics - Aruba

3.2. BEHAVIOR OF THE VISITORS

3.2.1 NUMBER OF VISITS TO ARUBA (In Percentages)

	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012	Qtr.1 2013	Qtr. 2 2013	Qtr. 3 2013	Qtr. 4 2013
First time	49.0	44.1	45.2	47.2	38.8	44.7	39.6	40.3
2 to 5 times	22.1	25.2	24.2	27.3	28.8	28.0	28.2	27.5
6 times or more	28.9	30.6	30.6	25.5	32.4	27.2	32.2	32.3
Total	100%	100%	100%	100%	100%	100%	100%	100%

Source: Tourist Survey - Central Bureau of Statistics - Aruba

3.2.2 PURPOSE OF VISIT (In Percentages)

	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012	Qtr.1 2013	Qtr. 2 2013	Qtr. 3 2013	Qtr. 4 2013
Vacation	92.7	89.6	89.9	89.4	90.2	90.3	90.5	89.9
Honeymoon	2.0	3.2	2.7	2.9	2.5	2.2	1.8	2.1
Visit friends / relatives	2.9	4.7	5.3	5.1	4.5	4.6	4.7	5.4
Business / leisure	0.4	0.9	0.8	0.8	0.7	0.4	0.6	0.3
Other ¹⁾	1.1	0.5	0.8	0.7	0.6	1.5	1.3	0.8
Business only / Convention	0.6	0.6	0.4	0.4	0.3	0.6	0.5	0.7
Wedding	0.1	0.4	0.3	0.6	0.4	0.4	0.5	0.7
Events/Festivals	0.1	0.0	0.0	0.0	0.7	0.0	0.1	0.1
Get Married	0.0	0.0	0.0	0.1	0.1	0.0	0.0	0.0
Total	100%	100%	100%	100%	100%	100%	100%	100%

Source: Tourist Survey - Central Bureau of Statistics - Aruba

¹⁾ Other also include incentive and golf

3.2.3 TYPE OF ACCOMMODATION USED BY THE VISITORS (In Percentages)

	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012	Qtr.1 2013	Qtr. 2 2013	Qtr. 3 2013	Qtr. 4 2013
Hotel	59.7	60.4	59.3	62.1	59.1	60.3	57.9	58.6
Timeshare	27.7	27.2	23.0	23.5	28.3	27.2	25.7	26.7
Guest house/Apartment	2.6	2.3	3.2	1.7	2.0	1.5	2.2	1.8
Friends / Relatives	9.3	9.5	13.6	12.0	9.8	9.9	13.5	12.7
Own House	0.7	0.4	0.5	0.4	0.4	0.7	0.4	0.1
Other	0.2	0.4	0.4	0.4	0.4	0.4	0.2	0.1
Condominium	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total	100%	100%	100%	100%	100%	100%	100%	100%

Source: Tourist Survey - Central Bureau of Statistics - Aruba

3.2.4 TRAVEL ARRANGEMENT OF THE VISITORS (In Percentages)

	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012	Qtr.1 2013	Qtr. 2 2013	Qtr. 3 2013	Qtr. 4 2013
Pre-paid package	56.9	56.9	56.2	58.3	78.8	82.4	80.4	77.3
Own arrangement	43.1	43.1	43.8	41.7	21.2	17.6	19.6	22.7
Total	100%	100%	100%	100%	100%	100%	100%	100%
Packages which were All-Inclusive	48.5%	43.2%	43.8%	48.1%	44.6%	45.4%	42.9%	41.9%

Source: Tourist Survey - Central Bureau of Statistics - Aruba

3.2.5 SINGLE MOST IMPORTANT SOURCE OF INFORMATION IN MAKING A DECISION TO VISIT ARUBA (In Percentages)

	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012	Qtr.1 2013	Qtr. 2 2013	Qtr. 3 2013	Qtr. 4 2013
Friends / Relatives	38.7	39.5	43.6	45.8	44.7	41.3	39.9	33.8
Travel agent	14.7	12.8	11.3	12.3	10.1	9.0	10.6	12.2
Newspaper / magazine	0.0	0.1	0.1	0.0	0.2	0.4	0.0	0.0
Television ad / Radio ad	0.0	0.0	0.1	0.0	0.0	0.2	0.0	0.1
Tourist board	0.0	0.0	0.2	0.0	0.0	0.1	0.0	0.0
Other	1.2	2.0	1.3	1.4	0.8	1.3	1.1	1.3
Repeat visit	31.2	30.8	31.1	25.7	32.0	29.4	31.3	32.1
Cruise	0.2	0.4	0.2	0.5	0.7	0.5	1.1	0.5
Internet	13.3	13.2	11.1	12.7	10.6	16.2	15.0	19.0
Business	0.7	1.2	1.0	1.0	0.9	1.5	1.0	0.9
Unknown	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.1
Total	100%	100%	100%	100%	100%	100%	100%	100%

Source: Tourist Survey - Central Bureau of Statistics - Aruba

3.2.6. USERS OF TIMESHARE PROPERTIES: OWNERS VS. NON-OWNERS (In Percentage of total timeshare users)

	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012	Qtr.1 2013	Qtr. 2 2013	Qtr. 3 2013	Qtr. 4 2013
Owner	67.3	64.8	62.8	64.0	66.1	60.3	64.6	66.7
<i>Non-timeshare owner:</i>								
Non-owner: Transient (Walk-in)	3.2	2.9	5.0	4.2	5.0	2.3	3.5	2.3
Non-owner: Exchange	7.4	11.1	10.9	10.2	9.7	15.7	14.6	13.3
Non-owner: Other	22.1	21.2	21.3	21.6	19.1	21.6	17.4	17.7
Total Timeshare user	100%	100%	100%	100%	100%	100%	100%	100%

Source: Tourist Survey - Central Bureau of Statistics - Aruba

3.2.7 TYPE OF FLIGHT USED BY THE VISITORS (In Percentages)

	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012	Qtr.1 2013	Qtr. 2 2013	Qtr. 3 2013	Qtr. 4 2013
Charter	4.5	3.6	2.0	3.0	4.4	1.4	0.7	1.1
Scheduled	95.4	96.3	98.0	97.0	95.5	98.6	99.3	98.9
Own Plane	0.1	0.0	0.0	0.0	0.1	0.0	0.0	0.0
Other Type of flight	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0
Total	100%	100%	100%	100%	100%	100%	100%	100%

Source: Tourist Survey - Central Bureau of Statistics - Aruba

3.2.A. CHARACTERISTICS OF THE VISITORS FROM THE U.S.A.**3.2A.1 VISITORS FROM THE UNITED STATES BY THE MAJOR STATES (In Percentages)**

