



# Marketing Retreat 2007

“Building a Stronger Brand Together”

June 8<sup>th</sup>, 2007

## A Consumer Perspective



*by The Central Bureau of Statistics*



The source of the following results is a Visitor Survey done by the C.B.S. since 1996. This Survey has been done for 11 years now.

*“C.B.S. is creating a Wealth of Information”*





# C.B.S. Visitor Survey



## Visitor Survey 2006

Central Bureau of Statistics / Ministry of Finance and Economic Affairs  
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Tel: 583-7433 / Fax: 583-8057 E-mail: cbs@setarnet.aw

YEAR: 2 0 0 6 MONTH:

### Form I : Visitors leaving by Air

**Attentie!**  
a. Vul de antwoorden in de wit gelaten hokjes van de vragenlijst in met potlood.  
b. Volg goed de aanwijzingen met pijltjes en de aanduidingen voor sprongen.  
c. Indien de respondent geen antwoord wil geven op een vraag, vul dan "n" in alle corresponderende hokjes of leeg laten.

**Examples:**  
To indicate    
Figures   
Writing

**Confidential**  
 Serial Number  
 Enquetter Number  
 TYPE

### A. Characteristics of the visitor

**A1 What was the main purpose of your visit to Aruba?**

Vacation  Business & Leisure  
 Honeymoon  Business Only /Convention /Conference  
 Incentive /Award  Wedding  
 Visit Friend /Relative  
 Golf (Write in block letters!)  
 Other → Specify:

**A3a Which of the following sources of information was the single most important source in making your decision to visit Aruba?** (Please check only one!)

Friends / Relatives  Business (Work)  
 Travel Agent  Tourist Board  
 Newspaper / Magazine  Repeat visit  
 Television / Radio  Other → Specify:   
 Internet  
 Cruise Ship

**A2 What is your place of residence?** (Please check only one!)

United States →  State Code:  Zip Code:   
 Venezuela  
 The Netherlands  
 Brazil (Write in block letters!)  
 Netherlands Antilles → Island:   
 Canada  
 Colombia (Write in block letters!)  
 Other → Country:

**A5 Where did you stay in Aruba?** (Please check only one!)

Hotel → Name:   
 Guest House /Apartment /Villa (Go to question A7)  
 Friend /Relative  
 Other → Specify:   
 Timeshare Resort → Name:   
 (Go to question A6)

**A3 How many times have you been to Aruba?**

First time  2-5 times  6 times and up

**A6 Is this timeshare owned by you?**

Yes  No → Specify:   
 Transient ( Rented as a Hotel / Walk-in )  
 Exchange  
 Other:

**A4a Have you ever been to Aruba by cruise?**

Yes  No

**A7 How many nights did you spend in Aruba?**

Nights:

**A4b Have you visited the Caribbean prior to this visit?**

Yes (Go to question A4ba)  No (Go to question A4c)

**A8 In which age group are you?**

Under 20 years  40-49 years  
 20-29 years  50-64 years  
 30-39 years  65 years and over

**A4ba If yes, mention the last 2 (two) Caribbean destinations:**

1.   
 2.  (Write in block letters!)

**A9 Person's sex? (by observation!!!)**

Male  Female

**A4c Which other Caribbean island would you like to visit?**

**A10 What is your occupation?**

Retired  House wife  Student  
 Other:

**A11 Could you provide your total yearly household income?** (This information is strictly confidential and like all other information on this form, will be used for statistical purposes only.)

Less than US\$ 20,000  US\$ 50,001-US\$ 75,000  
 US\$ 20,001-US\$ 30,000  US\$ 75,001-US\$ 100,000  
 US\$ 30,001-US\$ 50,000  US\$ 100,001 and over

### B. Expenditure of the Visitor

**B4a How did you book your trip?**

On-line (internet)  Travel agency  
 Tour operator  Charter operator  
 Other

Name:

**B1 What type of flight did you use?**

Charter  Scheduled

**B3 Did you travel on a pre-paid package?**

Yes  No → (Go to question B5a)

**B5 What was the total cost of the pre-paid package?**

US\$:  ( In US\$ please )

**B6 Which of the following did the pre-paid package include:**

Air ticket  Beverages  
 Accommodation  Car  
 Breakfast  Excursions /Tours  
 Lunch  Transportation to/from departure point abroad  
 Dinner  Transportation to/from hotel

**B8a Of the total amount of money spent in Aruba, could you give an indication in percentages what was the methods of payment used:** (Total 100%)

Cash:  % Traveller's Check:  %  
 Credit Card:  % Voucher:  %

**B9 How many persons does this expenditure cover?** (Please indicate adults and children separately)

Total:  Adults:  Children:

**B7 If you came with a pre-paid package, please continue with question B10 and please fill-in section B10(B), the group's total trip expenditure during the trip.**

If you did not come on a pre-paid package, did you make any advance payments before coming to Aruba?

Yes → (Please fill-in question B10 (B) and B10(C) - the group's total expenditures before commencement of the trip and total expenditures during the trip.)  
 No → (Please fill-in question B10 (B) only - the group's total trip expenditures during trip.)

	(A) Pre-Trip US\$	(B) During Trip US\$
<b>GRAND TOTAL:</b> →	<input type="text"/>	<input type="text"/>
Accommodation (incl. meals & drinks at the hotel)	<input type="text"/>	<input type="text"/>
Food & Beverage (consumed outside hotel)	<input type="text"/>	<input type="text"/>
Groceries, sundries (purchased in stores)	<input type="text"/>	<input type="text"/>
Entertainment/Recreation	<input type="text"/>	<input type="text"/>
Taxi	<input type="text"/>	<input type="text"/>
Car rental	<input type="text"/>	<input type="text"/>
Public Transportation	<input type="text"/>	<input type="text"/>
Tax Free Shopping	<input type="text"/>	<input type="text"/>
Shopping	<input type="text"/>	<input type="text"/>
Casino's	<input type="text"/>	<input type="text"/>
Internet / Telephone	<input type="text"/>	<input type="text"/>
Other → Specify: <input type="text"/>	<input type="text"/>	<input type="text"/>

### C. Satisfaction of the Visitor:

**C1 Concerning your visit to Aruba, how would you rate each of the following aspects:**

	Good	Average	Poor
Accommodation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Meals & Drinks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Local transportation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shopping	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Entertainment/Recreation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quality of Service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**C2 Concerning your visit to Aruba, how would you rate value for money paid for the following aspects:**

	Good	Average	Poor
Accommodation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Meals & Drinks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Local transportation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shopping	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Entertainment/Recreation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quality of Service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**C3 Please tell us what you liked & disliked about your visit to Aruba?** (Write in block letters!)

LIKES:

DISLIKES:

Expensiveness (In general)  Service (Hotel/Restaurant)  Nothing

Questions on the Survey that can measure  
Consumer Perspective among other things:

- Rating of Satisfaction
- Rating of Value for money
- Likes of the visitors
- Dislikes of the visitors

