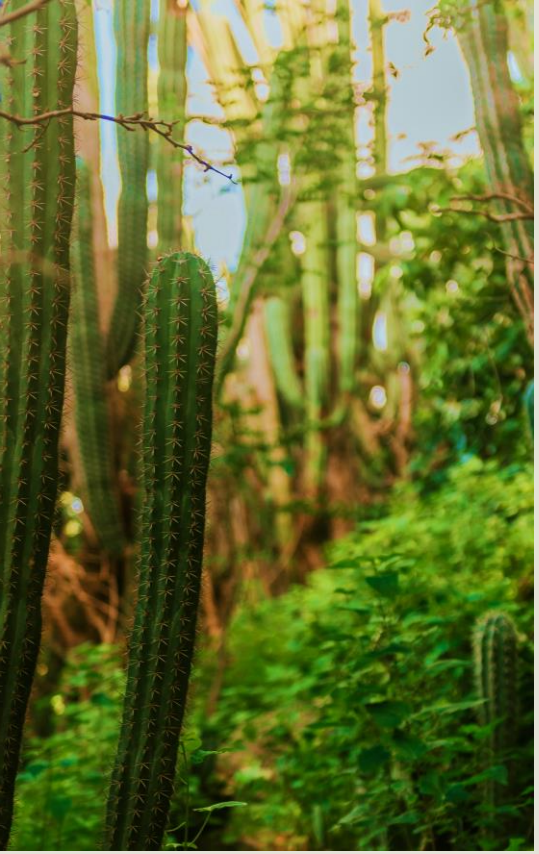

Colombia

Research Report

Aruba Tourism Authority

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Research *Methodology*

For this Colombian Research, A.T.A. examined the travel and leisure habits of the characteristics of the Colombians, their decision-making style, active lifestyle, their need for exploration, and the activities and experiences the Swiss traveler engages in at home.

The survey will be used to understand and measure which elements/attributes should be considered for the market and what is essential when considering a vacation.

The primary research for this report consisted of quantitative methods. An online survey was created in Spanish and deployed in September 2022.

In total, we received 620 respondents.

The survey was distributed through Qualtrics's online service to their Database. This entails that the respondents are not past visitors.

The following criteria were used to qualify:
- Do you currently reside in Colombia?
- Household Income: - $50K-100K (~50%) and - >100K (~50%)

Additionally, from the mentioned criteria, a screening question was used to select respondents who have traveled or will travel internationally to the Caribbean and if they have traveled in the past two years. The Survey consisted of 16 questions seeking to understand Colombian travel behavior.

The Data was also analyzed using the chi-square test to compare observed and expected results. Chi-square distributions are used for hypothesis testing.

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Demographics

Gender

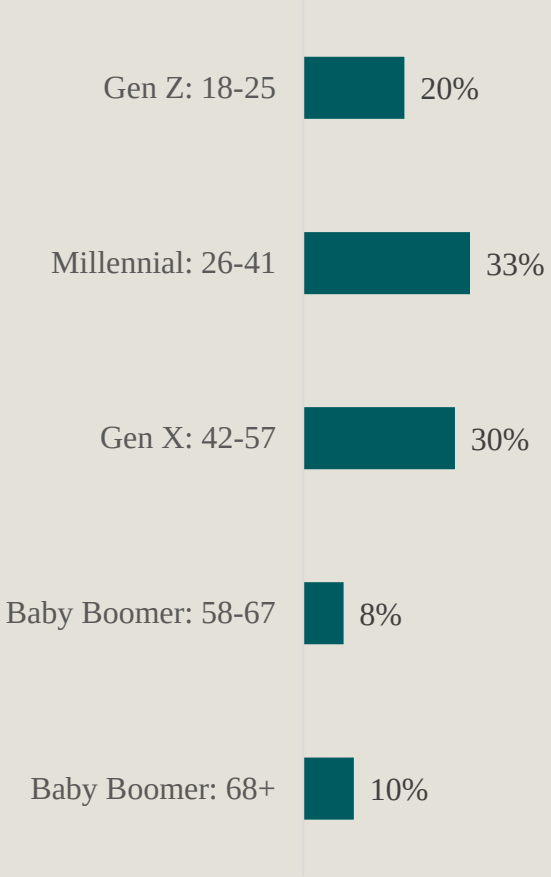
49%

Male

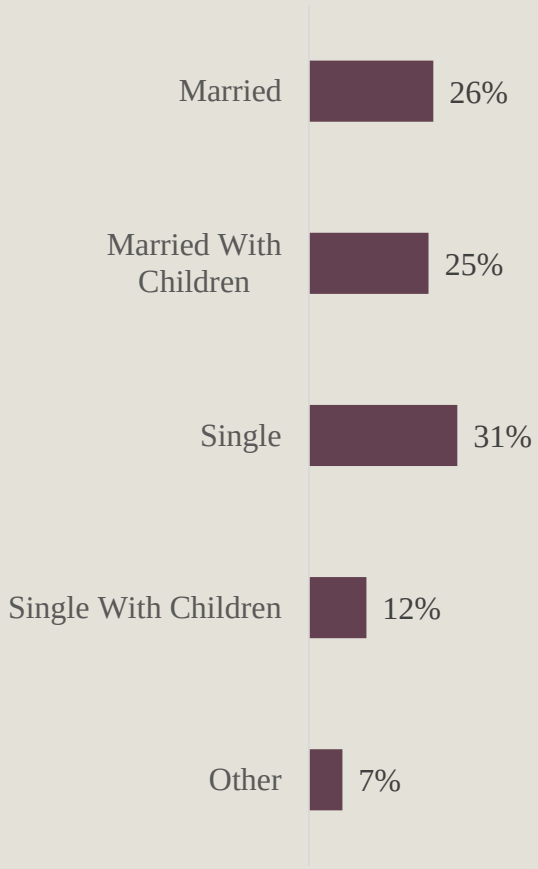
51%

Female

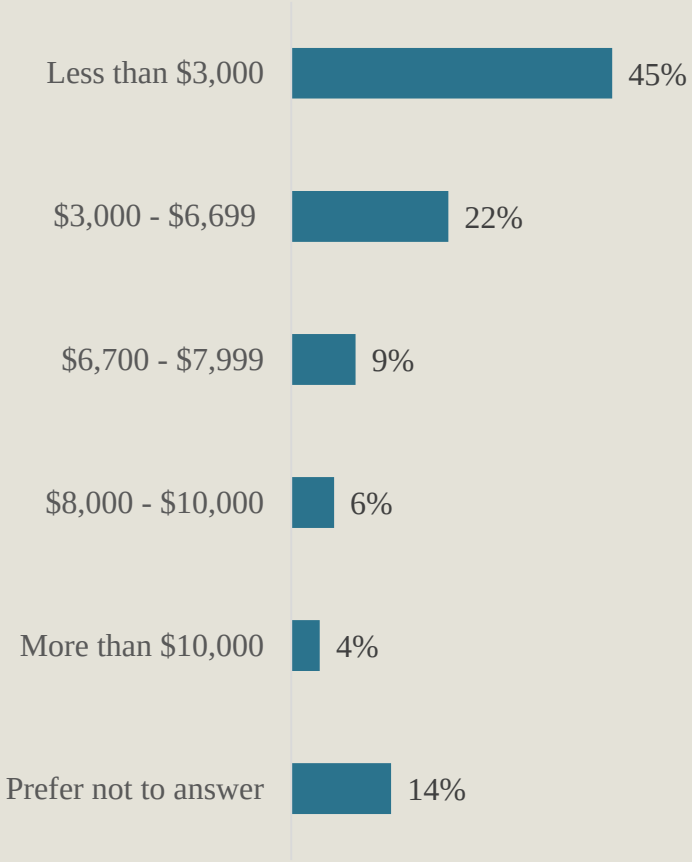
Age *Range*



Household



Average *Monthly Income*



N: 620

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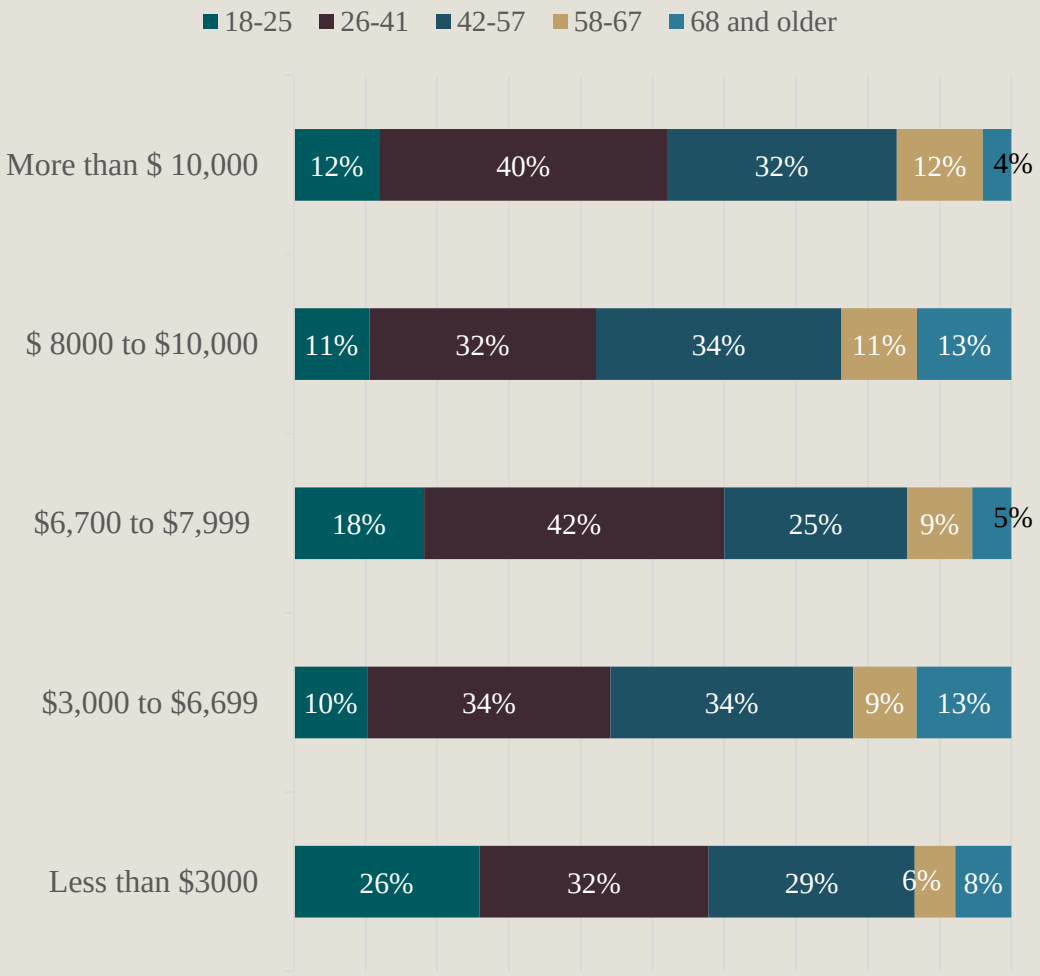
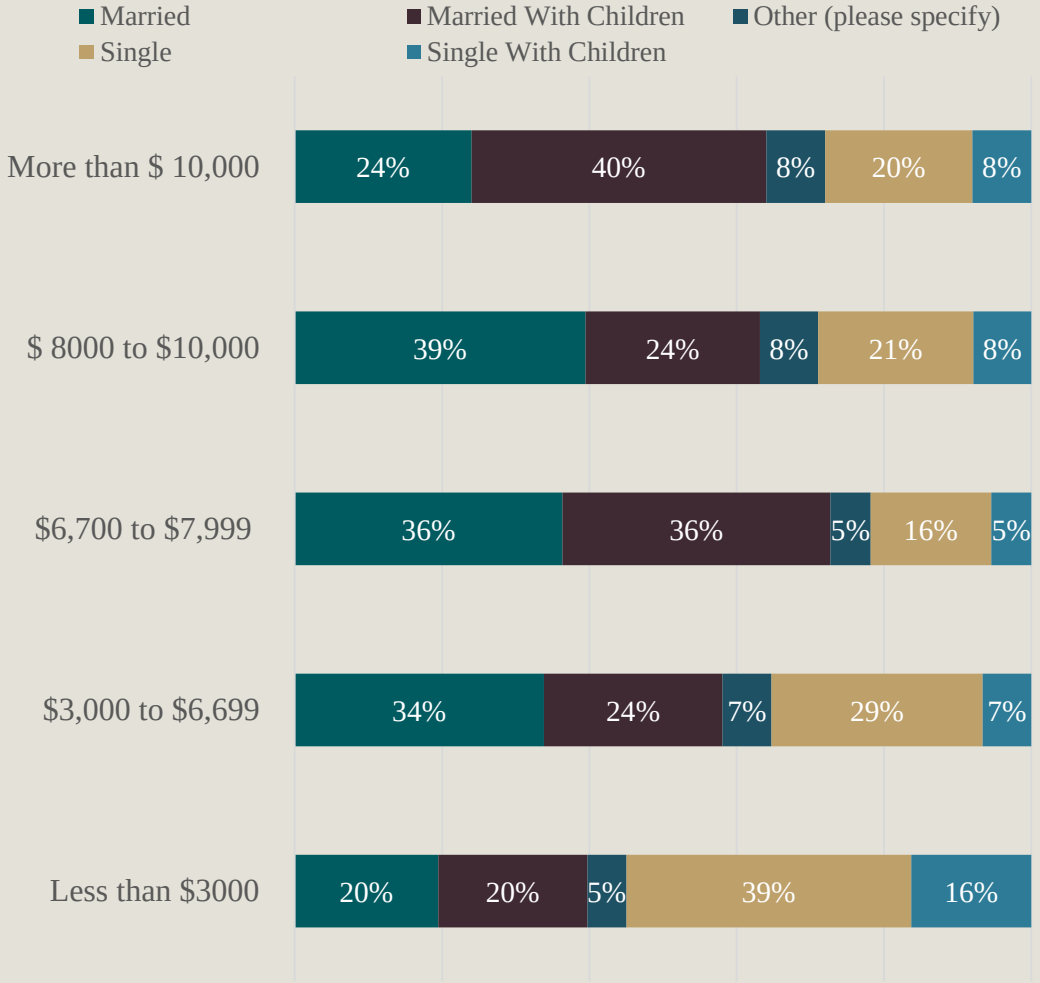
Monthly Income *by Generation*