	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012	Qtr.1 2013	Qtr. 2 2013	Qtr. 3 2013	Qtr. 4 2013
New York	28.3	26.7	24.4	23.8	18.2	18.7	19.3	20.7
New Jersey	15.6	15.9	18.3	17.2	15.0	18.0	19.3	13.2
Massachusetts	17.4	15.2	18.8	16.1	20.7	19.0	16.6	19.7
Pennsylvania	11.6	16.0	8.4	12.7	11.8	10.2	11.4	7.6
Connecticut	3.0	3.7	3.3	2.0	2.5	1.8	2.3	3.9
Ohio	1.0	1.2	1.7	1.4	1.8	0.6	0.5	1.3
Maryland	0.6	0.7	1.5	1.2	2.5	4.1	3.4	3.8
Michigan	0.6	0.6	1.0	0.5	0.4	0.8	0.3	1.0
Illinois	5.6	2.9	3.8	5.0	3.4	4.5	4.4	3.9
Florida	1.6	2.1	2.8	4.3	3.2	2.8	2.9	2.6
North Carolina	0.6	1.0	1.2	2.5	2.5	1.7	1.8	5.1
New Hampshire	1.5	1.1	0.3	0.5	1.0	1.3	1.8	0.8
Other States	12.8	13.0	14.7	12.8	16.8	16.5	15.9	16.3

Source: Tourist Survey - Central Bureau of Statistics - Aruba

3.2A.2 NUMBER OF VISITS OF VISITORS FROM THE UNITED STATES TO ARUBA (In Percentages)

	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012	Qtr.1 2013	Qtr. 2 2013	Qtr. 3 2013	Qtr. 4 2013
First time	44.9	42.5	43.7	45.5	35.0	41.9	40.9	38.2
2 to 5 times	21.6	25.3	23.7	26.6	30.2	28.4	24.5	27.8
6 times or more	33.5	32.2	32.6	27.9	34.8	29.7	34.6	34.0
Total	100%	100%	100%	100%	100%	100%	100%	100%

Source: Tourist Survey - Central Bureau of Statistics - Aruba

3.3. SATISFACTION OF THE VISITORS

3.3.1 RATING FROM 1 TO 10 OF OVERALL VISIT TO ARUBA:

	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012	Qtr.1 2013	Qtr. 2 2013	Qtr. 3 2013	Qtr. 4 2013
6	0.4	0.4	0.1	0.1	0.2	0.2	0.0	0.2
7	2.9	2.0	1.7	1.6	2.1	1.1	0.7	0.6
8	13.2	14.2	14.7	11.3	24.2	18.1	14.7	13.2
9	52.6	49.4	49.3	52.6	49.1	54.6	54.8	58.1
10	30.9	33.8	34.1	34.3	24.2	25.8	29.7	27.7
Mean	9.10	9.14	9.15	9.18	8.93	9.03	9.13	9.12

Source: Tourist Survey - Central Bureau of Statistics - Aruba

3.3.2 RATING OF SERVICE RELATED TO THE FOLLOWING:

	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012	Qtr.1 2013	Qtr. 2 2013	Qtr. 3 2013	Qtr. 4 2013
<u>ACCOMMODATION</u>								
Excellent	79.4	70.6	77.3	79.4	80.9	79.2	76.2	67.7
Good	19.4	27.0	21.7	20.2	18.3	20.4	23.2	31.3
Average	0.2	1.3	0.4	0.4	0.6	0.4	0.5	0.9
Poor	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.1
Unknown / n.a.	1.0	1.0	0.6	0.0	0.2	0.0	0.1	0.0
Total	100%	100%	100%	100%	100%	100%	100%	100%
<u>MEALS & DRINKS</u>								
Excellent	68.9	60.0	62.6	66.0	65.9	63.0	60.1	46.4
Good	29.0	37.7	35.6	32.1	32.5	35.8	38.4	52.7
Average	2.1	2.3	1.7	2.0	1.5	1.2	1.5	0.8
Poor	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1
Unknown / n.a.	0.0	0.0	0.1	0.0	0.1	0.0	0.0	0.0
Total	100%	100%	100%	100%	100%	100%	100%	100%
<u>LOCAL TRANSPORTATION</u>								
Excellent	55.5	42.3	34.7	33.2	34.2	34.9	33.7	22.0
Good	39.2	51.5	54.4	58.5	59.3	57.4	59.6	73.4
Average	0.4	1.0	0.4	1.1	0.2	0.7	0.3	0.4
Poor	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0
Unknown / n.a.	4.9	5.1	10.5	7.3	6.4	7.0	6.5	4.2
Total	100%	100%	100%	100%	100%	100%	100%	100%
<u>SHOPPING</u>								
Excellent	51.5	35.8	28.2	28.2	29.0	26.8	24.4	15.5
Good	41.7	56.5	61.5	65.3	64.0	67.1	69.4	78.6
Average	1.6	3.7	3.2	2.4	2.3	1.9	2.4	2.4
Poor	0.0	0.2	0.2	0.1	0.0	0.4	0.1	0.1
Unknown / n.a.	5.2	3.7	7.0	4.0	4.7	3.9	3.6	3.5
Total	100%	100%	100%	100%	100%	100%	100%	100%
<u>ENTERTAINMENT / RECREATION</u>								
Excellent	52.6	35.1	31.3	30.3	31.4	25.6	24.1	15.6
Good	44.4	57.3	59.9	64.3	62.7	67.1	70.4	80.2
Average	0.4	1.4	0.5	0.8	0.5	0.9	0.4	0.8
Poor	0.0	0.1	0.1	0.0	0.0	0.0	0.0	0.0
Unknown / n.a.	2.7	6.1	8.2	4.5	5.3	6.5	5.1	3.4
Total	100%	100%	100%	100%	100%	100%	100%	100%
<u>QUALITY OF SERVICE</u>								
Excellent	66.7	56.1	64.8	59.8	68.6	58.2	50.6	42.4
Good	32.1	42.5	34.5	38.7	30.1	40.8	48.8	57.0
Average	1.1	1.2	0.7	1.1	1.2	0.8	0.4	0.4
Poor	0.0	0.1	0.0	0.1	0.1	0	0.0	0.2
Unknown / n.a.	0.1	0.2	0.0	0.4	0.0	0.2	0.2	0.1
Total	100%	100%	100%	100%	100%	100%	100%	100%

