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A study to analyze the economic and the social impact of the growth of international tourism on Aruba and its future role in the Aruban society

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A STUDY TO ANALYZE THE ECONOMIC AND THE
SOCIAL IMPACT OF THE GROWTH OF
INTERNATIONAL TOURISM ON ARUBA
AND ITS FUTURE ROLE IN THE
ARUBAN SOCIETY

by
Ruben F. Giel

A thesis presented to the
Faculty of Hospitality Management
Florida International University
for the Degree of
MASTER OF SCIENCE

June 1979

THE QUALIFICATION OF THE RESEARCHER

Ruben F. Giel was born in Aruba Netherlands Antilles in 1947, finished High School there.

In 1967 he received a scholarship from the Island Government of Aruba to go to Holland to study in the field of Hotel and Restaurant business at the St. Joseph Horeca Dag School The Hague. After four years, he received his diploma and returned to Aruba where he worked as a Food and Beverage Controller at the Holiday Inn Aruba for two years.

In 1975, he was employed by the Government of Aruba as a Food and Beverage Instructor, which position he still holds to date. During the years employed by the Aruban Government, he worked with I.L.O (International Labor Organization) experts to enhance his instructoral knowledge.

In March 1976, Ruben F. Giel was awarded a scholarship by the Aruban Government to further his studies in Hotel and Restaurant Management at Florida International University. He received a Bachelor of Science degree in Hotel and Restaurant Management from the Florida International University in December 1976. The scholarship was extended in March 1977 to enable him to do post graduate work with the objective of obtaining a Masters of Science degree.

ACKNOWLEDGEMENTS

The writer wishes to express his appreciation for the guidance given by Dr. Norman Ringstrom and Mr. Richard Huse in the preparation of this thesis. The writer also wishes to thank all the people who have assisted in making this thesis possible, through release of pertinent information.

A special gratitude is going to Dr. Gerald Lattin, Dean of the Hospitality Management at F.I.U. who made it possible for the author to embark upon his studies at Florida International University.

DEDICATED TO MY WIFE

ELAINE

TABLE OF CONTENTS

Chapter	Page
INTRODUCTION	1
I. A. Statement of Problem.	2
B. The Importance of the Study	4
C. The Delimitations.	8
D. Assumptions.	8
E. The Definition of Terms.	9
II. THE REVIEW OF THE RELATED LITERATURE	11
A. Historical Overview.	11
B. The Economic Impact.	13
C. The Social Impact.	16
D. The International Tourism Growth	18
E. Summary.	20
III. TOURISM HISTORY AND ORIGINS OF TOURISM IN ARUBA.	22
A. The Origins of Tourism in Aruba.	23
IV. THE ECONOMIC IMPACT.	30
A. The Importance of the International Tourism Growth	32
B. The Hotel Sector	62
C. Economic Constraints	88
V. THE SOCIAL IMPACT.	90
A. Implications of Impact	94

Table of Contents (continued)

Chapter	Page
VI THE FUTURE ROLE OF TOURISM.	99
VII SUMMARY AND CONCLUSIONS.	107
APPENDIX A. Map of Aruba.	111
APPENDIX B. Summer-Fall Hotel Rates April 16, 1978-December 15, 1978.	112
BIBLIOGRAPHY.	113
A. Books.	113
B. Research Reports and Unpublished Papers.	114

LIST OF TABLES

Table		Page
3.1	Guests by Country of Residence	24
3.2	U.S. Visitors by Region and State of Origin	26
4.1 - 4.20	Recapitulation Statistical Data on Non-Resident Visitors 1958 - 1977.	36-55
4.21	Working Labor Force 1974 and 1978	58
4.21A	Contribution of Tourism to the Aruban Economy 1973-1976	61
4.22	Development of Hotel Accomodation Number of Rooms per Type of Accomodation	64
4.23	Length of Stay by Type of Guest December 1, 1977 to May 31, 1978	68
4.24	Length of Stay by Month December 1, 1977 to May 31, 1978	69
4.25	Number of Adults by Type of Guest December 1, 1977 to May 31, 1978	71
4.26	Number of Adults by Month December 1, 1977 to May 31, 1978	72
4.27	Number of Children by Type of Guest December 1, 1977 to May 31, 1978	75
4.28	Number of Children by Month December 1, 1977 to May 31, 1978	76
4.29	Room Rate Paid by Type of Guest December 1, 1977 to May 31, 1978	79
4.30	Room Rate Paid by Month December 1, 1977 to May 31, 1978	80

List of Tables (continued)

Table		Page
4.31	Stay Plan by Type of Guest December 1, 1977 to May 31, 1978	84
4.32	Stay Plan by Month December 1, 1977 to May 31, 1978	85
5.1	Justice and Prisions Records 1967-1977	97
5.2	Registered Divorces on Aruba 1967-1977	98

APPENDICIES

Appendix		Page
A	Map of Aruba	111
B	Summer-Fall Hotel Rates. April 16, 1978 - December 15, 1978	112

INTRODUCTION

Aruba is a delightful island. Its bleached white beaches and its climate, as perfect as a climate can be, have for the last twenty years fascinated the foreign tourist.

Many foreign tourists who visited Aruba have decided they wanted to build a vacation or retirement home there. Many others who heard or read about Aruba also became interested in the possibility of acquiring an island hideaway.

Whether it is wanderlust, the white beaches, the perfect climate or merely the desire for fun and relaxation that brings the tourists to Aruba, he is never disappointed. Through the last year Aruba was involved in the mass movement of the foreign tourist; Aruba always has maintained its tranquility and hospitality for the foreign travelers.

CHAPTER I

A. Statement of the Problem

The purpose of this study is to analyze the economic and the social impact of the growth of International Tourism on Aruba and to determine its future role in the Aruban society.

International tourism has experienced phenomenal growth during the past twenty years in Aruba. Its growth has been especially rapid since the early sixties. This study is concerned with the economic and social development of International Tourism in Aruba during the last 20 years. It addresses itself primarily to the question of the contribution of the International Tourism sector to the social economy and its future role in the Aruban society.

The study will be limited to Aruba. The study will not attempt to predict the rates of foreign exchange and will not predict any political change that may occur in Aruba in the future.

Chapter II of the study is research of the related literature which includes; A Historical Overview; The Economic Impact; The Social Impact and the International Tourism growth.

Chapter III will reveal both the history and tourism history of Aruba. It also analyzes the origins of the International Tourism by country and a detailed analysis has been provided by state, since a major source of guest registrants come from the United States. In addition, a percentage to total will be given.

Chapter IV analyzes the economic impact of International Tourism on Aruba. Relevant data of the years 1959 through 1977 will be analyzed based on the contribution to the deviation of the economy. External influences, such as Foreign Aid, will be eliminated to preserve the basis of the analysis on the impact of International Tourism in Aruba. This section will also give the growth of International Tourism Industry; in what manner and at what time the economic impact of International Tourism started to contribute to Aruban economy. Tourist receipts and average spending per tourist will be determined.

Contribution of the International Tourism Industry to the Aruban G.N.P. will be analyzed.

Specific trends in the industry will be analyzed, such as:

- countries of origin of visitors
- seasonal pattern of arrival
- mode of arrival
- length of stay
- type of accommodation preferred

- spending per tourist
- supply of accommodation
- occupancy levels of local accommodations by type
- accommodation rates.

The trends will be summarized from tables and graphs gathered on the above topics to indicate the economic impact of the growth of International Tourism.

Chapter V analyses the social impact of the growth of the International Tourism Industry. Employment figures and levels will be stated. The responses by social leaders obtained through interviews will be analyzed to ascertain changes in the morals of the society.

Chapter VI will give the prospect of tourism in Aruba and Chapter VII will summarize and conclude the study.

B. The Importance of the Study

The official opening of Aruba's first multi-story resort hotel in 1959, heralded a period of rapid growth for tourism on Aruba. The nature of this growth has caused such an impact on the island's economy, and more importantly on the island's people, that it would be desirable to reflect for a moment on the history of Aruba and its people up to that memorable day in 1959.

Discovered by Alonso de Ojeda on one of his voyages to the West about the year 1499, Aruba, except for a place on the map, remained insignificant up to the latter part

of the 19th century. An attempt at gold mining and milling by the English at that time met with limited success and stirred the scant population into an era of industrialization and away from the basic efforts at agriculture and fishing. The taste of mechanical industry, a novelty at the time, lingered on long after the mines had closed and the wheels of the gold mills lay idle for lack of spare parts because of the devastation of World War I.

Accustomed as they were to a new type of industry and a paycheck, the male population left Aruba to seek gainful employment elsewhere, Venezuela's newly discovered oilfields, Colombia's stable agricultural society, Cuba's growing sugar industry, and Panama's joining of the oceans all beckoned with abundant employment opportunities and regular paychecks.

The only significant agricultural activity on Aruba, the aloe culture, suffered by the exodus of the able-bodied population and was never able to recover its prominent position.

Activity on Aruba practically remained at a standstill until 1925, when the leeward coastline with its possibilities for deep-sea harbors, attracted the attention of American investors looking for a place to transfer the abundant black gold that was flowing from Lake Maracaibo oilfields from lake tankers to ocean-going tankers. The petroleum harbor which was eventually built and the influx of thousands of workers from all parts of the world, shot

Aruba and its people into the era of the oil industry, leaving an indelible mark on the culture of the people, and needless to say, on the economy of Aruba. In less than ten years, Aruba's population soared from 12,000 to 35,000. In the meantime, the transfer harbor had been expanded and the oil refinery was built where previously wild goats roamed in search of grazing grounds. Even today, remnants of that boom era, in the form of hastily-built shanty houses, can be seen close to the 10-foot high fence which surrounds the refinery. World War II precipitated a second boom which lasted until 1951, when automation finally caught up with the oil industry and the refinery started a reconstruction phase that would reduce the labor force by thousands and would fill the ranks of the unemployed. Also, in 1951, a significant event changed the manner in which Aruba was governed and the Colonial period came to an end as Aruba was set adrift to seek its own fortunes with self-government.

Luckily for Aruba, the jet age was making its entrance in the world of travel and the prospect of shorter flying times and more direct routes formed the basis for a few men of foresight to analyze the possibility of launching Aruba into the tourist trade. What these men saw, and what they did, made Aruba the hottest discovery in the Caribbean, a reputation that it still enjoys to this date.

As early as 1947, attempts were made to interest

Dutch capital to invest in the tourist trade. However, the adamant attitude of the then colonial government precluded the addition of casino's to hotels, and not even the beautiful beaches and the year round balmy weather were considered to be sufficient to attract visitors from Latin and North America. In 1956, attitudes had changed, the government had changed, and out of a desperation to alleviate the unemployment situation, construction was started on the first resort hotel with local and Venezuelan capital.

The entrepreneurs must have been aware of the economic impact that the tourist trade would have on Aruba. However, except for a mild warning from the Roman Catholic Church, which is the predominant religion on the island, no study was made of the possible effects of this trade on the people.

As a matter of fact, even the economic impact, which certainly helped the unemployment situation, has never been researched thoroughly.

The continued economic and social development of Aruba is expected to benefit from this research as there have been no similar studies.

It is true that the economic and social environments of certain islands in the Caribbean have been devastated by the unplanned and on-the-spur development of the International Tourism Industry. However, this study attempts to form a basis for future government policies to encourage

International Tourism to Aruba and to secure a planned economic growth. This will help to guarantee the people of Aruba a standard of living that they have become accustomed to.

The study will indicate problems that the future growth in International Tourism may bring to Aruba as this extremely vulnerable industry has at present no effective plan in which the Aruban government, commerce and the people of Aruba in general have a strong participation.

In general, the study will propose positive ways that the International Tourism Industry can benefit Aruba in both its economic and social environments and to which purpose this study is dedicated.

C. The Delimitations

The study will be limited to Aruba.

The study will not attempt to predict in the rates of foreign exchange.

The study will not attempt to predict any political change that may occur in Aruba in the future.

D. Assumptions

The first assumption. The first assumption is that

International tourists will continue to come to Aruba in the future.

The second assumption. The second assumption is that International Tourism can provide employment for the growing labor force of Aruba.

The third assumption. The third assumption is that there is data available on both economic and social aspects to do this study.

E. The Definition of Terms

Aruba. An island in the Caribbean Sea which lies 15 miles off the Venezuelan coast.

Economic Impact. A deviation in the structure of International balance of payments and trade flow among other factors in the economy, the result of which has a changing effect on the economy of the island.

Social Impact. A deviation in the structure, function, and relationship of social systems caused by external influences exerted on the system.

International Tourism. In 1937, the committee of Statistical Experts of the League of Nations recommended the first definition of the term "foreign tourist" which gained some international acceptance and which remains in essence to this day: "Any person visiting a country, other than that in which he/she usually resides, for a period of at least twenty-four hours."

Aruban Economy. The main sources of income of Aruba are: The oil industry, tourism and commerce. Banking and trade expanded in connection with both the oil industry and the International Tourism Industry.

CHAPTER II

THE REVIEW OF THE RELATED LITERATURE

A. Historical Overview

The tourist industry of Aruba is very young. In order to understand the development of its tourism it is essential to go back to its early history, beginning approximately in the year 1500:

. . . Aruba. . . was discovered about 1500 by Alonso de Ojeda when it was still in a stone age. From excavations it is known that Aruba was inhabited before that date. In order to form a picture of how conditions were on Aruba before 1500 recourse must be had to the results of excavations here and elsewhere. It is the period of Aruba's prehistory. Considering its poverty in natural resources the island is likely to have been no more than a halting place for a succession of Indians, tribes and clans. This must have been so both before the discovery and after; the Indians came and went.¹

In the course of the centuries preceding its discovery people are thought to have lived everywhere on the island.

Based upon objects, fragments of pots and remainder of shells that were found, the history of Aruba can be divided into three periods:

¹Johan Hartog, Aruba, Past and Present (Oranjestad, Aruba: J.D. deWitt, 1961), p. 1.

- "1. the time before the discovery, a period about which little information exists;
- "2. the Spanish period, from about 1500-1636;
- "3. the Dutch period, which commences with the arrival of the Dutch in 1636 and ends with the death of the last Indian in or about 1862."²

Paleolithic evidence is that given the right environment man prefers to remain one place and not wander over the face of the earth. During a million years only changes of climate, dwindling food supplies or hostile invaders could drive human beings from their safe retreat.³

In 1937, the Committee of Statistical Experts of the League of Nations recommended the first definition of the term 'foreign tourist', which gained some international acceptance and which remains in essence to this day:

- . . . Any person visiting a country, other than that in which he usually resides, for a period of at least twenty four hours.
- . . . The following were to be considered tourists within this definition:
 - a. persons traveling for pleasure, for domestic reasons for health etc.
 - b. persons traveling to meetings, or in a representative capacity of any kind (scientific, administrative, diplomatic, religious, athletic, etc.).
 - c. persons traveling for business reasons.
 - d. persons arriving in the course of a sea cruise, even when they stay less than 24 hours. (The latter should be reckoned as a separate group, disregarding if necessary their usual place of residence.)⁴

²Ibid., pp. 5-6.

³R.W. McIntosh, Tourism, Principles, Practices, Philosophies (Columbus, Ohio: Grid, Inc., 1972), p. 13.

⁴A.J. Buckart, S. Medlik, Tourist Past, Present and Future (London: Heinemann, 1974), p. 91.

Until 1959, few visitor records were kept except for those happenings that were considered as occurring for the first time in the history of Aruba.

. . . During the Spanish period (1500 - 1676), the island had been regarded as an 'isla inutil' (useless island) and as a consequence been neglected. English and Dutch ships were sighted near but they actually did not set foot ashore. Even the Spanish rulers of these islands did not visit Aruba.

.
It was Peter Stuyvesant, according to the Dutch records kept, who was the first visitor of Aruba in December 1742. Actually, he visited the island and took horses aboard so as to have some cavalry with which to act on his raids on the mainland of Venezuela.

.
The oil industry brought the first cluster of visits to the island between 1924 and 1928 where there are about 200 recorded schooners, yachts, motor-vessels, tankers, and other vessels arrivals bringing American business-men and visitors for the installation of the oil refinery.⁵

The first tourist ship to call at the harbour was on the 3rd of February 1955, (Tradewind) which opened the new era in the history of the island.

. . . Tourism dates from the beginning of 1955 after the visit of the 'Tradewind'. The 'Grace Line', whose freighters only used to call at our island before June 1956, ever since have had their luxury liners head for Aruba. During the cruising-season the biggest tourist vessels now moor in our harbour.⁶

B. The Economic Impact

Krause, Jud and Joseph cited in their study that:

. . . International tourism has been growing in volume during recent decades, both for developed

⁵Hartog, Aruba, Past and Present, p. 435.

⁶Ibid.,

regions and for 'developing' regions. In developing regions, in fact, international tourist business has been growing faster than other industry. An 11 percent annual increase, overall, in tourist receipts over the past two decades, in comparison with, for example, a receipts increase in commodity exportation averaging only 4 percent annually. The number of visitors to developing countries (considered here as areas other than Europe and North America) increased from 2.2 million in 1950 to 11.2 million in 1967, with associated receipts rising from \$0.5 billion to \$3 billion. Concurrently, total exports of all developing countries increased from \$19.1 billion to \$40 billion.⁷

The construction of the Aruba Caribbean Hotel was begun by the island administration as soon as they finally resolved to attract tourists so as to make our island benefit by the yearly increasing wave of vacationers in the Caribbean area. In this manner, it was hoped, a considerable source of income would be opened up. Again quoting from Frause, Jud and Joseph:

. . . In an examination of the general role of International Tourism in a program of economic development, tourist business can be considered a fact of the foreign sector. So regarded, international tourist business offers two distinct advantages that, for locales such as Latin America and the Caribbean, set it apart from traditional regional exports. First, tourism provides a potentially expanding outlet for labor, a relatively abundant local resource. Second, tourist business provides a potentially increasing source of foreign exchange, a relatively scarce resource much needed for continued development.⁸

⁷Walter Krause and G. Donald Jud with Hyman Joseph. International Tourism and Latin American Development (Austin: Bureau of Business Research, University of Texas, 1973), pp. 3-4.

⁸Ibid., p. 10.

The following table illustrates the relative growth of tourism in Aruba from 1959 to 1977.⁹

Year	Visitors By Air	Percent Change	Cruise Tourists	Percent Change
1959	7,209	-	15,077	-
1965	25,524	254.0	14,815	(1.7)
1970	75,042	940.0	44,619	195.9
1975	128,852	16,873.0	57,830	283.6
1976	148,487	19,320.0	67,735	349.3
1977	151,169	19,969.0	88,686	488.2

From the above table it can be seen that the number of visitors increased almost 20 times in 19 years of successful tourist business. The significant increase was due to the fact that the island administration was actively engaged in the promotion of tourism, not only abroad but also locally, and the American operated hotels who did their own promotions from which no advertising dollar was obtained.