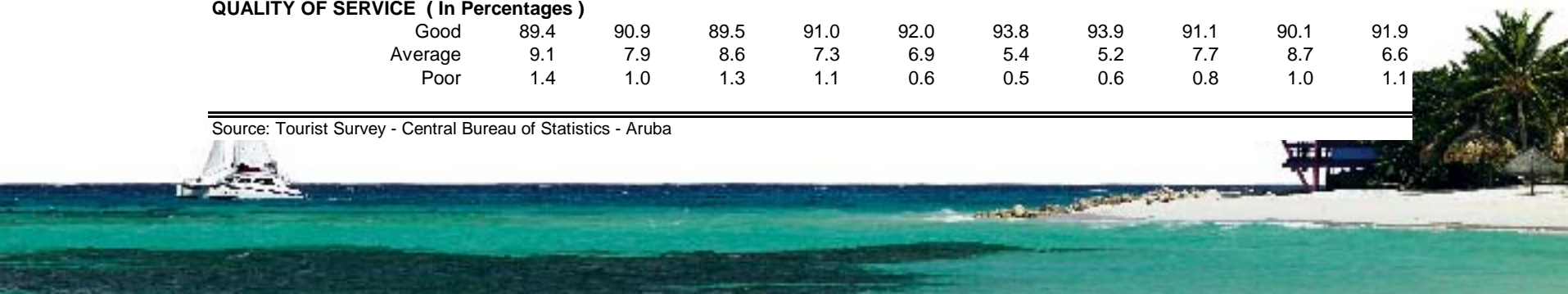


# Rating of Service:

## RATING OF SERVICE RELATED TO THE FOLLOWING:

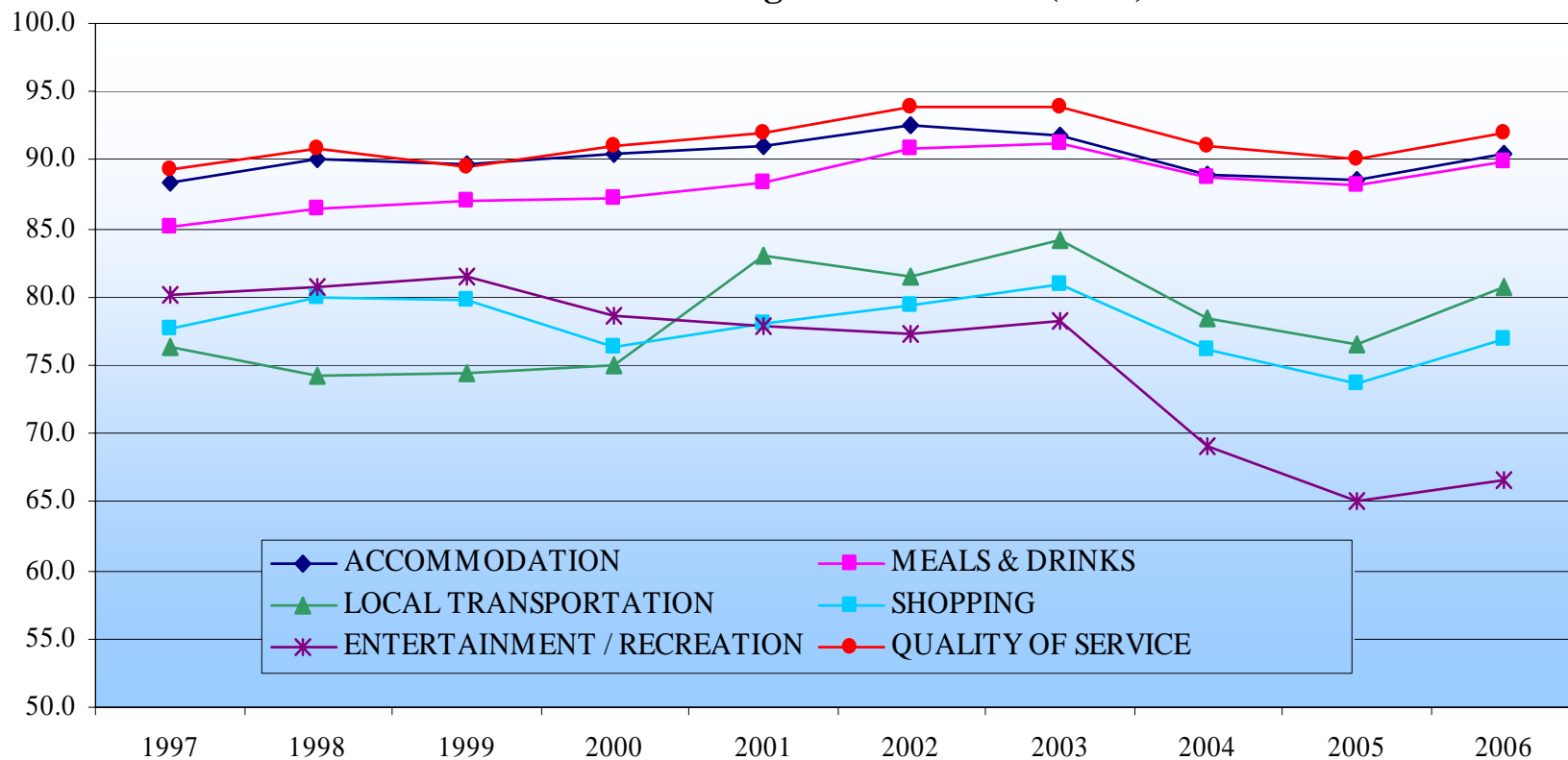
Rating	Year 1997	Year 1998	Year 1999	Year 2000	Year 2001	Year 2002	Year 2003	Year 2004	Year 2005	Year 2006
<b>ACCOMMODATION ( In Percentages )</b>										
Good	88.4	90.0	89.6	90.4	91.1	92.7	91.8	88.9	88.5	90.4
Average	9.3	8.4	9.0	8.3	7.9	6.0	7.0	9.9	10.6	8.5
Poor	1.1	0.8	0.9	0.7	0.5	0.7	1.1	0.9	0.6	0.5
<b>MEALS &amp; DRINKS ( In Percentages )</b>										
Good	85.2	86.5	87.1	87.2	88.4	90.8	91.2	88.8	88.2	89.9
Average	13.0	12.2	11.6	11.4	10.6	8.6	8.0	10.4	10.8	9.1
Poor	1.2	1.0	0.8	0.9	0.6	0.4	0.6	0.6	0.8	0.7
<b>LOCAL TRANSPORTATION ( In Percentages )</b>										
Good	76.3	74.3	74.4	75.0	83.1	81.5	84.1	78.4	76.6	80.8
Average	7.9	5.7	5.3	4.4	5.4	4.8	4.0	7.0	7.3	5.7
Poor	1.5	0.6	0.6	0.4	0.5	1.2	0.4	0.6	0.4	0.2
<b>SHOPPING ( In Percentages )</b>										
Good	77.6	80.0	79.7	76.4	78.1	79.5	80.9	76.1	73.7	76.9
Average	13.4	10.7	10.6	11.1	11.9	9.9	8.1	10.1	12.1	9.4
Poor	1.5	1.3	0.8	0.9	0.5	1.5	0.4	0.8	0.5	0.5
<b>ENTERTAINMENT / RECREATION ( In Percentages )</b>										
Good	80.2	80.7	81.5	78.6	77.8	77.3	78.2	69.1	65.1	66.6
Average	9.4	8.3	8.9	8.0	8.0	7.7	6.7	8.8	10.3	8.2
Poor	1.5	0.8	0.9	0.7	0.5	1.6	0.4	0.6	0.7	0.6
<b>QUALITY OF SERVICE ( In Percentages )</b>										
Good	89.4	90.9	89.5	91.0	92.0	93.8	93.9	91.1	90.1	91.9
Average	9.1	7.9	8.6	7.3	6.9	5.4	5.2	7.7	8.7	6.6
Poor	1.4	1.0	1.3	1.1	0.6	0.5	0.6	0.8	1.0	1.1

Source: Tourist Survey - Central Bureau of Statistics - Aruba

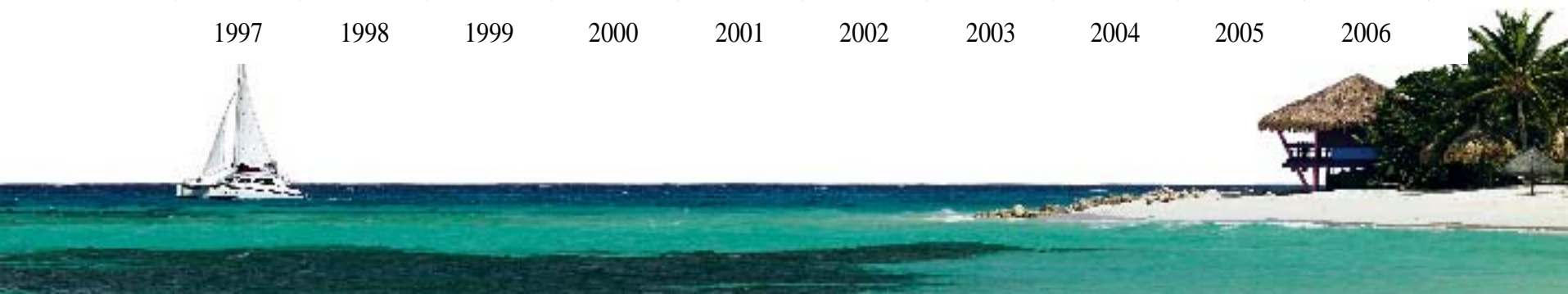
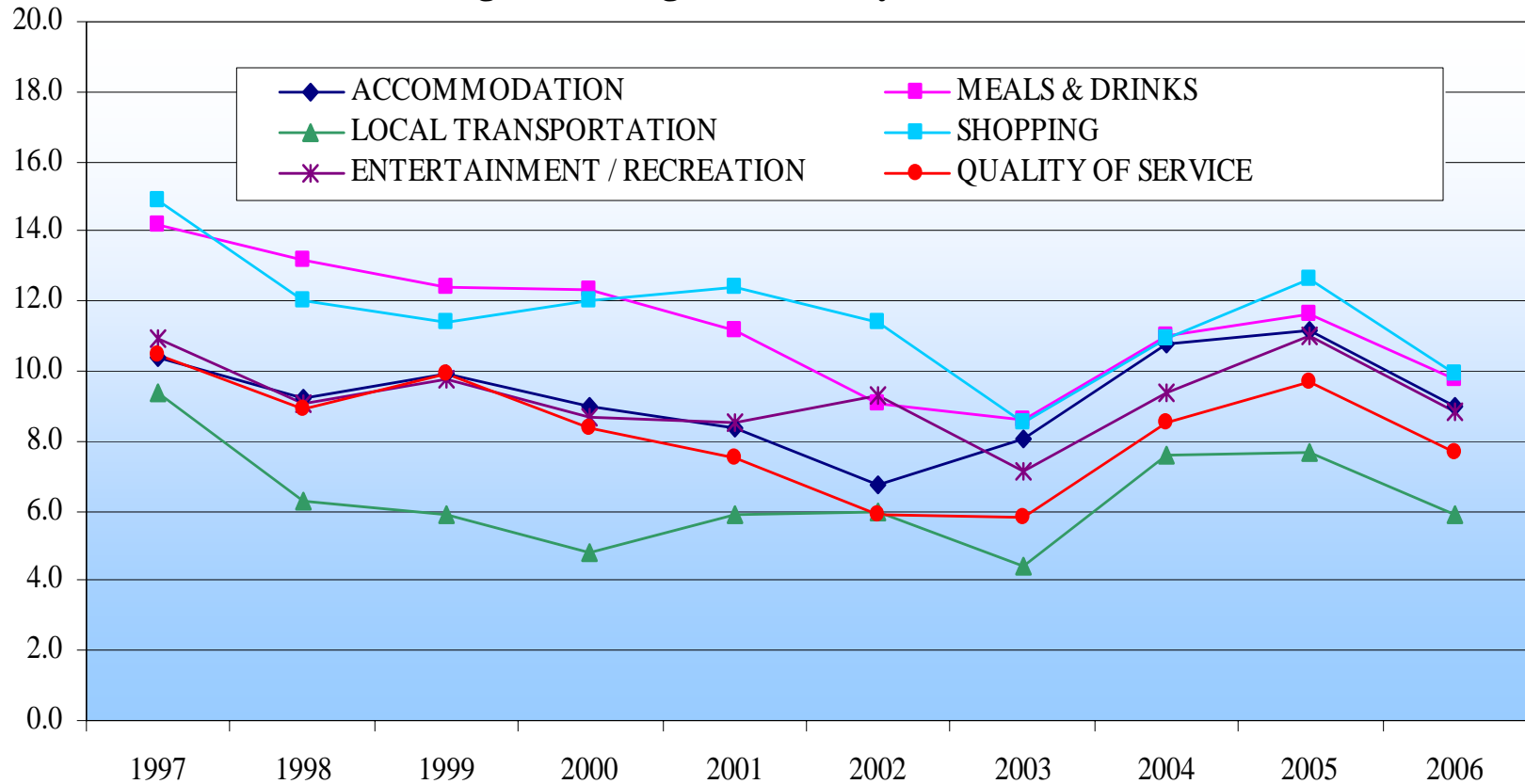