Source: Tourist Survey - Central Bureau of Statistics - Aruba

3.3.3 RATING OF VALUE FOR MONEY OF THE FOLLOWING:

	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012	Qtr.1 2013	Qtr. 2 2013	Qtr. 3 2013	Qtr. 4 2013
ACCOMMODATION ¹⁾								
Excellent	9.7	10.4	15.0	5.3	7.5	8.4	16.3	6.6
Good	11.7	15.7	20.2	19.2	13.2	13.5	14.6	14.0
Average	0.4	0.4	0.0	0.3	0.6	0.9	0.2	0.4
Poor	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0
Unknown / n.a.	78.2	73.5	64.8	75.2	78.6	77.1	69.0	79.0
Total	100%	100%	100%	100%	100%	100%	100%	100%
MEALS & DRINKS								
Excellent	16.0	10.1	13.1	6.4	16.2	14.3	14.7	10.6
Good	50.9	56.1	58.3	60.4	47.5	49.3	49.4	53.5
Average	2.5	3.0	2.0	1.9	5.2	5.7	4.5	2.8
Poor	0.1	0.1	0.0	0.0	0.1	0.4	0.2	0.2
Unknown / n.a.	30.5	30.7	26.6	31.3	31.0	30.3	31.2	32.9
Total	100%	100%	100%	100%	100%	100%	100%	100%
LOCAL TRANSPORTATION								
Excellent	15.6	10.1	9.0	4.0	17.0	13.4	13.1	9.8
Good	45.0	49.2	45.8	42.1	43.5	44.5	43.4	48.6
Average	1.0	1.3	0.5	0.5	1.3	2.7	1.3	1.1
Poor	0.2	0.3	0.0	0.0	0.1	0.0	0.0	0.1
Unknown / n.a.	38.3	39.1	44.7	53.4	38.1	39.5	42.1	40.4
Total	100%	100%	100%	100%	100%	100%	100%	100%
SHOPPING								
Excellent	15.1	9.7	8.5	5.3	20.1	12.7	11.5	9.1
Good	68.4	71.9	79.3	79.6	58.8	60.2	64.8	74.3
Average	2.7	3.1	3.2	3.0	4.3	7.2	7.5	3.1
Poor	0.0	0.4	0.2	0.0	0.0	0.7	0.4	0.0
Unknown / n.a.	13.8	14.9	8.8	12.1	16.9	19.3	15.7	13.5
Total	100%	100%	100%	100%	100%	100%	100%	100%
ENTERTAINMENT / RECREATION								
Excellent	13.5	6.8	6.9	3.3	20.3	13.5	13.9	7.7
Good	65.1	66.5	68.3	72.5	63.3	61.4	60.7	68.4
Average	1.1	2.3	1.1	1.1	3.2	3.5	3.1	1.3
Poor	0.0	0.0	0.0	0.0	0.1	0.4	0.0	0.1
Unknown / n.a.	20.4	24.4	23.7	23.1	13.1	21.3	22.2	22.4
Total	100%	100%	100%	100%	100%	100%	100%	100%
QUALITY OF SERVICE								
Excellent	45.8	30.1	26.6	17.2	35.5	32.8	45.8	33.9
Good	51.6	67.6	71.6	80.2	61.5	64.1	52.0	63.7
Average	2.1	1.7	1.1	1.4	2.4	2.4	1.5	1.8
Poor	0.1	0.1	0.0	0.2	0.0	0.2	0.0	0.2
Unknown / n.a.	0.4	0.5	0.7	1.0	0.5	0.5	0.6	0.4
Total	100%	100%	100%	100%	100%	100%	100%	100%

Source: Tourist Survey - Central Bureau of Statistics - Aruba

1) The results presented for 2010 to 2013 for accommodation are only based on responses of visitors with a valid amount for expenditures on accommodation during their visit in Aruba or prior to visiting Aruba. This was not applied in the previous years.

3.3.4 PLACES VISITED BY THE VISITORS WHILE IN ARUBA (in %)

	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012	Qtr.1 2013	Qtr. 2 2013	Qtr. 3 2013	Qtr. 4 2013
Visit museum	2.8	3.7	2.7	4.0	8.4	5.3	4.4	2.0
Visit Historical buildings	21.0	18.5	21.8	10.4	37.3	21.7	25.0	15.2
Visit Historical sites	40.0	39.6	41.1	34.1	50.2	43.2	42.9	34.3
Visit Art galleries	1.2	2.1	1.9	0.7	4.7	2.6	4.3	2.0
Took cultural tours	1.5	2.0	1.4	1.0	3.8	1.6	4.8	2.8
Attended festival or concert	17.9	11.6	18.8	9.1	28.1	17.9	25.0	17.3
Visit beaches	96.1	96.4	95.6	95.3	97.8	97.0	95.8	37.2
Visit center of Oranjestad	93.4	91.3	93.8	88.7	91.3	91.0	94.8	93.8
Visit Franse Pas	11.1	15.2	16.6	7.8	21.5	15.4	16.1	9.5
Visit Restaurants outside the hotel	62.1	58.9	63.2	56.7	68.9	60.4	59.6	61.6
Saw Hotels shows	16.4	23.6	24.9	11.3	31.7	18.6	17.7	11.6
Made Island tour	63.1	61.5	63.2	59.6	65.9	58.7	60.7	56.1
Visit National park	38.6	35.9	36.6	33.5	35.2	34.3	28.6	20.6
Visit North Coast	57.3	57.1	60.9	58.3	65.4	59.9	58.5	54.4
Architecture	11.8	6.5	10.3	8.0	50.1	39.4	39.6	31.7
Visit rock formation	45.0	45.6	48.9	38.9	42.4	39.8	43.3	30.0
Visit San Nicolas	57.0	49.7	58.7	56.7	64.3	54.0	59.7	49.6
Visit shopping malls	93.3	91.9	92.3	94.5	88.8	89.4	98.8	89.0

Source: Tourist Survey - Central Bureau of Statistics - Aruba

4.0. MONEY ASPECTS OF THE VISITORS

4.1 AVERAGE DAILY EXPENDITURE SPENT IN ARUBA PER CATEGORY ¹⁾ (In US\$)

	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012	Qtr.1 2013	Qtr. 2 2013	Qtr. 3 2013	Qtr. 4 2013
Accommodation ²⁾	9.04	9.33	8.79	8.01	8.17	10.35	10.30	13.09
Food & beverage	18.70	20.97	19.33	18.97	22.25	20.86	20.18	22.79
Groceries / sundries	2.97	3.31	3.10	3.38	3.49	3.49	3.54	3.65
Entertainment / recreation	8.54	8.00	7.83	7.68	8.34	7.03	7.28	7.07
Taxis	3.10	3.05	3.21	3.43	3.46	3.88	3.36	2.58
Car rental	5.12	4.90	5.55	5.52	6.45	5.38	5.30	6.53
Public transportation	0.25	0.18	0.19	0.19	0.17	0.25	0.11	0.14
Tax free shopping	2.28	2.27	2.53	3.08	1.85	3.24	2.37	3.07
Shopping	18.94	19.27	20.61	24.49	19.98	20.52	24.37	28.59
Casinos	14.64	13.36	10.51	11.55	9.06	10.16	10.72	15.25
Internet/Telephone	0.23	0.24	0.08	0.09	0.05	0.06	0.10	0.16
Other ³⁾	0.33	0.47	0.71	0.27	0.47	0.63	1.03	0.13
Total (In US\$)	84.12	85.37	82.43	86.65	83.74	85.85	88.66	103.06

Source: Tourist Survey - Central Bureau of Statistics - Aruba

Notes: (Note 1 apply to all expenditures mentioned in the tables regarding expenditures)

1) The expenditures mentioned above are expenditures that were made while the visitors were IN ARUBA, excluding anything spent on pre-paid package outside Aruba.