Note: Excluded answer option "Prefer not to state" N=84

Monthly Income *by Marital Status*



Note: Excluded answer option "Prefer not to state" N=84

N: 620

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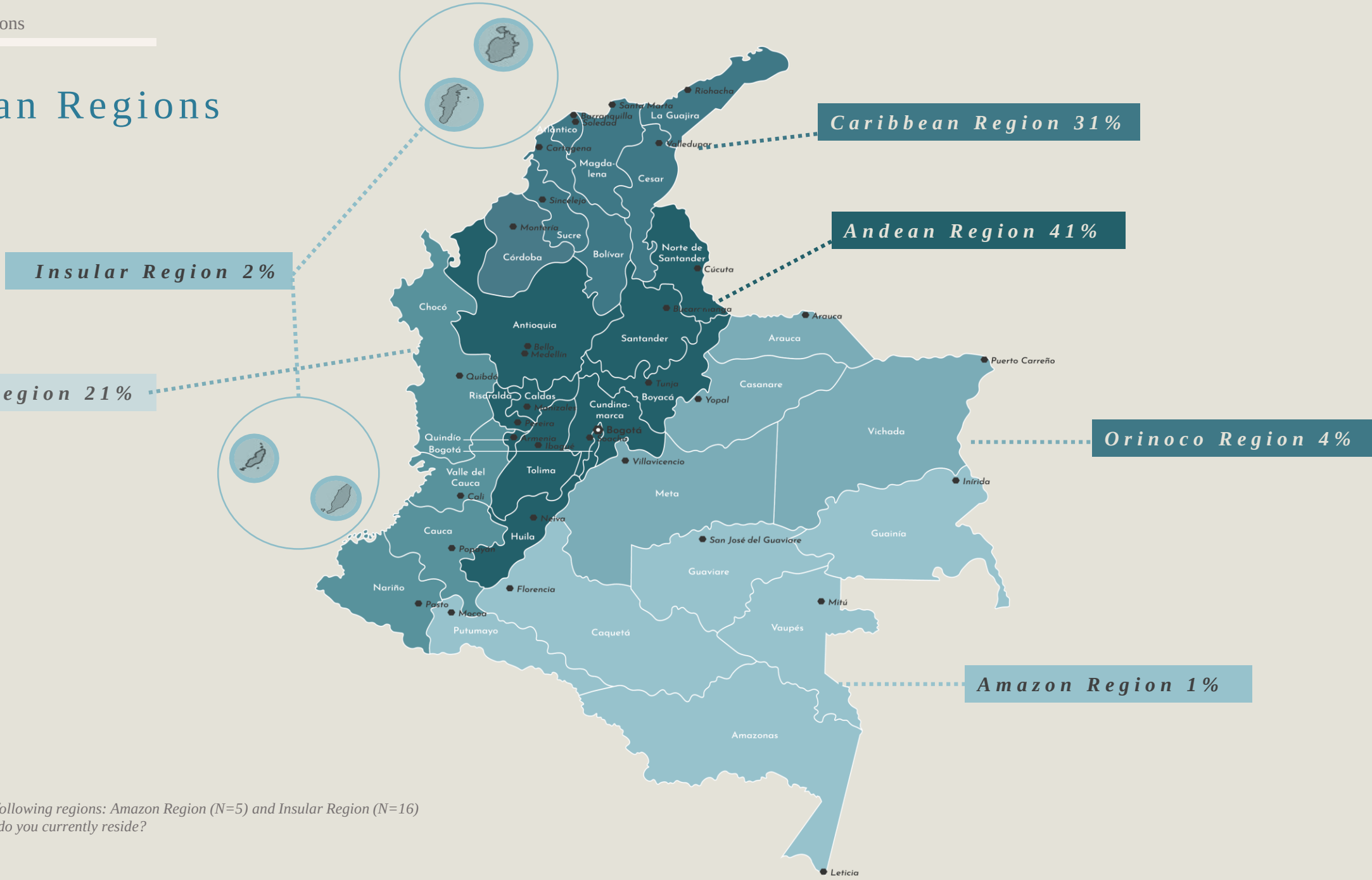
Colombian Regions



Note: Directional data for the following regions: Amazon Region (N=5) and Insular Region (N=16)
Q: Which Region in Colombia do you currently reside?

N: 620

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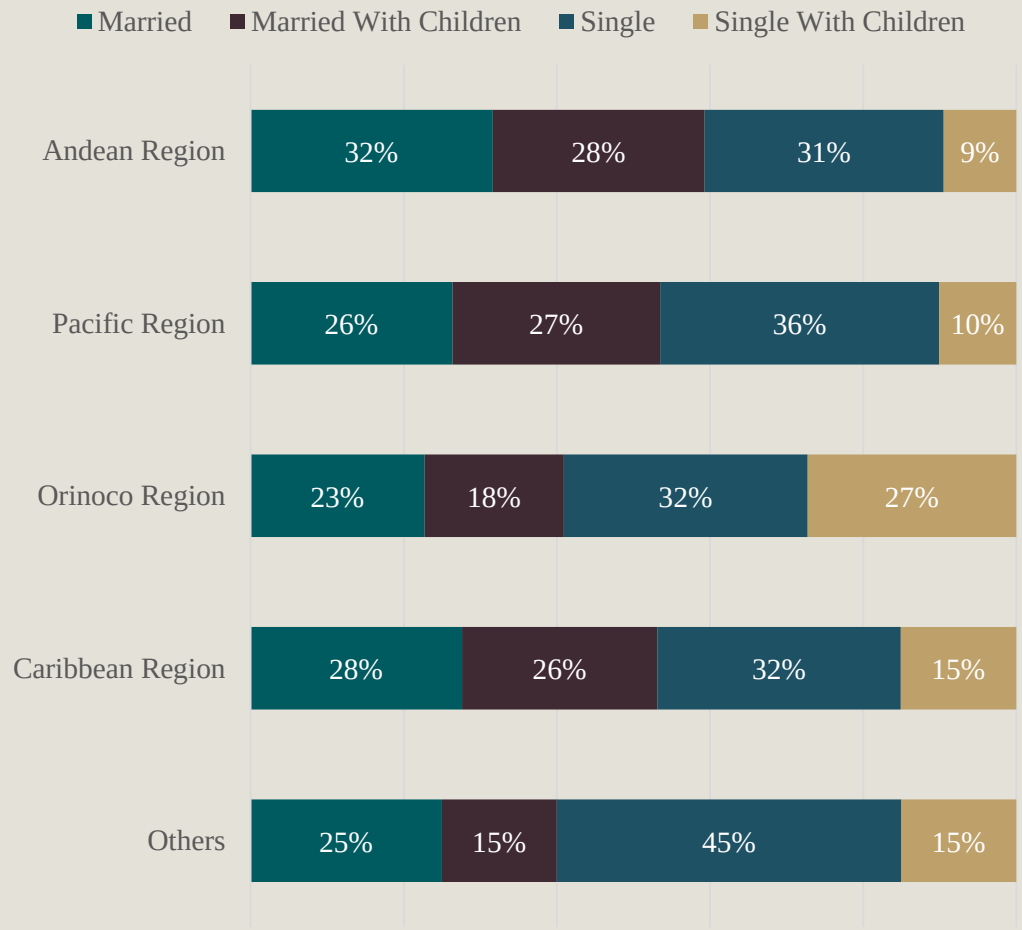
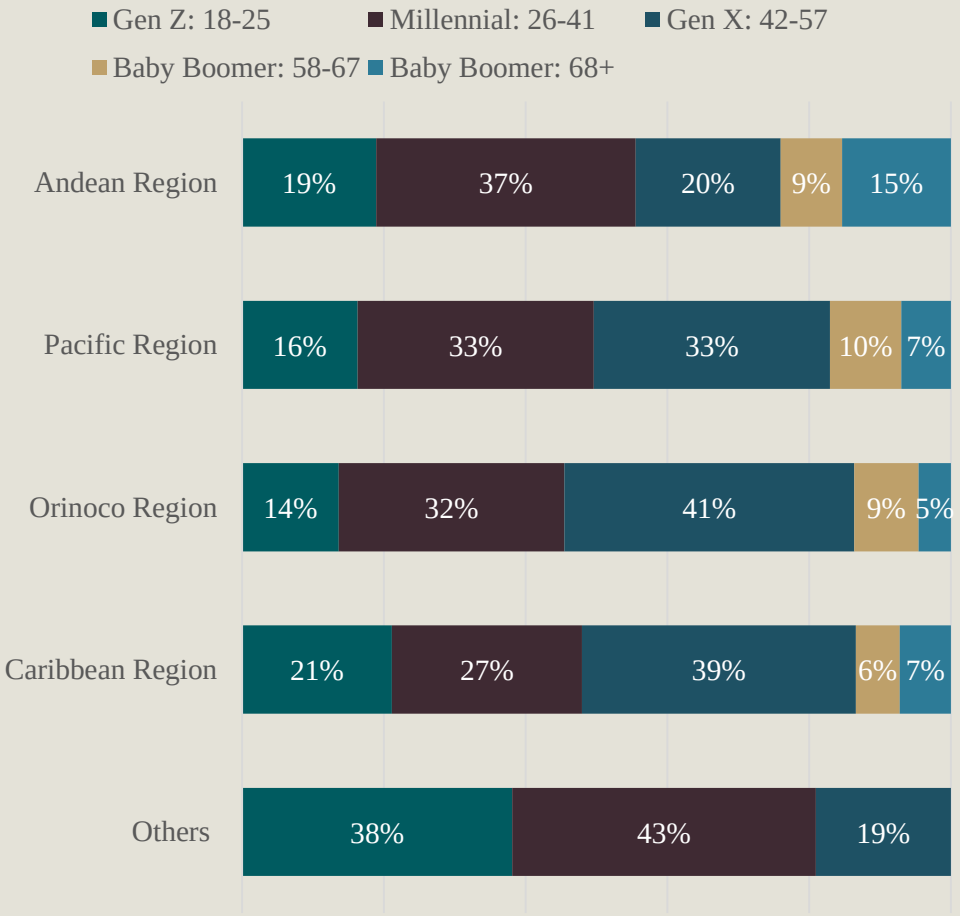
Region by *Marital Status*



Note: Others consist of the following regions: Amazon Region (N=5) and Insular Region (N=16)

Region by *Generation*



Note: Others consist of the following regions: Amazon Region (N=5) and Insular Region (N=16). Excluded Prefer not to state N=84

N: 620

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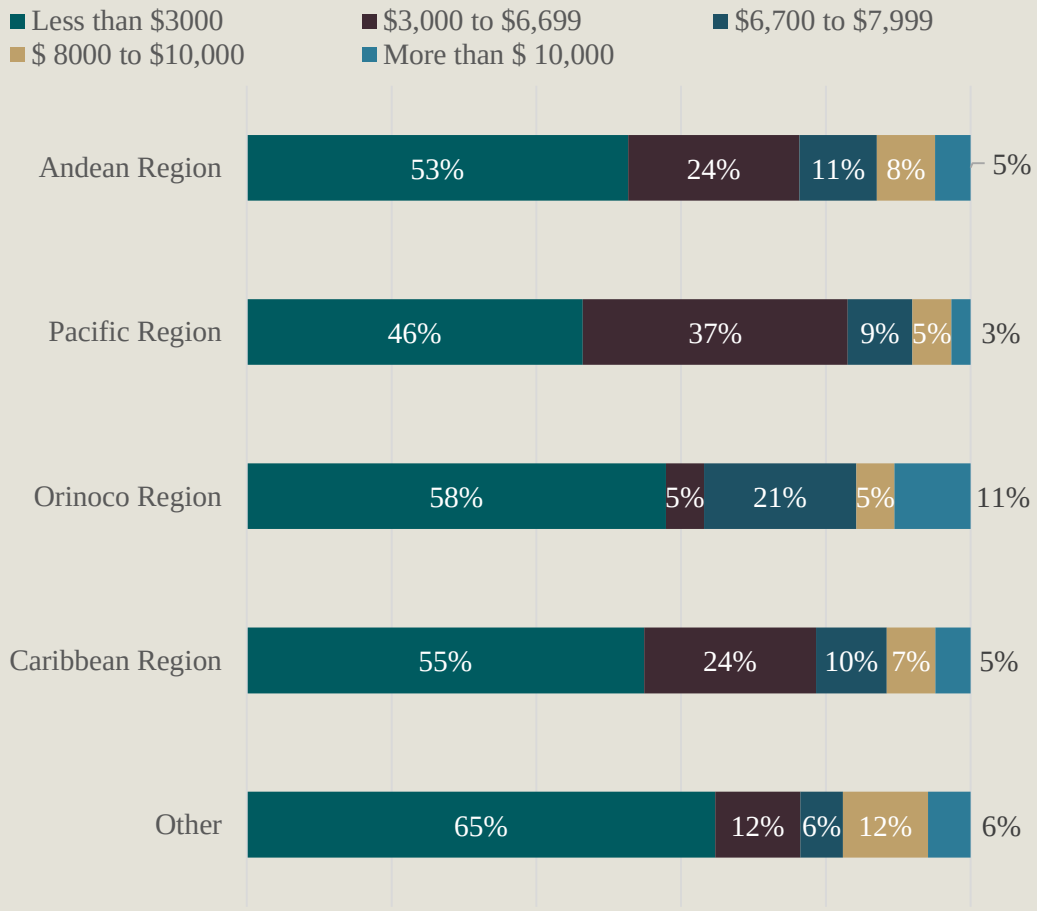
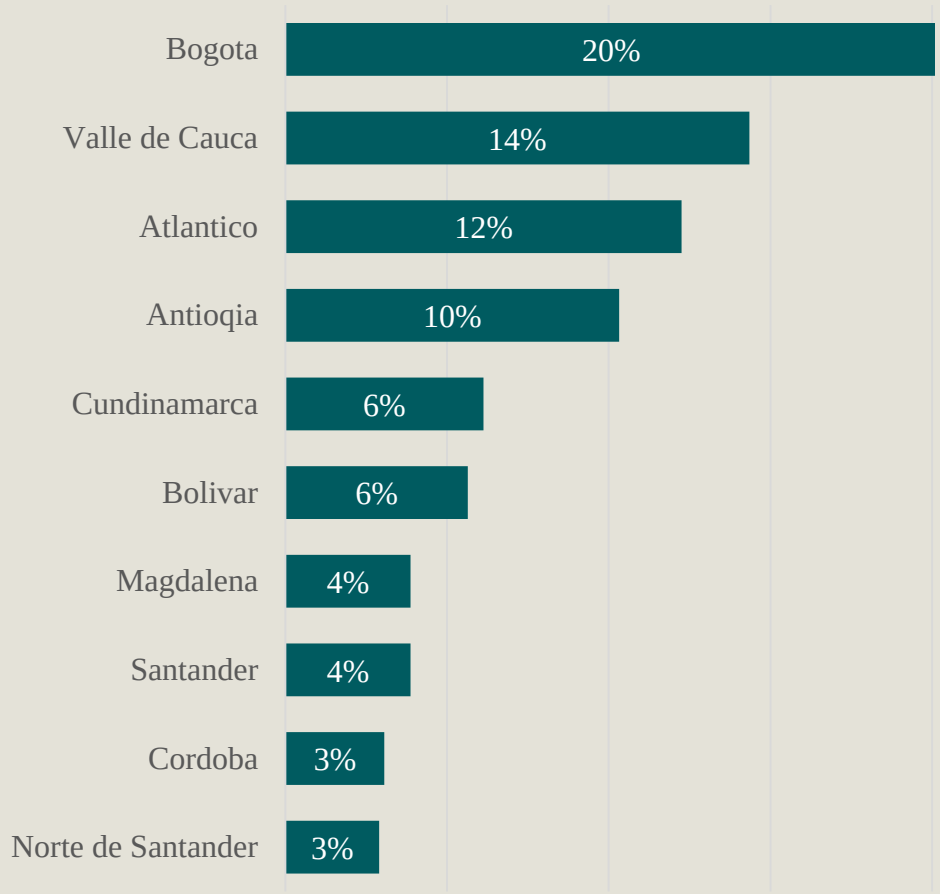
Region by *Household Income*



Note: Others consist of the following regions: Amazon Region (N=5) and Insular Region (N=16). Excluded answer option "Prefer not to state" N=84

Top 10 *Departments*



Note: Other Departments -17%

N: 620

Key Highlights

- 33% of the respondents are Millennials, and 30% are Gen X.
- 51% of the respondents were Females, and 49% were Males.
- 45% of the respondents indicated having an HHI below $3,000 (HHI less than 6,7 million COP) and 10% of the respondents have an HHI of above $8,000 (HHI above 44.1 million COP).
- 42% of the respondents who indicated having an HHI between $6,700 – 7,999 (max 35.3 million COP) are between 26-41 years.
- 31% were single. Of those married with children, 36% have an HHI between $6,700 – 7,999 (max 35.3 million COP), and 40% have an HHI above 10,000 (above 44.1 million COP). 39% of the respondents with an HHI between 8,000-10,000 (Approximately max 44.1 million COP) are married. 39% of those with an HHI of less than 3,000 are single (Approx. less than 6,7 million COP).
- 41% of the respondents live in the Andean Region, 31% in Caribbean Region, and 21% in Pacifico Region.
- Of the top 3 departments of the respondents are as follows, 20% live in Bogota, 14% in Valle Cauca, and 12% in Atlantico.