# Trend of Results:

**Good Satisfaction Ratings of the Visitors (in %)**



## Ratings of Average and Poor by the Visitors (in%)

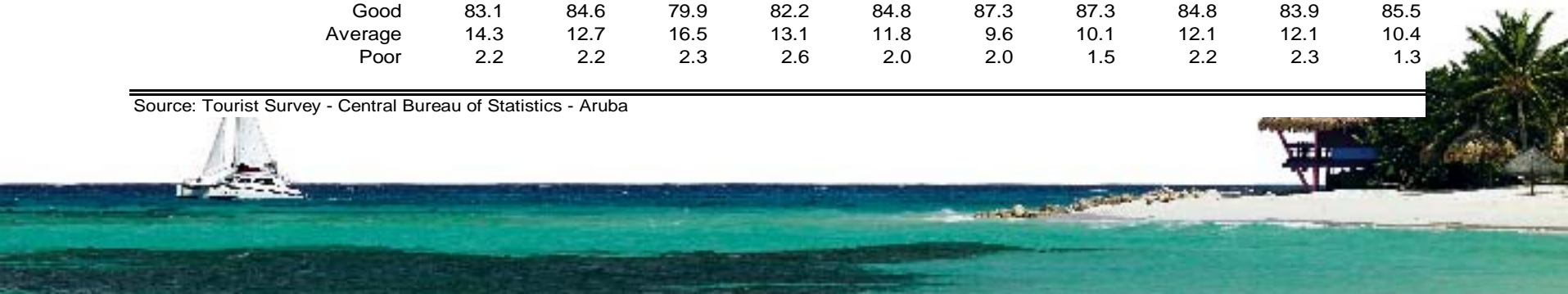


# Rating of Value for Money:

## RATING OF VALUE FOR MONEY OF THE FOLLOWING:

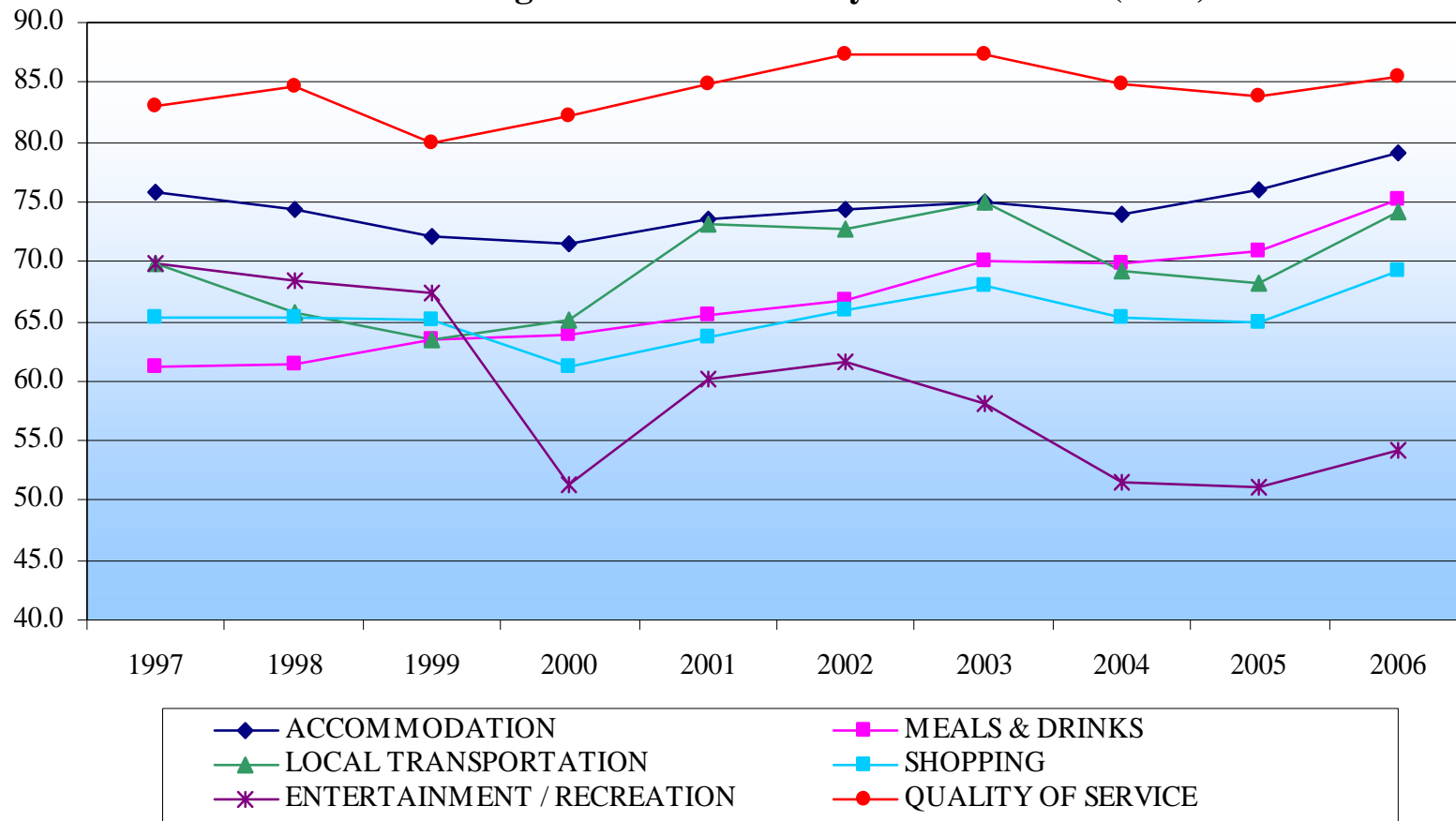
Rating	Year 1997	Year 1998	Year 1999	Year 2000	Year 2001	Year 2002	Year 2003	Year 2004	Year 2005	Year 2006
<b>ACCOMMODATION ( In Percentages )</b>										
Good	75.9	74.4	72.1	71.4	73.6	74.3	74.9	73.9	76.0	79.1
Average	16.2	15.3	16.2	15.4	14.0	12.6	11.8	15.5	16.0	13.3
Poor	3.5	3.2	3.1	3.2	3.0	3.0	2.8	2.7	2.5	1.5
<b>MEALS &amp; DRINKS ( In Percentages )</b>										
Good	61.1	61.3	63.5	63.8	65.6	66.8	70.1	69.9	70.9	75.1
Average	29.0	29.0	27.2	26.7	25.0	23.9	21.7	20.7	21.4	19.3
Poor	9.1	8.7	6.8	7.7	6.8	6.5	5.7	7.0	5.6	3.2
<b>LOCAL TRANSPORTATION ( In Percentages )</b>										
Good	69.9	65.8	63.5	65.2	73.2	72.8	74.9	69.2	68.2	74.1
Average	14.3	11.3	11.7	9.6	11.2	10.8	10.4	13.3	13.5	11.1
Poor	3.0	2.9	2.8	2.9	2.9	3.0	2.4	2.7	2.2	0.6
<b>SHOPPING ( In Percentages )</b>										
Good	65.4	65.4	65.0	61.1	63.7	66.0	67.9	65.3	64.9	69.2
Average	22.4	21.0	21.5	21.6	22.1	20.8	18.2	18.1	18.9	16.1
Poor	5.5	4.9	4.2	4.5	3.8	3.6	2.8	3.2	2.5	1.1
<b>ENTERTAINMENT / RECREATION ( In Percentages )</b>										
Good	69.9	68.3	67.3	51.3	60.1	61.6	58.1	51.6	51.2	54.2
Average	18.4	17.2	18.6	15.4	15.2	17.3	15.6	15.5	16.9	14.1
Poor	3.4	3.3	3.2	3.1	2.6	2.4	2.0	2.2	2.3	1.0
<b>QUALITY OF SERVICE ( In Percentages )</b>										
Good	83.1	84.6	79.9	82.2	84.8	87.3	87.3	84.8	83.9	85.5
Average	14.3	12.7	16.5	13.1	11.8	9.6	10.1	12.1	12.1	10.4
Poor	2.2	2.2	2.3	2.6	2.0	2.0	1.5	2.2	2.3	1.3