2) The expenditure category "accommodation" does not include any expenses made on a pre-paid package for accommodation.

3) The expenditures belonging to the category "other" also includes expenditures which are unknown or that that could not be specified by the interviewed visitors.

For this reason the amount does not represent expenditures belonging to the category "other" only.

4.2 AVERAGE DAILY EXPENDITURE BY PLACE OF RESIDENCE ¹⁾ (In US\$)

	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012	Qtr.1 2013	Qtr. 2 2013	Qtr. 3 2013	Qtr. 4 2013
United States	85.95	81.19	78.78	82.88	84.57	84.46	84.96	91.24
Venezuela	136.19	144.22	113.31	143.56	127.32	140.76	124.09	179.82
Netherlands	50.31	47.21	65.43	58.03	58.22	48.48	50.69	48.55
Netherlands Antilles	78.45	84.14	89.87	73.21	78.03	86.67	80.89	95.69
Brazil	103.85	91.45	83.77	89.63	85.34	89.26	74.83	84.23
Canada	48.34	56.37	50.56	52.31	60.30	44.32	62.08	78.24
Colombia	65.53	87.21	83.49	62.13	85.96	68.24	117.23	77.65
Other	70.49	70.25	58.37	54.55	57.85	51.44	63.51	69.35
Total visitors	84.12	85.37	82.43	86.65	83.74	85.85	88.66	103.06

Source: Tourist Survey - Central Bureau of Statistics - Aruba

4.3 AVERAGE DAILY EXPENDITURE BY PURPOSE OF VISIT (In US\$) ¹⁾

	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012	Qtr.1 2013	Qtr. 2 2013	Qtr. 3 2013	Qtr. 4 2013
Vacation	85.13	85.61	83.12	85.32	84.30	86.61	89.18	103.40
Honeymoon	72.52	75.44	69.19	86.14	67.05	63.81	72.14	95.00
Visit friends / relatives	37.55	48.89	70.48	67.72	50.82	47.36	52.42	68.41
Other	46.43	138.23	87.75	66.61	46.48	183.95	57.18	166.21
Business & leisure	149.44	190.91	124.09	312.2	175.30	156.28	238.78	354.58
Business Only / Convention ²⁾	194.12	212.38	117.83	218.57	124.33	216.07	186.23	94.33
Wedding	130.00	41.76	61.44	68.01	176.08	25.63	112.13	227.41

Source: Tourist Survey - Central Bureau of Statistics - Aruba

1) Expenditures belonging to the categories Incentives and Golf are based on a very small sample and therefore has been left out.

2) The expenditure belonging to the category "Other" and "Business Only / Convention" are based on a small sample and therefore may not be very representative.

4.4 AVERAGE DAILY EXPENDITURE BY NUMBER OF VISITS TO ARUBA ¹⁾ (In US\$)

	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012	Qtr.1 2013	Qtr. 2 2013	Qtr. 3 2013	Qtr. 4 2013
First time	71.20	75.34	71.05	70.32	65.78	71.75	73.43	86.79
Between 2 and 5 times	89.85	93.78	90.85	102.89	97.34	93.04	91.30	103.58
6 Times or more	101.69	92.95	92.58	99.43	93.17	101.58	105.07	122.92

Source: Tourist Survey - Central Bureau of Statistics - Aruba

4.5 AVERAGE DAILY EXPENDITURE BY YEARLY HOUSEHOLD INCOME LEVEL ¹⁾ (In US\$)

	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012	Qtr.1 2013	Qtr. 2 2013	Qtr. 3 2013	Qtr. 4 2013
Less than US\$20,000	52.29	60.29	61.20	73.89	55.65	57.53	49.69	58.25
US\$20,001 - US\$30,000	69.08	77.24	76.16	88.25	98.25	83.19	92.11	121.65
US\$30,001 - US\$50,000	76.55	80.92	85.21	68.78	80.33	84.53	84.00	95.06
US\$50,001 - US\$75,000	75.09	87.10	82.70	88.03	85.40	82.54	92.32	96.99
US\$75,001 - US\$100,000	108.32	91.04	80.79	96.35	86.86	88.45	92.48	78.62
US\$100,001 and over	118.66	108.15	102.42	112.62	105.49	112.26	120.78	155.87

Source: Tourist Survey - Central Bureau of Statistics - Aruba

4.6 AVERAGE DAILY EXPENDITURE SPENT IN ARUBA BY TRAVEL ARRANGEMENT¹⁾ (In US\$)

	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012	Qtr.1 2013	Qtr. 2 2013	Qtr. 3 2013	Qtr. 4 2013
Package deal	70.06	73.05	68.08	72.78	70.68	69.51	78.62	82.76
Own arrangements	102.71	101.63	100.85	106.06	100.72	105.9	100.2	127.02
Avg. Daily Expend. in Aruba	84.12	85.37	82.43	86.65	83.74	85.85	88.66	103.06
Pre-paid packag. - Not All-Inclusv.	57.45	54.66	54.43	57.05	54.09	56.08	59.83	61.78
Pre-paid packages - All-Inclusive	142.53	130.96	116.13	146.32	132.48	132.59	153.56	154.36

Source: Tourist Survey - Central Bureau of Statistics - Aruba

4.7 HOW MANY PERSONS DOES THE EXPENDITURE COVERS

	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012	Qtr.1 2013	Qtr. 2 2013	Qtr. 3 2013	Qtr. 4 2013
Adults	2,294	2,229	2,296	2,257	2,231	2,254	2,375	2,221
Children	150	163	282	119	142	110	241	83
Total	2,294	2,392	2,578	2,376	2,373	2,364	2,616	2,304

Source: Central Bureau of Statistics - Aruba

4.8 HOTEL RELATED STATISTICS

	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012	Qtr.1 2013	Qtr. 2 2013	Qtr. 3 2013	Qtr. 4 2013
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Hotel :

Occupancy	82.5%	75.1%	80.5%	76.7%	84.2%	71.6%	75.5%	74.0%
Average Daily Rate	\$255.83	\$180.63	\$167.03	\$196.42	\$273.51	\$185.73	\$176.45	\$216.32
Revenue per available room	\$211.02	\$135.69	\$134.43	\$150.71	\$229.74	\$132.87	\$133.41	\$160.00

Timeshare :