According to Hartog:

. . . By now tourism employment has taken the first place in number and importance after the oil company had introduced computers in its operation. So tourism had grown to such an extent that hotel industry had become one of the major economic pillars of Aruba.¹⁰

Local activity patterns may change as a result of tourism and travel activities more than they do as a result of, say, equivalent exports in manufacturing. Changes in behavior, including both production and consumption of goods and services, occur as a result of exposure to tourists and

⁹Source: Aruba Tourist Bureau, Unpublished Data, 1977.

¹⁰Hartog, Aruba, Past and Present, p. 251.

travelers. Changes occur also because of new and different employment opportunities, both because of increased exposure and because of the kind of employment itself.¹¹

Even with deflated statistics an emphatic statement of the contemporary importance of tourism and travel in Latin America could be made by Victor Urquidi:

. . .At present, tourism yields a net balance of nearly \$550 million, which is not large in relation to total export trade, but considered as an individual earner, is in fourth place after petroleum, coffee, sugar. Most of this income goes to Mexico (along its border) and a lesser amount goes to Haiti, Panama, and Uruguay. Argentina, Brazil, and Venezuela have negative travel balances. Tourism, at least in Mexico and the Caribbean, is expanding faster than any export product, and in ten years will probably be a major element in the general picture of Latin America' external demand. It will be determined primarily by the rate and level of disposable income in the United States, although in time it should benefit significantly from tourism of other countries.¹²

C. The Social Impact

One of the neglected considerations in International Tourism is the assessment of the sociological impact of tourism.

Gearing, Swart and Var said in their book:

. . .In general, travel experiences can have a profound effect upon the life of an individual traveler as well as upon a society. While the visitor is influenced by the contrast in culture

¹¹William W. Goldsmith, The Impact of the Tourism and Travel Industry on a Developing Regional Economy: The Puerto Rican Case, (Cornell University, Ph.D., 1968), p. 13.

¹²Victor L. Urquidi, The Challenge of Development in Latin America, trans. Marjory M. Urquidi (New York: Praeger, 1964), p. 26.

observed in foreign countries or different section of his own country, the presence of visitors in a country also affects the living patterns of the host people.¹³

Erik Cohen emphasizes the potential dislocations that the impact of tourism can cause.¹⁴ He particularly draws attention to the fact that the developing economies, which most eagerly seek the economic advantages of tourism, are also the most vulnerable to the disruptions that likely will follow the rapid expansion of a tourist industry. He predicts that mass tourism in developing countries, if not controlled and regulated, will tend to destroy whatever is still left of unspoiled nature and of traditional ways of life.¹⁵

According to Bryden, there are at least five potential benefits from tourism for any developing country, these are:

- "1. A contribution to the balance-of-payments as an earner of hard currency;
- "2. The dispersion of development to non-industrial regions;
- "3. The creation of employment opportunities;
- "4. The effect on general economic development through the multiplier effects.
- "5. The social benefits arising from a 'widening of people's interest generally in world affairs and to a new understanding of foreigners and foreign tastes.'"¹⁶

¹³Charles E. Gearing, William W. Swart, Turgut Var, Planning for Tourism Development Quantitative Approaches (New York: Praeger Publishers, 1967), p. 30.

¹⁴Erik Cohen, Toward a Sociology of International Tourism, Social Research (Spring 1972), p. 164.

¹⁵Ibid.

¹⁶John M. Bryden, Tourism and Development (Syndicates

Dr. R.J. Sethna stated in his Caribbean tourism re-
search report:

. . .It has been reported that in 1973 approximately 215 million people were involved in tourism. One cannot ignore the impact of this mass movement of people, and the accruing of human interaction. Today, many developed and developing countries are facing ecological, economic, spiritual and social problems. There are many plans and programs being implemented by these countries in an attempt to reduce some of these problems. Many are looking for the tourist dollar to solve some of their difficulties however, the development of tourism is causing social changes in the life style of the people.¹⁷

Goldsmith illustrates in his study that the tourism-travel industry emerges most clearly when viewed from two aspects: the structure of the population groups involved, and the structure of sectors of the industry.¹⁸

D. The International Tourism Growth

The past twenty-five years have witnessed a remarkable world-wide expansion in tourism. The tourism phenomenon, as Wahab calls it, and the consequent recognition of its potential to promote the economic growth of countries, have essentially been developments of the post-World War II era. The basic underlying cause of this has been the remarkable

of Cambridge University, Bently House, 1973), p. 71.

¹⁷Dr. R.J. Sethna, The Social Impact of Tourism (Caribbean Tourism Research Centre, 1971), p. 1.

¹⁸Goldsmith, The Impact of Tourism and Travel Industry on a Developing Regional Economy: The Puerto Rican Case, p. 61.

¹⁹Salah Wahab, Tourism Management (Tourin, Italy: Tourism International Press, 1975), p. 16.

and sustained economic expansion experienced by the more advanced countries.¹⁹

Krause, Jud and Joseph indicated in their study:

. . .The potential of the international tourism as a factor in Latin America's economic development, specifically, Mexico and the Caribbean is just beginning to obtain tourist business in substantial volume.²⁰

Given the current status of information on Latin America and the Caribbean tourist business, detailed forecasts of tourism demand are not possible though, within the broad range of available estimates of tourism potential, governments nonetheless can proceed with national plan for tourism business.²¹

A plan so undertaken generally begins by defining the role of the private sector in the tourism program, then sets forth the objective(s) and extent of government participation in the industry.

By establishing and supporting a foreign-travel industry, governments necessarily assume a commitment to provide for the safety and fair treatment of foreign visitors. A minimal requirement for successful involvement is substantive political stability, with civil order and effective law enforcement. Again, quoting from Krause, Donald Jud and Joseph:

¹⁹Salah Wahab, Tourism Management (Tourin, Italy: Tourism International Press, 1975), p. 16.

²⁰Krause, Jud and Hyman, International Tourism and Latin American Development, p. 8

²¹Ibid., p. 19.

. . . Additionally, the longer-range interests of the industry require that foreign tourists be protected against patently unfair business practices and that a plausible system for handling visitor complaints be on hand. In such matters government regulation can lend itself as a positive force to help insure the long-run growth and stability of tourism industry.²²

Jones quoted in his study:

. . . The role of government is seen as the most important single force in the contemporary approach to economic growth and development. Assuming that developmental resources are very scarce, only government is powerful and pervasive enough to force the institutional changes necessary to guide development, so that the maximum benefit to society is achieved.²³

World Travel cited:

. . . Since the industry is so important, with its octopus-like tentacles reaching deep into many sectors of life of a people and its government, the state therefore has to exercise its responsibilities to the full, determining the right tourist areas of development within the overall national policy and objectives, phase this development also in such a way as to ensure that it does not encroach upon all the other vital priorities of national development, upon other necessities--agricultural, industrial, social, etc.²⁴

E. Summary

World Travel, in its chapter "Constraints In the Tourist Industry" came to the following conclusion:

. . . Tourism, we should know by now, is a vulnerable industry, as other industries for that matter, to a great or lesser degree. Ill planned or ill

²²Ibid., p. 21.

²³Fremon Jones, Tourism as a Tool for Economic Reference to the Countries of Jamaica, Trinidad and Guyana (Gainesville: University of Florida, 1970), p. 28.

²⁴World Travel No. 140 Jan.-Feb. 1978, p. 26.

conceived, it can bring a rash of problems in its wake, environmental, political, social or economic. Those countries which have relied too heavily on the tourist dollar crop have come to harm or have had to rue their over-hastiness and lack of planning. Many examples come to mind of those countries that may be suffering from too rapid or excessive tourist development, making it difficult for them to tide over the present depression. Their economies--tourist or otherwise--could be suffering from overheating and we should not fall into the same trap.²⁵

²⁵Ibid., p. 27.

CHAPTER III

TOURISM HISTORY AND ORIGINS OF TOURISM IN ARUBA

When discussing the previous tourism history of Aruba it is important to look back at its early history. Until 1956, almost no tabulations were kept except for the few happenings that were considered as Happening for the first time in the history of Aruba.

During the Spanish period (1500 - 1676) the island had been regarded as an "isla inutil" (useless island and as a consequence been neglected. English and Dutch ships were sighted near but they actually did not set foot ashore. Even the Spanish rulers of these islands did not visit Aruba.

It was Peter Stuyvesant, according to the Dutch records kept, who was the first visitor of Aruba in December 1742. Actually, he visited the island and took horses aboard so as to have some cavalry with which to act on his raids on the mainland of Venezuela.

The oil industry brought the first cluster of visits to the island between 1924 and 1928 where there are about 200 recorded schooner, yachts, motor vessels, tankers, and other vessels arrivals bringing American businessmen and visitors for the installation of the oil refinery.

The first tourist ship to call at the harbour was on the 3rd of February 1955, (Tradewind) which opened the new era in the history of the island.

A. The Origins of Tourism in Aruba

In this section guest origins have been analyzed first by country. Secondly, since a major source of guest registrants was the United States, a detailed analysis has been provided by State.

The distribution of total guest registrants by country of residence during the period of December 1, 1977, to May 31, 1978, is given in Table 3.1 on the following page.

TABLE 3.1
 GUESTS BY COUNTRY OF RESIDENCE
 DECEMBER 1, 1977 to May 31, 1978¹

Country	Number of Registrants	Percent to Total
United States	14,489	65.9%
Canada	955	4.3%
Venezuela	3,671	16.7%
Columbia	609	2.8%
Other South America*	207	1.0%
Puerto Rico	151	.7%
Other Caribbean**	835	3.8%
Central America	94	.4%
Netherlands	338	1.5%
Germany	59	.3%
Other Europe***	423	1.9%
All other Countries	<u>155</u>	<u>.7%</u>
Total	21,986	100.0%
No Response	370	

- * All South American nations other than Venezuela and Colombia.
- ** All Caribbean nations other than Aruba and Puerto Rico.
- *** All European nations other than Netherlands and Germany

¹Source Aruba Tourist Bureau, Marketing Services to the Travel/Hospitality/Leisure Industries (Robinsons, Inc. January 1979), p. 12

As indicated in Table 3.1, 65.9% of all guests originated from the United States while an additional 4.3% came from Canada. Thus, over 70.2% of all guests staying in Aruba between December and May originated from these two countries.

Venezuela, the second largest country of guest origin for Aruba, provided 16.7% of the total registrants while Colombia furnished another 2.8%. Other South American countries accounted for approximately 1.0% of total visitors, bringing the total from South America up to 20.5%.

In terms of the Caribbean, Puerto Rico accounted for only .7% of guest and another 3.8% of all visitors came from various other islands throughout the region. Central America contributed only .4% of the guests during the period.

Europe, as a whole, also proved to be a relatively minor source of business. Only 3.7% of the guests came from Europe between December and May. As might be expected, however, over 41% of those Europeans lived in the Netherlands. German residents accounted for just over 7% of European visitors while the balance of Europeans came from various countries on that continent. Only .7% of the guests originated from various other countries.

Since the United States represented such a large percentage of total visitations to the island, this country of origin will be examined next in Table 3.2.

TABLE 3.2

U.S. VISITORS BY REGION AND STATE OF ORIGIN

DECEMBER 1, 1977 to MAY 31, 1978²

Region and State	Number of Visitors	Percent to Total
1) New England:		
Massachusetts	563	4.3%
Rhode Island	104	.8%
New Hampshire	27	.2%
Maine	19	.1%
Vermont	22	.2%
Connecticut	490	3.7%
Total New England	<u>1225</u>	<u>9.3%</u>
2) Mideast:		
New Jersey	1510	11.4%
New York	4222	32.0%
Pennsylvania	885	6.7%
Delaware	29	.2%
District of Columbia	57	.4%
Maryland	309	2.3%
Total Mideast	<u>7012</u>	<u>53.1%*</u>
3) Great Lakes:		
Ohio	598	4.5%
Indiana	205	1.6%
Michigan	811	6.1%
Wisconsin	291	2.2%
Illinois	1014	7.7%
Total Great Lakes	<u>2919</u>	<u>22.1%</u>
4) Plains:		
Iowa	49	.4%
Minnesota	31	.2%
North Dakota	5	-
South Dakota	-	-
Missouri	74	.6%
Kansas	55	.4%
Nebraska	23	.2%
Total Plains	<u>237</u>	<u>1.8%</u>
5) Southeast:		
Virginia	129	1.0%
West Virginia	34	.3%
North Carolina	31	.2%

*Totals and subtotals may not add because of rounding.

²Source: Tourist Bureau Aruba. Marketing Services to the Travel/Hospitality/Leisure Industries (Robinsons, Inc., January 1979).

TABLE 3.2 (continued)

Region and State	Number of Visitors	Percent to Total
5) Southeast: (continued)		
South Carolina	18	.1%
Georgia	108	.9%
Florida	624	4.7%
Alabama	56	.4%
Tennessee	119	.9%
Mississippi	17	.1%
Kentucky	54	.4%
Louisiana	58	.4%
Arkansas	66	.5%
Total Southeast	<u>1314</u>	<u>10.0%</u>
6) Southwest:		
Oklahoma	80	.6%
Texas	205	1.6%
Arizona	10	-
New Mexico	4	-
Total Southwest	<u>299</u>	<u>2.3%</u>
7) Rocky Mountain:		
Colorado	15	.1%
Idaho	3	-
Utah	6	-
Montana	2	-
Total Rocky Mountain	<u>26</u>	<u>.2%</u>
8) Far West:		
Nevada	21	.2%
California	128	1.0%
Hawaii	2	-
Oregon	7	-
Washington	8	-
Alaska	7	-
Total Far West	<u>173</u>	<u>1.3%</u>
Total USA	<u>13205</u>	<u>100.0%</u>
Other U.S. Territories	141	
No Response*	1143	

*Insufficient information provided to determine city, state, or zip code.

Table 3.2 shows that of the eight regions, the Mideast provided 53.1% of total U.S. visitors during the period. Within the Mideast region the largest contributing state was New York, with 32.0% of U.S. visitors, while New Jersey was the next major source and furnished 11.4% of total guests. Pennsylvania was a major contributor of visitors also, supplying 6.7% total guests.

Maryland contributed an additional 2.3% of the visitors while Delaware contributed less than two tenths of one percent. The District of Columbia, as defined by postal and political boundaries, also contributed only a small portion of visitors. However, when defined in terms of the Washington ADI (Area of Dominant Influence) the number of visitors increases slightly.

The second largest region providing U.S. visitors to Aruba was the Great Lakes region. Some 22.1% of U.S. registrants originated from the various Great Lake states. Illinois furnished the highest percentage with 7.7%, while Michigan was next highest with 6.1%. Ohio accounted for 4.5% of U.S. registrants, Wisconsin less than half of that number at 2.2%, and Indiana was lower yet at 1.6%.

The Southeast region was the next largest contributor of U.S. visitors. This region is large geographically. Encompassing 12 of the 50 states, and is the fastest growing regions in the country. In total, the Southeast produced 10.0% of the U.S. visitors, nearly half of these visitors originated from Florida. Each of the remaining states

accounted for only one percent or fewer of total visitors.

The New England region produced 9.3% of the visitors. However, 8.0% of these visitors were from Massachusetts and Connecticut. The remaining four states in this region produced only 1.3% of the total.

In total, these four regions, representing the eastern half of the United States, produced 94.5% of total U.S. visitors.

Of the remaining four regions in the western half of the United States, 2.3% of the visitors come from the Southwest, 1.8% from the Plains states, 1.2% from the Farwest and less than .2% from the Rocky Mountain states.

CHAPTER IV
THE ECONOMIC IMPACT

The establishment of the oil industry in Aruba in 1924 transformed the economics of the island. Increased job opportunities and higher wages brought a reasonable degree of prosperity to Aruba. In the early 1950s, the total number of workers in the refinery was over 8,000. However, this number decreased steadily ever since, partly as a result of new refineries built in Venezuela, partly as a result of automation, and it is now approximately 1200.¹

Aruba's economy from 1924 to the late 1950s was only dependable on the oil refinery. Agriculture and cattle raising were of little economic importance and together with fisheries provided employment for less than two percent of the labor force. Rainfall is insufficient. Furthermore, the soil is eroded as a result of deforestation and roving herds of goats. Fishing might be developed, but at the present time fish, like nearly all other goods for domestic consumption, is imported. In fact, the only

¹UNESCO, Netherlands Antilles, Education Issues and Priorities for Development (Advisory Services to member States in Educational Policy and Planning, Paris: June 1976), p.2.

natural economic assets of the island are its good harbor, its location on the important trade routes, a good climate and sandy beaches.

The most striking development during the past ten years has been in the International Tourist Industry. The tropical climate, sandy beaches, good air connections, and government incentives, such as, tax remittance and freedom to open casinos, combined to attract large numbers of tourists.

In the following tables (Table 4.1 - 4.20, p.) of statistics, we can follow the growth of the industry from 1958 to 1977.² In 1956, it has not been possible to secure earlier figures - 3,002 foreigners visited Aruba, regretfully, with no distinction between arrivals by air or cruise tourists. These visitors stayed at three different boarding houses totaling 30 rooms. The Strand Hotel opened in 1956 with 26 rooms and the Basi Ruti Hotel with 15 rooms in 1957.

From the tables we can see that the number of visitors increased almost 20 times in 19 years of successful tourism application. The significant increase was due to the fact that the island administration was actively engaged in the promotion of tourism, not only abroad, but also locally, and the American operated hotels who did their own promotions from which no advertising dollar was obtained.

²Source: Aruba Tourist Bureau.

Relating the significant number of visitors to the total number of accommodations on the island, we can arrive at an overall occupancy rate for the island:

Year	No. of visitors	Avg. Nights	Room nights Available	% Occupancy ³
1959	7,209	N/A	41,760	N/A
1965	25,524	N/A	85,060	N/A
1970	75,042	6.5	332,640	63.8
1975	128,852	7.7	528,960	73.9
1976	146,487	7.0	545,760	82.4
1977	151,169	7.3	611,550	73.8

In the off-season, April 16 - December 15, the average hotel occupancy on the island ranges from 55% to 60%, while during the high season, December 16 - April 15, the average occupancy rate is 85% to 100%; usually 100%, which makes it very difficult and frustrating to find accommodations.

A. The Importance of the International Tourism Growth

It is safe to assume that the inhabitants of Aruba are aware of the tourist trade. However, the importance of this industry to Aruba, simply is not appreciated.

Presently one can easily determine that tourism is one of the most vital pillars of the economy of Aruba. If this Industry for any reason should deteriorate, approximately

³Ibid.

50% of Aruban families will not have a source of income and approximately 50% of the workforce will be unemployed. In the luxury and first class hotels alone, we find that, in 1976, about 2,200 workers found a livelihood, which surpasses the employment figures of the oil industry. Research throughout the entire world has established, that for every job in a hotel, 2.5 - 4 jobs are created in related fields of tourism. This means, that for Aruba in 1976 about 7,700 workers held job in the tourist industry. This is about 42% of the total work force. If we assume that in the average family, the husband, the wife, and one or more children are gainfully employed, then it follows, that about 50% of the families in Aruba depend to some degree on the tourist industry.⁴

The above statistics can be computed in a different way:

Labor force		22,800	
Unemployed		<u>4,400</u>	
Number of Employees			18,400
Government employees/ including teachers	5,000		
oil industry	1,800		
construction	2,000		
hotels	2,200		
business & trades	<u>1,900</u>	12,900	

Miscellaneous tourist trade 5,500

The total for the tourist trade: 2,200 and 5,500, for a total of 7,700.