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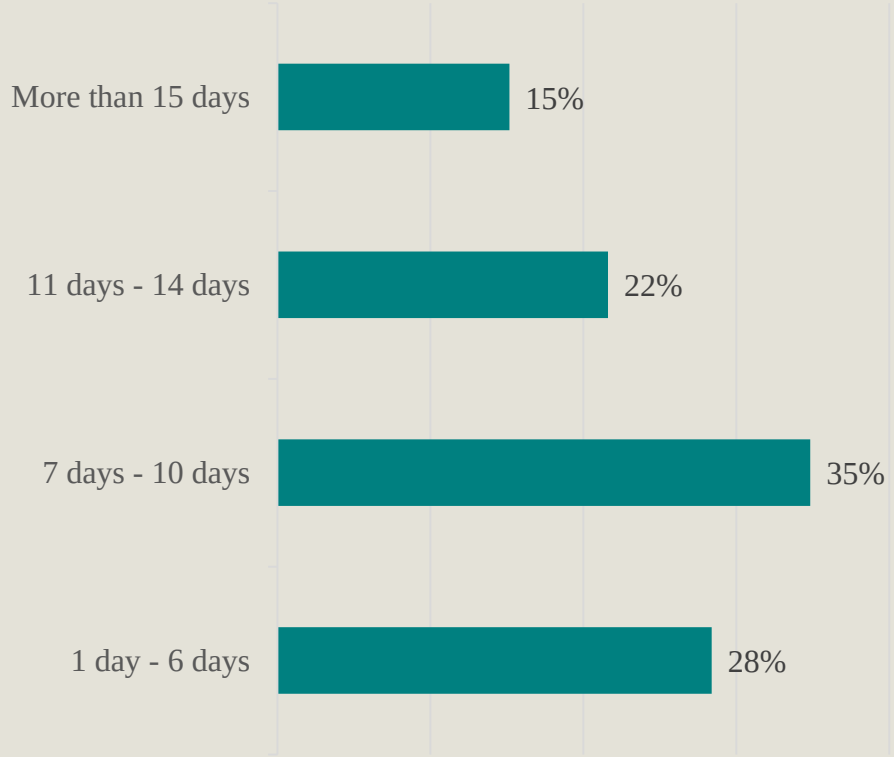
Familiarity

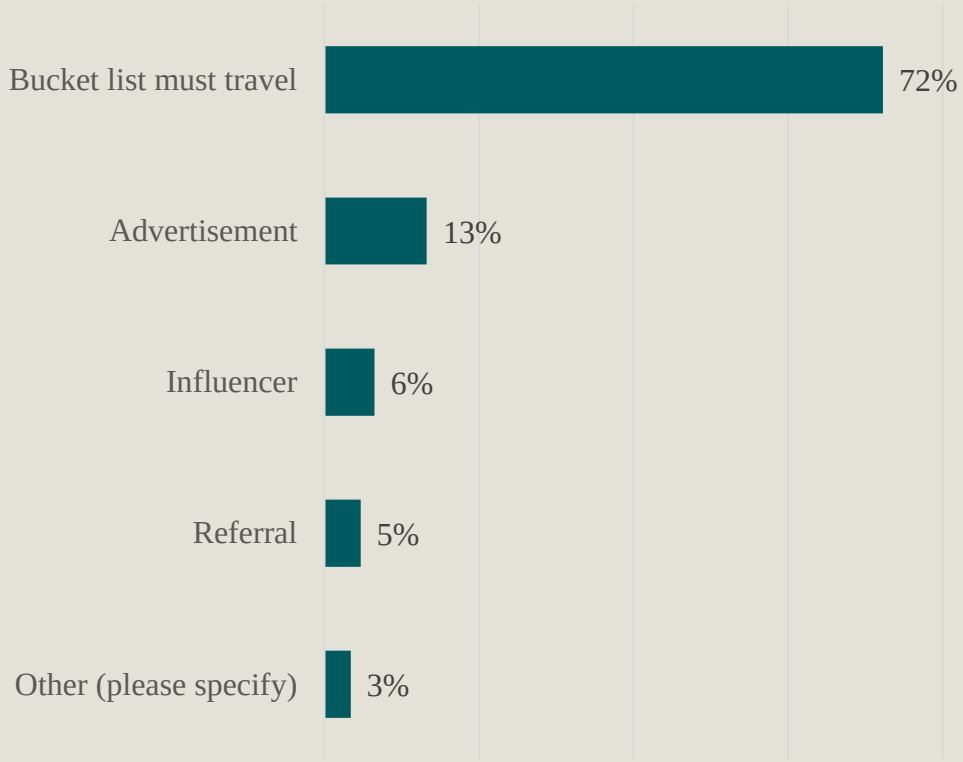
Vacation Days *and Type of Vacation*

Vacation Days per Year



Q: How many vacation days do you usually take per year on average?

Type of Vacation



Q: How would you define your next vacation destination?

N: 620

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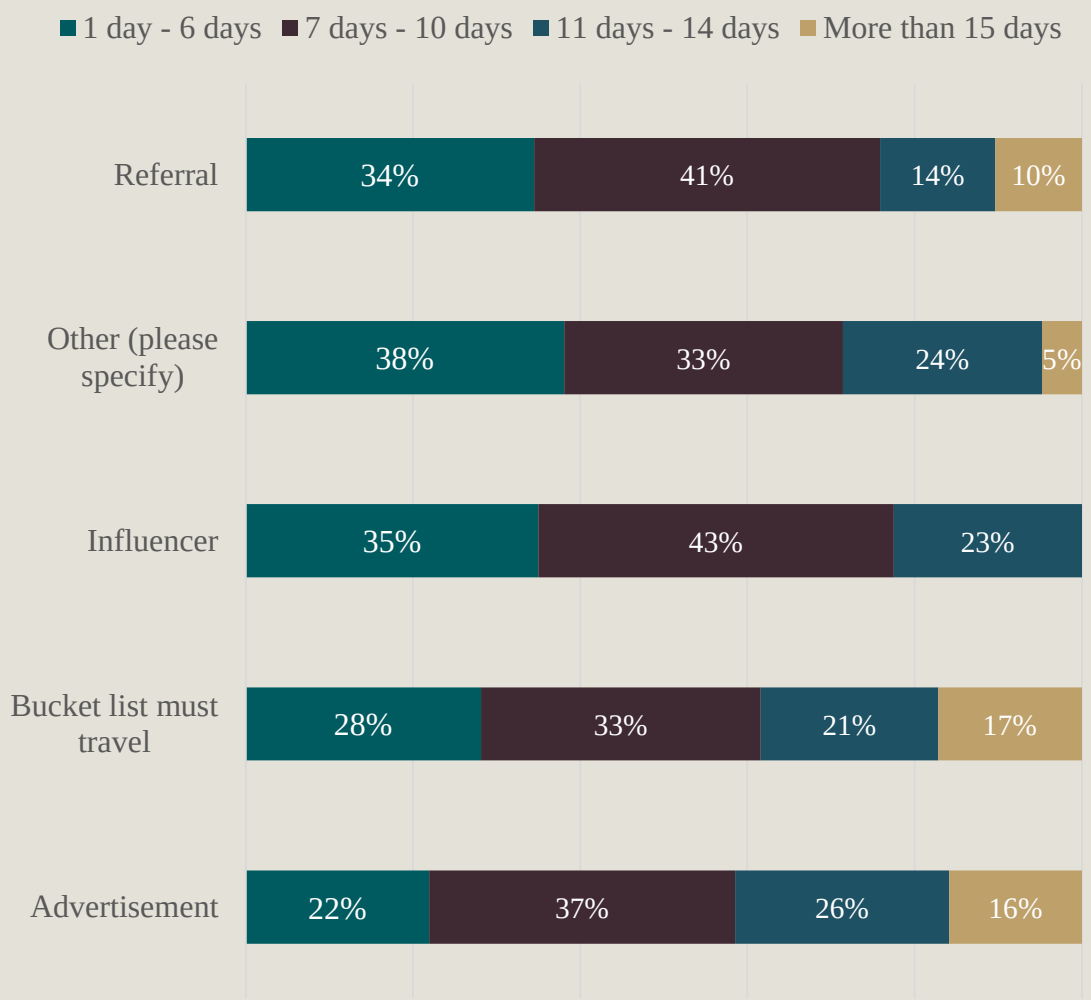
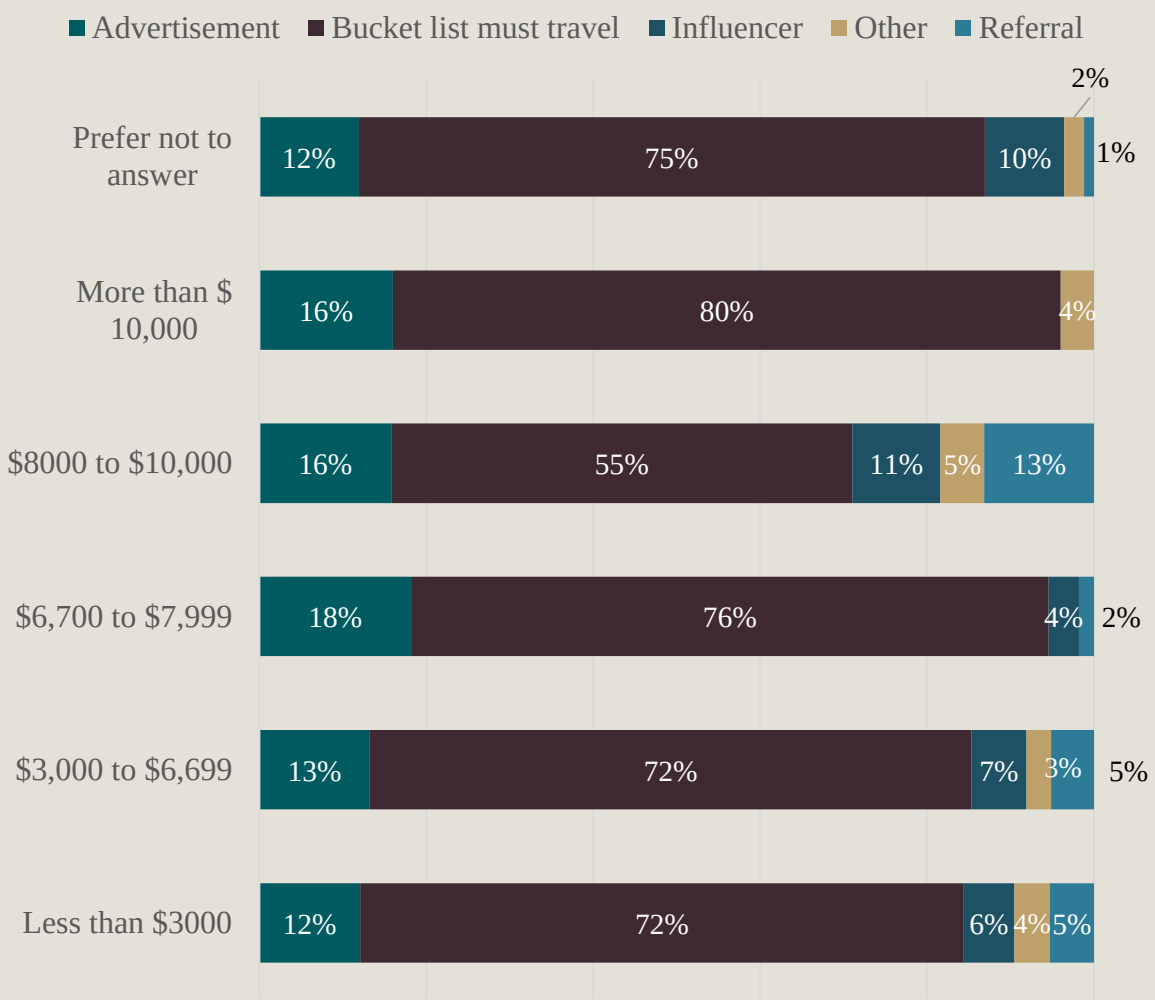
Type of Vacation
By Vacation Days



Type of Vacation
By HHI



N: 620

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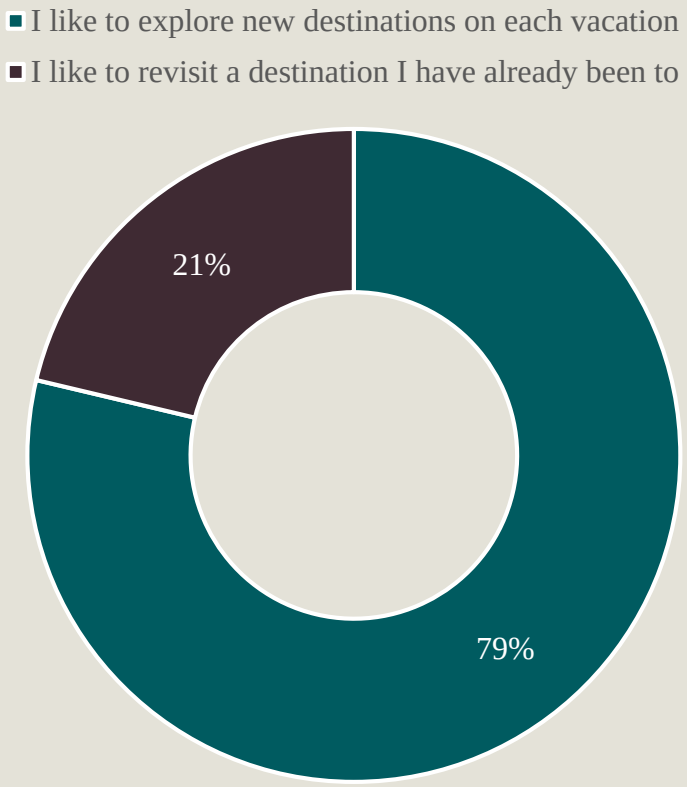
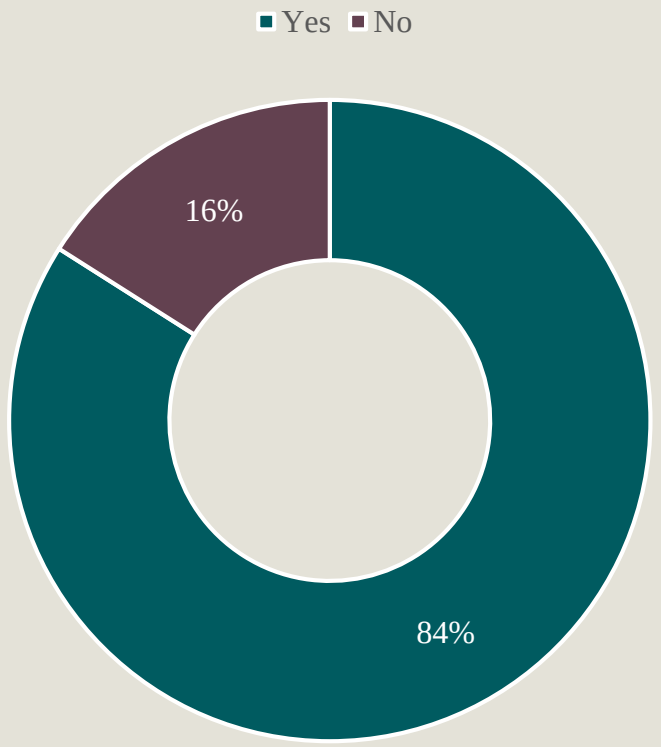
Type of Traveler *and Heard of Aruba*

Type of Traveler
Explorer vs. Loyal Traveler



Q: Which of the following best describes you as a traveler?

Have you heard about Aruba before?