Occupancy	85.5%	75.1%	79.3%	77.7%	86.2%	76.1%	75.9%	78.4%
Average Daily Rate	\$214.31	\$150.76	\$136.42	\$145.63	\$220.91	\$150.81	\$152.38	\$147.61
Revenue per available room	\$20.91	\$18.37	\$20.33	\$18.71	\$25.05	\$18.53	\$20.92	\$21.02

Total :

Occupied Room Nights	551,788	495,162	527,860	513,445	566,014	506,083	519,112	504,880
Occupancy	83.9%	75.1%	79.9%	77.2%	85.1%	73.7%	78.7%	75.9%
Average Daily Rate	\$251.73	\$176.75	\$162.62	\$189.61	\$267.89	\$181.27	\$173.31	\$207.37
Revenue per available room	\$119.59	\$79.42	\$80.13	\$87.28	\$133.59	\$80.25	\$82.44	\$99.20
Total Room Revenue	\$78,603,787	\$52,346,147	\$52,920,691	\$58,068,237	\$88,934,505	\$55,148,797	\$56,458,850	\$66,009,141

Source: Central Bureau of Statistics - Aruba

4.9 AVERAGE EXPENDITURE PER PERSON PER TRIP BY THE MAJOR MARKETS 1) (In US\$)

	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012	Qtr.1 2013	Qtr. 2 2013	Qtr. 3 2013	Qtr. 4 2013
United States	672.13	617.04	571.94	611.65	651.18	641.93	628.72	656.96
Venezuela	815.78	816.29	714.99	776.66	802.11	689.72	707.30	971.04
Netherlands	552.40	524.98	772.73	608.73	652.05	552.62	613.32	543.79
Netherlands Antilles	404.02	381.15	447.55	337.50	444.77	355.35	396.38	459.30
Brazil	762.26	625.52	603.98	608.59	580.34	580.22	508.84	589.59
Canada	372.22	413.19	385.27	364.08	452.27	310.21	453.19	547.66
Colombia	542.59	655.82	766.44	459.14	1,005.73	696.04	762.01	605.68
Other	711.95	594.32	531.75	538.41	601.67	432.07	609.72	540.90
Total visitors	665.39	638.57	614.93	633.41	663.25	630.99	657.86	721.43

Source: Tourist Survey - Central Bureau of Statistics - Aruba

4.10 TOURISM EXPENDITURE IN ARUBA BY THE MAJOR MARKETS ¹⁾ (In 1,000 US dollars)

	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012	Qtr.1 2013	Qtr. 2 2013	Qtr. 3 2013	Qtr. 4 2013
United States	97,061.48	84,892.30	71,670.15	75,632.29	96,032.07	92,248.30	83,866.17	86,540.95
Venezuela	18,528.77	23,126.99	34,159.18	34,468.15	25,807.10	20,280.54	39,093.15	69,109.55
Netherlands	5,747.76	4,863.37	8,236.51	5,871.25	5,852.12	5,270.32	5,948.61	5,207.90
Netherl. Antilles	2,085.54	2,952.80	3,225.06	2,445.51	2,252.76	2,486.05	2,983.16	3,258.74
Brazil	4,127.63	2,579.64	3,632.35	3,357.58	2,869.21	2,763.00	3,527.30	3,923.72
Canada	6,513.82	3,215.87	2,891.43	4,769.05	7,611.64	2,570.05	3,438.78	6,371.98
Colombia	1,833.41	2,964.30	3,264.26	2,740.61	3,735.28	3,558.15	3,260.63	3,864.24
Other	11,154.10	10,306.61	13,268.24	10,447.28	10,161.59	6,068.40	10,239.61	9,131.53
Total visitors	149,479.68	138,371.85	143,696.94	144,995.49	158,944.56	142,433.40	163,553.62	191,371.58

Source: Tourist Survey - Central Bureau of Statistics - Aruba



6.0. PURPOSE AND METHODOLOGY

6.1. Purpose of the Tourist Survey

6.1.1. Background of the Tourist Survey

Tourism has become one of the major economic sources of the island. Therefore, the use of up-to-date, reliable and comprehensive data is imperative for a successful operation in both the public and private sector.

In order to improve the product and implement new marketing strategies, it is important for the policy makers to determine the characteristics of the visitors; why they choose Aruba as their destination, who they are, where they come from, how much they spend during their stay and how satisfied they are with the product Aruba. The survey also provides detailed socio-economic characteristics of the visitors, which are important for the definition of appropriate target groups.

The Tourist Survey will continue during 2012 and on and will take place the third Saturday of every month during the year for a period of one week. Some of the results of the surveys will be presented in quarterly publication, called Tourist Profile, together with other tourism information. Every year a final report will be presented in order to give a total view of the visitors. This report will also present the total result of the 5 past surveys.

6.1.2. Purpose of the Tourist Survey

The Tourist Survey provides the following information:

1. Socio-economic characteristics
2. Visitor Expenditure
3. Level of Satisfaction

The results of the Tourist Survey will enable us to:

1. Analyze existing trends and market developments in tourism
2. Produce the expenditure patterns of the visitors divided into their place of residence and other characteristics
3. Provide information on the country's image among visitors

6.2. Methodology of the Tourist Survey

6.2.1. Set up of the survey

The Tourist Surveys took place every third Saturday of the month and had a duration of one week every month. They were held in the Departure Hall of the Queen Beatrix International Airport. The questionnaires were filled out by the interviewers, whom were highly qualified to do this work and received intensive training by staff members of the Central Bureau of Statistics prior to the fieldwork. The training included how to locate, identify, contact, greet and examine the respondents, as well as how to record responses and terminate the interview. Above all, they were instructed on the importance of following instructions and procedures for the interviews.

In the year 2012 a total of 4,510 questionnaires were filled out throughout the four quarters of the year 2012 by the Central Bureau of Statistics interview team. We chose for face-to-face interviews, due to the fact that this approach gives a higher response. Advantages of a face-to-face interview in a departure hall of the airport are:

1. All visitors leaving the island by air must come by
2. It can provide extensive information on their expenditures

A disadvantage could be the limited time to cooperate by the visitors. It is worth mentioning, though, that the visitors were more than willing to cooperate with the surveys.

6.2.2. Definitions

In order to avoid any misunderstandings regarding definitions used in this study, we have listed the most used tourism-related definitions according to World Tourism Organization classifications and the occupations according to the International Standard Classification of Occupation 1988 (see literature list).

6.2.2.1. Tourism

Tourism Expenditure in Aruba:

The total consumption expenditure made by visitor (during his/her stay in Aruba) or on behalf of a visitor for and during his/her trip and stay at

destination. Tourism expenditure encompasses a wide variety of items, ranging from the purchase of consumer goods and services inherent in travel and stays to the purchase of small durable goods for personal use, souvenirs and gifts for family and friends.