⁴Kuiperi M.S. and Estrada R.V., The Reorganization of the Aruban Tourist Bureau, (A study prepared by the Commission appointed by the island ordinance, March 17, 1976), p. 10.

The number of families in Aruba is about 14,000 from which one can conclude that about 50% of the families are dependent on the tourist industry.

TABLES 4.1-4.20

ARUBA

RECAPITULATION STATISTICAL DATA ON NON-RESIDENT VISITORS

Months: January/December
Year: 1958

Visitors from:	Total visitors	Nights Spent:				Total nights spent	Av. nights spent
		A	B	C	P		
U. S. A.	1769	457	2152	64	11161	13834	7.82
VENEZUELA	1068	455	875	405	5599	7234	6.87
COLOMBIA	480	1	70	2206	10179	12456	25.95
UNITED KINGDOM	92	67	179	276	425	947	10.29
BR. COMMONWEALTH	453	9	171	232	14796	15298	32.91
REST OF AMERICAS	686	71	325	1057	11154	12677	18.46
OTHER COUNTRIES	718.	140	833	347	2279	9694	13.58
TOTAL	5266	1200	4670	4537	61633	72060	13.63

RECAPITULATION STATISTICAL DATA ON NON-RESIDENT VISITORS

Table 4.2

Month:

Year: 1959

Visitors from:	Total Visitors:	Nights Spent:										Av. night spent	Sex:		
		L		A		B		C		P			Total nights spent	M:	F:
		Visitors	Nights spent	Visitors	Nights spent	Visitors	Nights spent	Visitors	Nights spent	Visitors	Nights spent				
U. S. A. & P. R.	2,582	4,334	1,574	2,812	436	12,935	8,48	1,753	829			8,48	1,753	829	
VENEZUELA	1,904	2,794	653	542	929	6,492	7,04	980	224			7,04	980	224	
COLOMBIA	617	261	21	195	1,808	9,297	18,77	334	283			18,77	334	283	
UNITED KINGDOM	152	161	132	527	134	644	10,51	122	30			10,51	122	30	
BR. COMMONWEALTH	405	101	116	162	742	16,211	40,53	196	109			40,53	196	109	
OTHER C.T.A. Member countries	408	373	278	576	252	7,343	21,63	222	183			21,63	222	183	
REST OF AMERICA	359	366	140	314	559	3,795	14,41	244	115			14,41	244	115	
OTHER COUNTRIES	782	447	544	884	576	5,322	9,94	572	210			9,94	572	210	
TOTAL	7,209	8,837	3,458	5,812	7,436	63,041	12,01	4,423	2,786			12,01	4,423	2,786	

L = Luxe Hotel
 A = Resort Hotel
 B = Commercial Hotel
 C = Guesthouses
 P = Private

Table 4.3

RECAPITULATION STATISTICAL DATA ON NON-RESIDENT VISITORS

By sea: 353

By air: 12772

Month: January-December

Year: 1960

VISITORS FROM	N I G H T S S P E N T											TOTAL NIGHTS SPENT	Average nights spent	S E X	
	L		A		B		C		P		Males:			Female	
	Visitors	Nights spent	Visitors	Nights spent	Visitors	Nights spent	Visitors	Nights spent	Visitors	Nights spent					
U. S. A.	2,533	74,667	174	1,097	323	1,942	27	325	1,064	13,519	31,580	7.7	N.A.	N.A.	
VENEZUELA	2,758	9,304	231	1,605	491	1,346	493	1,780	1,388	12,800	26,835	5	N.A.	N.A.	
COLOMBIA	153	990	3	30	34	162	195	1,543	307	9,726	11,851	17.3	N.A.	N.A.	
UNITED KINGDOM	23	88	-	-	37	161	1	1	2	22	272	4.25	N.A.	N.A.	
BR. COMMONWEALTH	218	766	24	150	83	432	31	275	253	4,109	5,732	9.4	N.A.	N.A.	
OTHER C. I. A. MEMBER COUNTRIES	862	3,654	34	162	162	606	100	813	463	6,826	12,067	7.4	N.A.	N.A.	
REST OF AMERICAS	78	318	6	76	60	605	28	348	111	1,944	3,371	11.8	N.A.	N.A.	
OTHER COUNTRIES	206	406	9	40	19	262	3	6	748	2,797	2,905	6.9	N.A.	N.A.	
T O T A L	6,831	30,273	421	3,160	1,239	5,576	678	5,091	3,730	50,567	94,607	7.2	N.A.	N.A.	

L= Deluxe hotels
A= First class hotels
B= Second class hotels
C= Third class hotels
P= Private

Table 4.4

RECALCULATION STATISTICAL DATA ON NON-RESIDENT VISITORS

By sea: 319
By air: 12,072

Month: JANUARY - DECEMBER

Year: 1961

Visitors from:	Total Visitors:	Nights Spent:												Total nights spent	Av. night spent	Did not spend the night here:	Sex:			
		L			A			B			C						P		M:	F:
		Visi- tors	nights spent	Visi- tors	nights spent	Visi- tors	nights spent	Visi- tors	nights spent	Visi- tors	nights spent	Visi- tors	nights spent				Visi- tors	nights spent		
U. S. A.	4,865	3480	20787	210	1578	187	958	35	114	953	15305	38742	7.96	--	2,628	2,177				
VENEZUELA	3,145	1529	4910	147	845	269	696	321	895	879	8900	16236	5.16	--	1,902	1,233				
COLOMBIA	690	197	854	17	118	23	126	102	1643	271	9302	12133	17.58	--	372	315				
UNITED KINGDOM	1	1	2	--	--	--	--	--	--	--	--	2	2	--	1	--				
BR. COMMONWEALTH	1,157	728	2523	20	408	159	676	35	767	215	3761	8135	7.03	--	772	335				
OTHER C.I.B. Member countries	2,096	1418	6065	62	403	156	561	88	202	372	6418	11349	6.51	--	1,161	935				
EAST OF AMERICAS	215	81	261	10	29	22	113	9	101	93	2468	2972	13.82	--	124	91				
OTHER COUNTRIES	222	98	306	6	15	35	221	1	1	82	1204	1747	7.87	--	154	68				
TOTAL	12,391	7532	35708	472	3396	851	3351	671	3713	2865	47448	93616	7.56	--	7,161	5,210				

L = Luxe hotel.

A = First class hotel.

B = Second class hotel.

C = Third class hotel.

P = Private.

By sea: 221
By air: 11024

RECAPITULATION STATISTICAL DATA ON NON-RESIDENT VISITORS

Table 4.5

Month: JANUARY - DECEMBER

Year: 1962

Visitors from:	Total visitors:	Nights Spent:										Total nights spent	Av. night spent	Did not spend the night here:	Sex:	
		L		A		B		C		P					M:	F:
		Visitors	Nights spent	Visitors	Nights Spent	Visitors	Nights Spent	Visitors	Nights Spent	Visitors	Nights Spent					
U. S. A.	3,622	2615	16858	147	953	92	414	30	135	738	12767	31157	--	8.6	2,023	1,599
VENEZUELA	3,099	1605	5808	186	992	133	303	377	1573	798	9002	17678	--	5.7	1,833	1,266
COLOMBIA	758	141	468	18	107	19	55	278	1859	302	1069	13148	--	17.35	323	435
BRITISH KINGDOM	1	1	2	--	--	--	--	--	--	--	--	2	--	--	1	--
BR. COMMONWEALTH	980	657	2486	34	102	62	271	23	177	204	4791	7827	--	7.99	593	387
OTHER C.T.A. Member countries	3049	2028	10173	151	1077	146	484	179	654	545	8699	21087	--	6.91	1,628	1,421
REST OF AMERICAS	284	50	196	8	22	21	59	81	561	124	3077	3915	--	13.79	172	112
OTHER COUNTRIES	237	87	331	5	17	27	138	6	18	112	1867	2371	--	10	159	70
TOTAL	12,030	7184	36322	549	3270	500	1754	974	4977	2823	50862	97185	--	8.08	6,732	5,298

L = Luxe Hotel.
A = First class hotel.
B = Second class hotel.
C = Third class hotel.
P = Private.

By sea: 275
By air: 16,882

RECAPITULATION STATISTICAL DATA ON NON-RESIDENT VISITORS

Table 4.6

Month: Year: 1963

Visitors from:	Total Visitors:	Nights Spent:												Total nights spent	Av. night spent	Did not spend the night here:	Sex:			
		L			A			B			C						P		M:	F:
		Visitors	Nights spent	Visitors	Nights Spent	Visitors	Nights Spent	Visitors	Nights Spent	Visitors	Nights Spent	Visitors	Nights Spent							
U. S. A.	10139	8677	37584	385	2378	124	712	228	596	1025	17577	59745	5.63	-	5382	4857				
VENEZUELA	2992	1574	5580	218	1300	94	215	242	1004	764	8911	17010	5.69	-	1743	1246				
COLOMBIA	991	287	1117	34	142	18	154	271	238	381	12457	16208	16.37	-	415	546				
UNITED KINGDOM	2	2	6	-	-	-	-	-	-	-	-	6	3	-	2	-				
BR. COMMONWEALTH	886	503	1951	48	169	28	111	56	520	251	5114	7861	8.88	-	503	383				
OTHER C.T.A. Member countries	867	347	1897	35	253	18	42	65	224	414	3483	8079	9.33	-	245	422				
BEST OF AMERICAS	625	129	465	8	76	28	170	100	1523	300	5184	7721	12.35	-	326	299				
OTHER COUNTRIES	355	153	364	14	54	23	116	15	146	163	2610	3490	9.27	-	236	117				
TOTAL	17157	11653	48964	742	4271	331	1520	1127	6644	3298	57523	118925	6.93	-	9287	7870				

L = Luxe Hotel.
A = First class hotel.
B = Second class hotel.
C = Third class hotel.
P = Private.

RECAPITULATION STATISTICAL DATA ON NON-RESIDENT VISITORS

Table 4.7

By sea: 345

By air: 79,902

Month: January - December

Year: 1964.

VISITORS FROM	N I G H T S S P E N T												S E X :		
	L		A		B		C		P		TOTAL NIGHTS SPENT	Average nights spent		Males:	Females:
	Visitors	Nights spent	Visitors	Nights spent	Visitors	Nights spent	Visitors	Nights spent	Visitors	Nights spent					
U. S. A.	10,150	48,665	524	3,089	323	1,718	361	1,207	1,261	17,857	71,966	5.7	6775	5847	
VENEZUELA	2,705	7,463	144	713	163	379	383	493	769	8,274	17,922	5.03	2129	1435	
COLOMBIA	531	1,908	68	321	68	412	334	3,599	1,882	12,988	19,258	12.99	772	711	
UNITED KINGDOM	10	22	2	4	2	9	-	-	1	3	38	2.53	13	2	
IR. COMMONWEALTH	410	1,517	30	104	33	202	32	337	217	3,859	6,019	8.47	434	282	
OTHER COMMONWEALTH AND AFRICAN COUNTRIES	89	419	70	35	79	56	16	61	392	4,539	5,710	9.72	253	273	
WEST OF AMERICAS	245	919	15	41	29	89	289	2,314	386	6,349	9,742	10.11	525	431	
OTHER COUNTRIES	133	417	9	24	32	120	70	73	176	3,214	3,848	10.69	230	130	
T O T A L	13,673	51,360	802	4,411	669	2,465	1,425	8,584	3,678	57,083	133,903	6.61	11,131	9,176	

L= Deluxe hotels
 A= First class hotels
 B= Second class hotels
 C= Third class hotels
 P= Private

A R U B A

By sea: 528
By air: 24,996

RECAPITULATION STATISTICAL DATA ON NON-RESIDENT VISITORS

Table 4.8

Month

Year 1965

Visitors from:	Total Visitors:	Nights Spent:												Av. night spent	Sex:	
		L		A		B		C		P		Total nights spent	M:		F:	
		Visi-tors	Nights spent	Visi-tors	Nights spent	Visi-tors	Nights spent	Visi-tors	Nights spent	Visi-tors	Nights spent					
U. S. A. & P. R.	16,853	12,479	64,962	1,003	6,001	1,597	5,392	286	1,370	1,488	20,636	96,361	5.84	6,713	8,140	
VENEZUELA	4,346	1,705	5,534	333	1,234	995	1,941	344	827	969	8,740	16,276	4.21	2,471	1,875	
COLOMBIA	1,856	310	1,173	37	127	411	909	505	5,718	593	16,730	24,657	13.29	1,082	774	
UNITED KINGDOM	46	21	69	2	7	19	28	-	-	4	24	128	2.78	42	4	
BR. COMMONWEALTH	903	544	2,174	42	177	102	424	42	356	173	3,080	6,211	6.88	596	307	
OTHER O.T.A. Member countries	544	92	328	10	55	59	147	16	81	367	4,606	5,217	9.59	272	272	
REST OF AMERICA	423	107	423	8	45	49	230	62	812	197	3,715	5,225	12.35	233	190	
OTHER COUNTRIES	553	131	415	30	209	86	237	15	71	291	5,252	6,184	11.18	346	207	
T O T A L :	25,524	15,289	75,076	1,465	7,855	3,318	9,308	1,270	9,235	4,082	62,783	164,259	6.43	13,755	11,769	

L = Luxe Hotel
A = Resort Hotel
B = Commercial Hotel
C = Guesthouses
P = Private

ARUBA

RECAPITULATION STATISTICAL DATA ON NON-RESIDENT VISITORS

Table 4.9

By sea: 779

By air: 25,678

Months:

Year: 1966

VISITORS FROM	NIGHTS SPENT												TOTAL NIGHTS SPENT	Average nights spent	SEX:	
	L		A		B		C		P		Males:	Females:				
	Visitors	Nights spent	Visitors	Nights spent	Visitors	Nights spent	Visitors	Nights spent	Visitors	Nights spent						
U. S. A.	12,046	65,891	1,599	9,733	1,780	4,662	300	1,339	1,693	22,649	104,274	6.2	8,640	8,173		
VENEZUELA	2,098	7,406	531	1,742	681	1,853	210	695	1,179	11,712	23,408	5.03	2,636	2,003		
COLOMBIA	241	883	134	421	432	1,360	500	6,279	574	17,675	26,678	14.2	1,161	720		
UNITED KINGDOM	16	41	3	7	2	7	2	2	3	39	96	3.7	21	5		
BR. COMMONWEALTH	406	1,440	89	307	106	275	33	233	218	3,769	6,024	7.1	514	338		
OTHER C.T.A. MEMBER COUNTRIES	80	277	33	160	39	110	11	45	428	4,877	5,489	9.3	301	290		
REST OF AMERICAS	83	452	74	49	91	248	158	1,579	335	5,948	8,276	12.2	352	349		
OTHER COUNTRIES	167	530	65	253	164	686	37	253	476	9,268	10,990	12.1	516	313		
T O T A L	15,137	76,940	2,468	12,672	2,695	9,201	1,251	10,425	4,846	75,937	185,175	7.01	14,141	12,256		

L= Deluxe hotels
 A= First class hotels
 B= Second class hotels
 C= Third class hotels
 P= Private

RECAPITULATION STATISTICAL DATA ON NON-RESIDENT VISITORS

Table 4.10

By sea: 503

Month: January - December

By air: 31,370

Year: 1967

VISITORS FROM	N I G H T S S P E N T													TOTAL NIGHTS SPENT	Average nights spent	S E X :		
	L			A			B			C			P			Males:	Females:	
	Visitors	Nights spent	Visitors	Nights spent	Visitors	Nights spent	Visitors	Nights spent	Visitors	Nights spent	Visitors	Nights spent						
U. S. A.	15,099	86,171	2,966	74,661	413	7,177	793	2,606	1,970	25,163	129,780	6.11	10,781	10,460				
VENEZUELA	2,558	9,305	983	3,567	714	360	554	1,527	1,241	11,554	26,313	4.83	2,845	2,605				
COLOMBIA	220	692	351	699	37	101	703	5,728	526	19,120	26,340	74.34	977	866				
UNITED KINGDOM	74	42	15	33	1	1	-	-	4	104	180	5.27	24	10				
DR. COMMONWEALTH	456	2,014	131	435	32	119	50	180	216	3,357	6,105	6.9	579	365				
OTHER C.T.A. MEMBER COUNTRIES	72	268	29	78	22	35	43	172	375	3,719	4,272	7.9	260	281				
REST OF AMERICAS	179	577	76	336	32	125	300	3,313	381	7,756	12,097	13.32	380	528				
OTHER COUNTRIES	181	664	197	675	29	53	44	208	524	9,509	11,107	11.37	489	488				
T O T A L	18,727	99,735	4,742	20,474	680	7,973	2,437	13,734	5,237	80,282	216,798	6.78	16,269	15,664				

- L= Deluxe hotels
- A= First class hotels
- B= Second class hotels
- C= Third class hotels
- P= Privato

A R U B A

RECAPITULATION STATISTICAL DATA ON NON-RESIDENT VISITORS

Table 4.11

By sea: 827
By air: 51,175

Month: Jan./ Dec.
Year: 1968

VISITORS FROM	T o t a l V i s i t o r s		N I G H T S S P E N T												T O T A L N I G H T S S P E N T		A v e r a g e n i g h t s s p e n t		S E X :			
			L			A			B			C							P		Males:	Females:
			Visitors	Nights spent	Visitors	Nights spent	Visitors	Nights spent	Visitors	Nights spent	Visitors	Nights spent	Visitors	Nights spent								
U. S. A.	27,708	156,164	4,820	24,816	507	1,807	858	2,568	2,258	23,721	2,258	23,721	209,366	5.8	78,368	17,837						
VENEZUELA	5,716	19,723	1,003	4,625	174	474	917	2,435	7,509	13,510	4,231	4,231	40,737	4.6	4,231	4,678						
COLOMBIA	272	1,019	170	736	26	138	608	2,507	500	15,403	833	833	71,811	12.5	833	733						
UNITED KINGDOM	102	485	61	310	4	80	13	13	18	224	117	117	1,112	5.5	117	85						
FR. COMMONWEALTH	706	889	91	417	16	73	63	905	372	7,104	306	306	9,331	13.2	306	320						
OTHER C.T.A. MEMBER COUNTRIES	837	489	76	233	20	54	55	120	593	5,359	448	448	6,216	7.5	448	427						
WEST OF AMERICAS	1,623	4,477	173	560	86	424	250	2,271	515	9,190	803	803	16,910	10.4	803	815						
OTHER COUNTRIES	2,044	2,815	376	1,512	45	157	639	639	865	7,371	1,123	1,123	17,521	8.6	1,123	427						
T O T A L	53,002	186,317	6,755	33,189	872	3,117	2,911	11,537	6,690	86,903	2,244	2,244	321,117	6.2	2,244	25,758						

L= Deluxe hotels
A= First class hotels
B= Second class hotels
C= Third class hotels
P= Private

Table 4.12

RECAPITULATION STATISTICAL DATA ON NON-RESIDENT VISITORS

By sea: 793
By air: 58227

Month:

Year: 1969

VISITORS FROM:	NIGHTS SPENT												TOTAL NIGHTS SPENT	Average nights spent	SEX	
	L			A			C			P					Males	Females
	Visitors	Nights spent	Visitors	Nights spent	Visitors	Nights spent	Visitors	Nights spent	Visitors	Nights spent	Visitors	Nights spent				
Total Visitors:																
U. S. A. and Puerto Rico	41401	193111	5082	26984	217	840	570	2503	2722	30187	253625	6.1	20809	20592		
Venezuela	7603	19933	1000	3136	39	99	682	1696	1242	10783	35647	4.7	3256	4047		
Colombia	1703	301	1713	784	40	465	621	3306	560	15755	22023	12.9	873	830		
United Kingdom	329	166	930	334	13	112	13	109	66	1524	3009	9.1	207	122		
Canada as of May	1122	963	5081	702	4	21	10	56	38	376	6236	5.6	601	521		
Ir. Commonwealth	688	139	708	269	13	29	61	226	415	6289	7521	10.9	371	317		
Other C.T.A. Member Countries	708	132	524	96	7	15	49	125	484	4926	5686	8.0	305	403		
Rest of Americas	2407	917	5332	1526	56	276	428	3732	741	13328	24194	10.5	1049	1358		
Other Countries	3059	986	4599	2249	40	170	294	1143	1257	17712	25873	8.5	1762	1297		
Total	59020	41054	231931	36080	429	2027	2728	12896	7525	100880	383814	6.5	29533	29487		

L= Deluxe hotels. A= First class hotels. B= Second class hotels. C= Third class hotels. P= Private.