Source: Tourist Survey - Central Bureau of Statistics - Aruba



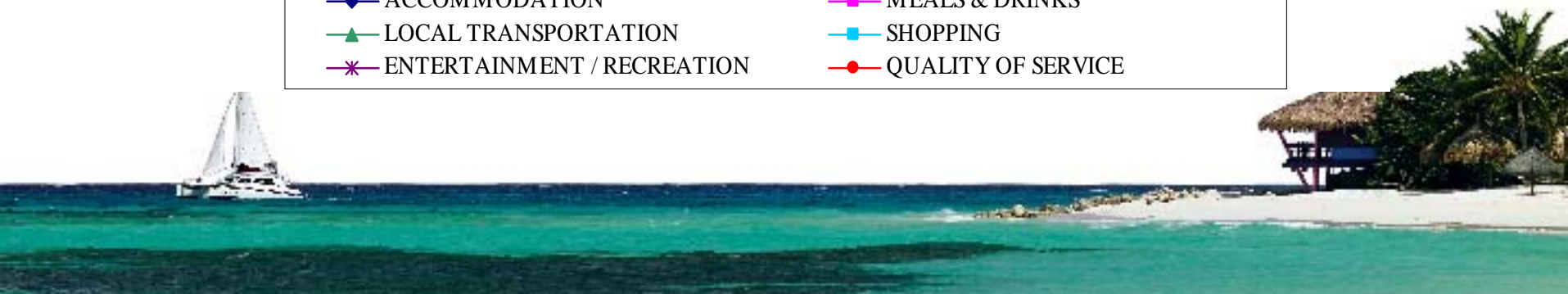
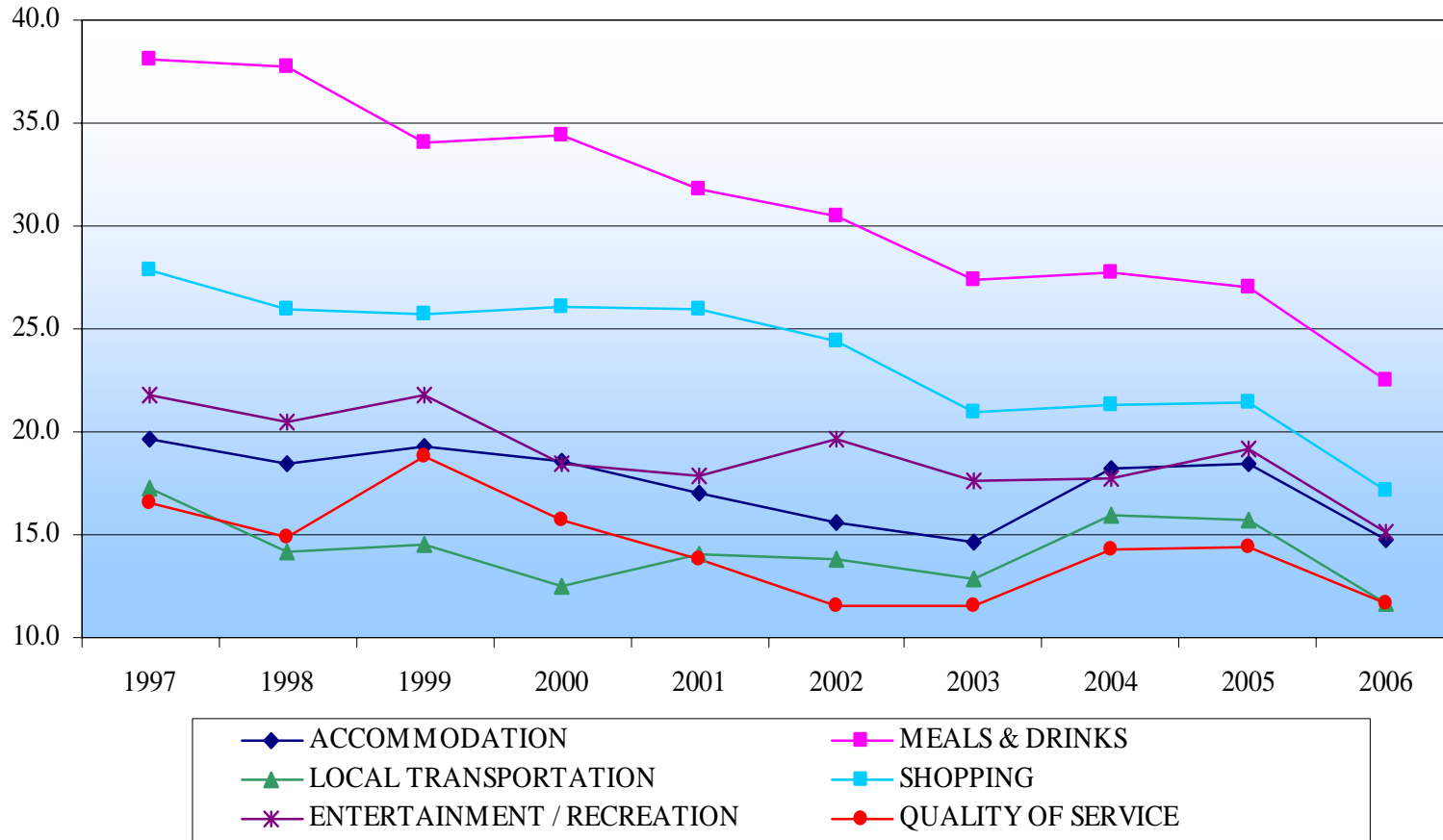


**Good Ratings of Value for Money of the Visitors (in %)**



# Trend of Results:

**Average & Poor Ratings of Value for Money of the Visitors (in %)**



# What the visitors liked:

## WHAT VISITORS LIKED ABOUT ARUBA ( In Percentages )

Likes	Year 1996	Year 1997	Year 1998	Year 1999	Year 2000	Year 2001	Year 2002	Year 2003	Year 2004	Year 2005	Year 2006
Beaches	45.1	50.6	55.5	56.3	36.5	54.7	52.7	53.5	48.3	49.9	50.1
People / Hospitality	43.8	50.9	54.7	60.0	42.9	55.4	54.4	53.4	52.9	54.0	49.4
Weather / Climate / Wind	34.0	43.5	49.4	52.3	35.6	52.4	56.6	50.8	46.3	46.1	45.1
Safety / Atmosphere / Quietness / Relaxing	16.9	23.1	29.1	35.6	13.7	6.2	9.5	8.3	6.5	4.9	6.1
Hotel / Restaurant (food)	11.3	17.6	21.8	27.5	5.4	3.8	3.8	2.3	2.5	1.6	1.5
Night life / Entertainmt. / Recreation / Attraction	8.8	18.6	21.7	29.1	3.1	2.5	1.2	1.8	0.6	0.7	1.5
Service	6.1	12.6	17.6	24.3	1.5	0.8	0.8	0.7	1.1	0.9	0.6
Island cleanness	7.7	16.3	21.2	28.3	4.6	3.3	2.4	2.6	1.4	0.5	1.1
Nature/Landscape	7.7	16.0	18.3	24.7	2.1	1.3	1.1	0.7	0.7	0.5	0.3
Casino	6.4	13.1	18.2	24.5	2.5	1.1	1.4	0.8	0.6	0.3	0.4
Downtown area / shopping facilities	5.8	13.4	17.9	25.1	2.4	1.3	0.6	0.9	0.6	0.3	0.5
Watersports					2.6	1.3	1.8	1.9	1.1	0.9	0.8
Everything					17.3	14.6	16.0	18.0	26.7	31.6	32.3
Other						n.a.	2.4	1.2	2.0	1.4	1.3
Drinking Water					n.a.	n.a.	0.9	1.2	1.6	1.0	0.7
Food (in general)					n.a.	n.a.	n.a.	0.8	0.9	0.6	1.2

Source: Tourist Survey - Central Bureau of Statistics - Aruba

n.a. = not available



# What the visitors disliked:

WHAT VISITORS DISLIKED ABOUT ARUBA ( In Percentages )

Dislikes	Year 1996	Year 1997	Year 1998	Year 1999	Year 2000	Year 2001	Year 2002	Year 2003	Year 2004	Year 2005	Year 2006
Expensiveness in general (food / beverage)	18.2	16.2	10.6	9.4	10.8	10.8	16.6	12.7	11.3	13.8	14.8
Departure tax (too expensive)	3.8	0.8	0.2	0.2	2.6	2.6	1.0	0.1	0.1	0.1	0.1
Service (in general) (slow / bad)	4.8	5.1	3.2	4.8	3.9	3.9	16.5	3.0	3.6	3.4	2.8
Service at hotel (slow/bad)							3.9	1.8	1.4	1.5	1.6
Service at restaurant (slow/bad)							1.2	0.4	0.5	0.6	0.8
Weather / climate / wind	4.1	5.0	3.6	3.5	3.7	3.7	1.8	2.1	6.8	6.0	3.3
Insufficient night life / entertainment	3.2	2.4	2.2	1.4	1.3	1.3	0.6	0.7	0.6	0.3	0.5
Local transportation / traffic	3.3	4.6	2.2	2.1	2.1	2.1	0.8	0.5	0.6	0.9	0.5
Lack of roadsighns and bad condition road	2.6	2.0	1.6	2.9	2.6	2.6	1.0	0.7	1.4	1.1	1.5
Too much litter / garbage	1.7	1.2	1.8	1.1	1.4	1.4	0.7	0.5	0.7	1.0	1.1
Service airport / immigration	3.6	3.9	1.4	2	1.8	1.8	1.6	1.2	1.9	1.2	2.5
Shops closing too early and on Sunday	2.0	1.6	1.6	1.4	1.8	1.8	0.2	1.1	0.8	0.4	0.7
Nothing					50.2	50.2	67.7	69.2	62.7	63.5	66.1
Other					n.a.	n.a.	8.8	8.1	10.6	11.2	9.6

Source: Tourist Survey - Central Bureau of Statistics - Aruba

n.a. = not available



## Other relevant Questions on the Survey:

- Most important Source of Information used when making decision to visit Aruba
- Method used to Book a trip
- Travel arrangement of the Visitors