The purchases which should be excluded are:

- * Purchases for commercial purposes
- * Capital investments or transactions engaged in by visitors
- * Cash given to relatives or friends which does not represent payment of tourism goods or services, as well as donations made to institutions

Total Tourism Expenditure:

All travel related expenditures made by stay-over visitors, before, during, and immediately after a trip. The total tourism expenditure is the tourism expenditure in Aruba plus the estimated accommodation part of pre-paid packages.

Visitor:

Any person traveling to a place other than that of his usual environment for less than 12 consecutive months and whose main purpose of travel is one other than the exercise of a remunerated activity from within the place visited.

Purpose of Visit:

The main purpose of visit refers to the reason in the absence of which, the trip would not have taken place or the given destination would not have been visited. The data will be presented for the following groups:

Vacation

A trip mainly undertaken for relaxation. It is the visitor who decides to take the tourist trip as an activity disconnected with his/her occupation, where the trip is usually financed by household funds.

Honeymoon

This can be considered as a vacation with the difference that the travel party consists of a couple who has just gotten married and is celebrating that important event of their lives by means of vacation.

Visit friend/relative

These are the so-called social visits. They are usually undertaken for relaxation, just as a vacation. There are, however, other reasons to

visit friends and relatives, such as taking care of them when they are ill, or assisting them with work in and around their house.

Golf

They usually go to a destination which can offer them a good golf course, where their main purpose of visiting is to play golf most of the time at that particular destination.

Business & Leisure

It comprises all business and professional activities outside the usual environment. The visitor takes the tourist trip because of requirements related to his/her occupation or the economic activity of the production unit for which he/she works. Furthermore, the decision to take the trip and the financing of it, are decisions often made by someone other than the business traveler. Afterwards they will add a holiday to their trip, that way having two purposes.

Place of Residence:

Consists of the place where the respondent has lived for most of the past year (12 months), or for a shorter period, if the respondent intends to return within 12 months to live there.

Multi-Destination Trips:

These are the visitors that overnight at more than one destination during their trip.

Accommodation:

Refers to any facility that regularly provides overnight accommodation to tourists. Data will be presented in the following way:

Hotel

Hotels are typified as being arranged in rooms, exceeding a specified minimum, coming under a common management and providing certain services, including room service, daily bed-making and cleaning of sanitary facilities.

Guest house

Can be considered a private accommodation, due to the fact that the dwellings are rented from private individuals or professional agents.

Friend/Relative

This can be considered a private accommodation where the tourist stays with the family that usually lives in the home and where the tourist does not pay a room charge.

Apartment/Villa

This unit group comprises accommodation arranged in rooms, providing limited hotel services including daily bed-making and cleaning of the room and sanitary facilities.

Timeshare resort

This unit group consists of establishments that, besides providing accommodation, have another specialized function. The visitor can buy a time share interval of the resort and this gives him/her the right to stay one or more weeks each year at the resort. On a yearly basis he/she has to pay a certain amount for maintenance fee.

Charter:

These are to be considered non-scheduled flights. Usually they are cheaper than the scheduled flights and operate only during a certain period of time to a particular destination.

Package Tour:

A package tour comprises a number of tourist products which are purchased by the visitor as a single entity. There is one single charge for the whole package, which is usually cheaper than the aggregated cost of the items if purchased separately by the visitor. It is identified as a separate item because visitors who are supplying their expenditure breakdown cannot reliably break down their package expenditure into its component parts.

Yearly household income:

Income refers to gross income on a yearly basis. All data on income are presented in US\$. The yearly income includes salaries and wages from employment, profits from businesses, pension, welfare, alimony, etc. The yearly household income is the sum of the separate incomes of all members of the household.

The data will be presented in the following format:

1. Less than US\$ 20,000
2. US\$ 20,001-US\$ 30,000
3. US\$ 30,001-US\$ 50,000
4. US\$ 50,001-US\$ 75,000
5. US\$ 75,001-US\$ 100,000
6. US\$ 100,001 and over

6.2.2.2. Occupation

Occupation refers to the kind of work done, by the person employed. To classify the data on occupation, the International Standard

Classification of Occupation (ISCO-88) has been used. The ISCO provides a systematic classification structure which encompasses all occupations of the economically active population. The classification structure consists of four levels: major groups, sub-major groups, minor groups and unit groups. There are ten major groups.

The ten major groups of the SCO classification are:

1. Legislators, senior officials, and managers;
2. Professionals;
3. Technicians and associate professionals;
4. Clerks;
5. Service workers and shop and market sales workers;
6. Skilled agricultural and fishery workers;
7. Craft and related trades workers;
8. Plant and machine operators and assemblers;
9. Elementary occupations;
0. Armed forces.

For analyzing purposes we used the major groups only. In the following please find a description of the classification according to SCO-88.

1. Legislators, senior officials, and managers

This major group consists of occupations in which policy-making and high level management play a primary role. These functions can be executed in the private and public sector. Managers at a lower level do not belong to this category.

2. Professionals

This major group includes occupations whose main tasks require a high level of professional knowledge and experience in the fields of physical and life sciences, or social sciences and humanities. The tasks of the members of this group consist of increasing knowledge and experience, applying scientific concepts and theories to the solution of problems, and teaching the foregoing in a systematic manner.

3. Technicians and associate professionals

This major group requires technical knowledge and experience in one or more fields of physical and life sciences, or social sciences and humanities. The main tasks consist of carrying out technical work connected with the applications of concepts and operational methods in the above-mentioned fields, and in teaching at certain educational levels.

4. Clerks

Occupations with as main tasks secretarial duties, operating word processors and other office machines, recording and computing numerical

data, and performing a number of customer-oriented clerical duties, mostly in connection with mail services, money-handling operations, and appointments.

5. Service workers and shop and market sales workers

This major group consists of occupations which as main tasks provide services related to travel, house-keeping, catering, personal care, protection of individuals and property, and to maintain law and order, or selling goods in shops or on the market.

6. Skilled agricultural and fishery workers

The main responsibilities of this group consist of growing crops, breeding or hunting animals, catching or cultivating fish, conserving and exploiting forests, and, especially in the case of market-oriented agricultural and fishery workers, selling products to purchasers, marketing organizations, or at markets.

7. Craft and related trades workers

The main tasks of these occupations consist of extracting raw materials, constructing buildings and other structures, and making various products as well as handicraft goods.

8. Plant and machine operators and assemblers

The occupations within this major group are involved in operating and monitoring mining, processing, and production machinery and equipment, as well as driving vehicles and operating mobile plants, or assembling products from component parts. These occupations require the knowledge and the experience to operate this machinery.