ARUPA GOVERNMENT TOURIST BUREAU

1031

Table 4.13

RECAPITULATION STATISTICAL DATA ON NON-RESIDENT VISITORS

MANAGOK

By sea: 1,229
By air: 73,813

Year: 1970

VISITORS FROM:	NIGHTS SPENT												TOTAL NIGHTS SPENT	Average nights spent	SEX			
	L		A		B		C		P		Males:	Females:						
	Visitors	Nights spent	Visitors	Nights spent	Visitors	Nights spent	Visitors	Nights spent	Visitors	Nights spent								
Total Visitors:																		
U. S. A. and Puerto Rico	54,313	43,079	7,502	44,932	116	363	584	2,439	3,032	29,530	339,313	27,091	27,223	6.2	27,091	27,223	6.01	1,052
Venezuela	11,610	7,429	1,640	6,162	45	142	846	2,513	1,650	16,409	57,244	5,593	5,593	4.9	5,593	5,593	4.9	1,052
Colombia	2,107	432	323	1,547	45	500	559	3,834	748	19,182	27,233	1,052	1,052	12.9	1,052	1,052	12.9	1,052
United Kingdom	207	109	57	286	--	--	8	36	33	319	1,238	146	146	6.	146	146	6.	146
Canada	793	444	195	1,718	--	--	37	174	117	1,644	6,970	398	398	8.9	398	398	8.9	398
Fr. Commonwealth	960	377	120	446	7	22	61	430	395	6,683	9,083	560	560	9.5	560	560	9.5	560
Other C.T.A. Member Countries	842	86	79	377	7	39	43	117	627	5,875	6,748	391	391	8.1	391	391	8.1	391
Rest of Americas	1,737	481	125	470	12	37	326	2,958	793	14,020	20,150	673	673	11.6	673	673	11.6	673
Other Countries	2,473	843	411	2,046	18	63	166	750	1,035	15,908	22,976	1,386	1,386	9.2	1,386	1,386	9.2	1,386
Total	75,042	53,280	308,983	57,984	250	1,166	2,630	13,251	8,430	109,570	1,90,954	37,291	37,291	6.5	37,291	37,291	6.5	37,291

L= Deluxe hotels. A= First class hotels. B= Second class hotels. C= Third class hotels. P= Private.

ARUBA GOVERNMENT TOURIST BUREAU

A R U B A

RECAPITULATION STATISTICAL DATA ON NON-RESIDENT VISITORS

Table 4.14

By sea: 703
By air: \$5,052

Year: 1971

VISITORS FROM	T o t a l Visitors	N I G H T S S P E N T												Aver- age nights spent	S E X				
		L			A			B			C				P		TOTAL NIGHTS SPENT	Males	Female
		Visitors	Nights spent	Visitors	Nights spent	Visitors	Nights spent	Visitors	Nights spent	Visitors	Nights spent	Visitors	Nights spent		Visitors	Nights spent			
U.S.A.	58,222	44,059	265,199	10,071	58,651	87	408	583	2,742	3,422	34,001	361,001	6.2	28,493	29,729				
Venezuela	15,156	10,585	45,774	1,747	6,980	90	279	811	2,514	1,923	14,940	70,487	4.7	7,336	7,890				
Puerto Rico JULY-DECEMBER	3,321	2,023	9,093	856	3,538	36	84	129	430	277	1,961	15,106	4.5	1,708	1,613				
Colombia	2,365	462	1,973	344	1,536	11	21	734	3,050	814	19,849	26,429	71.2	1,292	1,073				
United Kingdom	229	211	1,946	6	27	-	-	4	6	8	76	2,055	9	122	107				
Canada	1,857	1,575	10,644	238	1,394	2	4	12	54	30	220	12,316	6.6	900	957				
Br. Commonwealth	756	276	1,105	68	283	4	7	55	212	353	4,921	6,528	8.6	446	310				
Other C.T.A. Member Countries	1,200	292	1,078	140	546	18	44	90	490	660	5,685	7,843	6.5	625	575				
Rest of Americas	1,074	182	639	134	479	2	2	197	956	560	6,593	8,669	8.1	470	605				
Other Countries	1,574	226	931	212	895	5	30	70	250	1,061	18,310	20,416	13	800	774				
T O T A L	85,754	59,891	325,382	13,816	74,329	255	879	2,685	10,704	9,107	106,556	530,850	6.2	42,192	43,563				

L= Deluxe hotels. A= First class hotels. B= Second class hotels. C= Third class hotels.
P= Private.

1970 : 75,042

ARUBA GOVERNMENT TOURIST BUREAU

RECAPITULATION STATISTICAL DATA ON NON-RESIDENT VISITORS

Table 4.15

MONTH:

YEAR: 1972

BY AIR: 88,078

BY SEA: 574

VISITORS FROM:	TOTAL VISITORS:	TOTAL NIGHTS SPENT:	AVERAGE NIGHTS SPENT:	NIGHTS SPENT												SEX			
				L			A			B			C			P		Males	Females
				Visit-ors:	Nights spent:	Visit-ors:	Nights spent:	Visit-ors:	Nights spent:	Visit-ors:	Nights spent:	Visit-ors:	Nights spent:	Visit-ors:	Nights spent:	Visit-ors:	Nights spent:	Visit-ors:	Nights spent:
U. S. A.	53,872	362,131	6.7	41,095	265,947	8,777	58,883	440	3,022	648	4,734	2,912	29,545	26,539	27,333				
VENEZUELA	13,961	74,850	5.4	8,392	42,885	1,946	7,926	270	1,378	1,133	4,367	2,220	18,294	6,769	7,192				
CANADA	5,923	38,889	6.6	5,280	34,572	607	3,995	4	24	1	6	31	292	2,844	3,079				
PUERTO RICO	6,578	37,021	5.6	3,917	20,942	1,444	7,215	92	422	330	1,617	795	6,825	3,479	3,099				
COLOMBIA	2,637	29,517	10.9	554	2,780	335	1,184	53	208	819	4,100	926	21,245	1,472	1,215				
UNITED KINGDOM	63	354	5.3	33	138	13	63	-	-	4	18	13	115	47	16				
BRITISH COMMONWEALTH	930	7,243	7.8	457	2,917	118	440	14	77	79	362	262	3,447	544	336				
OTHER C.T.A. MEMBER COUNTRIES	1,475	11,102	7.5	359	1,483	157	763	47	440	145	827	767	7,589	753	722				
REST OF AMERICAS	1,153	8,209	7.1	165	646	158	802	7	29	402	1,702	421	5,030	432	721				
OTHER COUNTRIES	2,010	28,799	14.3	314	1,603	246	1,270	33	138	114	767	1,303	25,021	1,050	960				
TOTAL	88,652	598,095	6.7	60,566	373,913	13,001	82,541	960	5,738	3,675	18,500	9,650	117,403	43,929	44,723				

L = DELUXE HOTELS
 A = FIRST CLASS HOTELS
 B = SECOND CLASS HOTELS
 C = THIRD CLASS HOTELS
 P = PRIVATE

CRUISE-PASSENGERS:
 TOTAL VISITORS 1971: 85,755
ARUBA GOVERNMENT TOURIST BUREAU.

A R U B A

RECAPITULATION STATISTICAL DATA ON NON-RESIDENT VISITORS

Table 4.16

By sea: 1,725
By air: 93,128

Month: 1 9 7 3
Year :

VISITORS FROM:	TOTAL VISITORS:	TOTAL NIGHTS SPENT	Average nights spent:	N I G H T S S P E N T												S E X			
				L			A			B			C			P		Males	Females
				Visit-ors	Nights spent	Visit-ors	Nights spent	Visit-ors	Nights spent	Visit-ors	Nights spent	Visit-ors	Nights spent	Visit-ors	Nights spent	Visit-ors	Nights spent		
S. A.	51,666	412,323	7.95	37,326	204,955	10,140	78,305	572	4,744	610	5,296	3,210	39,023	25,422	26,444				
VENEZUELA	16,443	105,173	6.39	10,329	63,009	1,741	9,713	207	1,249	1,307	6,203	2,779	24,956	8,122	8,321				
CANADA	9,790	67,650	6.91	7,827	54,387	1,895	12,694	2	14	2	4	64	951	1,741	5,026				
PUERTO RICO	7,024	48,337	6.88	4,332	28,709	1,547	9,713	87	566	305	1,707	753	7,642	3,741	3,284				
COLOMBIA	3,176	36,428	11.47	1,030	5,431	258	1,197	50	279	812	4,345	1,026	25,176	1,734	1,442				
UNION KINGDOM	288	1,203	4.14	58	229	207	725	2	11	7	64	14	174	172	116				
FR. COMMONWEALTH	945	9,438	9.99	281	1,512	127	554	19	113	79	294	439	6,955	571	374				
OTHER C.F.A. MEMBER COUNTRIES	1,357	10,684	7.87	244	1,228	121	618	33	324	214	890	740	7,624	672	685				
WEST OF AMERICAS	1,467	10,196	6.94	287	1,275	123	499	14	52	533	2,337	510	6,033	601	203				
OTHER COUNTRIES	2,797	41,571	14.86	567	2,932	320	1,984	30	293	116	804	1,764	35,658	1,412	1,373				
TOTAL	95,153	743,003	7.81	62,281	443,567	16,487	116,002	1,021	7,645	4,065	21,944	11,299	153,845	47,120	47,973				

L= Deluxe hotels
A= First class hotels
B= Second class hotels
C= Third class hotels
P= Private

CRUISE-PASSENGERS: 1972: 45,358
1973: 44,532

Total visitors 1972: 88,652
Total nights-spent : 598,095

ARUBA GOVERNMENT TOURIST BUREAU

Table 4.17

RECONSTRUCTION AND DEVELOPMENT BANK FOR THE CARIBBEAN

BY AIR: 200,814
BY SEA: 4,153

YEAR: 1974

VISITORS FROM:	TOTAL VISITORS:	TOTAL NIGHTS SPENT:	AVERAGE NIGHTS SPENT:	NIGHTS SPENT												SEX			
				L			A			B			C			P		Males	Females
				Visit-ors:	Nights spent:	Visit-ors:	Nights spent:	Visit-ors:	Nights spent:	Visit-ors:	Nights spent:	Visit-ors:	Nights spent:	Visit-ors:	Nights spent:	Visit-ors:	Nights spent:		
U. S. A.	54,278	409,718	7.5	38,163	282,111	11,686	86,758	182	3,310	406	3,604	3,211	33,667	26,389	27,869				
MEXICO	19,134	119,858	6.2	11,721	67,569	5,011	12,613	1,596	6,989	704	3,259	3,602	29,031	9,813	9,621				
CANADA	12,256	81,480	6.6	7,266	47,243	4,905	33,827	3	19	6	54	54	307	5,785	6,470				
PUERTO RICO	9,013	62,530	6.9	5,298	33,962	2,211	14,623	245	1,338	159	1,274	1,070	11,333	4,899	4,114				
COLOMBIA	3,909	42,437	10.9	1,219	5,912	283	1,468	567	2,871	589	3,895	1,251	28,261	2,320	1,569				
UNITED KINGDOM	96	139	1.6	10	156	22	115	6	47	7	21	21	109	72	24				
WEST GERMANY	710	6,617	9.4	193	856	92	405	43	217	23	136	359	5,033	409	312				
OTHER C.T.A. COUNTRIES	1,274	10,377	8.2	178	941	77	1,110	87	437	74	421	858	8,138	631	637				
WEST OF AMERICA	1,260	8,341	6.6	267	1,272	69	270	67	238	299	1,250	538	5,310	435	812				
OTHER COUNTRIES	3,037	41,919	13.8	512	2,895	393	2,341	118	711	108	599	1,906	35,403	1,546	1,491				
T O T A L	105,267	783,776	7.4	65,197	443,375	21,779	152,860	3,014	16,245	2,377	14,513	12,900	156,783	52,220	53,017				

Total Visitors 1973: 95,153
1974: 105,267

L = DELUXE HOTELS
A = FIRST CLASS HOTELS
B = SECOND CLASS HOTELS
C = THIRD CLASS HOTELS
P = PRIVATE

CRUISE-PASSENGERS: 62,273
Year 1973 : 44,532

ARUBA GOVERNMENT TOURIST BUREAU

Table 4.18

RECAPITULATION STATISTICAL DATA ON NON-RESIDENT VISITORS

BY AIR: 122.727
BY SEA: 6.125

MONTH: 1 9 7 5
YEAR:

VISITORS FROM:	TOTAL VISITORS:	TOTAL NIGHTS SPENT:	AVERAGE NIGHTS SPENT:	N I G H T S S P E N T												S E X			
				L			A			B			C			P		Males	Females
				Visit-ors:	Nights spent:	Visit-ors:	Nights spent:	Visit-ors:	Nights spent:	Visit-ors:	Nights spent:	Visit-ors:	Nights spent:	Visit-ors:	Nights spent:	Visit-ors:	Nights spent:	Visit-ors:	Nights spent:
U. S. A.	71.770	542.003	7.6	51.051	394.097	13.606	105.500	463	3.323	293	2.737	3.157	35.549	35.925	35.805				
VENEZUELA	24.837	165.434	6.7	15.516	101.123	2.228	14.377	2.135	11.762	490	3.179	4.168	34.993	12.280	12.549				
CANADA	16.132	122.799	7.5	10.828	80.221	5.359	40.404	15	91	16	167	214	1.916	7.679	8.753				
PUERTO RICO	3.256	25.650	7.9	1.912	14.608	700	4.961	141	717	100	731	403	4.641	1.832	1.424				
COLOMBIA	3.819	39.607	10.4	1.299	7.053	206	1.197	787	4.971	213	1.678	1.314	24.695	2.218	1.601				
THE NETHERLANDS	2.685	43.041	16.0	457	3.107	329	2.440	95	623	32	300	1.772	36.571	1.412	1.273				
UNITED KINGDOM & BR. COMMONWEALTH	047	8.070	9.6	307	1.909	125	763	56	357	8	50	351	5.011	484	363				
OTHER CTA MEM-BER COUNTRIES	1.820	15.403	8.5	312	1.555	206	907	118	559	127	674	1.065	11.768	912	916				
REST OF AMERICAS	1.717	11.448	6.7	785	4.166	270	933	104	750	174	757	303	4.842	767	950				
OTHER COUNTRIES	1.651	12.622	7.6	937	5.300	274	1.839	98	618	27	250	325	4.615	980	681				
T O T A L	128.852	986.192	7.7	86.705	613.956	23.503	173.321	4.012	23.771	1.480	10.523	13.152	164.621	64.497	64.355				

TOTAL VISITORS 1974: 105.267
TOTAL NIGHTS-SPENT 1974: 783.776

L = DELUXE HOTELS
A = FIRST CLASS HOTELS
B = SECOND CLASS HOTELS
C = THIRD CLASS HOTELS
P = PRIVATE

CRUISE-PASSENGERS: YEAR 1975: 57.830 (100 calls)
YEAR 1974: 62.273 (135 calls)
ARUBA GOVERNMENT TOURIST BUREAU.