# Source of Information used:

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

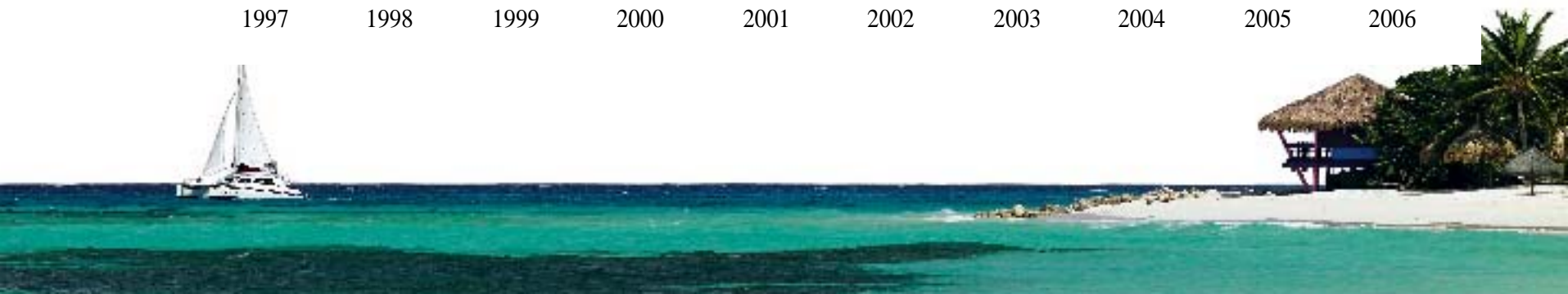
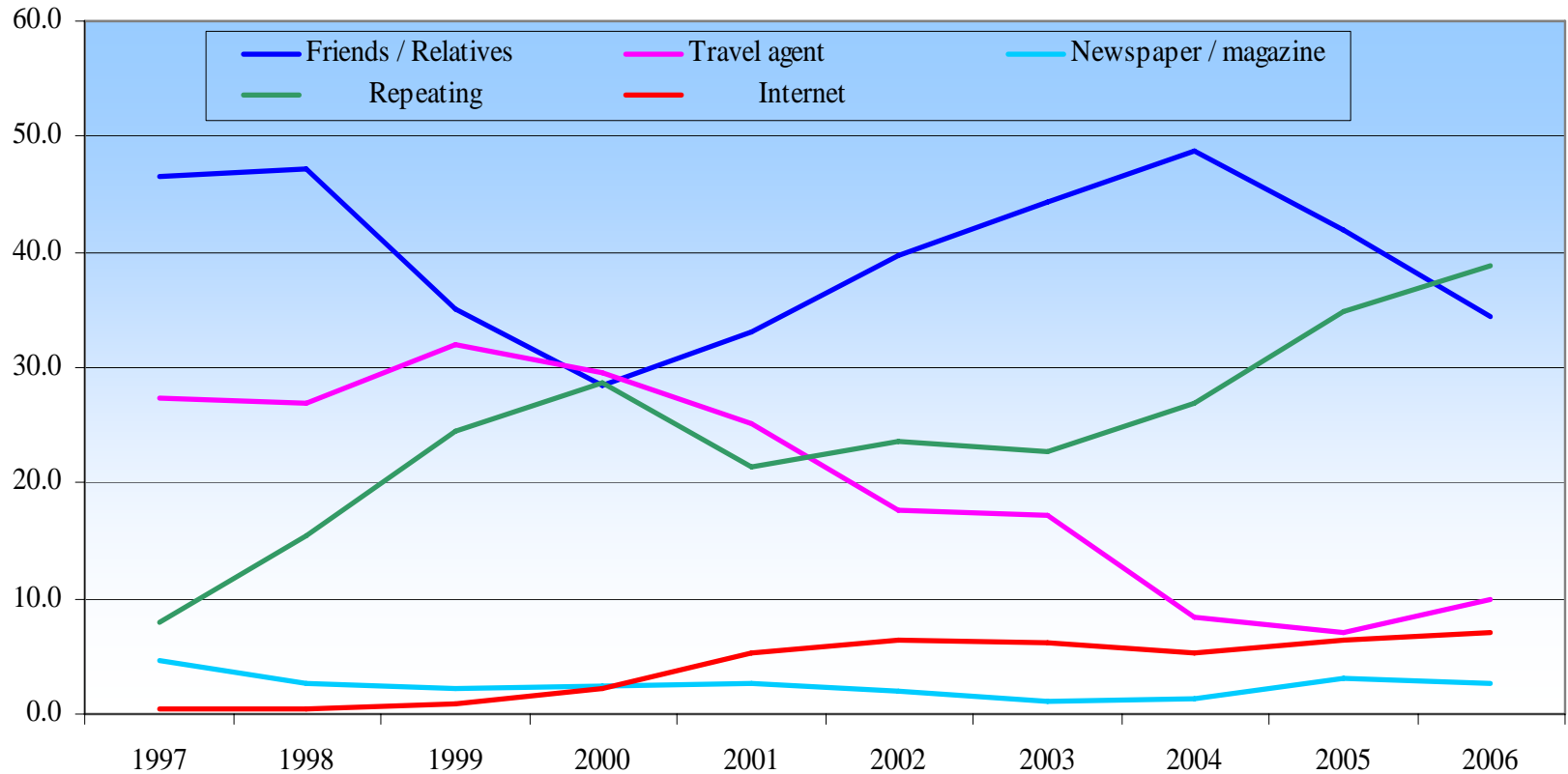
Source of information	Year 1997	Year 1998	Year 1999	Year 2000	Year 2001	Year 2002	Year 2003	Year 2004	Year 2005	Year 2006
Friends / Relatives	46.6	47.3	35.1	28.4	33.1	39.6	44.4	48.7	41.9	34.4
→ Travel agent	27.3	27.0	31.9	29.5	25.2	17.7	17.2	8.4	7.0	9.9
Newspaper / magazine	4.7	2.7	2.3	2.4	2.7	2.1	1.1	1.4	3.0	2.7
Television ad / Radio ad	1.6	0.7	0.4	0.7	0.8	0.6	0.5	0.8	0.5	0.1
Tourist board	1.2	0.9	0.6	1.1	1.1	0.6	0.6	0.6	0.2	0.3
Other	9.5	3.5	2.7	5.1	5.7	4.8	3.5	3.8	2.6	3.1
Repeating	8.0	15.5	24.5	28.6	21.4	23.7	22.8	26.9	34.8	38.9
Cruise	0.6	0.4	0.3	0.2	1.0	0.8	0.8	0.8	0.7	0.6
→ Internet	0.4	0.5	0.9	2.2	5.3	6.3	6.1	5.4	6.5	7.1
Business			1.4	1.4	3.7	3.8	2.8	3.0	2.8	2.9
Unknown							0.2	0.1	0.0	0.1
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Source: Tourist Survey - Central Bureau of Statistics - Aruba



# Trend of Results:

**Single most Important Source used when making a decision to visit Aruba (in %)**



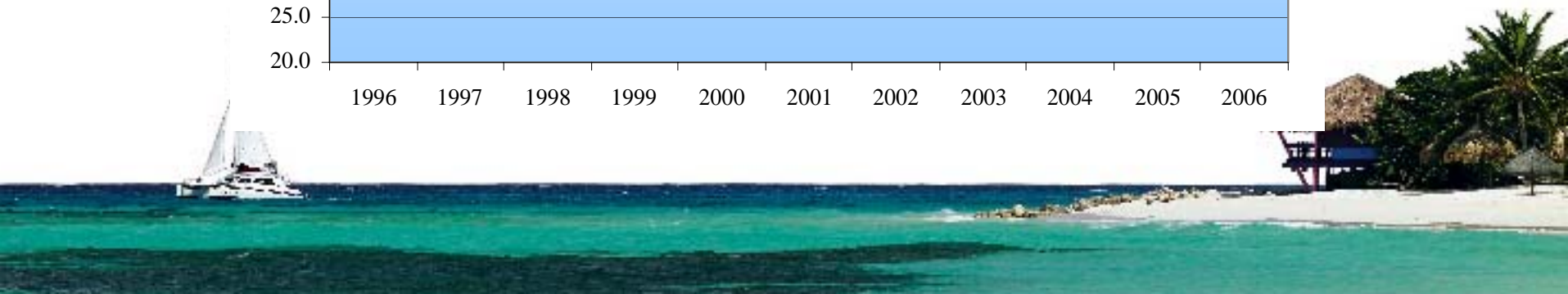
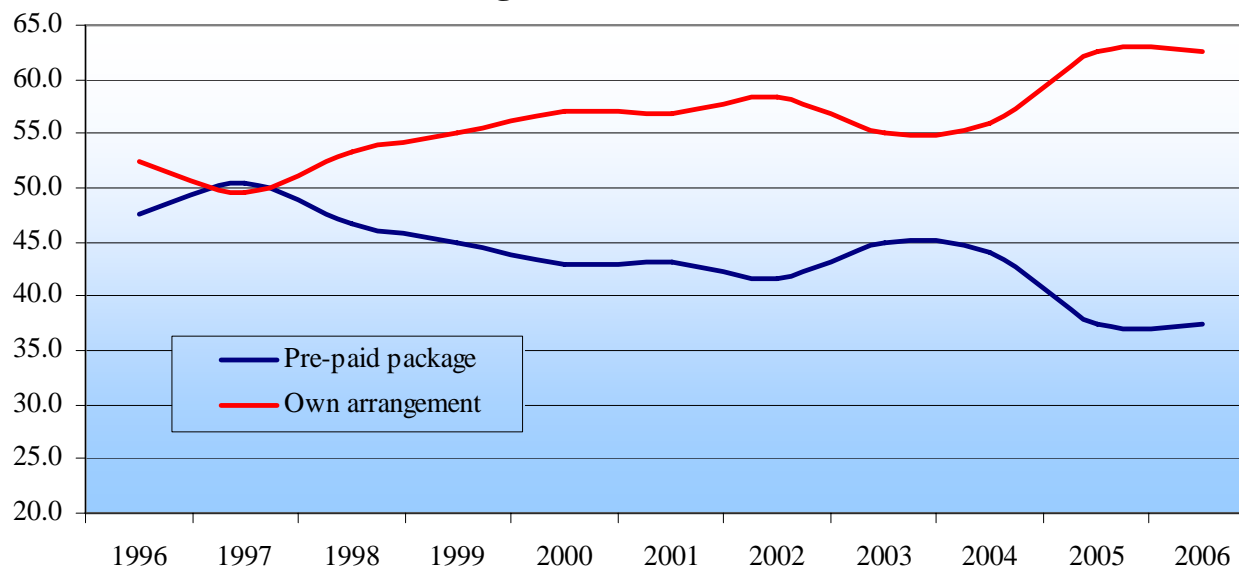
# Travel arrangements:

**TRAVEL ARRANGEMENT OF THE VISITORS ( In Percentages )**

Type of arrangement	Year 1996	Year 1997	Year 1998	Year 1999	Year 2000	Year 2001	Year 2002	Year 2003	Year 2004	Year 2005	Year 2006
Pre-paid package	47.6	50.4	46.8	44.9	43.0	43.2	41.7	45.0	44.0	37.5	37.4
Own arrangement	52.4	49.6	53.2	55.1	57.0	56.8	58.3	55.0	56.0	62.5	62.6
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Source: Tourist Survey - Central Bureau of Statistics - Aruba