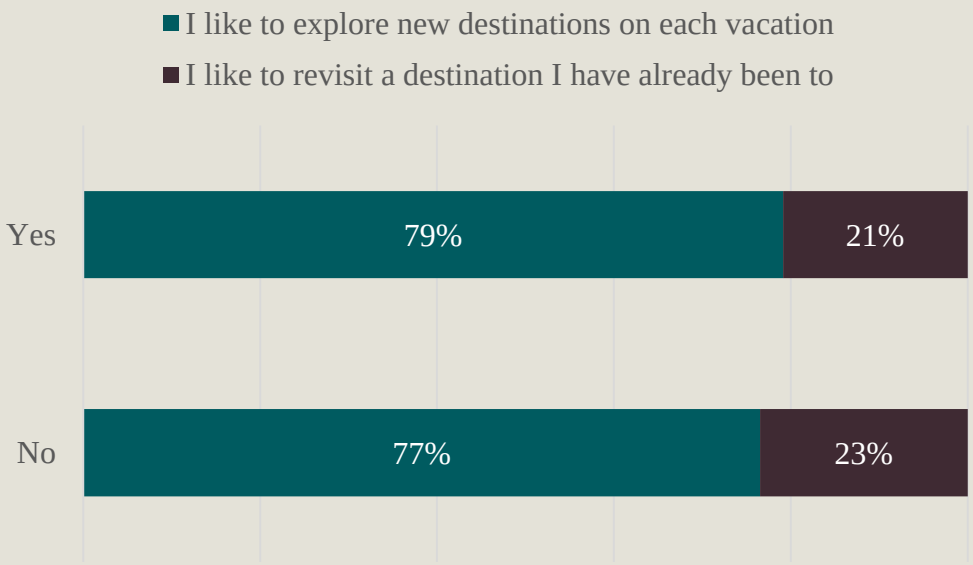


Q: Have you heard about Aruba before?

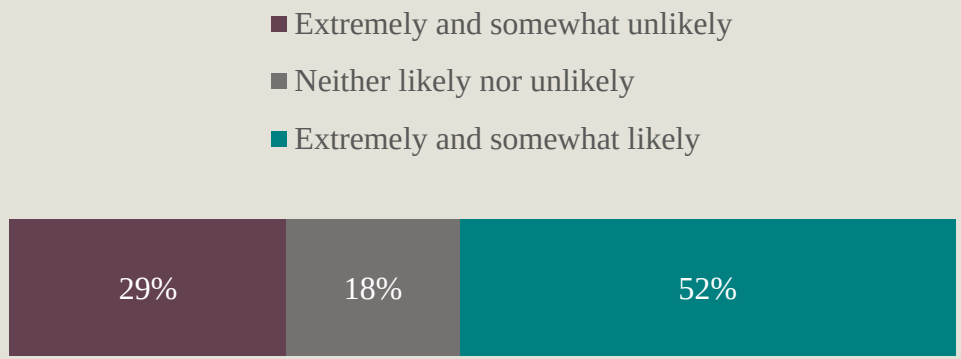
N: 620

Vacation Days *and Type of Vacation*

Familiar with Aruba



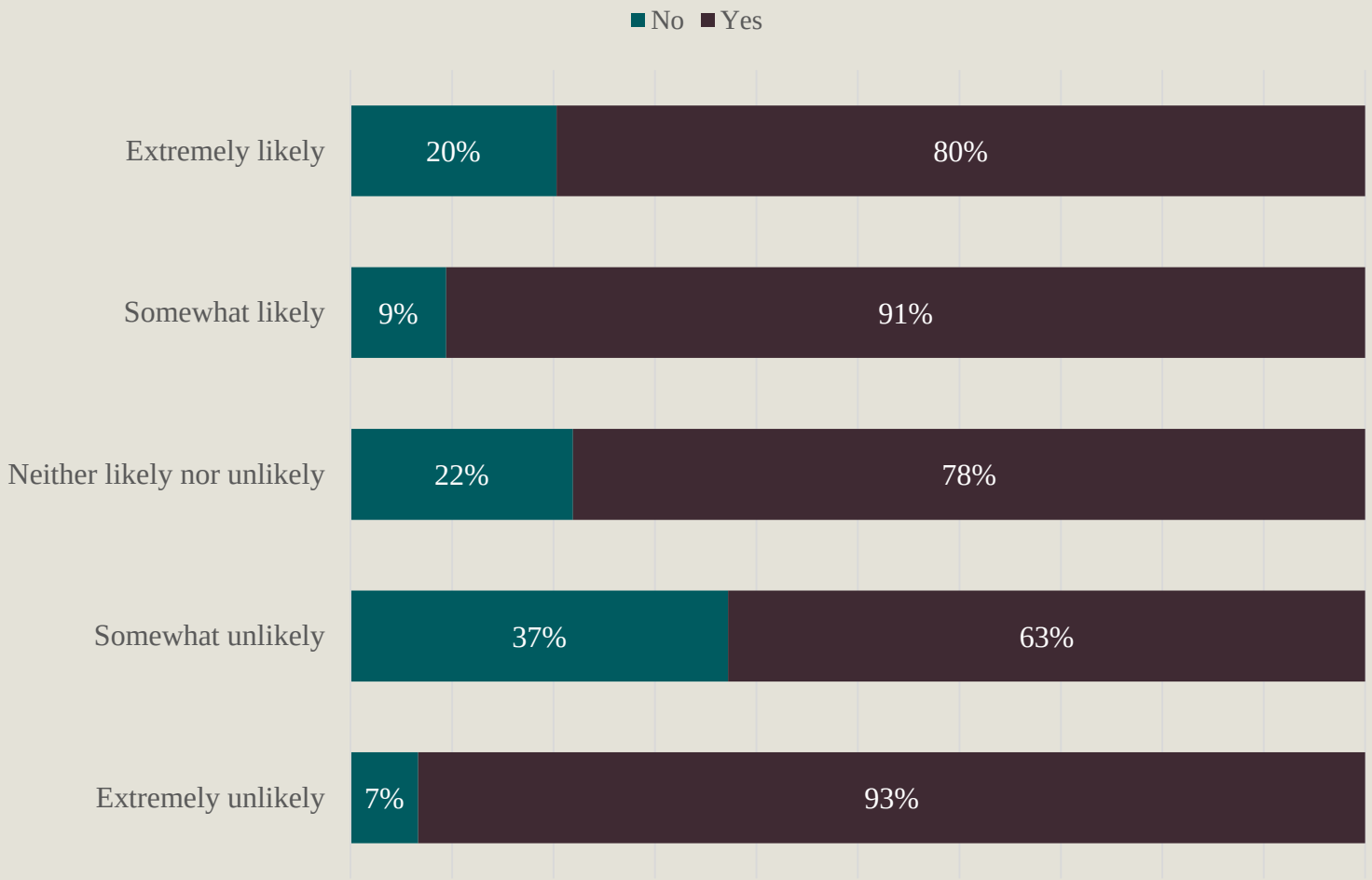
Likelihood of Traveling to a Caribbean Island Next Year



Q: How likely are you to travel abroad to a Caribbean island in the next 12 months?

N: 620

Likelihood to visit
By Familiarity With Aruba



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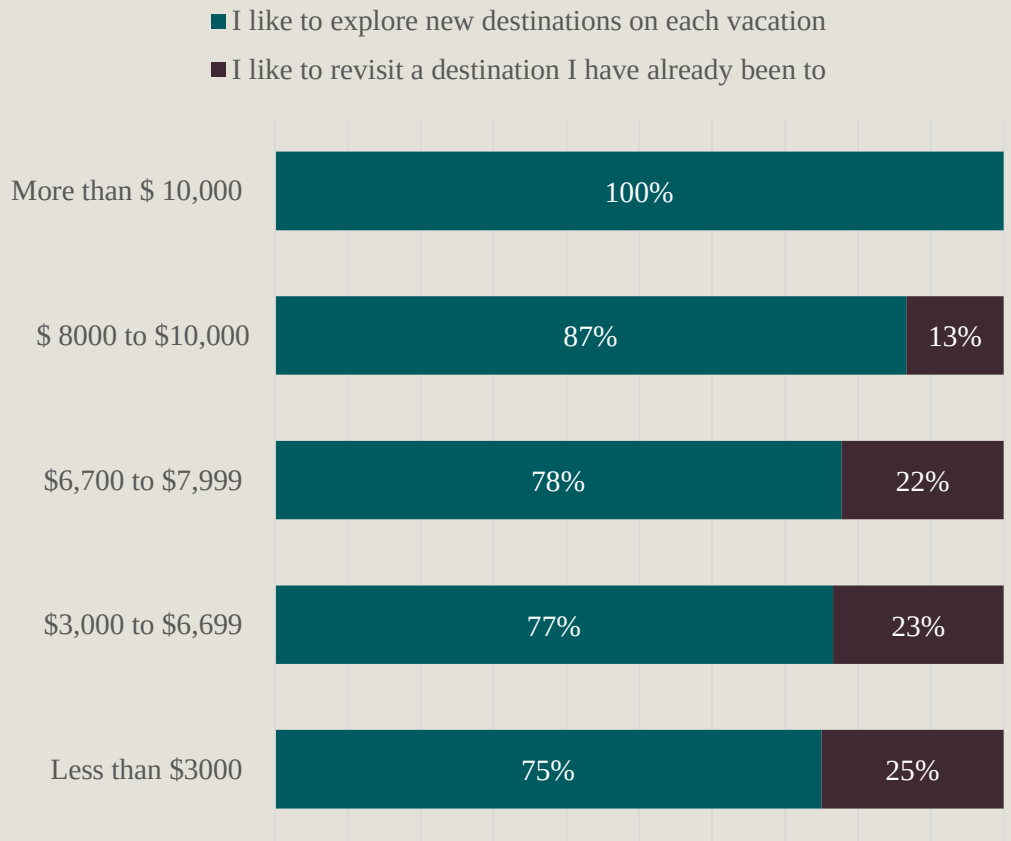
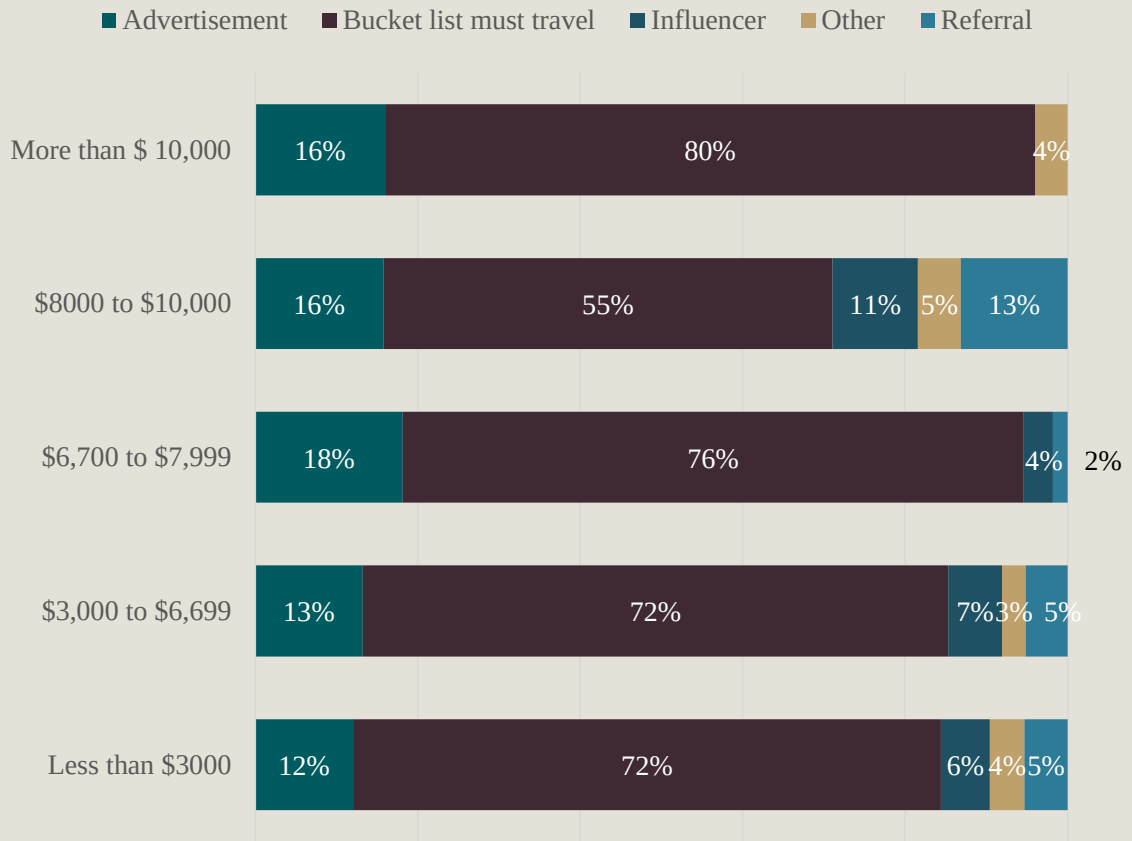
Monthly Income
By Type of Visitor