Table 4.19

RECAPITULATION STATISTICAL DATA ON NON-RESIDENT VISITORS

BY AIR: 139,236
BY SEA: 6,601

MONTH: X
YEAR: 1976

VISITORS FROM:	TOTAL VISITORS:	TOTAL NIGHTS SPENT:	AVER-AGE NIGHTS SPENT:	NIGHTS SPENT												SEX			
				L			A			B			C			P		Males	Females
				Visits-ors:	Nights spent:	Average	Visits-ors:	Nights spent:	Average	Visits-ors:	Nights spent:	Average	Visits-ors:	Nights spent:	Average	Visits-ors:	Nights spent:		
U. S. A.	90,392	624,895	7.02	63,025	437,750	22,962	163,149	415	3,668	352	2,759	2,833	28,130	64,650	45,748				
VENEZUELA	30,445	180,002	5.91	21,300	118,321	3,052	17,650	1,508	6,592	504	1,795	3,922	26,222	14,896	15,540				
CANADA	9,112	71,064	7.80	5,393	42,308	3,574	27,854	15	68	21	140	110	681	4,347	4,769				
PUERTO RICO	4,392	29,025	6.61	2,630	15,495	1,100	6,931	94	404	95	671	473	5,614	2,467	1,925				
COLOMBIA	4,853	42,841	8.82	2,098	11,612	453	2,064	654	4,472	216	1,344	1,247	23,000	2,702	2,155				
THE NETHERLANDS	2,623	24,012	9.16	400	2,444	564	3,232	75	332	39	269	1,525	27,600	1,885	1,908				
UNITED KINGDOM & BR. COMMONWEALTH	601	4,822	8.02	215	883	138	610	30	133	15	102	195	3,054	367	234				
OTHER CTA MEA-																			
BER COUNTRIES	1,334	10,673	8	259	1,196	149	702	93	400	79	384	754	7,996	697	637				
REST OF AMERICAS	1,863	11,176	6.01	519	2,722	258	1,244	183	1,130	143	1,316	488	4,766	736	1,085				
OTHER COUNTRIES	801	4,520	5.65	394	1,552	186	1,110	61	330	43	182	117	1,146	609	312				
TOTAL	146,467	1,023,673	6.99	97,202	633,633	32,420	224,816	3,416	16,934	1,717	8,982	11,724	139,308	72,766	73,721				

Total Visitors 1975: 122,852
Total Night-spent 1975: 806,192

L = DELUXE HOTELS
A = FIRST CLASS HOTELS
B = SECOND CLASS HOTELS
C = THIRD CLASS HOTELS
P = PRIVATE

CRUISE-PASSENGERS: 1975: 57,830 (100 calls)
1976: 67,735 (121 calls)

ARIMA GOVERNMENT TOURIST BUREAU

MONTH: YEAR: 1977

BY AIR: 147,252
BY SEA: 3,917

VISITORS FROM:	TOTAL VISITORS:	TOTAL NIGHTS SPENT:	AVER-AGE NIGHTS SPENT:	NIGHTS SPENT												SEX			
				L			A			B			C			P		Males	Females
				Visit-ors:	Nights spent:	Visit-ors:	Nights spent:	Visit-ors:	Nights spent:	Visit-ors:	Nights spent:	Visit-ors:	Nights spent:	Visit-ors:	Nights spent:	Visit-ors:	Nights spent:		
U. S. A.	33,691	621,102	7.3	66,923	602,110	21,157	153,722	301	1,722	262	2,378	4,556	35,670	46,929	46,162				
VERIZUELA	25,240	275,709	6.4	24,792	156,316	4,998	29,005	1,272	5,910	196	1,099	4,214	34,999	17,315	17,315				
CANADA	6,503	46,832	7.3	4,326	31,053	1,937	14,745	16	88	13	114	111	802	3,236	3,177				
PUERTO RICO	1,874	13,375	7.1	977	5,296	374	1,982	102	505	63	444	408	5,158	1,195	675				
COLOMBIA	6,041	56,057	9.3	2,636	15,330	792	4,510	1,000	6,369	113	735	1,450	29,113	3,211	2,830				
THE NETHERLANDS	3,040	40,465	13.3	1,501	3,518	602	3,850	53	303	63	600	1,821	32,194	1,540	1,500				
UNITED KINGDOM & COMMONWEALTH	397	3,025	7.6	148	811	92	403	16	98	5	23	136	1,620	254	113				
OTHER CTA MEM-BER COUNTRIES	1,630	13,083	8.0	281	1,244	162	773	100	317	93	533	994	10,216	857	773				
PEST OF AMERICAS	2,630	15,764	6.0	546	2,876	532	2,106	107	845	710	2,873	655	7,064	847	1,783				
OTHER COUNTRIES	823	6,345	7.7	333	2,053	219	1,226	72	293	20	197	179	2,576	503	320				
TOTAL	151,169	1,101,007	7.3	101,420	700,727	30,615	216,802	3,072	16,480	1,538	8,786	14,524	159,012	76,368	74,001				

TOTAL VISITORS 1976: 146,487
TOTAL NIGHTS-SPENT 1976: 1,023,673

L = DELUXE HOTELS
A = FIRST CLASS HOTELS
B = SECOND CLASS HOTELS
C = THIRD CLASS HOTELS
P = PRIVATE

CRUISE-PASSENGERS: 1976 : 67,735 (121calls)
1977 : 88,686 (145calls)

ARUBA GOVERNMENT TOURIST BUREAU.

Table 4.21 illustrates the comparison of the labor force in 1974 and 1978. Again the hospitality sector which relates directly to the tourism industry is the largest employer in both years. An indication again that the tourism industry is one of the major contributors to the economy of Aruba. In 1978, the work-force in the Tourism Industry increased due to the opening of 500 room Concorde Hotel and the establishment of more free-standing restaurants. One can also notice that the once so important oil industry to the economy of Aruba is decreasing in its employment figures. Obviously, this industry still maintains its significance in the Aruban economy, but is not the biggest employer like in the early 1950s.

It is also obvious that the activities related to the Tourism Industry are the most important ones. But it has been noted, and this is really specific to Aruba, that the government is slacking the hotel investment motion. Anything is made to avoid a wild development. This is especially in the first place to maintain the actual occupancy level, which at the moment, has an average of over the 70% and, secondly, for not creating a labor problem for an island with a labor force of 24,000 people. Even in its present state of development, the Tourist Industry seems to encounter problems in recruiting employees.

If we quote Robert W. McIntosh, he wrote:⁵

⁵J.R.W. McIntosh, Tourism, Principles, Practices, Philosophies (Columbus, Ohio: Gird, Inc., 1972), p.182.

. . . A further factor favoring tourism is its low requirement of costly "imported" manpower such as is frequently required for the operation of advanced industries. A recent study carried out in East Africa suggests that one new job is created for every \$2,400 of tourist expenditure. In other regions the ratio may be even higher. Tourism is also responsible for the creation of employment outside the tourist industry properly defined. In this respect it again scores noticeably over other forms of new industry. If these induced employment effects are included, i.e. increased employment in agriculture and the construction industry, the amount of employment for which tourism is responsible would increase substantially. The range of jobs created by tourism extends from unskilled through to management tasks. Insufficient attention is frequently paid to the importance of "management" in tourism. It should therefore be emphasized that one of management's essential functions is the operation of the tourist industry so as to obtain a satisfactory rate of return on capital employed.

TABLE 4.21
WORKING LABOR FORCE 1974 and 1978

Sector	Description	1974	1978
1	Agriculture	52	50
3	Oil Industry	2127	2100
4	Utilities	420	500
5	Construction	2943	2000
9a	Government	3300	4105
	Education	823	895
	Household	600	600
6	Commerce and Hotel,Casinos	6349	9351
7	Transportation	959	1050
8	Banking	762	1450
9b	Others	<u>2833</u>	<u>2350</u>
	TOTAL	21168	24451 ⁶

⁶Adapted from, Deelrapport I Tourism of Aruba, Chapter IV, 1978.

The tourism industry has brought quite some changes on Aruba during its upward growth in the 1960s to accommodate the mass movement of people. For example, the rapid growth of tourism made it necessary to adapt the airport accommodations to the new requirements of modern air traffic. The airstrip, which was built in 1964, was expanded and lengthened to 9,000 feet, more than sufficient for all large jet aircraft, including the Boeing 747, now a regular visitor to Aruba.

Almost all of the international hotels are operated by American Hotel chain companies. According to the Department of Economic and Development Affairs the "Playboy chain of Hotels" and the "Melia" also would like to enter into the business in Aruba with respectively 500 rooms each, which would bring the total of hotel rooms in Aruba to 3,416. The infrastructure has been improved drastically and there is no doubt that this is true because of the overall development which the growing tourist industry has caused.

Merchants in the main shopping area have improved, or in some cases, rebuilt their stores to suit the flow and taste of the visitors. Many opening of free standing restaurants and night clubs have taken place in the last five years, offering different cuisines. In overall, many aspects of the industry have been improved or developed to suit the International Tourism and at the same time contributing to the Aruban economy.

To give a comparison on the impact of the tourism industry on the G.N.P. of Aruba is very difficult because there are no statistics or reports available showing the G.N.P., even the G.N.P. of the Netherlands Antilles as a whole was not available. Even search for adequate information on expenditures, sales, and finally economic impact has been even more difficult. The form and degree of comprehensiveness of the data available have not permitted the kinds of interpretations necessary for adequate public or private decisions related to the International Tourist and Travel Industry. But as McIntosh stated:⁷

. . . We recognize that tourism's economic effects are manifested in two ways:

1. from the original investment,
2. from operations once the investment is completed.

These two effects are similar - and different. Both produce direct and induced effects throughout the economy. These may be summarized as:
Major direct effects.

Production (the marginal capital output ratio)

Employment (the capital/employment ratio)

Balance of Payments

Major induced (or indirect) effect

Income (the multiplier)

Investment (input-output analysis).

Major indirect effects:

Income (Tourism multiplier)

The multiplier is an income concept, not a transactions concept. For example, if a tourist were to purchase an import (to that country) in a gift shop, the immediate leakage effect reduces the number of rounds of spending and consequently the multiplier effect on income in that locality.

⁷R.W. McIntosh, Tourism, Principles, Practices, Philosophies (Columbus, Ohio: Grid, Inc., 1972), p. 181.

Money spent by foreign visitors affects the economy of a country in a profound way. When a visitor pays his hotel bill, for example, the money received by the hotel management will be used to pay various debts incurred, or make outlays, in behalf of the international visitor-electricity, telephone, personnel, and other goods and services. The recipients, in turn, use the money received to pay their bills to satisfy their personal wants. Visitor money in this way may be spent several times, spreading into different sectors of the economy, each time giving rise to fresh income until "leakage" payments for imports, foreign investments, hoarding and other diversions takes money out of circulation. The unbroken series of conversion of visitor money constitutes the "multiplier effect." The greater the number of hands through which such money passes, the greater the beneficial effect on the gross national product and the national accounts.⁸

For Aruba one can assume that the International Tourism Industry had contributed a sum of Naf 443.6 millions (1 U.S. \$ = 1.80 Netherlands Antilles florins Naf) from 1973 to 1976 (Table 4.21A). The multiplier effect increases these receipts with a factor of 1.67 and provides as such an income base of about 620 million florins.

TABLE 4.21A
CONTRIBUTION OF TOURISM TO THE
ARUBAN ECONOMY 1973-1976 IN MILLIONS⁹

Year	Inflow NAF (1 US \$=1.80 NAF)	Average Income Per Night Spent
1973	111.1	141.07
1974	95.5	117.61
1975	101.0	96.74
1976	136.0	124.61

⁸Ibid., p. 184.

⁹Unpublished report of the Department of Economic and Development Affairs, 1977.

The reason of the relative decreasing of income of resort-tourism in Aruba from 1973 to 1975 have to be sought in the development of the mass tourism. It regards here to the essential problem, that luxurious tourism and mass tourism at a certain point do not go together.

In 1976, we can see a relative increase of income, reason for this increase can be: price adjustments, growth of shopping tourism and junkets.

B. The Hotel Sector

The largest, most noticeable, and probably most important component of the visitor industry in many regions is the hotel sector. In Aruba this is certainly the case. Although it is obvious that the economic impact of such a large and dynamic sector must be important to the Aruban economy, particularly because a large portion of hotel income is derived from exports, just what portion of hotel sales are made to visitors, what goods sold are imported (directly or indirectly) and how hotel income is distributed, have not been determined by studies of the industry. However, this section will reveal the total amount of hotels and hotel rooms; type of hotels; type of visitors; length of stay; number of adults per party; number of children per party; spending patterns of visitors; daily room paid and stay plan of visitors.

In the table of the development of hotel accommodation on the next page we can see that Aruba entered the

tourism era with 26 first class rooms and within 19 years it had 1,590 luxury, 442 first class, and 116 commercial rooms.

The economic impact of tourism cannot be underestimated:

1. The 1.1 million nights spent in Aruba produced 2.2 million dollars in room revenues. (1.1 x \$20-average rate/night per person).
2. The expenditures on food and beverage per night averaged another \$20, producing another 2.2 million dollars.
3. The hotels have spent over half of their revenues to local services: wages, utilities, insurance, local foods, entertainment, taxes.
4. Tourists have spent sizeable amounts in the casinos. A significant amount of this revenue was funneled via taxes, back to the economy.
5. Continuing construction and expansion of hotels, created job opportunities for hundreds of unskilled laborers. In spite of its seasonality, the construction industry has developed in a solid way.¹⁰

¹⁰Source: Department of Education, (A study prepared by Z. Lavon 1978), p. 36.

TABLE 4.22
DEVELOPMENT OF HOTEL ACCOMMODATION
NUMBER OF ROOMS PER TYPE OF ACCOMMODATION¹¹

Name of Hotel	Year of Opening	Luxury	First Class	Commercial
Coral Strand	1956		26	
Expansion	1970		38	
Basi Ruti	1957		15	
Aruban Caribbean	1959	140		
Expansion	1966	80		
Astoria Hotel	1959			10
Cactus Inn	1964			20
Hotel Central	1964			25
Manchebo Beach	1966		72	
Aruba Sheraton	1968	202		
Hotel Caribana	1968			16
Aruba Holiday Inn	1969	200		
Expansion	1975	200		
Divi Divi	1969		104	
Expansion	1975		44	
Victoria Hotel	1970			30
Americana Hotel	1975	200		
Tamarijn Beach	1975		158	
Aruba Beach Club	1977	133		
Aruba Concorde	1977	435		
Total		1590	442	116

¹¹Source: Aruba Tourist Bureau.

Guest type includes the following categories.¹²

1. Foreign Individual Traveler (FIT) which includes guest traveling alone (not affiliated with a group), and paying full rate for their accommodations.
2. One-Stop Tour Charter (OTC) which includes guests traveling as part of a charter (tour) group.
3. Group Inclusive Tour (GIT) which includes guests traveling either alone or with a group (not a charter group) who are paying a reduced rate for their accommodations.
4. Incentive Traveler which includes guests traveling as part of an incentive group.
5. Junket Traveler which includes guests traveling on gambling junkets and casino guests.
6. Commercial Traveler (COMM) which includes guests traveling on business and paying a commercial rate for their accommodation.
7. Conference and convention (CONF) which includes guests traveling solely for the purpose of attending a business meeting or conference.
8. Other Travelers (OTH) which includes all other guests, guests receiving complimentary accommodations; special guests of the hotel receiving discounted rates (e.g., travel agents, travel writers, etc.)

The percentage of visitors staying for various numbers of nights by type of guest and month of arrival is given in Table 4.23 and Table 4.24 on the following pages.

As indicated in the two Tables, the average length of stay for all guests between December 1979 and May 1978 was 5.2 nights. The most frequent stay periods were seven nights (30.5%) for the visitors and five nights (16.5% of

¹²Source: Aruba Tourist Bureau, Marketing Services to the Travel (Hospitality) Leisure Industries (Robinson, Ind., January 1979), p.2.

the visitors). Other lengths of stay typically ranged from one to four nights, and six nights. Nearly 91% of all visitors stayed 7 nights or less, while fewer than 1% stayed on 14 nights.

FIT guests averaged about 5.1 nights on their length of stay, but far more FIT's versus total guests (47.9% FIT compared with 30.5% total visitors) stayed 4 nights or less. Only 25.9% of the FIT guests stayed seven nights. Conversely, the majority (79.3%) of OTC guests stayed seven nights, while 2.4% of this group, twice the average for all visitors, stayed 14 nights. Consequently, the OTC's average length of stay was higher than any other group, at 6.7 nights.

The most popular length of stay among junket travelers was 5 nights. Approximately 61.8% of the junket visitors stay 5 nights, while nearly 85% of this group stay between 4 and 7 nights.¹³

The majority of commercial travelers (66.8%) stay 3 nights or less, although an additional 25.6% stay between 4 and 7 nights. Conference travelers had the shortest length of stay, only 2.4 nights. In addition, only 5.6% of all conference visitors stay longer than 4 nights.

As indicated in Table 4.24, there was some variation in length of stay averaged 5.6 nights, in January the stay increased to 5.5 nights, and in February, the average length of stay peaked at 6 nights. During the following three months

¹³Ibid., pp. 39-43.

average length of stay declined to 5.2 nights in March, 4.8 nights in April and 4.6 nights in May. No appreciable differences in the frequency distribution of number of nights was evident with the exception of February, where a greater percentage of 5 and 7 nights stay occurred than during any of the other months.

Table 4.23

LENGTH OF STAY BY TYPE OF GUEST
DECEMBER 1, 1977 TO MAY 31, 1978

Nights	Number of Registrants	Percent to Total	Percent of Registrants by Type							Other
			FIT	OTC	GLT	Incentive	Junket	Commercial	Conference	
1	1945	9.0%	13.4%	.3%	3.7%	2.6%	1.5%	25.3%	42.5%	26.8%
2	1943	9.0%	12.6%	2.0%	8.7%	2.6%	2.5%	27.6%	21.9%	15.3%
3	2111	9.8%	11.2%	5.2%	11.6%	5.1%	6.9%	13.9%	15.3%	16.4%
4	2303	10.7%	10.7%	4.0%	15.1%	59.0%	13.2%	7.3%	14.7%	10.6%
5	3594	16.6%	7.1%	1.9%	6.9%	2.6%	61.8%	4.7%	2.0%	8.1%
6	1087	5.0%	5.9%	3.0%	5.6%	10.3%	5.9%	2.5%	1.2%	5.0%
7	6661	30.8%	25.9%	79.3%	35.4%	15.4%	3.5%	11.1%	.6%	8.4%
8	482	2.2%	3.8%	.4%	2.8%	-	1.2%	1.8%	.2%	1.9%
9	484	2.2%	3.1%	1.1%	4.2%	-	1.0%	1.1%	.2%	1.3%
10	286	1.3%	1.9%	.1%	2.5%	2.6%	1.9%	.7%	.6%	.7%
11	140	.6%	1.0%	-	.8%	-	.5%	.6%	-	.8%
12	91	.4%	.7%	.1%	.5%	-	.4%	.1%	-	.4%
13	61	.3%	.4%	-	.4%	-	.2%	-	-	.6%
14	259	1.2%	1.3%	2.4%	.9%	-	.3%	.6%	.4%	1.6%
Over 14	173	.8%	1.0%	.2%	.9%	-	.2%	2.5%	.4%	2.1%
Total	21610	100.0%	34.7%	18.7%	15.2%	.2%	19.6%	4.1%	2.4%	5.2%
Average Length of Stay	5.2		5.1	6.7	5.4	4.7%	5.0	3.7	2.4	4.0
No Response	740									

Percentages are calculated to the total of each column. Therefore the percent of FIT travelers staying one night is 13.4%, 2 nights 12.6%, etc. Of all registrants where length of stay could be determined by type of Guest, 34.7% were FIT's.

Table 4.24

<u>LENGTH OF STAY BY MONTH</u>		<u>Percent of Registrants by Month</u> ^{1/}									
<u>DECEMBER 1, 1977 TO MAY 31, 1978</u>			<u>December</u>	<u>January</u>	<u>February</u>	<u>March</u>	<u>April</u>	<u>May</u>			
<u>Nights</u>	<u>Number of Registrants</u>	<u>Percent to Total</u>	<u>1977</u>	<u>1978</u>	<u>1978</u>	<u>1978</u>	<u>1978</u>	<u>1978</u>			
1	2046	9.2%	10.9%	9.0%	6.8%	8.0%	10.0%	10.9%			
2	2037	9.2%	9.7%	7.5%	5.6%	7.4%	12.2%	11.8%			
3	2183	9.8%	8.6%	7.1%	4.9%	8.8%	15.5%	11.3%			
4	2364	10.6%	9.0%	9.9%	8.5%	14.6%	7.8%	13.6%			
5	3664	16.5%	10.8%	14.9%	17.6%	17.7%	14.3%	23.4%			
6	1125	5.1%	3.9%	9.7%	4.7%	4.9%	4.1%	3.0%			
7	6763	30.5%	32.2%	32.7%	39.6%	29.8%	29.0%	21.3%			
8	495	2.2%	2.8%	2.1%	2.9%	2.9%	1.7%	1.1%			
9	491	2.2%	2.9%	1.4%	2.2%	2.0%	3.3%	1.1%			
10	292	1.3%	2.5%	1.9%	1.6%	1.4%	.5%	.7%			
11	144	.6%	1.6%	.8%	.8%	.6%	.3%	.3%			
12	96	.4%	1.4%	.5%	.5%	.4%	.1%	.1%			
13	66	.3%	.9%	.5%	.3%	.1%	.2%	-			
14	261	1.2%	1.8%	1.4%	2.4%	1.1%	.9%	.5%			
Over 14	179	.8%	1.0%	.6%	1.6%	.3%	.5%	.9%			
Total	22209	100.0%	11.6%	16.4%	14.0%	20.5%	22.7%	14.9%			
Average Length of Stay	5.2		5.6	5.5	6.0	5.2	4.8	4.6			
No Response	528										

^{1/} Percentages are calculated to the total of each column. Therefore 10.9% of the registrants in December stayed one night, 9.7% stayed 2 nights, etc. Of all registrants where length of stay could be determined, 11.6% stayed in December, 16.4% stayed in January and so forth.