9. Elementary occupations

This major group covers occupations which require the knowledge and experience to perform mostly simple and routine tasks involving the use of hand-held tools and in some cases, considerable physical effort. Only in a few cases do these occupations require personal initiative and judgment. The main tasks consist of selling goods in the street, door keeping and property watching, as well as cleaning, washing and pressing, and working as laborers in the fields of mining, agriculture and fishing, construction and manufacturing.

0. Armed forces

Members of the armed forces are those personnel who are currently serving in the armed forces,

including auxiliary services, whether on a voluntary or compulsory basis, and who are not free to accept civilian employment. It includes conscripts enrolled for military training or other services for a specified period.

00. Not economically active population

For the benefit of the analysis we include also the following categories of not economically active population: income recipients, students, home makers and other non-economically active persons.

6.2.3. Preparation of the Tourist Survey

The preparation of the first survey started in January 1996. The questionnaire was prepared together with the partners who evaluated the questions and together this resulted into the questionnaire (available upon request). The questionnaire was originally prepared in both English and in Spanish. Prior to the first fieldwork the questionnaire was tested and revised.

For the training session of the interviewers a manual was prepared in which explanations were given on how to conduct the survey.

Nowadays the survey takes place digitally by means of notebooks using the software CSPro to collect the necessary data corresponding with the questionnaires used (as explained in the Preface).

6.2.4. Sampling

One of the aims of this survey is to gather information on the different segments of our tourist market. This implicates the use of a stratified sampling method. After evaluating the feasibility of the different random and non-random techniques, we chose the quota sampling. It is a non-random sampling method, usually used in opinion and market research surveys. In that case it is not based on principles of the probability theory, therefore sampling-error formulas cannot be applied, with confidence, to the results of quota samples and generalization of the results, to certain extend, is not possible. On the other hand, this survey offers information that is hardly available in Aruba. For this reason, some generalizations are made while keeping in mind that the results are assumptions based on the surveys.

The sampling size was fixed at 1.125 respondents per survey (quarter). The stratification of the population is based on the place of residence of

the visitors. To determine the quotas of the sample, the relative distribution of the visitors throughout the quarters of the last year has been used.

The 1125 respondents were evenly distributed over a period of three months which represents the survey period. To enable them to plan their interviews, the interviewers were provided with flight schedules. Each interviewer filled in approximately 20 forms per day.

6.2.5. Fieldwork

The fieldwork starts every third Saturday of the month. Due to the fact that the interviewers were instructed to carefully select respondents according to the sampling plan as indicated above, they were supervised by a Central Bureau of Statistics team. In case they encountered problems for which they were not prepared they could request assistance.

At the end of each period the completed questionnaires are downloaded by the Central Bureau of Statistics and a procedure is followed in order to evaluate the data on four areas:

- * Legibility - are all responses to all questions readable?
- * Intelligibility - are responses to open-ended questions understandable?
- * Completeness - are all questions answered?
- * Consistency - are all answers recorded in a given instrument consistent with one another?

If the questionnaire did not meet with one of the requirements, the interviewer was requested to either revise it or perform an extra interview.

6.2.6. Data Processing and Analyzing

The department of Tourism Statistics is responsible for the verifying, coding, data-entry and editing of the questionnaires while the department of Research and Projects helps with the data-entry programs. The editing consists of execution of validity and consistency tests. Variables related to expenditures during and/or prior to people's visit are checked for data-entry errors. The use of outlier has not been applied since the 1997 expenditure survey data. The outliers are unusual large or small observations relative to the other values in the data set.

According to the WTO (World Tourism Organization), these unusual large or small observations can also happen in reality and for this

reason should not be left out of the set of data. Instead of using the outlier, the data on the questionnaires are double checked for errors. Frequencies are run to the data and a cumulative percentage is applied to it. The data set appearing between the percentages 95 to 100 were checked for consistency and double checked for data-entry errors. After correction of the mistakes or confirmation of correct answers, the data set was ready to be used. Finally different tables were made.

WTO also states that a visitor is any person traveling to a place other than that of his usual environment for less than 12 consecutive months and whose main purpose of travel is one other than the exercise of a remunerated activity from within the place visited. In Aruba, immigration rules states that a visitor is not allowed to stay in Aruba for more than 3 months.

When we calculated the average length of stay of the visitors, we only included visitors who stayed less than 3 months in Aruba. In general, most of the visitors who come to Aruba stay less than 3 months and stay in a hotel or a timeshare property. We applied the rule of the immigration when we calculated the average length of stay because we want to avoid that an interviewee visitor who stayed more than 3 months in Aruba stayed for purposes other than tourism.

Necessary to know is the fact that expenditure category "other" includes expenditures which do not only belong to this category, namely expenditures which amount were unknown or not remembered by the interviewed visitor.

6.2.7. Elevating total expenditures to a macro total - Total Tourism Expenditure

Here follows a brief description of the method used to bring the tourism expenditures to a macro total by calculating and imputing the accommodation part of pre-paid packages. The objective of imputing a value for pre-paid accommodation is to elevate the expenditure total to a macro total as best as possible in order to have a better idea of the development of the total picture of tourism expenditures or total tourism expenditure. This estimated total tourism expenditure will also be incorporated into the system of national accounts of Aruba. and the estimated total tourism expenditure as a concept is also better comparable to tourism receipts as measured by the Central Bank of Aruba.

It is appropriate to mention that the tourism expenditures gathered by the TES (Tourist Expenditure Survey) consist of expenses made by interviewed visitors who came with a pre-paid package and interviewed visitors who came with their own arrangements. Up to now, the reported expenditures of visitors who came with their own arrangements and of visitors who came with a pre-paid package are only expenses made while the visitors were in Aruba.

Other than that, (of the visitors that came with a pre-paid package) about 99% of the packages included accommodation. For this reason the effort to impute the accommodation part of pre-paid packages. Excluded from tourism demand are expenses made in a pre-paid package for goods or services other than accommodation as, for example, transportation, meals and drinks, tours, etc.

The following procedure was used to impute a value and to calculate the accommodation part of a pre-paid package. The value used per individual accommodation property is their respective ADR's pertaining to their respective quarters. This ADR is gathered from the accommodation properties who are member of AHATA (See Occupancy and other hotel statistics included in the methodology). For the properties for which we did not have an ADR, one has been imputed for them based on the average of the category that the resort belongs to. After the imputation, two variables are calculated per individual accommodation property with the conditions that the interviewed visitors came to Aruba with a pre-paid package and that the package included accommodation. The variables are: price of the accommodation property and total number of night spent by the interviewed visitors in Aruba. The accommodation property can only be a hotel or a timeshare property in this case. Two other variables used are the total number of occupied room nights per individual hotel and the total number of nights the interviewed visitors stayed in Aruba per individual hotel. All these variables are calculated per quarter. The number of night of interviewed visitors who came with a package including accommodation is then divided by the total number of night of all interviewed visitors in order to get the market share percentage of each property. This is then multiplied by the price and the number of occupied room nights of each property which delivers the pre-paid accommodation expenses per individual

accommodation property. The addition of the pre-paid accommodation expenses added to the total expenditures in Aruba is then the total tourist demand of the visitors per quarter.