**Travel arrangement of the Visitors (in %)**





# Method of Booking:

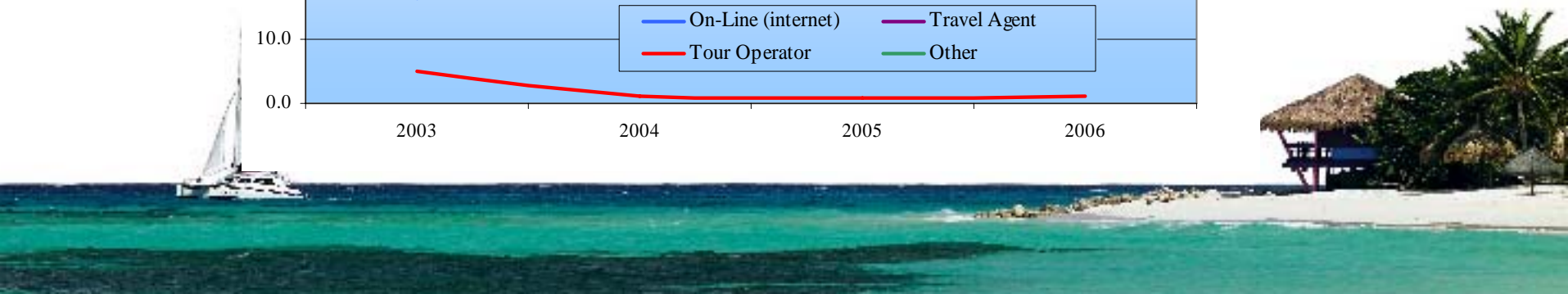
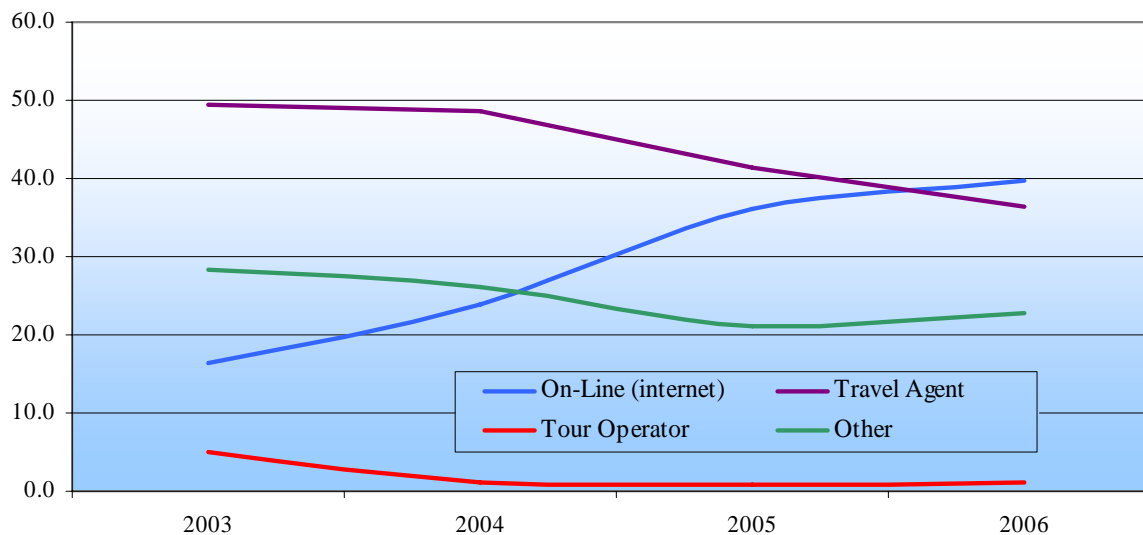
**METHOD USED BY VISITORS USED TO BOOK A TRIP TO ARUBA ( In % )**

	<i>Year</i> <b>2003</b>	<i>Year</i> <b>2004</b>	<i>Year</i> <b>2005</b>	<i>Year</i> <b>2006</b>
On-Line (internet)	16.5	23.8	36.1	39.6
Travel Agent	49.4	48.7	41.3	36.3
Tour Operator	5.0	1.0	0.8	1.0
Charter Operator	0.7	0.2	0.2	0.1
Other	28.3	26.1	21.2	22.8
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Increase of 23.1% in 3 years!

Decrease of 13.1% in 3 years!

Source: Tourist Survey - Central Bureau of Statistics - Aruba





# Where most Visitors Booked a trip in 2006

## Total Trip Bookings in 2006:

	Frequency	Percent			
AIRLINES (OTHER)	94	2.1	GIFT	17	0.4
A.A.	<b>304</b>	6.7	GO GO	54	1.2
AEROPPOSTAL	71	1.6	HOLLAND INTERNACIONAL	21	0.5
ARKE FLY	31	0.7	HOT WIRE	6	0.1
AVIANCA	30	0.7	INTERVAL	<b>115</b>	2.5
CONTINENTAL	181	4.0	KANGURO TRAVEL	5	0.1
D.A.E. / D.C.E.	36	0.8	LAST MINUTE TRAVEL	14	0.3
DELTA	52	1.1	LIBERTY TRAVEL	<b>283</b>	6.2
FUN JET	16	0.4	MADURO TRAVEL	21	0.5
K.L.M.	77	1.7	MARLON TRAVEL	6	0.1
SANTA BARBARA	55	1.2	OAD REIZEN	15	0.3
TIARA AIR	12	0.3	ORBIZ	<b>158</b>	3.5
UNITED AIRLINES	54	1.2	PLAYER'S CHOICE	20	0.4
US AIR	216	4.8	PRICE LINE	7	0.2
<b>TOTAL AIRLINES</b>	<b>1229</b>	<b>27.1</b>	R.C.A.	42	0.9
			R.C.I.	28	0.6
ABC TOURS / TOURS	9	0.2	SEARS TRAVEL	9	0.2
AOL	5	0.1	SPELLMAN	7	0.2
APPLE	78	1.7	SUNBURST	4	0.1
ARUBA.COM	5	0.1	SUNQUEST	23	0.5
AMERICAN EXPRESS	21	0.5	T.N.T.	40	0.9
BY PHONE	<b>117</b>	2.6	TELEPHONE	11	0.2
C.V.C.	15	0.3	THOMAS COOK	7	0.2
CARLSON	12	0.3	TOUR ACER	6	0.1
CHEAP CARIBBEAN	8	0.2	TRAVEL IMPRESSIONS	21	0.5
CHEAP TICKETS	32	0.7	TRAVEL LOST	14	0.3
CHEAP TRAVEL	6	0.1	TRAVEL WORLD	5	0.1
COMPANY / WORK	47	1.0	TRAVELOCITY	<b>130</b>	2.9
D-REIZEN	29	0.6	TUI	14	0.3
HOTEL / TIMESHARE	<b>127</b>	2.8	U.S.A. 3000	12	0.3
MARRIOTT.COM	89	2.0	VACATION OUTLET	17	0.4
EXPEDIA	<b>244</b>	5.4	VACATION TO GO	6	0.1
FIRST CHOICE	10	0.2	WORLD TRAVEL	6	0.1
FLY CENTER	5	0.1	WORLD WIDE TRAVEL	10	0.2
FAMILY / FRIENDS	<b>191</b>	4.2	YAHOO	13	0.3
G.W.V.	43	0.9			
			TOTAL	4539	100.0

Source: Tourist Survey - Central Bureau of Statistics - Aruba





# Further Info on Bookings in 2006

## Online Bookings in 2006:

	Frequency on on-line bookers	Frequency on all visitors
A.A.	12.7	5.0
AAA	4.0	1.6
CONTINENTAL	6.1	2.4
EXPEDIA	12.6	5.0
HOTEL	2.4	0.9
INTERVAL	2.8	1.1
K.L.M.	3.1	1.2
MARRIOTT.COM	4.2	1.7
ORBITZ	7.8	3.1
TRAVELOCITY	6.0	2.4
UNITED AIRLINES	2.6	1.0
US AIR	8.3	3.3
<b>Total</b>	<b>100</b>	<b>39.6</b>

## Booking through Travel Agents in 2006:

	Frequency on bookings thru travel agents	Frequency on all visitors
AAA	5.40	2.0
APPLE	4.49	1.6
GO GO	2.98	1.1
GWV	1.52	0.6
LIBERTY TRAVEL	15.85	5.8
T.N.T.	2.13	0.8
TRAVEL IMPRESSIONS	1.28	0.5
TRAVELOCITY	1.40	0.5
<b>Total</b>	<b>100</b>	<b>36.3</b>

## Other method of Booking in 2006:

	Frequency on other method of Booking	Frequency on all visitors
A.A.	6.5	1.5
AAA	3.4	0.8
AEROPOSTAL COMPANY	4.5	1.0
CONTINENTAL	2.3	0.5
FRIENDS	6.5	1.5
INTERVAL	8.0	1.8
PHONE	4.1	0.9
R.C.A.	11.2	2.6
SANTA BARBARA	3.7	0.8
US AIR	4.4	1.0
<b>Total</b>	<b>5.9</b>	<b>1.3</b>
	<b>100</b>	<b>22.8</b>

## Note:

A significant number of visitors are booking through airlines either by internet or phone!



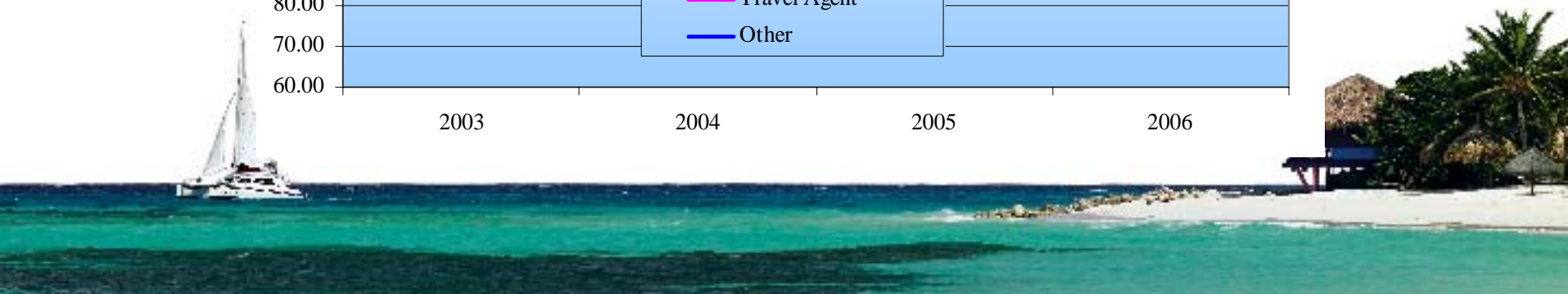
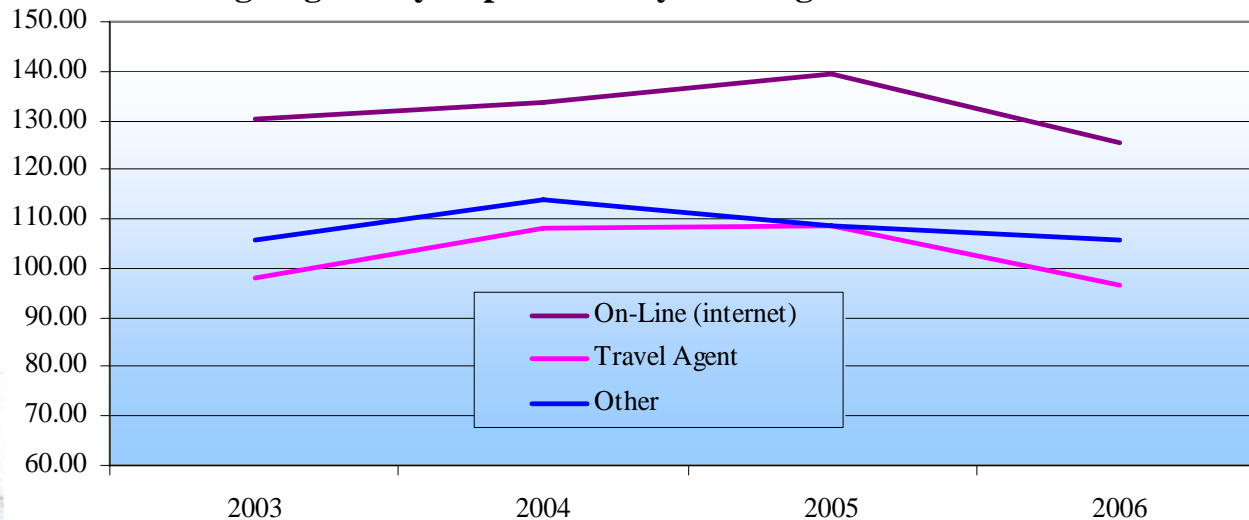
# Further Info on Bookings