1. Number of Adults per Party:¹⁴

The average number of adults per party and the percentages of registrants traveling in various party sizes are given by guest type and month in Table 4.25 and Table 4.26 on the following pages.

¹⁴Ibid., pp. 44-47.

NUMBER OF ADULTS BY TYPE OF GUESTDECEMBER 1, 1977 TO MAY 31, 1978

Type	Number of Registrants	Percent to Total	Percent of Registrants With			Four Adults	Over Four Adults	Average # Adults Per Party
			One Adult	Two Adults	Three Adults			
FIT	7532	34.8%	27.4%	67.0%	3.4%	1.4%	.8%	1.82
OTC	4038	18.7%	12.0%	82.9%	3.4%	1.3%	.4%	1.95
GIT	3285	15.2%	19.9%	70.8%	4.0%	2.4%	2.9%	2.06
Incentive	38	.2%	23.7%	73.7%	-	2.6%	-	1.82
Junket	4232	19.6%	9.9%	81.4%	3.8%	2.8%	2.1%	2.09
Commercial	875	4.0%	71.9%	25.0%	1.5%	.6%	1.0%	1.38
Conference	510	2.4%	50.2%	44.5%	4.7%	.4%	.2%	1.57
Other	1120	5.2%	49.2%	47.8%	2.1%	.4%	.5%	1.57
Total	21630	100.0%	23.4%	70.2%	3.5%	1.7%	1.5%	1.90
No Response	726							

NUMBER OF ADULTS BY MONTHDECEMBER 1, 1977 TO MAY 31, 1978

<u>Month</u>	<u>Number of Registrants</u>	<u>Percent to Total</u>	<u>Percent of Registrants With</u>				<u>Over Four Adults</u>	<u>Average # Adults Per Party</u>
			<u>One Adult</u>	<u>Two Adults</u>	<u>Three Adults</u>	<u>Four Adults</u>		
December	2548	11.5%	21.4%	69.6%	4.6%	2.7%	1.7%	1.96
January	3656	16.5%	21.3%	74.9%	2.1%	1.1%	.6%	1.85
February	3113	14.0%	15.6%	80.2%	2.0%	1.4%	.8%	1.93
March	4551	20.5%	22.7%	68.9%	4.9%	2.3%	1.2%	1.92
April	5033	22.7%	29.0%	63.1%	3.7%	1.7%	2.5%	1.92
May	<u>3314</u>	<u>14.9%</u>	<u>28.2%</u>	<u>67.3%</u>	<u>3.1%</u>	<u>.7%</u>	<u>.7%</u>	<u>1.79</u>
Total	22215	100.0%	23.6%	70.0	3.5%	1.7%	1.2%	1.90
No Response	141							

The average number of adults per party who stayed in Aruba during the six-month period was 1.9 persons. As indicated in Table 4.25, this varied by type of guest. Over two out of every three FIT parties traveled with 2 adults, although 27.4% of this group had only one adult. Approximately 99.2% of FIT parties traveled with 4 or fewer adults.

Among the registrants traveling on group tours, again, 2 adults was the most frequent party size. For OTC travelers, 82.9% had 2 adults while 12.0% traveled alone; among GIT parties, 70.8% had 2 adults and 19.9% had one adult. As for junkets, 81.4% traveled in pairs while 9.9% traveled alone. However, junket parties were occasionally larger, with 3.8% traveling with 3 adults, 2.8% with 4 adults and 2.1% with more than 4 adults.

Number of adults in party was lower for the other types of guests. Commercial travelers averaged only 1.38 persons since the majority of business guests traveled alone. Conference travelers averaged 1.57 adults, with the majority of parties being 1 or 2 adults.

Average party size did not appear to vary to any extent by month as Table 4.24 illustrates. Average number of adults ranged from a low of 1.85 persons in January to a high of 1.96 persons in December. In February, parties of 2 adults were more frequent than in any other month.

2. Number of Children per Party:¹⁵

Although most registrants during the six-month period traveled with adults only, some parties brought children. Parties with children and numbers of children per party are given by guest type and month in Table 4.27 and Table 4.28 on the following pages.

¹⁵Ibid., pp. 48-51.

NUMBER OF CHILDREN BY TYPE OF GUEST
DECEMBER 1, 1977 TO MAY 31, 1978

Type	Percent of Parties With Children	Number of Registrants	Percent to Total	Percent of Registrants With					Average Number of Children
				One Child	Two Children	Three Children	Four Children	Over Four Children	
FIT	6.1%	462	41.8%	43.9%	42.0%	10.8%	2.8%	.5%	1.74
OTC	2.6%	106	9.6%	54.7%	34.9%	7.5%	.9%	2.0%	1.77
GIT	6.6%	217	19.7%	41.9%	41.0%	11.1%	2.8%	3.2%	1.90
Incentive	-	-	-	-	-	-	-	-	-
Jambet	5.0%	213	19.3%	42.7%	40.4%	13.6%	3.1%	-	1.77
Commercial	3.1%	27	2.4%	55.6%	44.4%	-	-	-	1.44
Conference	1.2%	6	.5%	50.0%	50.0%	-	-	-	1.50
Other	6.5%	73	6.6%	52.1%	38.4%	5.5%	1.4%	2.6%	1.73
Total	4.9%	1104	100.0%	45.2%	40.7%	10.4%	2.5%	1.2%	1.77
No Response		21252							

NUMBER OF CHILDREN BY MONTH
DECEMBER 1, 1977 TO MAY 31, 1978

Month	Percent of Parties With Children	Number of Registrants	Percent to Total	Percent of Registrants With				Over Four Children	Average Number of Children
				One Child	Two Children	Three Children	Four Children		
December	10.7%	272	23.9%	43.8%	38.2%	14.3%	2.9%	.8%	1.79
January	3.8%	140	12.3%	42.1%	40.7%	15.0%	1.4%	.8%	1.79
February	5.1%	160	14.1%	40.0%	48.1%	8.8%	2.5%	.6%	1.79
March	5.6%	253	22.2%	46.2%	39.5%	9.9%	4.0%	.4%	1.73
April	4.7%	236	20.7%	48.3%	39.0%	7.2%	2.1%	3.4%	1.86
May	2.3%	77	6.8%	53.2%	42.9%	3.9%	-	-	1.51
Total	5.1%	1138	100.0%	45.2%	40.7%	10.5%	2.5%	1.1%	1.77
No Response		21218							

Only 5.1%¹⁶ of all parties brought children, and of those parties, the average number of children was 1.77. The percent of total registrants bringing one child was 45.2% while those bringing two children was 40.7%. Parties with three children represented 10.4% of the registrants, 2.5% of the parties had four children and only 1.2% brought over four children.

Of those parties bringing children, more were FIT guests (some 41.8%) than any other group. For the six-month period being analyzed, it is apparent that Aruba was not a family destination, but when children do come, they are more likely to accompany FIT, GIT or Junket guests than OTC, commercial or conference registrants.

¹⁶Percentage from Table 4.28.

3. Spending Patterns of Registrants¹⁷

The spending patterns of registrants are reflected in their average daily expenditures for rooms and other charges to the room bill while staying in the hotel. These spending patterns, however, do not reflect what the guest may have spent in cash or credit cards, either in or outside of the hotel. Also, these expenditures do not include any wagers made in the casino.

- a. Daily room rate paid. Daily room rates paid by type of guest and month are given in Table 4.29 and Table 4.30 on the following pages.

¹⁷Ibid., pp. 52-55.

Table 4.29

ROOM RATE PAID BY TYPE OF GUEST
DECEMBER 1, 1977 to MAY 31, 1978

Room Rate	Number of Registrants	Percent to Total	Percent of Registrants by Type of Guest ^{1/}									
			FIT	OTC	GLT	Incident lve	Junket	Commercial	Conference	Other		
Under \$20.00	801	3.9%	.9%	1.4%	1.1%	2.9%	-	13.7%	58.8%	28.8%		
\$20.00 to \$29.99	1579	7.6%	3.8%	10.6%	7.5%	2.9%	-	53.5%	19.4%	11.8%		
\$30.00 to \$39.99	2275	11.0%	15.9%	9.8%	16.6%	14.3%	2.2%	3.8%	6.6%	5.4%		
\$40.00 to \$49.99	2262	10.9%	12.1%	10.2%	15.4%	14.3%	4.1%	17.4%	12.2%	12.6%		
\$50.00 to \$59.99	2865	13.8%	13.2%	34.5%	10.5%	-	4.1%	4.7%	2.4%	2.4%		
\$60.00 to \$69.99	3200	15.4%	11.1%	14.5%	22.3%	-	26.1%	.8%	.4%	2.3%		
\$70.00 to \$79.99	4089	19.7%	14.3%	10.5%	11.3%	-	53.5%	.3%	-	.8%		
\$80.00 to \$89.99	500	2.4%	1.5%	5.7%	2.6%	62.9%	.7%	2.6%	-	1.5%		
\$90.00 to \$99.99	1103	5.3%	10.9%	1.0%	3.7%	-	1.9%	-	-	8.0%		
\$100.00 to \$109.99	562	2.7%	5.0%	.6%	2.7%	-	1.0%	-	-	4.9%		
\$110.00 to \$119.99	906	4.4%	7.5%	.4%	3.3%	-	2.0%	2.3%	.2%	15.7%		
\$120.00 to \$129.99	88	.4%	.6%	.1%	.6%	-	.5%	-	-	.3%		
\$130.00 to \$139.99	91	.4%	.4%	.1%	.4%	-	.9%	.1%	-	.6%		
\$140.00 to \$149.99	53	.3%	.2%	-	.9%	-	.1%	.1%	-	-		
\$150.00 and over	391	1.9%	2.6%	.6%	1.1%	2.7%	2.9%	.7%	-	4.9%		
Total	20766	100.0%	35.8%	18.3%	14.9%	.2%	20.4%	4.2%	2.4%	3.8%		
Average Rate Paid	\$62.70	\$67.57	\$54.75	\$55.91	\$70.71	\$74.11	\$33.71	\$23.28	\$59.82			
No Response	1590											

^{1/} Percentage based on total for the column.

ROOM RATE PAID BY MONTH		Percent of Registrants by Month ^{1/}						
DECEMBER 1, 1977 TO MAY 31, 1978		December 1977	January 1978	February 1978	March 1978	April 1978	May 1978	
Room Rate	Number of Registrants	Percent Total						
Under \$20.00	876	4.1%	5.4%	.5%	.3%	.6%	8.3%	9.5%
\$20.00 to \$29.99	1629	7.7%	11.4%	3.2%	2.1%	2.0%	11.7%	16.8%
\$30.00 to \$39.99	2316	11.0%	16.3%	1.4%	1.2%	3.1%	18.0%	27.0%
\$40.00 to \$49.99	2364	10.8%	14.8%	9.7%	6.2%	7.3%	12.9%	15.2%
\$50.00 to \$59.99	2922	13.7%	12.5%	17.2%	18.5%	16.8%	12.1%	4.7%
\$60.00 to \$69.99	3265	15.3%	16.3%	9.2%	9.9%	19.1%	13.9%	22.9%
\$70.00 to \$79.99	4189	19.7%	9.1%	33.7%	35.3%	24.3%	12.9%	1.8%
\$80.00 to \$89.99	516	2.4%	1.9%	5.1%	2.6%	3.3%	.9%	.8%
\$90.00 to \$99.99	1123	5.3%	2.8%	6.6%	8.8%	9.4%	2.9%	.2%
\$100.00 to \$109.99	573	2.7%	1.1%	3.1%	4.2%	4.8%	1.8%	.5%
\$110.00 to \$119.99	917	4.3%	3.6%	8.1%	7.9%	5.3%	1.5%	.1%
\$120.00 to \$129.99	89	.4%	.5%	.2%	.4%	.6%	.5%	.3%
\$130.00 to \$139.99	92	.4%	.8%	.6%	.4%	.7%	.2%	-
\$140.00 to \$149.99	54	.3%	.7%	.3%	.3%	.3%	.1%	-
\$150.00 and over	399	1.9%	2.8%	1.1%	1.9%	2.4%	2.1%	.2%
Total	21284	100.0%	11.6%	16.3%	13.9%	21.1%	21.9%	15.1%
Average Rate Paid	\$62.70		\$57.02	\$73.16	\$75.53	\$74.28	\$52.65	\$43.01
No Response	1072							

^{1/} Percentage based on total for the column.

The average daily room rate paid by all registrants was \$62.70.¹⁸ However, room rates paid ranged from under \$20.00 to over \$150.00. Of all registrants 19.7% paid rates from \$70.00 to \$79.99, 15.3% paid from \$60.00 to \$69.99, 13.7% paid from \$50.00 to \$59.99, 10.8% paid from \$40.00 to 49.99 and 11.0% paid from \$30.00 to \$39.99.

Room rates varied by type of guest. FIT guests paid an average of \$67.57, OTC guests paid \$54.75, GIT guests paid \$55.91 and Junket guests paid \$74.11. Conference guests were the lowest paying group at \$23.28, while commercial travelers paid an average of \$33.71.

Average room rate also varied by month as indicated in Table 4.30. The average room rate paid in December was \$57.02. Then during the heavy demand months the average rate increased to \$73.16 in January, peaked in February at \$75.53 and declined slightly in March to \$74.28. With high winter season rates still being charged through the middle of April, the average held to \$52.65.

4. Stay plan of registrants¹⁹ When a guest selects a hotel in Aruba, he or she has a wide range of stayplans from which to choose. There are twelve popular plans which are available at most hotels,

¹⁸Data and percentages from Table 4.30.

¹⁹Ibid., pp. 61-68.

including six standard plans offered throughout the year, and six additional plans which were recently introduced as special promotional packages. The first six, which are widely available and need little explanation, are:

- Continental Plan (CP) which includes breakfast only, with the room.
- European Plan (EP) where no meals are included.
- Modified American Plan (MAP) which provides two meals with the room.
- Modified American Plan Junket (MAPJUNK) which is available for casino junkets and includes two meals.
- Full American Plan (FAP) where all meals are included with the room.
- Full American Plan Junket (FAPJUNK) which is available for casino junkets and includes all meals.

The remaining six plans are somewhat unique and are offered by some of the hotels during certain times of the year. These include:

- Free Spree European Plan (FSEP) - programs jointly promoted by certain airlines and participating hotels that provide an all-inclusive tour package, excluding meals.
- Free Spree Modified American Plan (FSMAP) - programs jointly promoted by certain airlines and participating hotels that provide an all-inclusive tour package, including two meals per day.
- Inter-Island Tour Plan (ISLE) - special all-inclusive tour packages that include trips to Aruba, Curacao and Bonaire, including various special features.

- European Tour Plan (EURO) - all-inclusive tour packages aimed specifically at promoting increased travel from European markets.
- Two-fers (TWO) - special programs featuring various package components on a "two-for-the-price-of-one" arrangement.
- Honeymoon (HONEY) - all inclusive tour package combining a variety of features of plans previously described but offered exclusively to newlyweds.

The descriptions of these latter six plans are only general, and specific offerings contained within particular plans will vary from one hotel to another. Also, these plans may only be offered on a selective basis by some hotels and may not be offered at all at others. Based on results received, only a few of these plans (62) were actually sold between December and May. However, due to the recent introduction of these plans, it is premature to judge whether they have been successful or not. Therefore, the entire list of stay plans have been included in Table 4.31 and Table 4.32 on the following pages to provide a basic for future comparisons of the respective popularity among various stay plan categories.

Table 4.31

STAY PLAN BY TYPE OF GUEST

DECEMBER 1, 1977 TO MAY 31, 1978

Stay Plan	Number of Registrants	Percent of Total	Percent of Registrants							
			FIT	OTC	GIT	Incentive	Junket	Commercial	Conference	Other
CP	1531	7.4%	5.9%	18.1%	11.5%	-	*	.5%	.2%	3.4%
EP	14081	65.9%	78.8%	75.9%	71.3%	78.9%	12.5%	98.1%	98.4%	93.5%
MAP	1917	9.0%	15.0%	15.9%	15.6%	21.5%	*	.1%	1.4%	2.9%
MAP Junket	27	.1%	.2%	.1%	.1%	-	-	-	-	.1%
FAP	1062	5.0%	*	-	*	-	25.1%	-	-	.4%
FAP Junket	2625	12.3%	-	*	*	-	62.3%	-	-	-
FSEP	16	*	*	*	.2%	-	-	-	-	.6%
FMAP	14	*	*	*	.3%	-	-	-	-	-
ISLE	-	-	-	-	-	-	-	-	-	-
EURO	-	-	-	-	-	-	-	-	-	-
TWO-PERS	26	.1%	-	-	.8%	-	-	-	-	-
HONEYMOON	3	*	*	-	.1%	-	-	-	-	-
Total	21353	100.0%	34.7%	18.7%	15.3%	.2%	19.7%	4.0%	2.3%	5.1%
No Response	1003									

* Note: Responses are less than one-tenth of one percent.

STAY PLAN BY MONTH
DECEMBER 1, 1977 TO MAY 31, 1978

Stay Plan	Number of Registrants	Percent of Total	Percent of Registrants					
			December 1977	January 1978	February 1978	March 1978	April 1978	May 1978
CP	1594	7.3%	20.6%	14.2%	10.2%	23.5%	17.9%	13.5%
EP	14560	66.5%	11.5%	16.4%	12.8%	21.8%	24.3%	13.2%
MAP	1953	8.9%	13.3%	18.9%	24.1%	14.2%	18.1%	11.5%
MAP Junket	27	.1%	-	25.9%	29.6%	25.9%	11.1%	7.4%
FAP	1064	4.9%	14.3%	14.0%	17.3%	23.8%	19.3%	11.4%
FAP Junket	2630	12.0%	5.3%	18.4%	15.4%	16.3%	18.5%	26.1%
FSEP	16	.1%	-	-	-	6.3%	62.5%	31.3%
FSEMAP	15	.1%	13.3%	6.7%	-	-	33.3%	46.7%
ISLE	1	*	-	100.0%	-	-	-	-
EDRO	-	-	-	-	-	-	-	-
TWO-PERS	26	.1%	-	-	-	-	-	100.0%
MOREYMOON	2	.1%	-	-	-	-	25.0%	75.0%
Total	21890	100.0%	11.7%	16.6%	14.1%	20.6%	22.3%	14.7%
No Response	466							

* Note: Responses are less than one-tenth of one percent.