6.2.8. Comparison of Total Tourism Expenditures and Tourism Receipts

In the following some (possible) important differences is presented by illustrating the measurement and the operationalization of the two concepts.

Unit of analysis

Tourism demand as well as tourism receipt concentrates on the total purchase of tourist related goods and services. However, each one approaches the purchase from a different point of view. Whereas tourism demand concentrates on the demand of tourism related products, tourism receipt concentrates on the supply of tourism related products. Both are expressed in money value.

When measuring the tourism demand, the unit of analysis is the visitor. The expenditure of the visitors is one of the variables being measured. When measuring tourism receipt, the unit of analysis are the receivables in foreign currency from companies that operates in the tourism industry and sells goods and services to visitors. All transactions of these companies which can be related to receipts from tourist purchases constitute the main components of the tourism receipts as measured by the Central Bank of Aruba.

Ideally, the amount spend by visitors on tourism related goods and services (demand) should be equal to the amount received by companies for the tourism related goods and services sold to visitors (supply). However, balancing these two indicators proves to be difficult due to the difference in the registration method, among others.

Difference in method of registration

The tourism demand as measured in the survey is directly related to the visitor and the period the visitor was in Aruba as a stay-over visitor. Every dollar spent is related to the visitor from which it came from and the period the visitor was in Aruba. This registration method is on an accrual basis. In contrast, the tourism receipts of the Central Bank are registered on a cash basis. Cash based

registration registers (the moment of) payment for tourism related products as reported by local exchange banks as well as the foreign (bank) accounts held by residents. There is no direct relation to the period in which these goods and services -- already paid for -- were used by the visitor who paid for them.

The difference in registration makes a straight forward comparison of the two figures difficult. On the basis of the Banks figure on tourism receipts per quarter or per year one can only deduce the amount of money Aruba received from tourism related goods and services within that period. Nothing can be concluded about the number of person(s) that paid for these goods and services and when they were consumed. The tourism demand figures of the Central Bureau of Statistics, on the other hand, are directly related to the period the goods and services were consumed. It can be indicated in which period a certain amount of tourism related goods and services were consumed by visitors. However, no conclusions can be drawn from the Central Bureau of Statistics figure as to when the payments for these products were really received.

The amount of money registered by the Central Bank in a certain period does not necessarily correspond with the amount of money registered by the Central Bureau of Statistics for the same period. The difference in the method of registration leaves enough room for both these concepts to differ from each other.

Population covered

The population covered by the Central Bureau of Statistics concerns stay-over visitors (stayed in Aruba for at least one night). Statements based on tourism expenditures and tourism demand concerns only stay-over visitors. In contrast, the tourism receipt of the Central Bank covers stay-over visitors as well as cruise visitors.

6.2.9 Definitions

In order to avoid any misunderstandings regarding definitions used in this report please find list of definitions of the most used terms.

Number of Rooms

Total number of guest rooms in the room renting property.

Number of Rooms Available

Number of guest rooms in the room renting

property, less permanent house use.

Total net revenue

It is the total net revenue including service charge and net of rebates / wholesalers commission and for time share properties only, net of maintenance fee.

Total room nights of occupied rooms

The amount of nights the rooms were occupied by guest (paid or complimentary)

Total room nights of non-revenue rooms

Total room nights of non-revenue rooms which are vacant or out of order.

Total number of guests

It is the number of registered guests in each category of occupied rooms.

Total Room Nights

It is the total number of rooms available in a property multiplied by the respective number of days in a month.

Total room nights of units occupied by owners

Total room nights of rooms that are occupied by the time-share owner.

Total room nights of units occupied by exchange

Total room nights of rooms that are occupied by a person in an exchange program.

Total room nights of units put into rental program/pool

Total room nights of rooms that are occupied by a person in a rental program / pool or a transient business of a timeshare property.

Net Revenue

Total revenue less allowances constitutes net revenue.

Commission

The amount charged with remuneration to authorized agents for rooms business secured for the hotel including travel agents' commissions.

Service Charge

Charges for services which are added to the customer=s bill at a percentage of the sale and are not required to be paid to personnel should be recorded here.

Complimentary Rooms

Those rooms occupied by hotel guests on a gratis basis.

Paid rooms occupied

Rooms occupied by a guest on a paid basis.

Vacant rooms

Are those saleable guest rooms that were not occupied during the period.

Out-of order rooms

Those rooms removed from salable inventory due to renovation, temporary fault or problem rendering them inadequate for occupancy.

Rooms Occupied by guest

Total paid rooms occupied and complimentary rooms.

Non-revenue room

These are rooms which are vacant or out-of-order.

6.3.6 Calculations or formulas

The different statistics that we calculate based on the data of the room renting properties are:

Average Daily Rate (ADR) =

$$\frac{\text{Total Net Revenue}}{\text{Total Room Nights of Occupied Rooms}}$$

Average Occupancy =

$$\frac{\text{Total Room Nights of Occupied Rooms}}{\text{Total Room Nights}} \times 100$$

Average Revenue Per Available Room (RevPAR) =

$$\frac{\text{Total Room Net Revenue}}{\text{Total Room Nights}}$$

Fair Share =

$$\frac{\text{The Total number of Rooms for a category}}{\text{Grand Total of Rooms}}$$

Actual Share =

$$\frac{\text{Occupied Rooms of an Individual category}}{\text{Grand Total of Occupied Rooms}}$$

Note that the Average Daily Rate for time share properties is calculated by taking their net revenue divided by occupied rooms' nights only. The occupied room nights does not include the rooms sold to time share owners or occupied by exchange

since only a maintenance fee is collected on these rooms.

6.2.10 Reporting properties

Properties that are member of AHATA and that are supposed to report to the Central Bureau of Statistics are:

Hotels / Hotel style operation

Occidental Grand Resort
Amsterdam Manor
Aruba Marriott Resort
Aruba Renaissance
The Westin Aruba Hotel
B.W. Manchebo Hotel
B.W. Bucuti Beach Resort
Talk of the Town
Grape Holdings (Divi & Tamarijn)
Holiday Inn
Hyatt Regency Aruba
Radisson Aruba
The Mill Condominiums
Tierra del Sol

Timeshares

Aruba Beach Club
Aruba Renaissance Resorts
Caribbean Palm Village
Casa del Mar
Costa Linda Resort
Divi Village Beach Apartments
Dutch Village
La Cabana Beach and Racquet Club Hotel
Playa Linda Resort
Aruba Marriott Ocean Club
Aruba Marriot Surf Club
The Aruban Resort
Paradise Beach Village