**AVERAGE DAILY EXPENDITURE BY METHOD USED TO BOOK A TRIP ( In US\$**

	<i>Year</i> <b>2003</b>	<i>Year</i> <b>2004</b>	<i>Year</i> <b>2005</b>	<i>Year</i> <b>2006</b>
On-Line (internet)	130.22	133.64	139.42	125.53
Travel Agent	98.26	108.31	108.66	96.76
Tour Operator	50.93	120.67	103.21	84.25
Other	105.75	113.84	108.84	105.94

Source: Tourist Survey - Central Bureau of Statistics - Aruba

**Average Daily Expenditure by Booking method in 2006 in US\$**



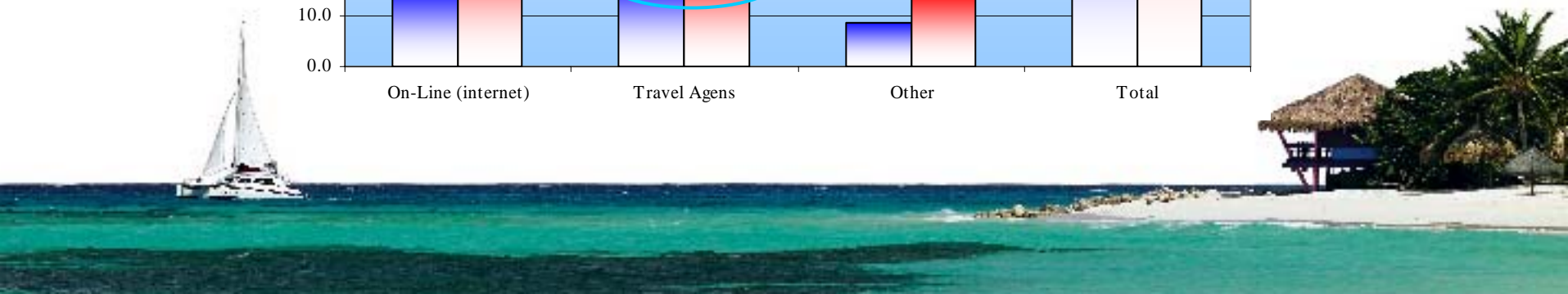
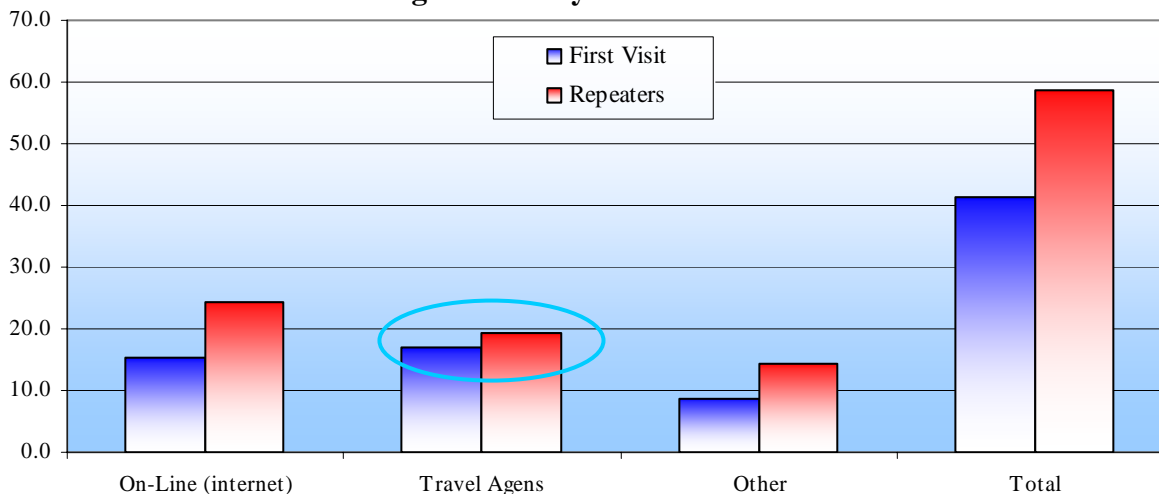
# Further Info on Bookings

**Method of Booking by Number of Visit in 2006 ( in % )**

	First Visit	2-5 Times	Times and up	=	Repeaters
On-Line (internet)	15.2	11.3	13.2	=	24.5
Travel Agens	17.1	10.6	8.7	=	19.3
Other	8.6	6.0	8.2	=	14.3
<b>Total</b>	<b>41.4</b>	<b>28.4</b>	<b>30.2</b>	=	<b>58.6</b>

Source: Tourist Survey - Central Bureau of Statistics - Aruba

**Bookings method by Number of Visit in 2006**



# Other Results & Trends

## AVERAGE DAILY EXPENDITURE BY NUMBER OF VISITS TO ARUBA <sup>1)</sup> ( In US\$ )

Number of visits	Year 1996	Year 1997	Year 1998	Year 1999	Year 2000	Year 2001	Year 2002	Year 2003	Year 2004	Year 2005	Year 2006
First time	111.79	102.29	104.45	101.75	107.37	109.79	110.37	103.37	114.97	115.60	109.20
Between 2 and 5 times	120.86	113.08	102.85	109.86	109.15	118.71	106.38	95.69	113.10	122.07	111.22
6 Times or more	143.14	126.76	111.43	126.68	137.16	132.52	133.03	115.07	120.59	123.57	110.29

Source: Tourist Survey - Central Bureau of Statistics - Aruba

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

## AVERAGE DAILY EXPENDITURE BY PLACE OF RESIDENCE <sup>1)</sup> ( In US\$ )

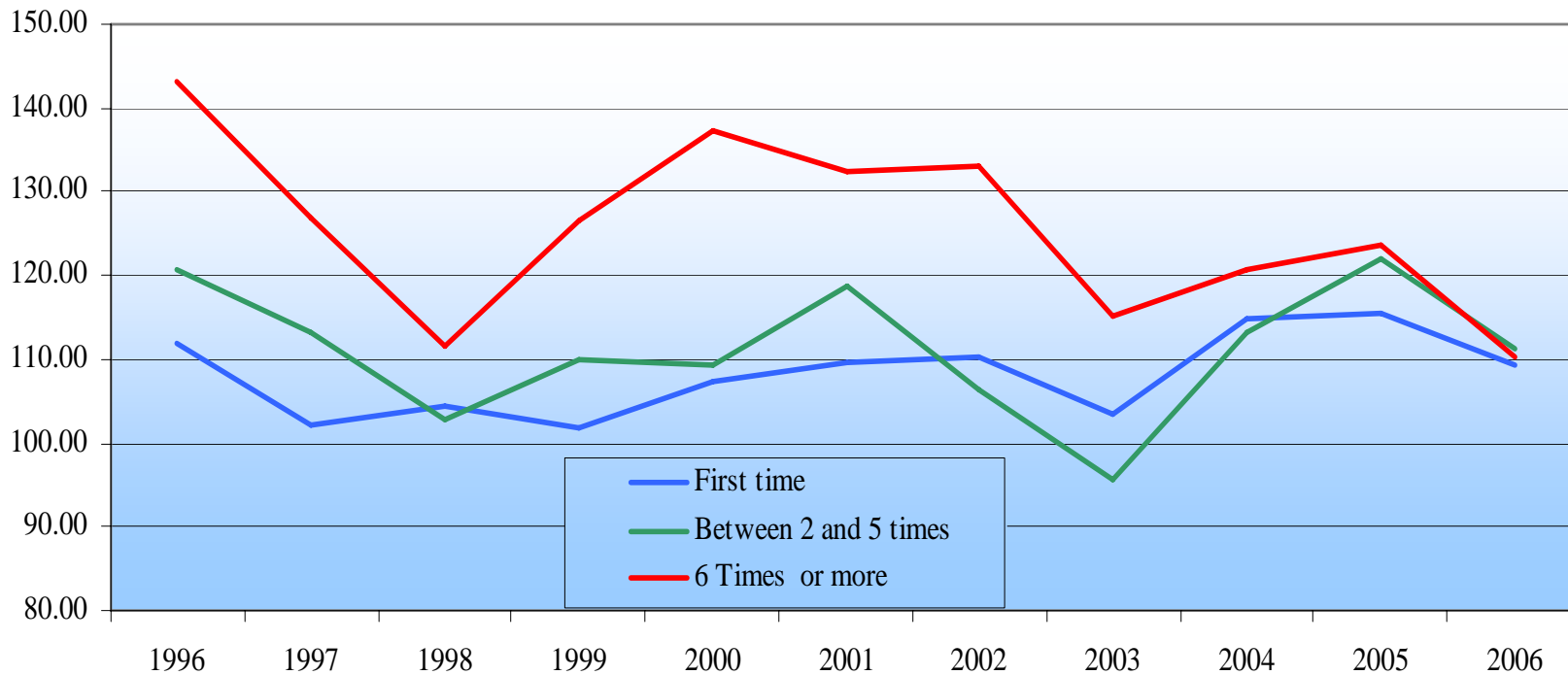
Place of residence	Year 1996	Year 1997	Year 1998	Year 1999	Year 2000	Year 2001	Year 2002	Year 2003	Year 2004	Year 2005	Year 2006
U.S.A.	110.70	104.69	102.47	106.89	113.22	112.97	117.43	104.37	118.75	124.30	114.14
Venezuela	164.32	169.58	154.98	155.83	159.17	163.77	143.09	124.90	155.28	170.02	143.26
Netherlands	80.86	81.35	63.24	54.67	54.23	52.61	67.04	66.13	67.36	53.31	52.06
Brazil	160.15	121.06	120.70	150.14	260.38	170.09	219.68	157.17	176.12	135.14	146.41
Netherlands Antilles	123.99	80.83	72.27	65.00	83.38	112.24	123.73	93.18	94.82	94.46	109.12
Canada	86.41	71.57	70.56	64.45	61.14	82.66	55.82	68.12	95.95	87.57	74.19
Colombia	124.46	124.57	101.30	118.87	108.83	122.79	86.15	89.61	93.40	74.84	101.40
<b>Total visitors (In US \$)</b>	<b>121.44</b>	<b>110.72</b>	<b>105.56</b>	<b>110.08</b>	<b>114.29</b>	<b>117.71</b>	<b>115.48</b>	<b>103.82</b>	<b>115.88</b>	<b>119.55</b>	<b>110.13</b>