As indicated in Table 4.31 between December, 1977 and May 31, 1978 the most widely used stay plan was EP, with 69.9%²⁰ of total registrants on that plan. Other popular stay plans included FAP Junket (12.3%), MAP (9.0%), CP (7.4%) and FAP (5.0%). The remaining categories of stay plans attracted fewer than one-tenth of one percent of total registrants during the period analyzed.

The choice of stay plan also varied by type of guest. With the exception of Junket travelers, the most frequently selected stay plan among the remaining categories of guests was the European Plan (EP). EP was picked by 78.8% of the FIT visitors, 75.8% of OTC travelers, 71.3% of the GIT groups and 78.9% of those registrants classified as Incentive Travelers. EP dominated nearly all commercial and conference travelers as well, with 98.1% and 98.4% of those respective groups choosing that stay plan.

The Continental Plan and regular Modified American Plan were the second or third choices by nearly all of the remaining registrants among these same guest categories. However, percentage distributions were relatively low, with fewer than 20% of guest registrants selecting either of these stay plans.

²⁰Percentages of frequency distributions of stay plan by month of arrival (Table 4.32) are marginally different due to slightly higher response rate.

Junket travelers most frequently selected either FAP Junket (62.3%) or regular FAP (25.1% stay plans). In addition, 12.5% of this group chose EP while fewer than one-tenth of one percent selected CP or MAP stay plans.

Some variations in stay plans as selected by month of arrival were also evident. Nearly twice the number of EP plans were sold during March and April than were sold during any other of the other four months being analyzed. Of the 14,560 registrants who picked EP, 24.3% arrived in April; 21.8% arrived in March; 16.4% arrived in January; 13.2% came in May; 12.8% came in February; and 11.5 came in December.

The remaining stay plans were less frequently taken by guests, but among them the FAP Junkets were more popular during December, a fairly constant number of FAP junkets were sold during the other months as well. The number of CP packages sold varied from month to month, although the percentage of total registrants using CP was highest in December and March.

MAP Packages were more popular among registrants from December through February than from March through May. FAP, although a moderately used plan, remained fairly constant as a percent of registrants throughout the period.

All other stay plans, including FSEP, FSMAP, ISLE, EURO, TWO-FERS, and Honeymoon, were generally not promoted during the peak season period. Therefore, as mentioned previously, these six categories did not account for a

material number of the total packages sold. However, it was evident that from mid-April through the end of May, some limited demand for several of these stay plan categories arose. However, as of the analyses only one Inter-Island Tour package and no European Tour package had been sold to date.

C. Economic constraints

Economic factors are the most active set of limitations or obstacles to the future development of international tourism. The government is persistently pursuing the policy that the answer in developing markets is not pumping money into promotion until these geographic origins are known. Robinson's, Inc. of Orlando, Florida had been contracted to study the markets, but until now no extra credit appears on the budget in order to assess the promoting in the areas of its findings.

While the world was suffering from recession and energy crisis, Aruba was able to show steady growth in visitors even when fares were skyrocketing abnormally.

The fuel embargo hit the major source of income of Aruba. Lago Oil & Transport Company (EXXON), one of the world's largest refineries, had to cut down production by 40% and coupled with the Carter's Administration of oil import reduction, the refinery was operating at the beginning of 1978 at a 50% capacity. This eventually will result in approximately \$20 million decrease in the island's GNP.

With the independence of the Netherlands Antilles in sight considerable problems are encountered in securing capital investments from potential investors in any industry; the European Common Market and Holland. Holland approved only half of the required economic assistance to Aruba of NAf 200 million required for the next 10 years in early 1978.

CHAPTER V
THE SOCIAL IMPACT

The world is changing. We live in a world in which change is the rule rather than the exception. Change is usually costly. Not only does change disrupt the existing life pattern of a society but even the existing social values and mores. Very few innovations can be hung to the existing social structure; most innovations need some adjustment to the existing society. After a prolonged period of discussion, Canada has switched to the metric system of measure. Britain's change to the decimal system brought more problems than just the people having a new monetary system.¹

As an aspect of culture, tourism is theoretically subject to the control by man. This cannot, however, appear to be decreasing as tourism becomes more international. The modern man in a developing society is faced with decisions that are far more complex than those faced in the past. The many rapid social forces that are impinging on him are hard for him to grasp, leave alone absorb. The funniest part of it is, they are mostly not

¹Dr. R.J. Sethna, The Social Impact of Tourism, (Caribbean Tourism Research Centre, 1971), p.4.

his creations.²

Undoubtedly, Aruba had some changes in its social environment the last twenty years. One can argue the point that these changes came along due to the International Tourism Industry, because Aruba had quite some changes in its economic development before the tourism industry had opened the new economic era in the history of the island.

As this study is prepared to analyze the social impact of the International Tourism on Aruba, only this impact will be discussed in this section of the study. Many social leaders have been interviewed by the researcher to stress the implications of the impact caused by the International Tourism. With these implications the researcher will not approve or disapprove, or propose any changes in the Aruban society. These implications will be stated merely to analyze the impact which undoubtedly exist if we read Erik Cohen and Dr. R.J. Sethna.³

To describe the social impact of tourism as all good or all bad is not telling the whole truth; it is like saying one can pull a cart on one wheel, or use a coin with one side.⁴

In the social effects peculiar to tourism the chief factor is the very presence of visitors in the country.

³See page 17 and 18 of the Chapter Review of The Literature for explanation.

⁴Dr. R.J. Sethna, The Social Impact of Tourism, (Caribbean Tourism Research Centre, 1971), p.1.

The impact of their sheer numbers (measured by arrivals or bed-nights) varies according to the size of the population and of the country or area actually visited. While some areas ranking as important tourism destinations receive tourist numbering no more than 1 or 2 percent of their population, a few others receive as many as 5 to 10 times the number of their inhabitants. Given the geographical concentration of most countries' tourism industries, those with an apparently low ratio between tourists and population may have areas where the number of tourists in relation to locals is actually much higher, which is the case in Aruba, if we compare the arrivals of visitors of the last ten years with a population of approximately 62,000.

On the positive side, it is argued that, apart from tourism being generally beneficial in improving mutual understanding, the contact involved contributes socially to economic development by generally encouraging "development-mindedness."⁵ This is not, of course, easily evaluated; and any evaluation is likely to be influenced by the view taken about what is the correct path to development. The least that can be said is that there is, indeed, propagation of the notion of economic change. The growth of the tourist

⁵Adapted from, The Impact on International Tourism on the Economic Development of the Developing Countries, (International Union of official Travel Organization, World Tourism Organization, Geneva 1975), p.33.

industry, like that of other sectors, helps to produce increased income and employment opportunities. And the improved infrastructure, equipment and services provided by the industry's growth may be enjoyed by the population at large, to a greater extent than is often the case for alternative forms of development.

On the other hand some social disadvantages may emanate from tourism. The "demonstration effect" that may set standards for desirable change can also operate to encourage other changes that are regarded as more or less undesirable. The presence of tourists in large numbers tends to encourage consumption patterns that are often inappropriate for the population as a whole, since they reflect the tastes of visitors with income levels higher than those prevailing in the host country. And some services provided for tourists are demanded for, but cannot possibly be supplied to, the entire population. It is chiefly those most closely involved in the tourism industry who are led to have such expectations, it is argued; and they may tend, by their income levels, expectations and life style, to accentuate social cleavages in the country. In more general terms, it has been argued that tourism has, in the case of many developing countries, helped to undermine social standards, through the behavior of tourists and through the demands that are imposed by tourist trade.⁶

⁶Ibid., p. 34.

A. Implications of Impact

This section of the Chapter will show responses of different social leaders interviewed by researcher. Interviews were held with: Union leader, political leader, Director of the Aruban Hotel and Restaurant Association, Director of the Aruba Tourist Bureau, religious leaders, Directors of two local newspapers, previous Director of Aruba Tourist Bureau, a person who had been involved in many of the changes which occurred during the developments in the tourism industry, member of the local Chamber of Commerce and last but not least, families involved in the evolution of the industry.

Researcher is aware that opinions of a group of people are not the opinions of the entire population.

The following are the general implications:

The tourism impact as an advantage on the Aruban society:

- Employment in tourism industry (direct or indirect) for a vast amount of people after the automation of the oil refinery.
- The mass movement of foreign people to Aruba presented a leisure lifestyle to the Aruban people.
- Stimulation of ambitions of hospitality workers; they also want to reach a certain goal in life.
- Exposure of foreigners to local people.
- Achieving the world wide recognition that Arubans are seen as having a great deal of hospitality.

- Education has been broadened to include courses about tourism and the hospitality industry.
- Developing and improving the awareness that working in the tourist industry is not a menial task.
- Creation of entertainment centers open to the general public.⁷

The tourism impact as a disadvantage on the Aruban society:

- Inappropriate patterns of expenditure and behavior of locals.
- Standard of living has sky-rocketed since the introduction of foreign tourism from countries with a high standard of living. McIntosh explains this as follows:⁸

. . . International travel largely emanates from countries with a comparatively high standard of living with high rates of economic growth, with social systems where inequality of incomes are declining and the bulk of the population is urbanized. In addition, these international travelers come from countries where large-scale industry and commerce comprise the foundations of the economy and where the communications and information environment is dominated by the mass media. The international market is largely made up of middle income people including the more prosperous minority of the working class, who normally live in large cities and earn their living in managerial, professional, white-collar supervisory and skilled occupations.

⁷During the development of the oil industry there existed entertainments but these were private.

⁸R.W. McIntosh. Tourism: Principles, Practices, Philosophies, (Gird, Inc., Columbus, Ohio 1972), p.29.

Probably the most pronounced effects of this phenomenon are noted when visitors from North America or Western Europe travel in emerging countries having a primitive culture or a culture which characterized by low (economic) standard of living and unsophisticated population.

- International Tourism has increased the crime rate, (See Table 5.1) drugs trafficking.
- The divorce rate (See Table 5.2) has increased, especially among the hotel employees.
- Another problem that has been noticed lately is the increase of prostitution by the local youth. This problem, if not attacked in time, will cause serious problems with consequences for the tourism industry and the society in general.
- Problems in families where parents and children work in the hospitality sector. The conformance to employment regulation can result in drastic change in mode of living by those persons so employed or may not be desirable from the employee's point of view.
- Resentment by local people towards the tourists because the tourists are taking away all of the nice beaches.

TABLE 5.1

JUSTICE AND PRISON RECORDS 1967-1977⁹

Years	Sexual Offences		Offence Agst Life		Assult	Larc'y	Robbery		Emb.	Swind.	Mal. Damg.		Rec'vg.
	Offences	Agst Life	Life	Offence			Hsebrk'g	Mard'g			Damg.	Rec'vg.	
1967	29	5	234	263	160	2	17	7	76	4			
1968	26	3	215	306	218	-	15	10	99	28			
1969	17	7	243	317	276	2	15	12	90	4			
1970	28	6	193	336	236	3	14	15	76	13			
1971	38	7	198	411	375	1	12	17	122	10			
1972	19	7	208	493	467	3	22	12	128	25			
1973	21	5	292	509	685	3	20	36	144	7			
1974	39	13	286	548	942	6	35	29	139	16			
1975	21	20	236	526	958	10	29	19	150	12			
1976	20	5	193	544	946	14	25	14	156	6			
1977	22	5	205	356	685	-	19	24	162	25			

⁹Source: Statistics Information, Statistic Bureau, Department of Economics, Netherlands, Antilles 1978), pp.61-62.

TABLE 5.2
REGISTERED DIVORCES ON ARUBA 1967-1977¹⁰

Years	Divorces	Total Population
1967	55	59,020
1968	65	59,231
1969	69	59,813
1970	69	60,811
1971	106	60,293
1972	92	61,293
1973	97	61,711
1974	110	61,788
1975	118	62,982
1976	122	62,288
1977	102	62,755

From the above table one can observe the increase in divorces from 1967-1977. A 54% increase if we take 1967 as the base year. It is arguable that this increase is because of the impact of tourism because earlier figures were impossible to obtain. But responses of interview with social leaders, previously mentioned, reflected that before the tourism industry hardly any divorce was heard of.

¹⁰Ibid., p.5.

CHAPTER VI
THE FUTURE ROLE OF TOURISM

The world tourist movement has manifested itself in the last two decades as one of the fastest growing items of world trade as well as a dynamic and ever progressing industry. Yet, the ratio of increase has been far from even during this period due to fluctuating trends of various inducing and accelerating factors of international tourism. On the whole, one can safely say that since 1950 an overall average of just below 10% increase annually always applied to tourism. This brought international tourism up from 25 million tourist arrivals in 1950 to about 215 million in 1973.¹

The long-term forecasts released by IUOTO some three years ago made it clear that by 1980 international tourism would reach about 200 million tourist arrivals as against 150 million in 1970. As a low estimate, the number of tourist arrivals will be around 250 million in 1980 out of which Europe will receive 180 million representing 72% of the world tourist traffic.²

¹Salah Wahab, Tourism Management, (Tourin, Italy: Tourism International Press, 1975), p.169.

²International Union of Official Travel Organization. Pilot Study on Long-Term Forecast (Geneva, 1974).

Such forecast is based on the following assumptions:

1. The world population based on the present world rate of increase, averaging more than 2% a year, may reach about 6.8 to 7 billion people in the year 2000.
2. The European population is expected to rise to 792 million in 1985 and 886 in the year 2000. The North America population will likewise rise to about 430 million in 1985 and 578 million in the year 2000.³
3. The GNP per capita in Europe will rise from an average of \$1,970 now to \$2,870 in 1985, an increase of 145% and to over \$5,000 in the year 2000, an increase of 253%. The North American GNP per capita will increase from about \$3,400 now to about \$4,330 in 1985, an increase of 127% and to \$6,250 in the year 2000, an increase of 183%.⁴
4. The "prosperity gap" will increase between the haves and the have-nots to reach 50:1 in the year 2000 unless the third world countries catch up much faster with the more advanced countries due to the pressing difficulties in the latter countries. And if this happens, the whole process of progress and development will certainly be checked.

³Kahn and Weiner, The Year 2000, 1968, p.139.

⁴Ibid.

5. Having regard to the IUOTO estimate the elasticity of world tourist expenditure (International and domestic) is 1:2 in relation to the variations of total income, the annual increase rate of tourist expenditure will be 5.7%, which will raise tourists expenditure (domestic and international) to about \$86 billion in 1975 and \$151.5 billion in 1985.

6. Technological progress is likely to accelerate and therefore means of transport should diversify and distances will be diminished through increased speed and better safety measures. Transport cost, however might still be an obstacle because of the steady increase in fuel prices.

It is due to all previous factors as well as others that the IUOTO has estimated that by 1980 there could be between 780 and 1050 million domestic and foreign tourist arrivals throughout the world, of which 250-280 million could be foreign tourists.⁵

This encouraging estimate, which was conservative at the time it was made, might be strained by the supervening/acute economic and energy problems facing Europe at present. Various factors that might have a positive or negative influence on the tourist movement in the world at least in the short to medium term are political, institutional, economic, social, geographic and technical.

⁵International Union of Official Travel Organization, Pilot Study on Long-Term Forecasts, (Geneva, 1974).

They should be seriously taken into consideration when studying the future of tourism.

To most people in Aruba, tourism looks like a beautifully dressed-up shop window, with the draped or semi-nude figurines having miraculously strolled out of the glass case to swarm on the beaches, the town pavements, and through the city streets. But to those in the trade it is a different, nerve-racking exercise: how to market the product properly, sort out the right market, the proper clientele and, once formed, how to keep them right there as long as possible, nurse their interests in the country, and the people and keep their minds alert, up to the very last minute of their stay.

For we are dealing here with the most complex of industries, with its cause and finality rooted in the human heart. Beyond and above market studies, research reports, statistical interpretations, the core of the matter is that the raw material at our disposal is eventually human nature, with its changeable whims and moods, its vulnerability to fancy, fashion and change, social, economic or both.

Many then are the constraints facing the industry, especially in a developing country.

Since the industry is so important, with its octopus-like tentacles reaching deep into many sectors of the life of a people and its government, the government, therefore, has to exercise its responsibilities to the full,

determining the right tourist areas of development within the overall national policy and objectives, phase this development also in such a way as to ensure that it does not encroach upon all the other vital priorities of national development, upon other necessities, agriculture, industrial, social, etc.⁶

Seeing the projections of many studies done by different tourism organizations for the 80s, one can safely assume that the international tourism will continue to grow. Aruba (an island in the Caribbean) certainly will enjoy the role of the host country for a vast amount of visitors. Presently the role of the international tourism upon the social economy of the island can be managed by the local authorities. But if we foresee a growing trend in the industry, drastic changes have to be made on the part of National Tourism Organization (Aruba Tourist Bureau). Presently the islands government operates directly in the tourism sector which is not suggested on an island where tourism is already fairly advanced and where the private sector is active in it. That's why it is preferable to establish a tourist organization that functions as a professional body outside the government in order to play an optimum role in the industry in the near future.⁷

⁶World Travel No. 140 Jan.-Feb. 1978, p.26.

⁷In 1976 the Government of Aruba supported a commission to study such possibilities. The well known Estrada Rapport.

This organization have to be strenghtened by representatives of various segments of the Aruban community to develop the future impact of the international tourism economically as well as socially. It is obvious that the government also will have its vital part in such an organization. If we quote McIntosh, he wrote the following about NTO's:

. . . Whatever the tasks that the National tourism body is called upon to do, what is essential is that it should have the full powers necessary to carry them out. It must, above all, have authority. It must be able to present effectively the case for tourism among the claims of other sectors competing for government support and finance. In a situation where the imperatives of tourism development infringe on those of other sectors and there is a conflict of interests, as in the location of a highway or the priority to be given to a new airport, the head of the tourism organization should be listened to with as much respect as the Ministers of Public Works or Aviation.

It is essential also that it be technically competent and recognized as such. The wide range of functions developing upon it require a high degree of experience and professionalism and the caliber and prestige of the senior management of the National tourism organization can be important factors in the effectiveness with which the government puts through its tourism policy.

Finally, it is essential that the tourism office recognizes the limitations of its own mandate, however that may be defined, and maintains close and harmonious liaison with all the other interests that may be involved in tourism development. Three principal interests are concerned. The first is the national planning organization. In most countries there is regular provision for this liaison at the national level.

The second is liason with the other departments

of government, partly as a matter of information and negotiation between different interests e.g., labor regulations, taxation, etc., and partly for the infrastructure and services needed for tourism development and which will normally fall to other departments to provide.