Monthly Income
By Type of vacation

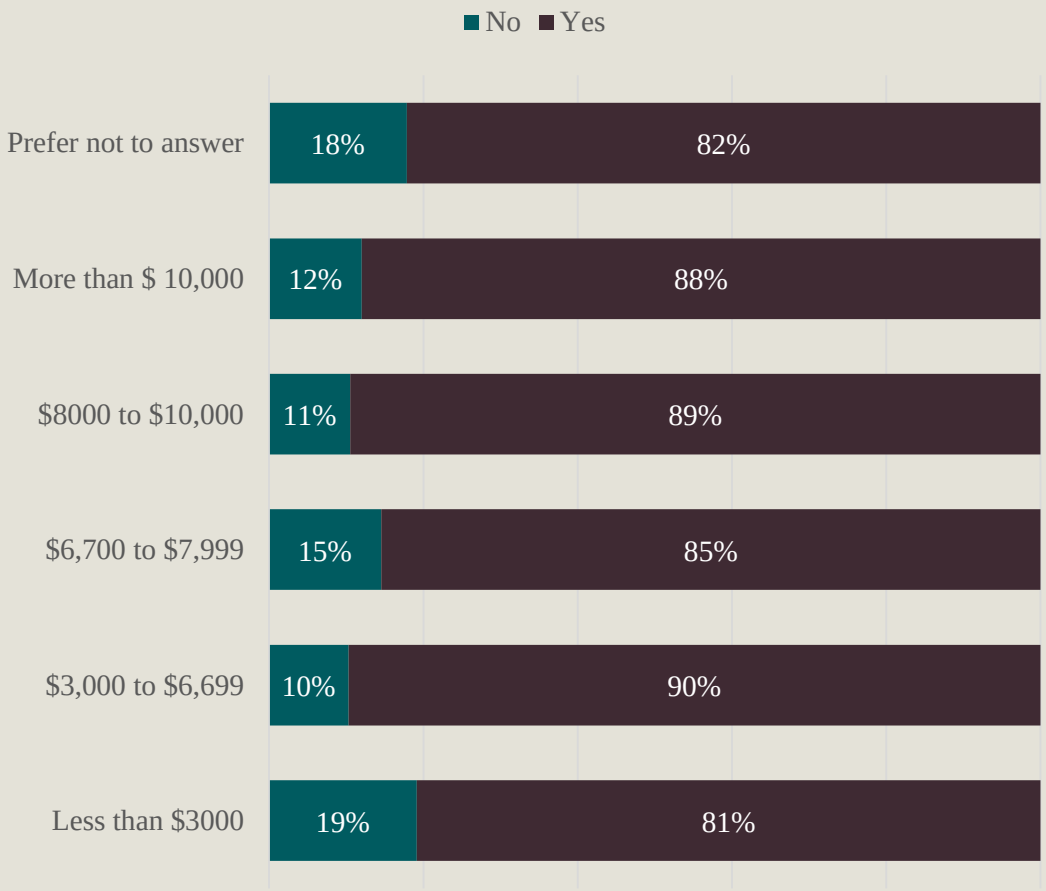


Note: Excluded Prefer not to state N=84

N: 620

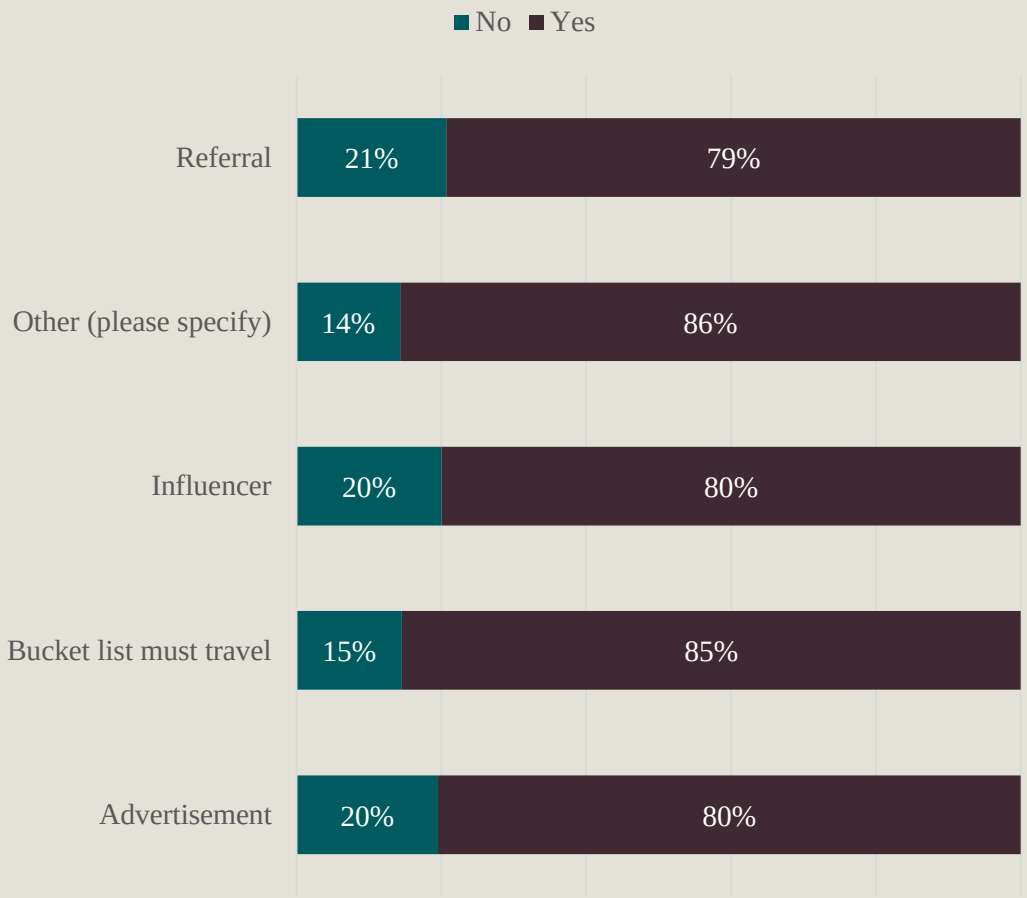
Monthly Income

By Heard of Aruba



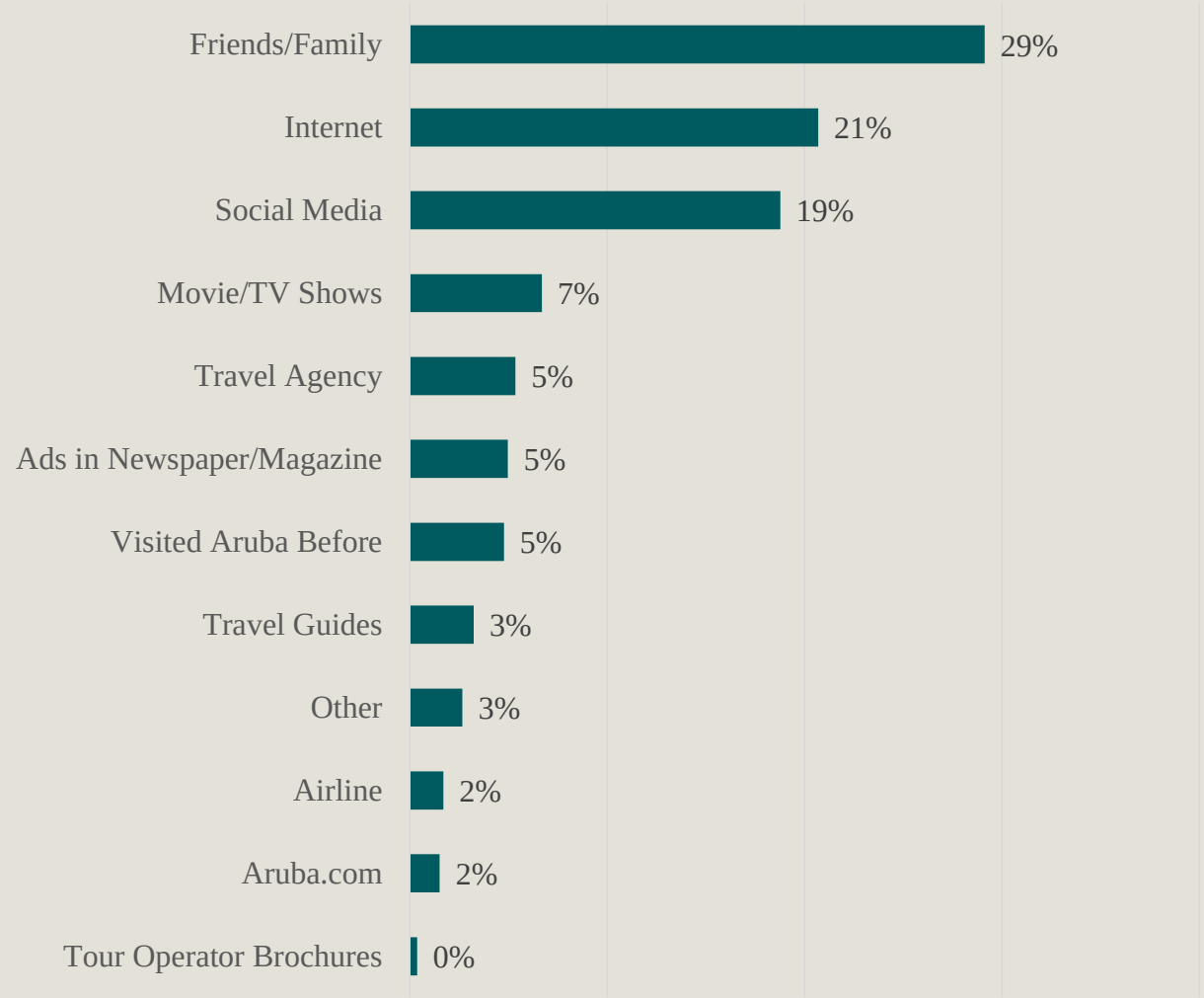
Type of Vacation

By Heard of Aruba



N: 620

Channels when hearing *about Aruba*



Question: How did you hear about Aruba?

Top channels when *hearing about Aruba*

Friends/Family	Internet	Social Media	Movie/Tv Shows
29%	21%	7%	7%

N: 620

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Key Highlights

- 35% of the respondents indicated taking, on average, 7 to 10 days of vacation.
- 72% of respondents defined their next vacation as a bucket list.
- 79% of the respondents like to explore new destinations.
- 84% of the respondents indicated that they had heard of Aruba.
- 79% of the respondents who heard about Aruba before are the type of travelers that like to explore new destinations.
- 52% of the respondents indicated (extremely and somewhat) likely to travel to the Caribbean in the next 12 months, while 29% indicated that they were (extremely and somewhat) unlikely to travel to the Caribbean in the next 12 months.
- The top 4 channels when hearing about Aruba are as follows, 29% indicated hearing about Aruba via Friends and Family, 21% via Internet, 7% via Social Media, and 7% via Movies/TV Shows.

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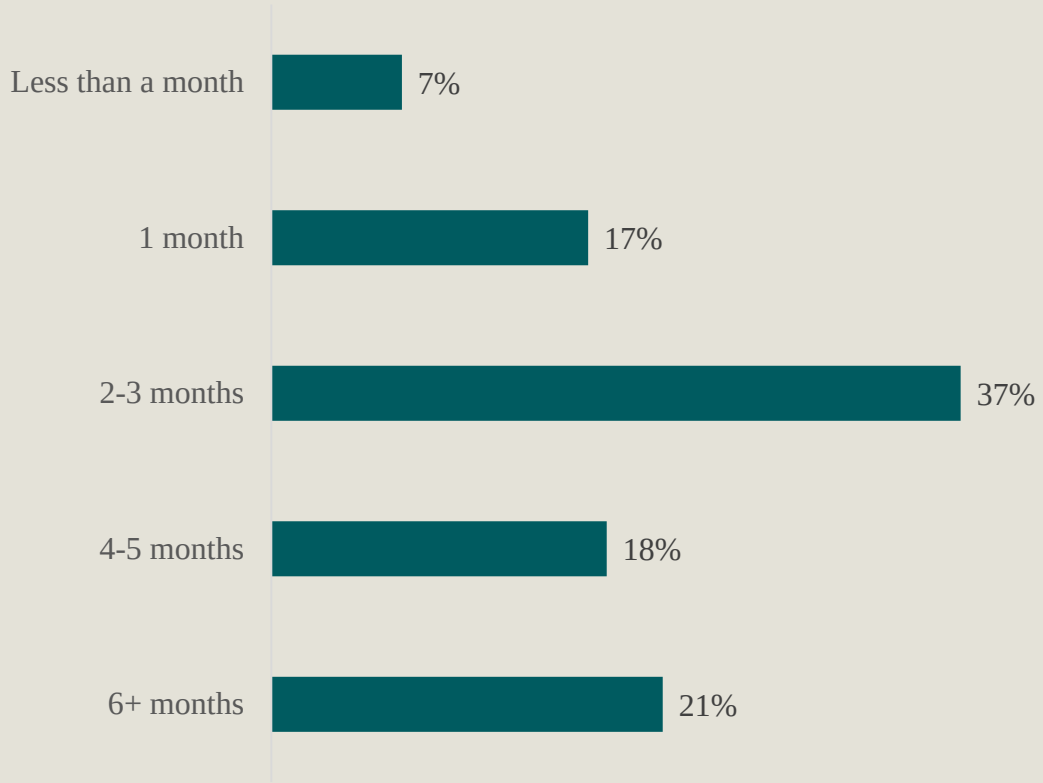
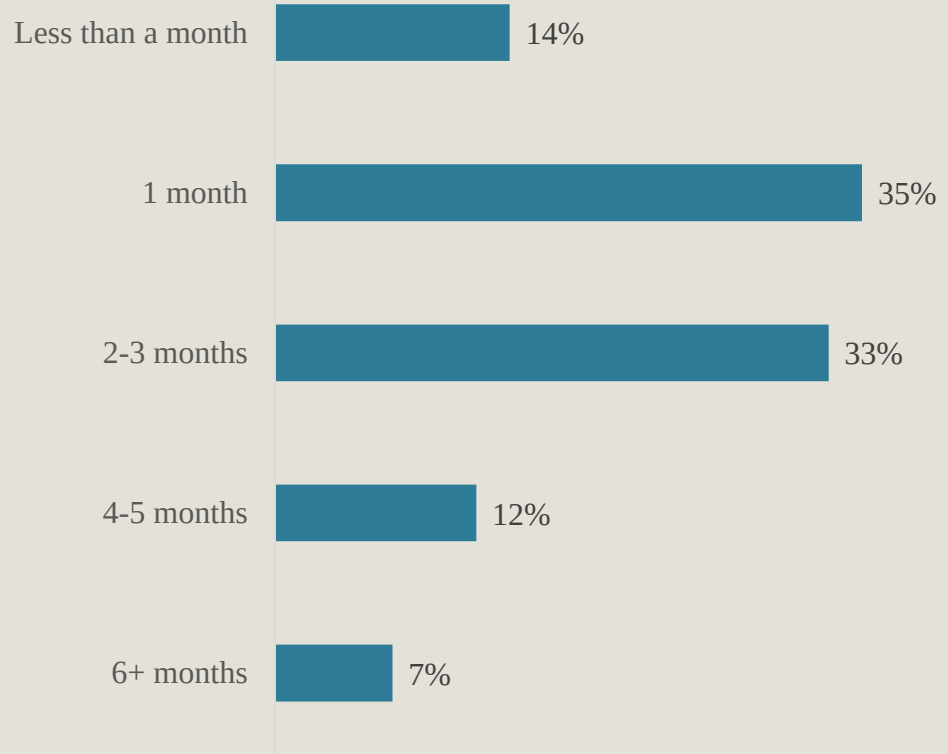
Planning & Booking
Behavior