Source: Tourist Survey - Central Bureau of Statistics - Aruba

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



**Average Expenditure of Repeat Visitor vs First Time Visitor (in US\$)**



# Other Interesting Trends

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

Type of accommodation	Year 1996	Year 1997	Year 1998	Year 1999	Year 2000	Year 2001	Year 2002	Year 2003	Year 2004	Year 2005	Year 2006
Hotel	56.5	58.9	53.4	53.4	54.0	56.4	57.1	56.3	60.2	55.7	51.1
Timeshare	31.1	27.7	30.0	29.8	29.5	27.2	25.5	27.7	27.4	32.9	37.8
Guest house/Apartment	3.5	4.4	3.9	4.0	4.1	4.0	4.8	4.2	2.6	2.6	2.7
Friends / Relatives	8.1	8.5	12.0	11.7	11.0	10.5	11.2	10.6	8.6	7.5	7.4
Other	0.7	0.4	0.6	1.1	1.5	1.9	1.4	1.2	1.1	1.3	0.9
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Source: Tourist Survey - Central Bureau of Statistics - Aruba

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

Timeshare owner	Year 1996	Year 1997	Year 1998	Year 1999	Year 2000	Year 2001	Year 2002	Year 2003	Year 2004	Year 2005	Year 2006
Owner	42.0	44.6	46.2	44.9	38.9	36.9	42.7	46.8	44.3	50.7	54.7
<i>Non-timeshare owner:</i>	52.5										
Non-owner: Transient (Walk-in)		29.9	20.4	22.8	24.7	24.1	16.8	18.4	16.3	14.0	8.9
Non-owner: Exchange		11.0	17.7	14.2	17.3	18.6	17.8	14.4	20.3	15.2	15.2
Non-owner: Other		14.5	15.7	17.9	17.7	17.5	19.8	19.2	19.0	19.6	21.2
Unknown	5.4	0.1		0.1	1.4	2.9	2.9	1.3	0.1	0.4	0.0
<b>Total Timeshare user</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Source: Tourist Survey - Central Bureau of Statistics - Aruba



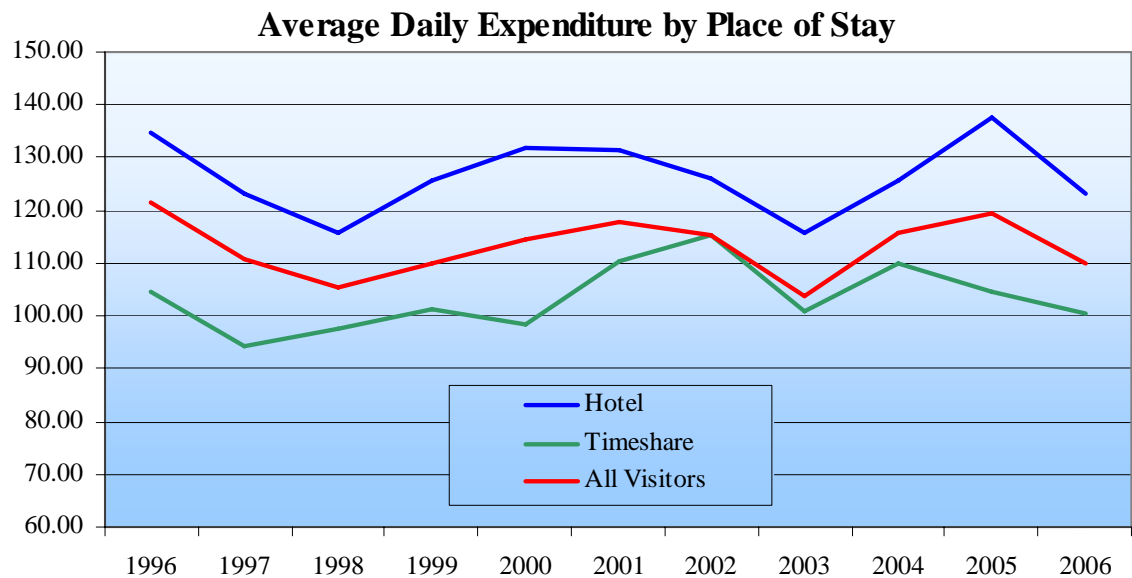


# Other Interesting Trends

**AVERAGE DAILY EXPENDITURE BY PLACE OF STAY ( In US\$ )**

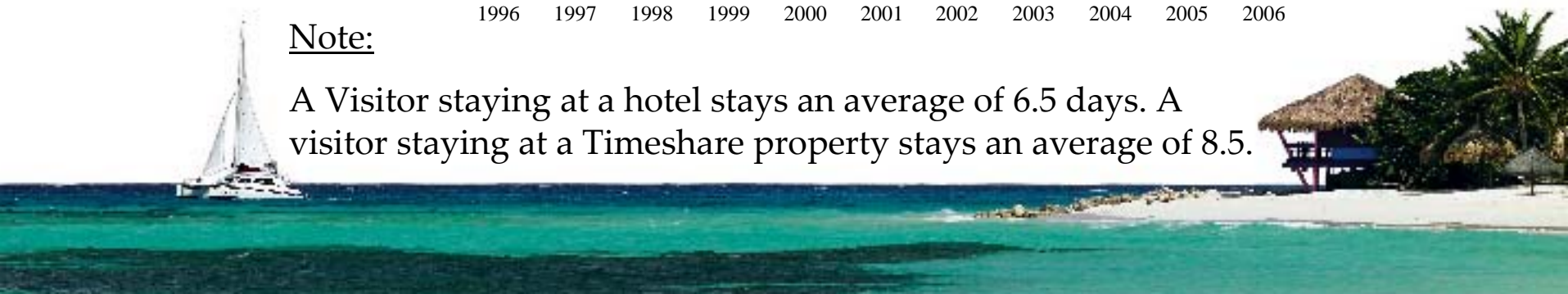
	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Hotel	134.59	123.33	115.77	125.78	131.87	131.54	126.09	115.54	125.70	137.52	123.32
Timeshare	104.39	94.44	97.38	101.38	98.52	110.47	115.21	101.02	109.85	104.39	100.65
All Visitors	<b>121.44</b>	<b>110.72</b>	<b>105.56</b>	<b>110.08</b>	<b>114.29</b>	<b>117.71</b>	<b>115.48</b>	<b>103.82</b>	<b>115.88</b>	<b>119.55</b>	<b>110.13</b>

Source: Tourist Survey - Central Bureau of Statistics - Aruba



Note:

A Visitor staying at a hotel stays an average of 6.5 days. A visitor staying at a Timeshare property stays an average of 8.5.



# Economic Values

## TOURISM EXPENDITURE IN ARUBA BY THE MAJOR MARKETS 1) ( In 000 US\$ )

Place of residen	Year 1999	Year 2000	Year 2001	Year 2002	Year 2003	Year 2004	Year 2005	Year 2006
U.S.A.	347,481.45	386,429.30	387,038.65	373,296.44	364,057.14	463,893.42	487,856.85	424,709.34
Venezuela	98,479.28	121,599.95	97,499.72	74,436.28	57,235.87	69,517.01	71,730.27	49,985.57
Netherlands	18,552.18	19,018.20	18,431.08	21,167.86	29,860.74	34,281.44	27,292.11	25,787.76
Brazil	4,845.47	5,712.39	3,957.51	3,273.71	2,551.90	7,221.06	4,845.58	5,729.63
Netherl. Antilles	10,847.20	10,793.64	12,097.44	10,841.34	10,957.67	15,147.65	13,402.76	10,783.27
Canada	10,911.73	10,400.31	12,665.57	7,967.98	9,734.99	16,689.31	18,041.83	13,676.26
Colombia	31,540.73	38,472.07	39,191.98	22,581.78	14,400.12	13,286.83	7,056.68	9,749.08
Other	43,239.39	37,537.18	43,612.41	31,353.04	44,228.56	40,337.66	39,475.83	36,106.92
<b>Total visitors</b>	<b>579,195.51</b>	<b>637,998.07</b>	<b>639,783.59</b>	<b>561,031.88</b>	<b>553,134.25</b>	<b>683,468.55</b>	<b>691,819.18</b>	<b>596,322.19</b>

Source: Tourist Survey - Central Bureau of Statistics - Aruba

1) The expenditures above mentioned are expenditures that took place while the visitors were IN ARUBA, excluding thus anything spent on pre-paid package. (see highlights for further explanation and comments. )

## ESTIMATED TOTAL TOURISM EXPENDITURE 1) ( In 000 US\$ )

	2000	2001	2002	2003	2004	2005	2006
Quarter 1	197,810.54	210,613.13	183,747.62	183,443.41	234,504.32	246,518.69	218,200.60
Quarter 2	182,730.00	183,904.65	156,480.25	131,786.76	182,441.32	192,500.67	184,070.38
Quarter 3	181,343.80	171,264.48	152,329.66	153,559.06	185,476.31	198,843.22	156,362.80
Quarter 4	175,145.64	173,471.01	161,513.30	178,696.91	209,986.75	182,092.73	158,850.51
<b>Total</b>	<b>737,029.98</b>	<b>739,253.27</b>	<b>654,070.83</b>	<b>647,486.14</b>	<b>812,408.69</b>	<b>819,955.31</b>	<b>717,484.30</b>

Source: Tourist Survey - Central Bureau of Statistics - Aruba



## Change in the Tendency

- ❑ People are using the Internet to do their own travel arrangements instead of package deals and a significant number are using Airlines Websites.
- ❑ More people are staying in Timeshare properties. Most of them are timeshare owners or (family) related to timeshare owners.



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CENTRAL BUREAU OF STATISTICS

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to Progress!!!”



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Thank You!!!