Thirdly, there must be the fullest co-operation with the private sector. This should be preparing its program in consultation with local and private interests. It should continue by means of frequent and informal contact to ensure harmonious collaboration on the practical problems involved in making the program into a profitable business.⁸

Future tourism has to be looked at from the viewpoint of what needs to be done rather than to sit back and "contemplate" what will happen.

Public authorities in both tourist generating and tourist receiving countries, having regard to the needs and conditions of their national economy, their social and cultural development and the protection of their environment, should take upon themselves the obligation to plan tourism expansion in the medium and longer terms.⁹ Such planning would mean to formalize action programmes well-synchronized in time for the various tourist facilities and services as well as their national tourist demand.

Such planning should not only concentrate on tourist supply development but should go beyond to match development with already forecast demand which is expected to change. In this sense, a marketing approach should become the point of departure.

⁸R.W. McIntosh, Tourism, Principles, Practices, Philosophies (Columbus, Ohio: Grid, Ind., 1972), pp. 161-162.

⁹Salah Wahab, Tourism Management (Tourin, Italy: Tourism International Press, 1975), p.172.

Wahab stresses the future role of tourism:

. . . No matter what type of tourism organization be created in various countries, a common task would be to place tourism and recreation policies as top priorities in the lists of Government's responsibilities whether in advanced or developing countries.¹⁰

CHAPTER VII
SUMMARY AND CONCLUSIONS

Aruba, an island in the Caribbean, with its beautiful beaches and its genuine hospitality has all the potential for large-scale development of its tourist industry. The Aruban Tourist Industry has grown rapidly after 1959, since the construction of the first luxurious hotel was begun by the Island Administration and as soon as they have finally resolved to throw out Aruba lures to attract tourists. Tourists are attracted to Aruba primarily from the United States, Canada, Venezuela and Columbia. The European market remains practically untouched. There may be many reasons why this market has not been explored. One reason might be that air fares to and accommodations on Aruba are still very highly priced. The tourist growth rate compares very favorably if we analyse the years 1959 to 1977. The steady growth of visitors has created an upward trend in the Aruban economy. Not only more accommodation facilities were needed to accommodate these visitors, but also many employment opportunities were created, not only directly in the hospitality fields but also in related fields. More money was poured into the economy through this significant tourism growth and at the same time the infrastructure has been improved, providing better accessibility to the island.

The improvements in the infrastructure has benefited the visitor as well as the local population.

The hotels maintained an average of 75% occupancy rate throughout the years, generating millions of dollars and in so doing sustained the island economy. A rough estimate for the fiscal years 1973-1976 shows the flourishing tourist industry. Undoubtedly this mass movement of people not only created an impact on the economy of Aruba but also exercised its influence on the Aruban society. Many social leaders were content with the growth rate in the tourist industry but on the other side are regretting its negative impact on the society. Findings, mentioned by these leaders indicate an advantageous as well as an disadvantageous impact caused by the booming international tourism industry.

It's obvious that the highest authority of the island, which is the government, must ensure that the international tourism industry will continue with its upward trend and at the same time continue to contribute to the island's economy, and to experience a healthy effect upon the life of the individual as well as upon the entire Aruban population.

The government has played an important role in the development of tourism in Aruba, especially during the past 15 years. It has provided the basic infrastructure for the development of the tourist industry, given fiscal incentives for private sector investment in hotel building, provided

promotion where necessary, established rules for collecting data of visitors and invested in vocational training in the field. However, it is important that future planning for the tourist industry take note not only of its benefits in terms of foreign exchange earnings, generation of income and creation of employment, but also of the cost of these benefits in terms of opportunity costs of the resources expended on tourism and distortions in the economy due to its side-effects (e.g. on land prices, income distribution, etc.) No attempt has been made, so far, to estimate these costs, which may have been substantial. A social cost-benefit approach alone would enable the economic planners of the island to measure accurately the contribution of tourism to the economy. Such an exercise appears to Aruba to be a prerequisite for planning the future development of tourism in Aruba.

A determination of the net social rate of return from tourism would enable Aruban economic planners to decide the optimum level of investment in the tourist industry in the future, consistent with the overall economic goals of the island.

People continue to travel no matter the economic constraints that are hampering the entire world. The long-term forecasts released by IUOTO some three years ago, made it clear that by 1980 international tourism would reach about 280 million tourists arrival.¹ Aruba will

¹IUOTO, Pilot Study on Long-Term Forecasts.

undoubtedly receive part of this estimation and with cooperation of all government departments having an impact on tourism, will produce a balanced tourism growth.

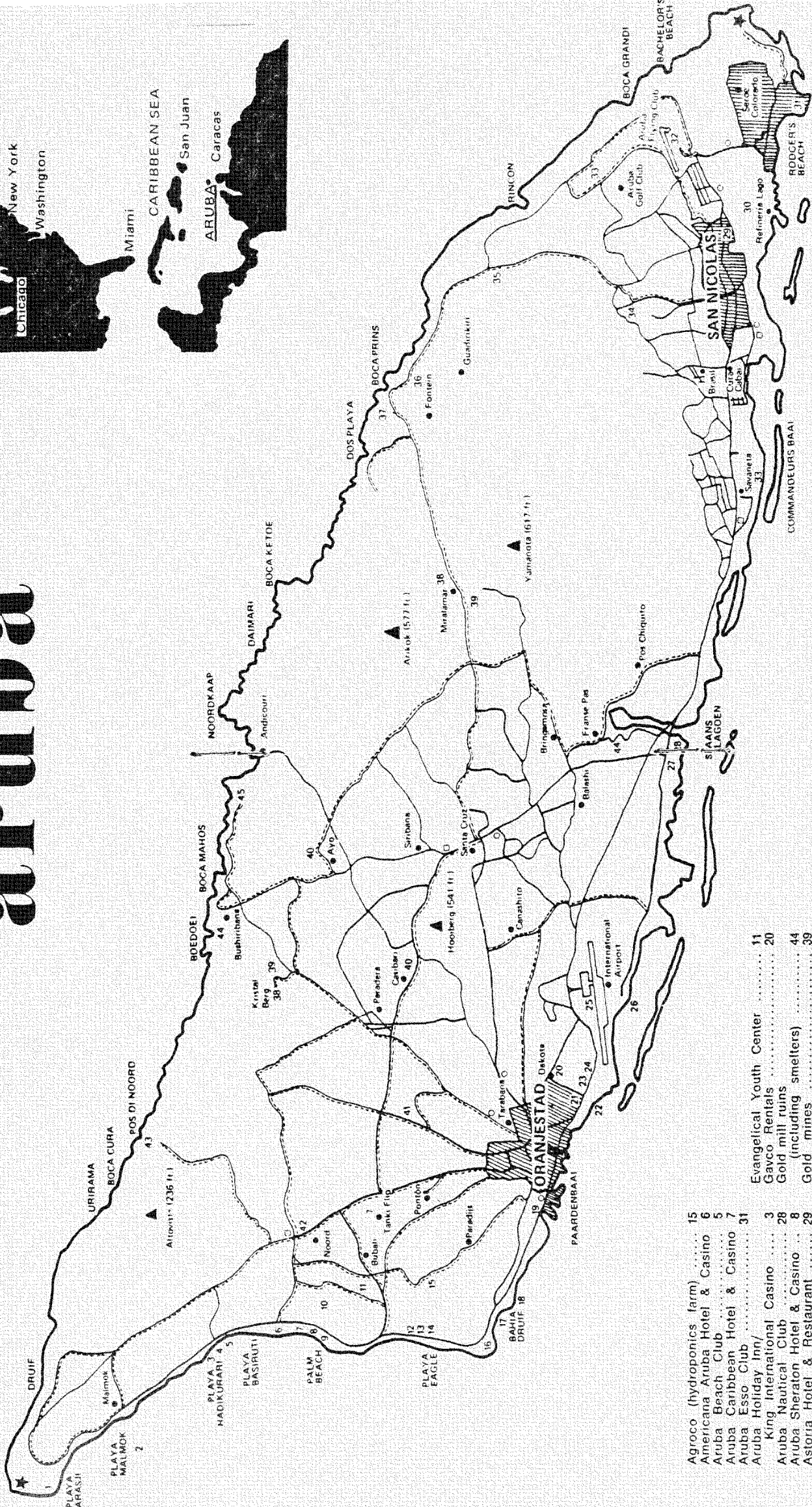
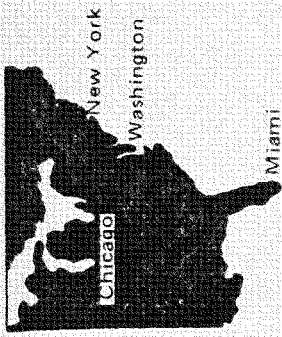
Regarding the above concern, world travel cited:

. . . Tourism, we should know by now, is a vulnerable industry, as other industries for that matter, to a greater or lesser degree. Ill-planned or ill-conceived, it can bring a rash of problems in its wake; environmental, political, social or economic. Those countries which have relied too heavily on the tourist dollar crop have come to harm or have had to rue their over-hastiness and lack of planning. Many examples come to mind of those countries that may be suffering from too rapid or excessive tourist development, making it difficult for them to tide over the present depression. Their economies - tourist or otherwise - could be suffering from overheating and we should not fall into the same trap.²

²World Travel No. 140, Jan.-Feb., 1978, p. 26.

APPENDIX A

Aruba



SCALE

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KILOMETERS

— Best route to points of interest
▲ Hill ○ Esso gasoline station
□ Police Station ★ Lighthouse

- 1 Playa Arashi
- 2 Playa Malinok
- 3 King International Casino
- 4 Aruba Esso Club
- 5 Aruba Caribbean Hotel & Casino
- 6 Americana Aruba Hotel & Casino
- 7 Aruba Beach Club
- 8 Aruba Sheraton Hotel & Casino
- 9 Astoria Hotel & Restaurant
- 10 De Palm Tours
- 11 Evangelical Youth Center
- 12 Playa Eagle
- 13 Playa Basiruti
- 14 Divi Divi Beach Hotel
- 15 Agroco (hydroponics farm)
- 16 Manchebo Beach Resort Hotel
- 17 Divi Divi Beach Hotel
- 18 Tamarijn Beach Hotel
- 19 De Olde Molen
- 20 Gavco Rentals
- 21 Talk of the Town Resort Hotel
- 22 Surfside
- 23 Cas di Cultura (Cultural Center)
- 24 Caribe Club
- 25 Princess Beatrix Airport
- 26 Bucuti Yacht Club
- 27 Electricity Plant
- 28 Aruba Nautical Club
- 29 Heriz Car Rental
- 30 Karawara Inn
- 31 Aruba Holiday Inn
- 32 De Vuyst airfield
- 33 Panoramic view
- 34 Lago Oil & Transport Co.
- 35 Huliba Cave
- 36 Caves (with indian inscriptions)
- 37 Dunes
- 38 Kintal Berg
- 39 Gold mines
- 40 Paradijs
- 41 Aruba Esso Club
- 42 Santa Anna Church (hand carved altar)
- 43 P.O.V.A. (social club for policemen)
- 44 Gold mill ruins
- 45 Buhiribana
- 46 International Airport
- 47 Natural Bridge
- 48 Tamarijn Beach Hotel
- 49 Heriz Car Rental
- 50 I.O.W.A. Clubhouse
- 51 Aruba Golf Club
- 52 Wreck of German freighter
- 53 Picnic area
- 54 Paradijs
- 55 Paradijs
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- 100 Paradijs

- 11 Evangelical Youth Center
- 12 Gavco Rentals
- 13 Gold mill ruins
- 14 Gold mines
- 15 Heriz Car Rental
- 16 Huliba Cave
- 17 I.O.W.A. Clubhouse
- 18 Karawara Inn
- 19 Lago Oil & Transport Co.
- 20 Lourdes Grotto (R.C. shrine)
- 21 Manchebo Beach Resort Hotel
- 22 Marine Recreation Center
- 23 Natural Bridge
- 24 Panoramic view
- 25 Picnic area
- 26 Pilgrim's chapel
- 27 P.O.V.A. (social club for policemen)
- 28 Princess Beatrix Airport
- 29 Wreck of German freighter
- 30 Santa Anna Church (hand carved altar)
- 31 Surfside
- 32 Talk of the Town Resort Hotel
- 33 Tamarijn Beach Hotel
- 34 Water distillation & Electricity Plant
- 35 Wreck of German freighter

APPENDIX B

SUMMER—FALL HOTEL RATES
April 16, 1978—December 15, 1978

ON PALM BEACH

Aruba Caribbean Hotel and Casino (Resort Hotel)

RATES, E.P.:
 (220 rooms and 20 cabanas)
 Single: \$32-44-56
 Double: \$36-48-60
 Suite: \$65-100-115
 Extra person in room: \$6
 M.A.P. add \$21 per person

Telephone: 2250
 Casino, night club, bar with entertainment, swimming pool, water sports, tennis courts, shuffleboard, golf by arrangement, entirely air conditioned
 An Executive House Hotel—
 N.Y. office: 212-986-3302

Aruba Sheraton Hotel and Casino (Resort Hotel)

RATES, E.P.:
 (202 rooms including lanais)
 Single: \$32-39-45
 Double: \$41-46-52
 Suite: \$80-132
 Extra person in room: \$10
 Children up to 12 years sharing room with parent(s) free
 M.A.P. add \$24 per person

Telephone: 3900
 All resort activities, including water sports, tennis, shuffleboard, golf at Aruba Golf Club by arrangement, casino, night club, bars and shopping arcade, entirely air conditioned.
 A Sheraton Hotel—
 N.Y. office: 800-325-3535

Holiday Inn and Casino—Aruba (Resort Hotel)

RATES, E.P.:
 (390 rooms)
 Single: \$34-42-46
 Double: \$38-46-50
 (July/Aug: \$2 Additional)
 Extra person in room: \$8
 Children up to 12 years sharing room with parent(s) free
 M.A.P. add \$20 per person
 (Children: \$16)

Telephone: 3600
 Water sports and lessons available, fresh water swimming pool, tennis, casino, restaurant, bar, night club, entirely air conditioned, television in every room
 N.Y. office: 212-736-4800

Americana Aruba Hotel and Casino (Resort Hotel)

RATES, E.P.:
 (200 rooms)
 Single: \$33-39-43-55
 Double: \$38-44-48-60
 Suite: \$120 - 250
 Extra person in room: \$8
 M.A.P. add \$22 per person

Telephone: 4500
 Casino, swimming pool, two tennis courts, water sports, shopping arcade, restaurant, night club, lounge with entertainment.
 N.Y. office: 800-228-3278

Concorde Hotel And Casino (Resort Hotel)

RATES, E.P.:
 (490 rooms)
 Single: \$44-51-57
 Double: \$49-56-62
 Suite: \$95-120-185
 Extra person in room: \$10
 M.A.P. add \$20 per person
 (Children: \$18)

Telephone: 4472
 Spacious beach, swimming pool, restaurant, casino, night club, tennis courts, water sports and shopping arcade.
 N.Y. office: 212-586-5099

Basi Ruti Beach Hotel (Resort Hotel)

RATES, E.P.:
 (15 rooms)
 Single: \$20-24
 Double: \$26-30
 Villa: \$45

Telephone: 2222
 Italian dining room and terrace. Bar overlooks ocean.

ON MANCHEBO BEACH

Manchebo Beach Resort Hotel

RATES, E.P.:
 (72 rooms)
 Single: \$28-30
 Double: \$33-35
 Extra person in room: \$8
 Children up to 12 years sharing room with parent(s) free
 M.A.P. add \$20 per person

Telephone: 3444
 Located between Oranjestad and Palm Beach. All rooms face the sea, completely air conditioned, restaurant, bar, fresh water swimming pool, shuffleboard, water sports, golf by arrangement. All facilities of Talk of the Town interchangeable with Manchebo Beach guests.
 N.Y. office: 212-628-3319

ON DRUIF BEACH

Aruba Beach Club (Resort Hotel)

RATES, E.P.:
 (133 Suites)
 Single: \$30-35-60
 Double: \$34-40-60
 Extra person in room: \$8
 M.A.P. add \$18 per person.

Telephone: 3000
 Restaurants, mini supermarket, shops, beach, swimming pool and entertainment.
 N.Y. office: 212-757-5910

Divi Divi Beach Hotel (Resort Hotel)

RATES, E.P.:
 (148 rooms including casitas)
 Single: \$30-34-38
 Double: \$32-36-40
 Extra person in room: \$7
 Children up to 12 years sharing room with parent(s) free
 M.A.P. add \$20 per person
 (Children: \$17)

Telephone: 3300
 Dining terrace and al fresco bar overlook pool and beach. Filtered fresh water pool, tennis, shuffleboard, water sports by arrangement. Completely air conditioned. Nightly local entertainment. All facilities of Tamarijn interchangeable with Divi Divi guests.
 N.Y. office: 800-252-6323
 Outside N.Y., collect: 607-277-3484.

Tamarijn Beach Hotel (Resort Hotel)

RATES, E.P.:
 (150 rooms)
 Single: \$28-33
 Double: \$30-35
 Extra person in room: \$5
 M.A.P. add \$18 per person
 (Children: \$15)

Telephone: 4150
 Al fresco dining room and terrace. Bar overlooks ocean. Filtered fresh water pool, tennis. Nightly local entertainment. Completely air conditioned. All rooms oceanfront. All facilities of Divi Divi interchangeable with Tamarijn guests.
 N.Y. office: 800-252-6323
 Outside N.Y., collect: 607-277-3484

IN ORANJESTAD

Talk of the Town Resort Hotel

RATES, E.P.:
 (62 rooms)
 Single: \$28-30
 Double: \$33-35
 Extra person in room: \$8
 Children up to 12 years sharing room with parent(s) free
 M.A.P. add \$20 per person

Telephone: 3380
 Overlooking Caribbean beach, swimming pool, night club, bar, restaurant with entertainment and dancing. Completely air conditioned. All facilities of Manchebo Beach interchangeable with Talk of the Town guests.
 N.Y. office: 212-628-3319

Hotel Caribana (Commercial Hotel)

RATES, E.P.:
 (16 rooms)
 Single: \$14
 Double: \$19
 Extra person in room: \$8

Telephone: 1687
 All rooms air conditioned, restaurant.

Central Hotel (Commercial Hotel)

RATES, C.P.:
 (25 rooms)
 Single: \$14.30
 Double: \$20
 Extra person in room: \$6

Telephone: 2260
 Restaurant and bar, air conditioned rooms available.

Victoria Hotel (Commercial Hotel)

RATES, E.P.:
 (30 rooms)
 Single: \$12.50-15.50
 Double: \$18-22.75
 Extra person in room: \$4

Telephone: 3850
 All rooms air conditioned.

IN SAN NICOLAS

Astoria Hotel (Commercial Hotel)

RATES, E.P.:
 (10 rooms)
 Single: \$12
 Double: \$14

Telephone: 5132
 All rooms air conditioned, restaurant.

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