Planning & Booking Behavior

Planning *Behavior*



Booking *Behavior*



N: 620

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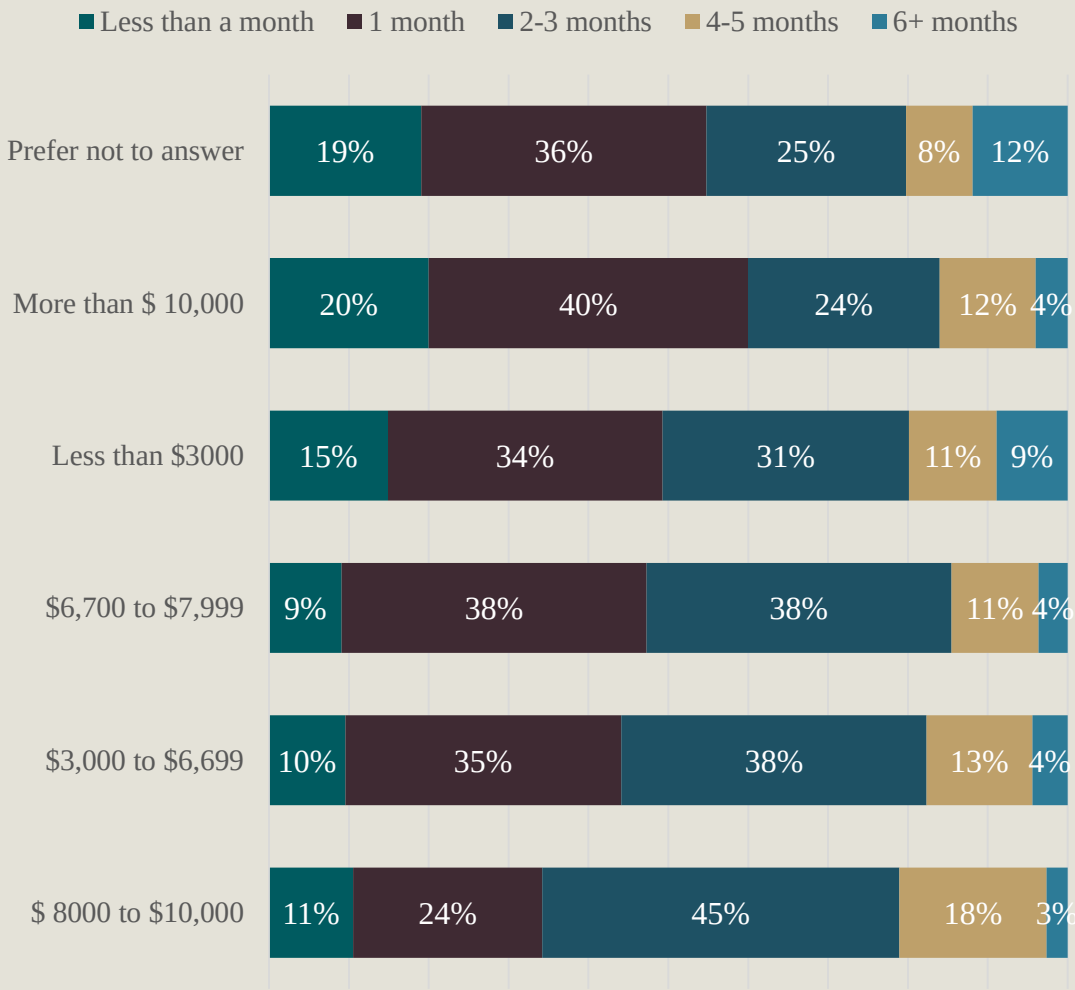
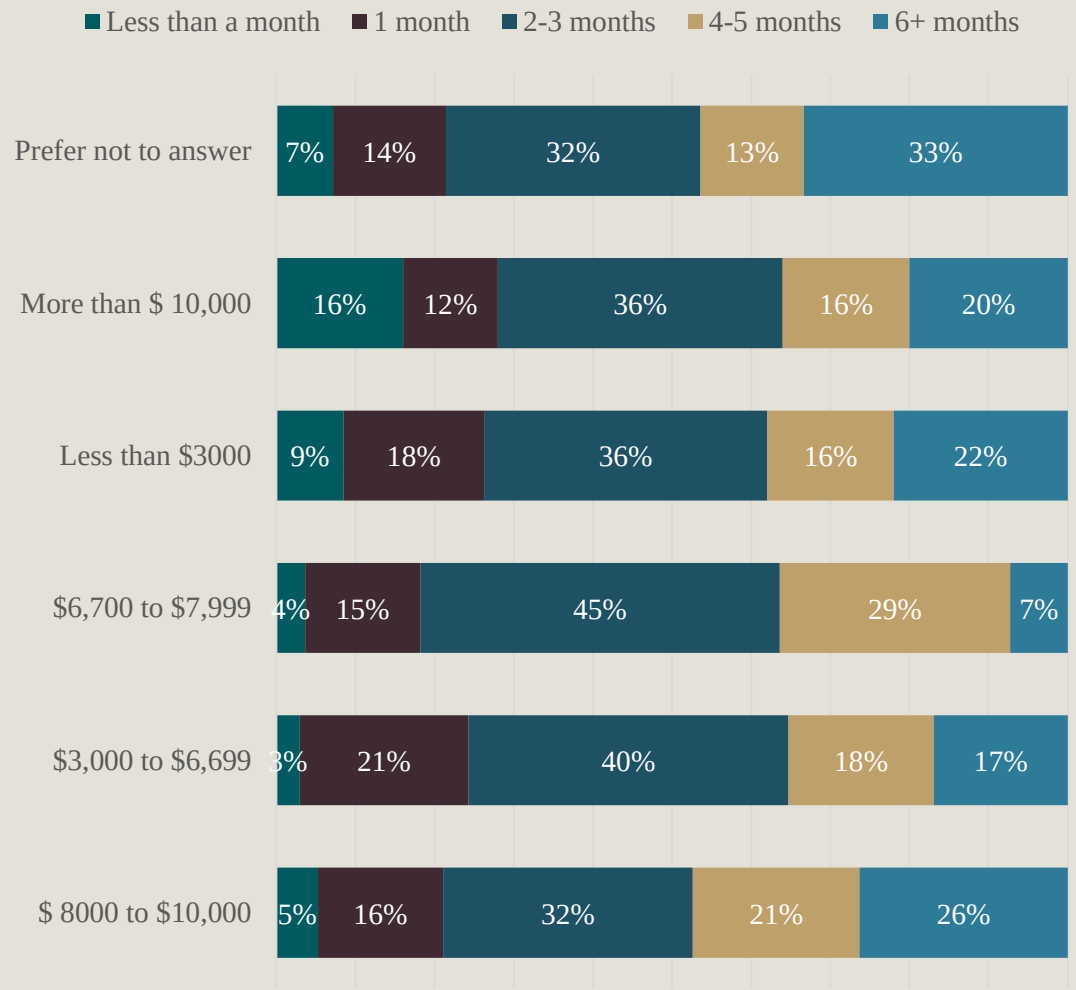
Planning: *By Monthly Income*

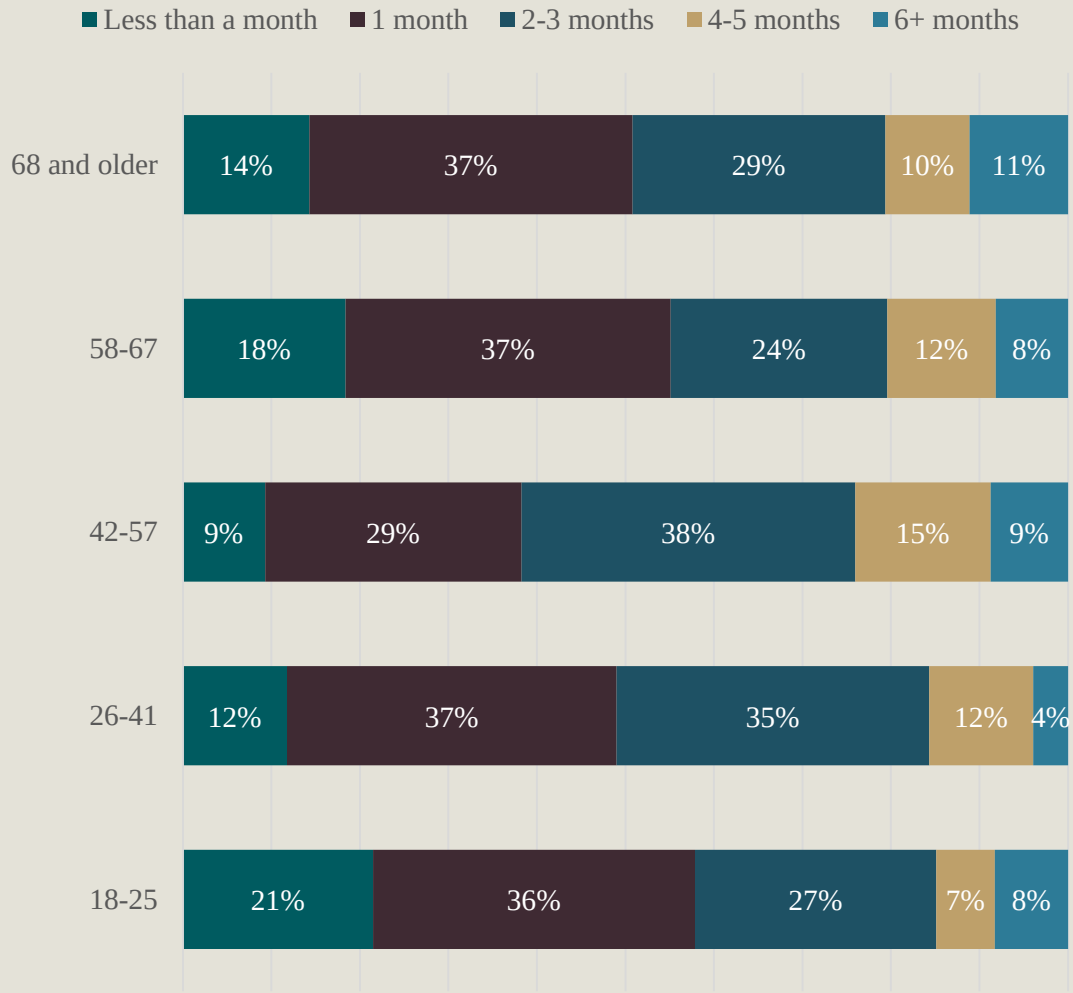


Booking: *By Monthly Income*

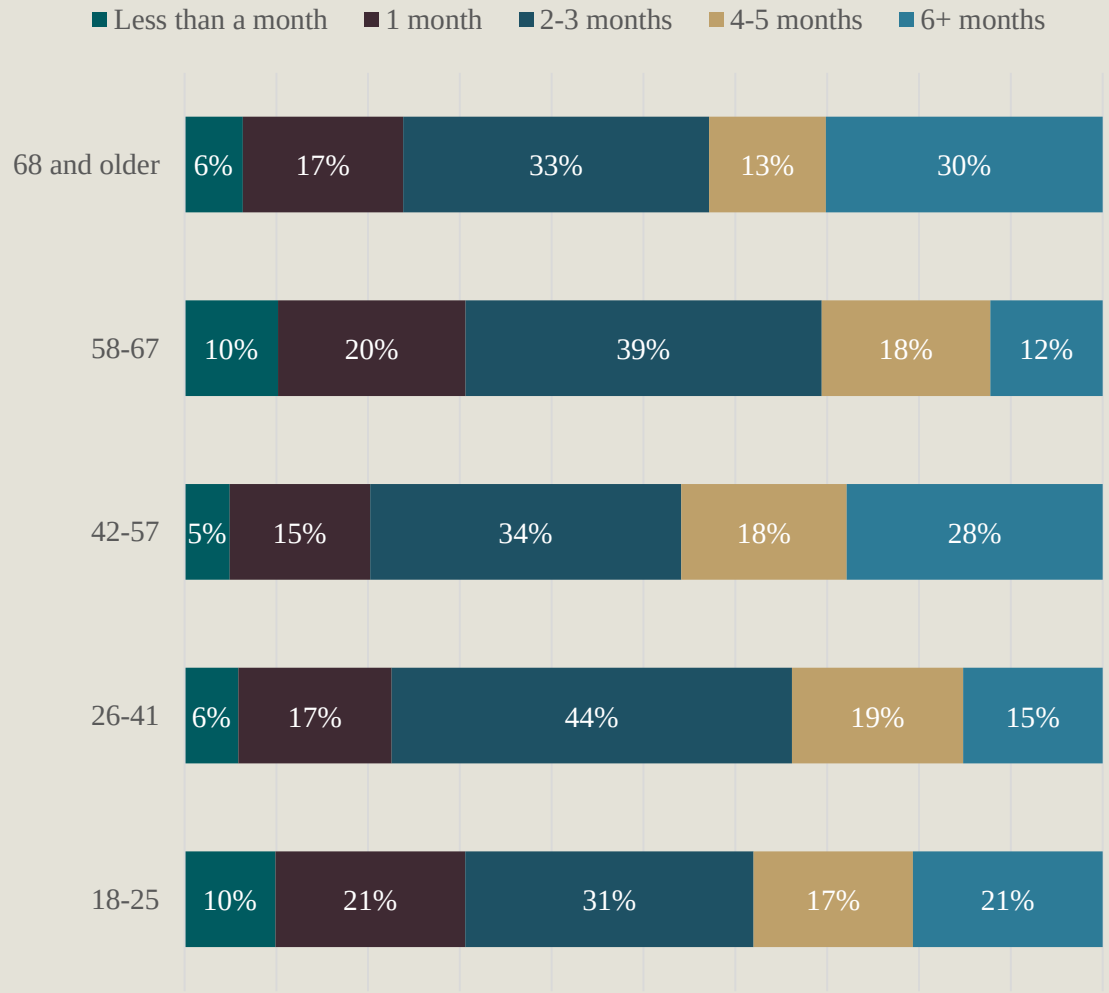


N: 620

Planning: *By Generation*



Booking: *By Generation*



N: 620

Planning Behavior *Highlights*

	N: 42 < 1 MONTH	N: 108 1 MONTH	N: 229 2-3 MONTH	N: 109 4-5 MONTH	N: 132 >6 MONTH
Overall	7%	17%	37%	18%	21%
Avg. Monthly Income	**More than $10,000**: 16%	**$3,000 to $6,699**: 21%	$3000-$6699: 40%; $6700-$7999: 45%	**$6,700 to $7,999**: 29%	**$8,000-$10,000:** 26%
Age	**18-25:** 29% **58-67:** 10%	**18-25:** 31%	**26- 41:** 44%	**26-41:** 19%	**42-57:** 28%
Top 3 Regions	Andean Region Caribbean Region Pacific Region	Andean Region Caribbean Region Pacific Region	Andean Region Caribbean Region Pacific Region	Andean Region Caribbean Region Pacific Region	Andean Region Caribbean Region Pacific Region

N: 620

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Booking Behavior *Highlights*

	< 1 MONTH	1 MONTH	2-3 MONTH	4-5 MONTH	>6 MONTH
Overall	**14%**	**35%**	**33%**	**12%**	**7%**
Household Income	**More than $10,000**: 20%	**More than $10,000**: 40%	**$8000 to $10,000**: 45%	**8000 to $10,000**: 18%	**Less than $3000:** 9%
Age	**18-25:** 21%	**26-68 and older:** 37%	42 - 57	**42-57:** 15%	**68 and older:** 11%
Top 3 Regions	Caribbean Region Andean Region Pacific Region	Andean Region Caribbean Region Pacific Region	Andean Region Caribbean Region Pacific Region	Andean Region Caribbean Region Pacific Region	Andean Region Caribbean Region Pacific Region

N: 620

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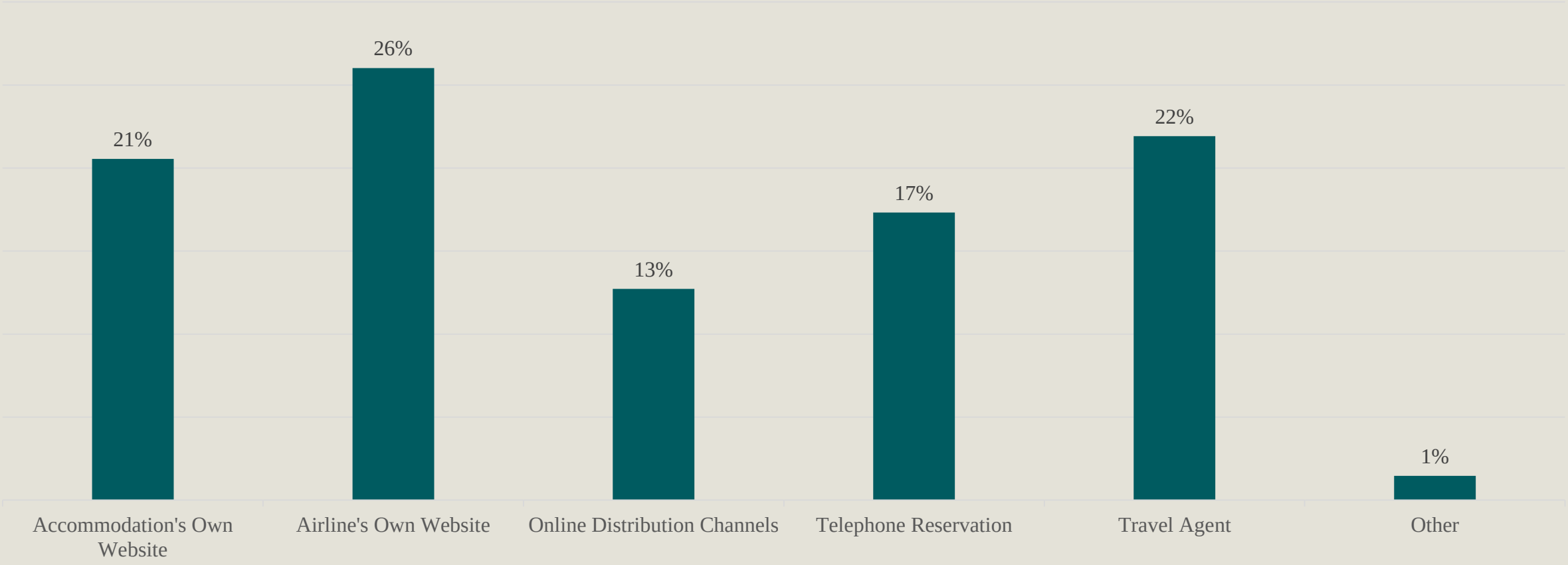
Channel used to *Arrange Reservations*



Question: How do you normally arrange your reservation(s) for your vacation?

N: 620

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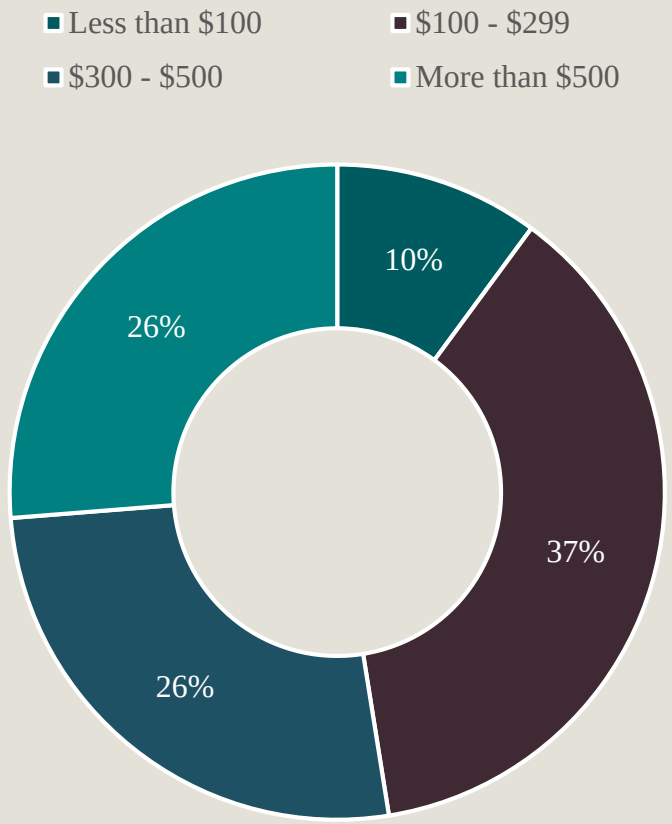
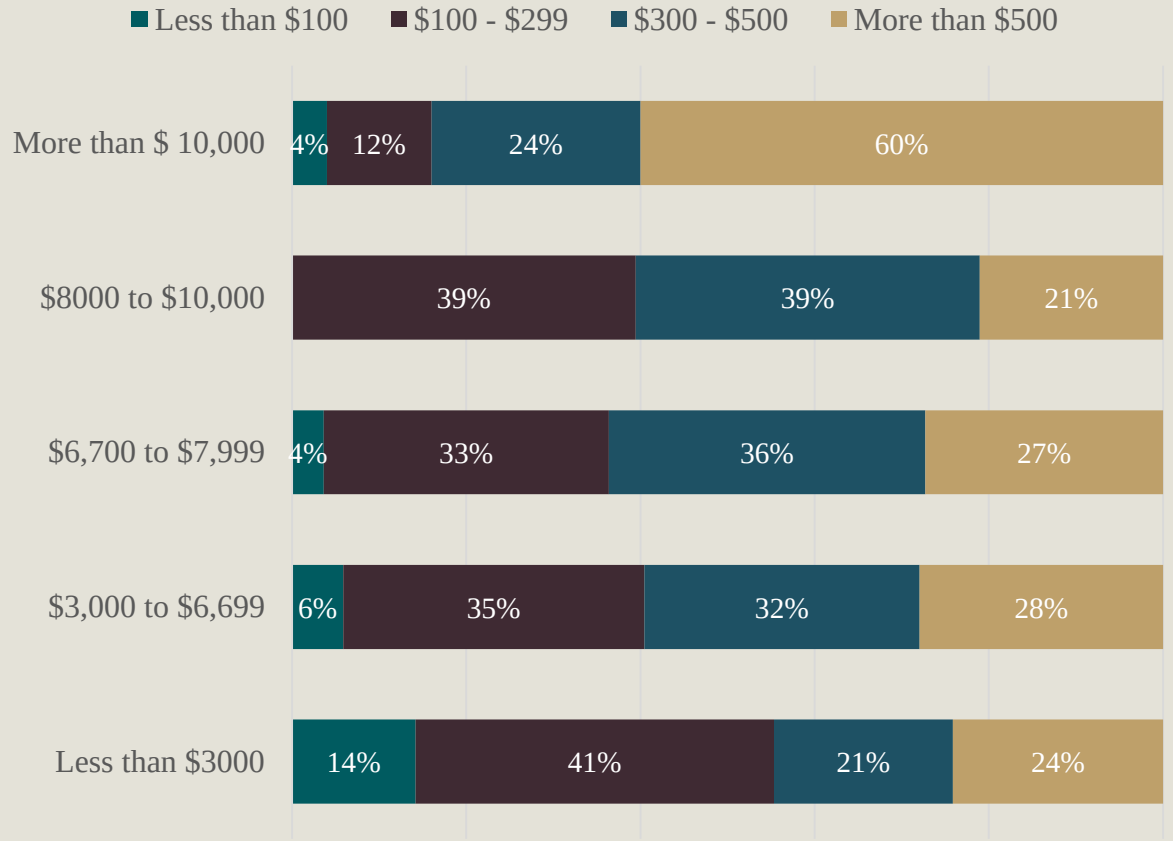
Spending *Behavior*

Spend Per Day
F&B and Activities



Spend per Day
By HHI



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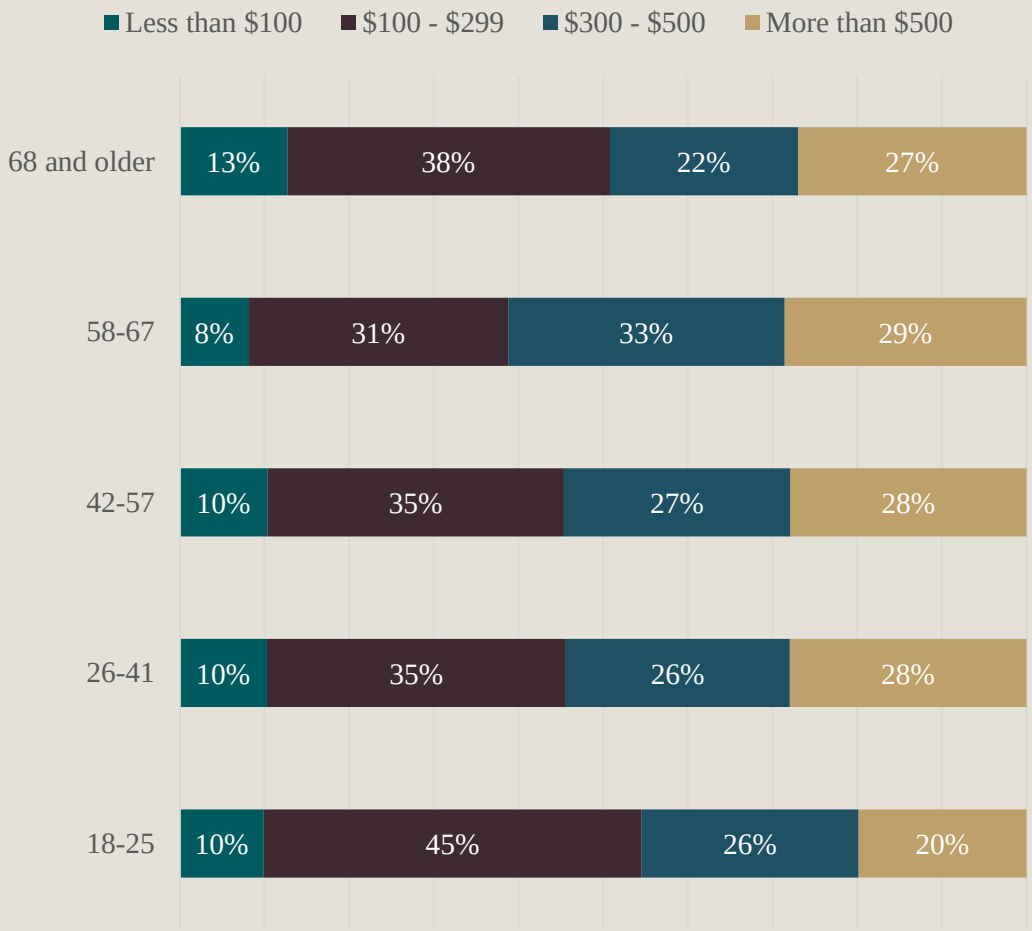
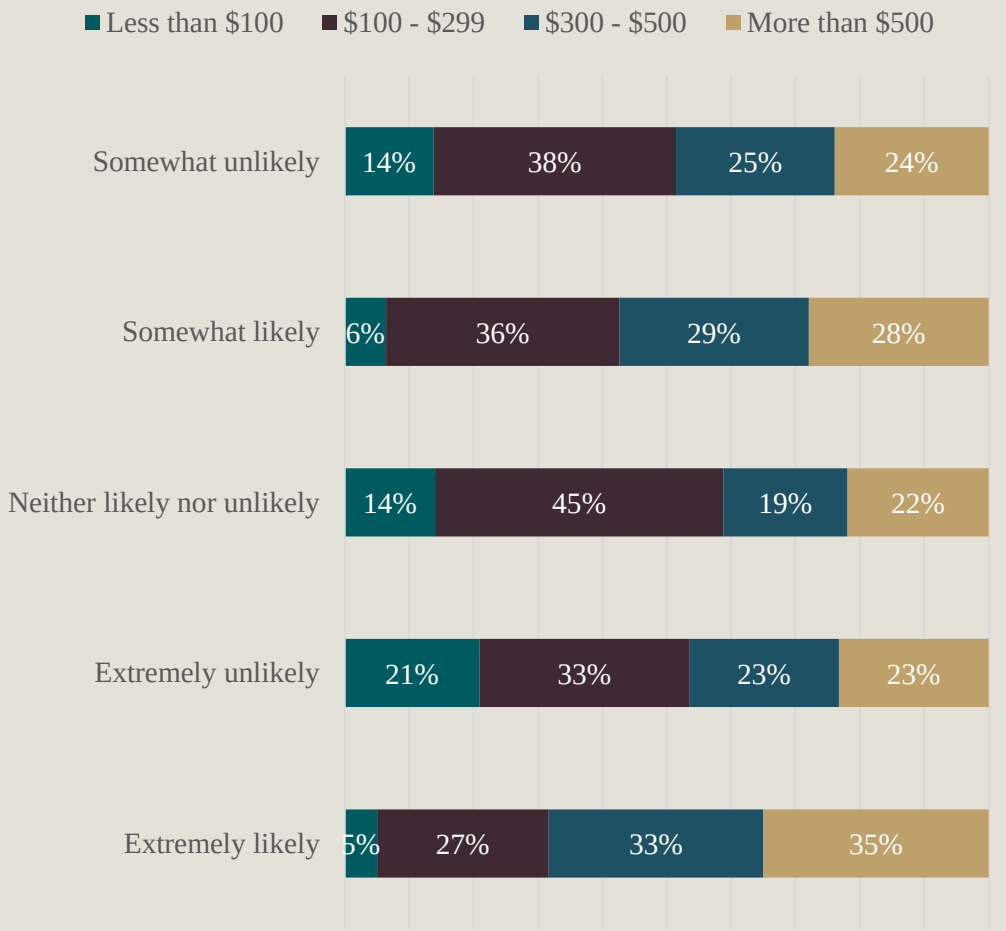
Spend per Day

By Generation



Spend per Day

By Likelihood of visiting a Caribbean Destination



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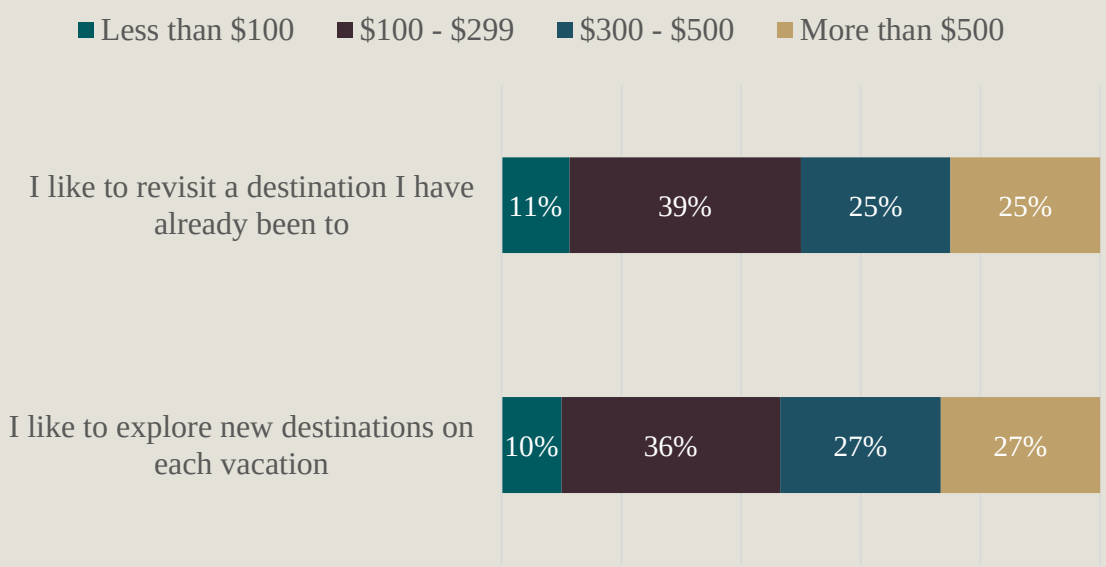
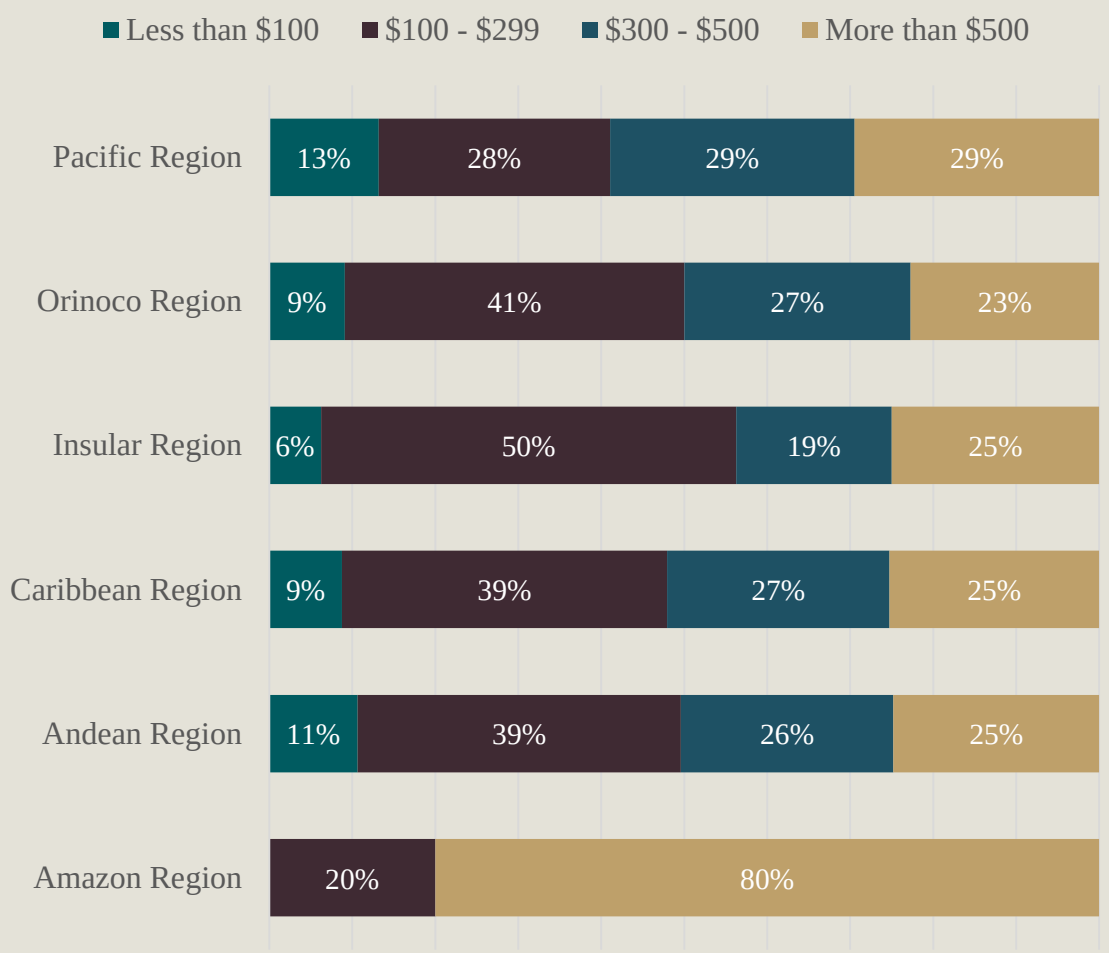
Avg. Per Day Spend
By Type of Traveler: Explorer vs. Loyal



Avg. Per Day Spend
By Region



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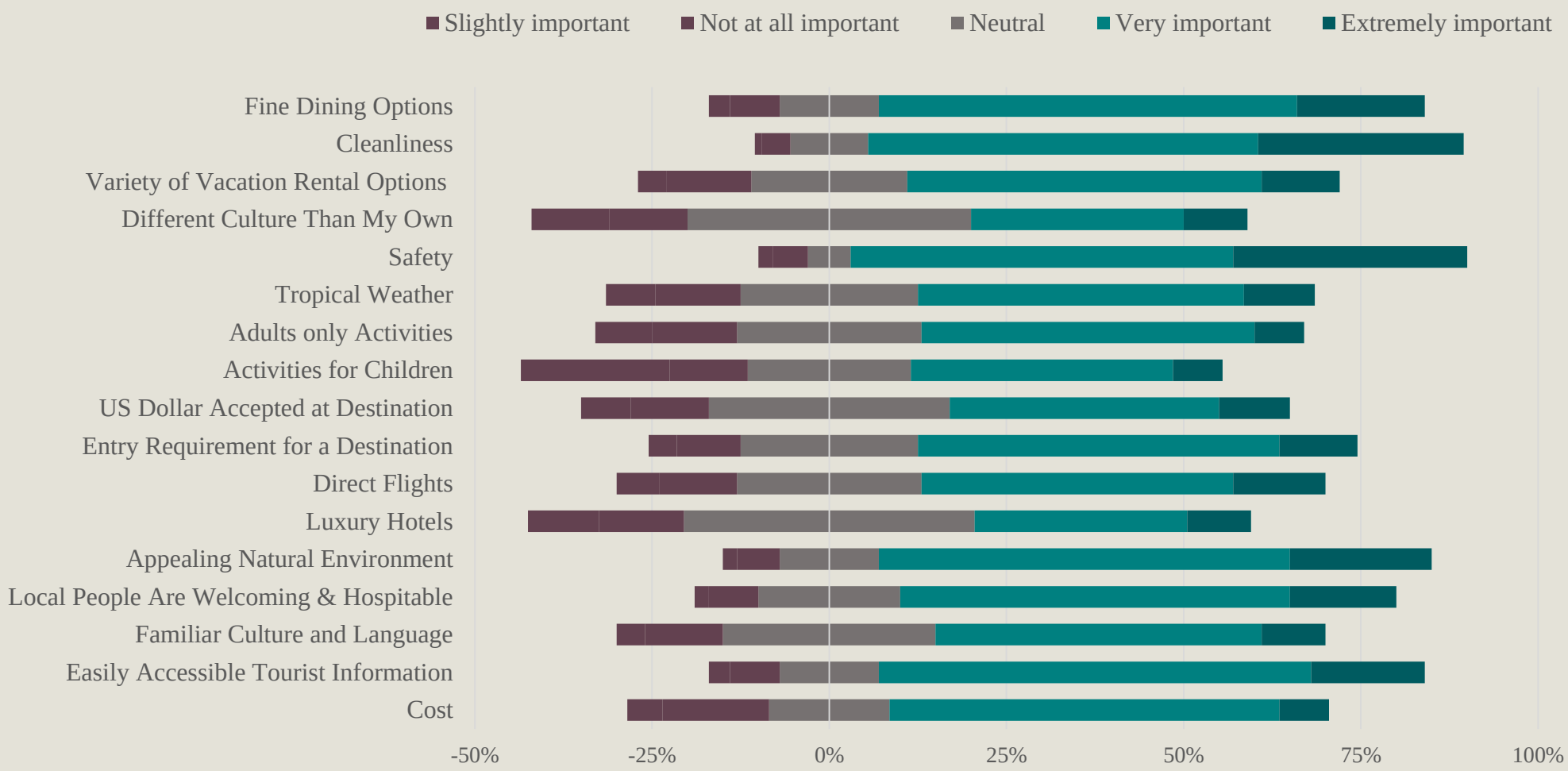
Travel *Considerations*

Important Considerations when *Choosing a Destination*



Question: When choosing to go on a vacation, how important are the following for you? Please indicate how important each of the following statements are for you when choosing a vacation.

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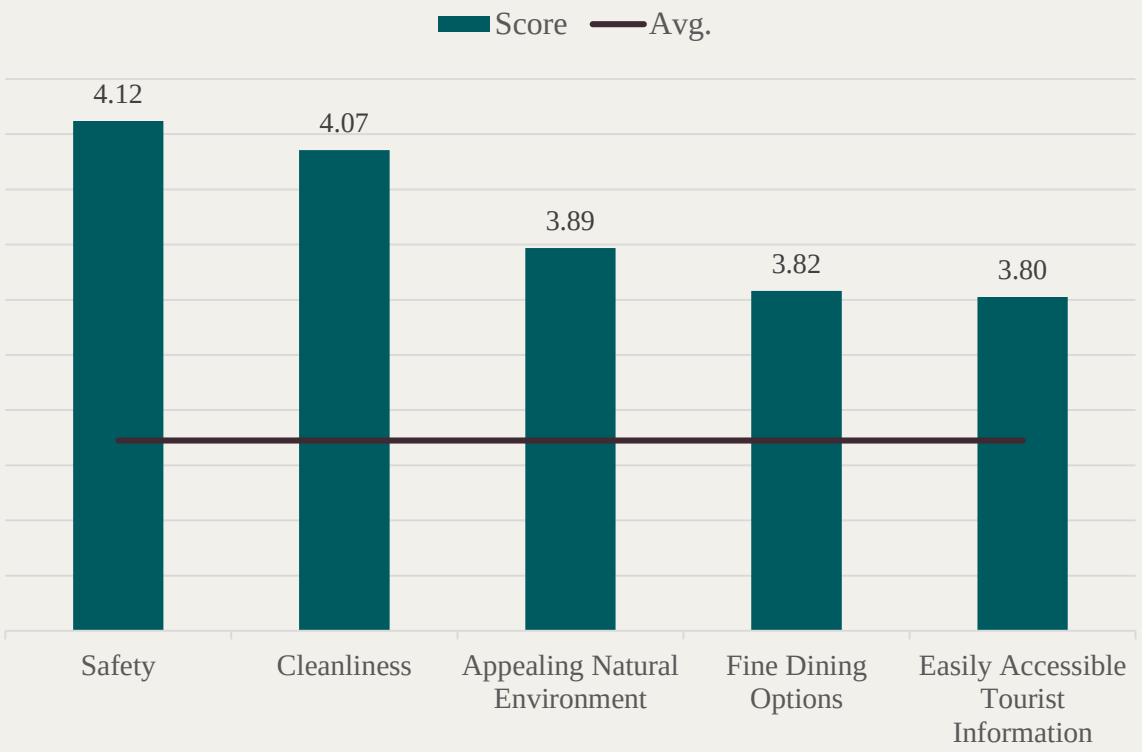
Key Highlights of *Important Considerations*



INSIGHT

- The graph shows the results of the categories that stood out.
- The deviations from the norm were calculated to determine the categories that stood out. The calculation was done by looking at the highest scores, those above the average (line in the graph).
- The more relevant categories that scored higher than average are safety, cleanliness, an appealing natural environment., fine dining, and easily accessible tourist information.
- ATA can focus on the four components which scored the highest by including them in messaging geared towards Colombian travelers.

N: 420

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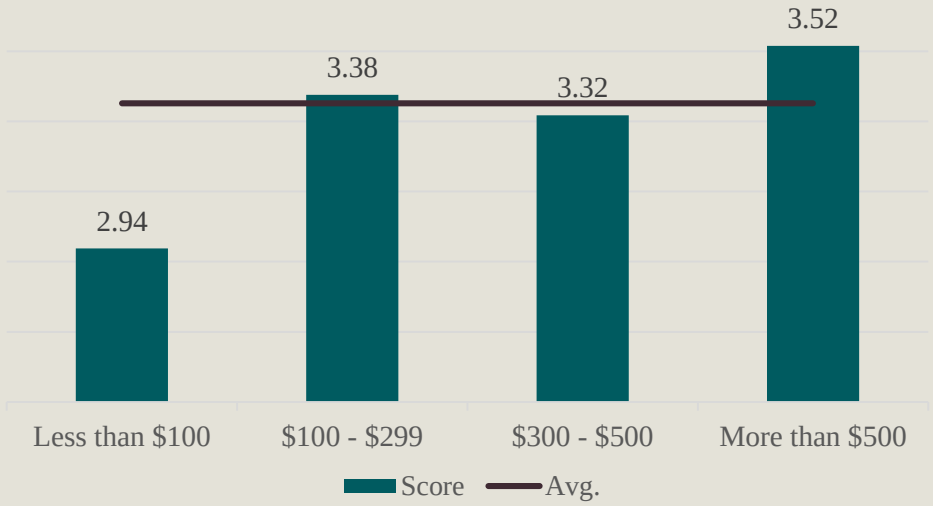
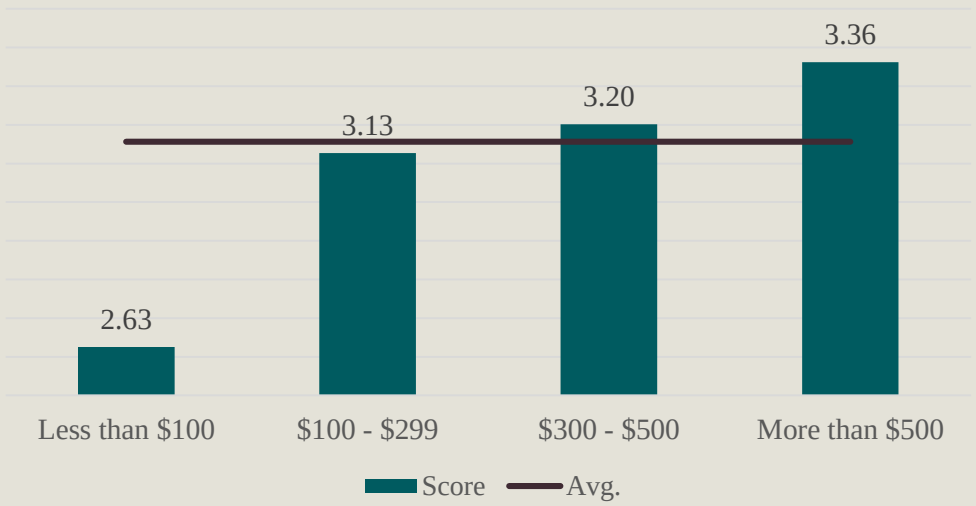
Key Highlights of *Important Considerations by Spending*



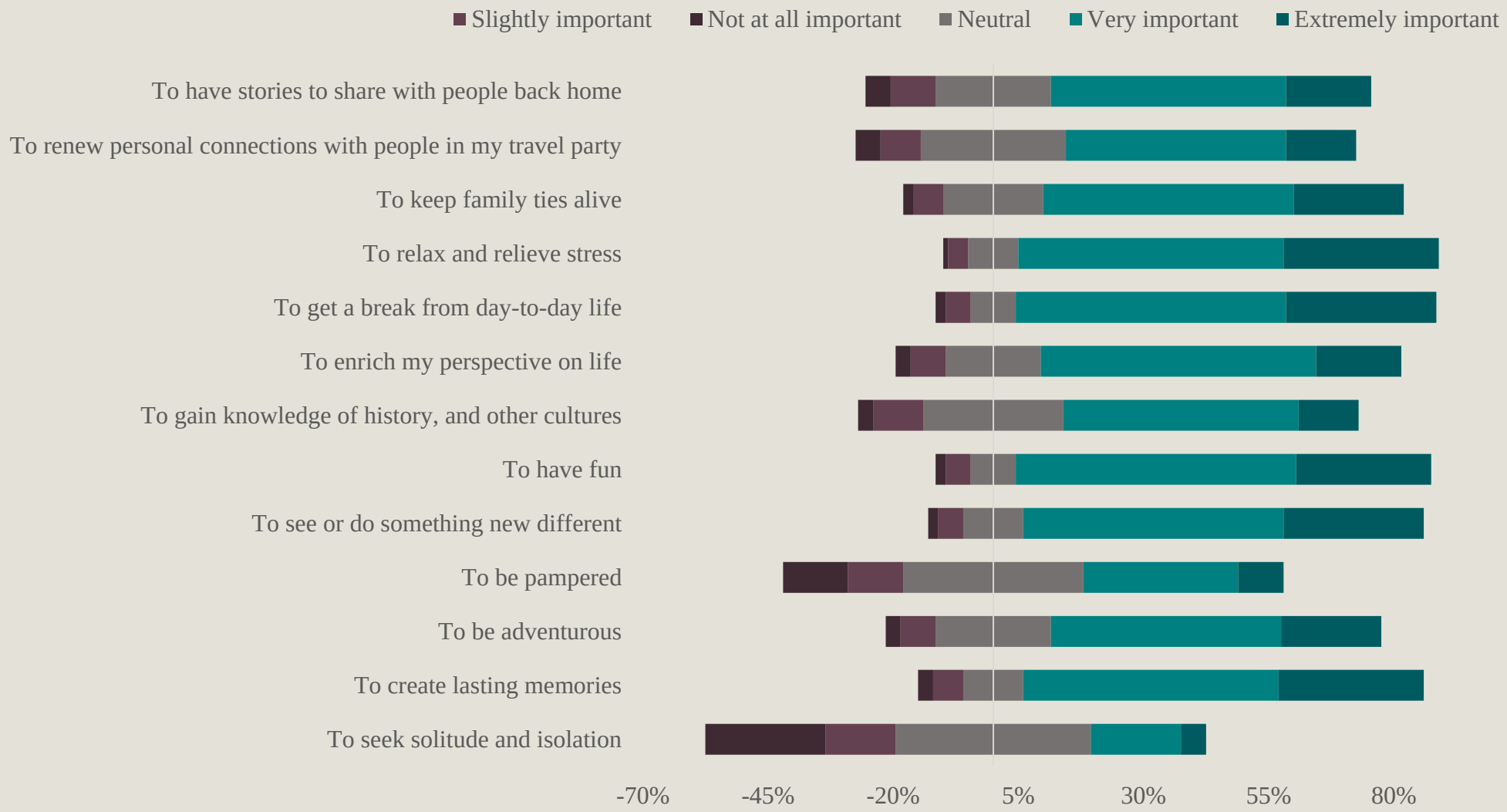


INSIGHT

- The graph shows the results of the categories that stood out among the spend categories. The deviations from the norm were calculated to determine the categories that stood out. The calculation was done by looking at the highest scores, those above the average (line in the graph).
- The acceptance of US dollar scored the highest among those who spend more than $500 while on vacation.
- Luxury Hotels scored the highest amongst the respondents who spent $300-500 and spent above $500.

N: 420

Important Benefits



Question: What are some of the benefits you seek from a vacation? Please indicate how important each of the following statements are to you.

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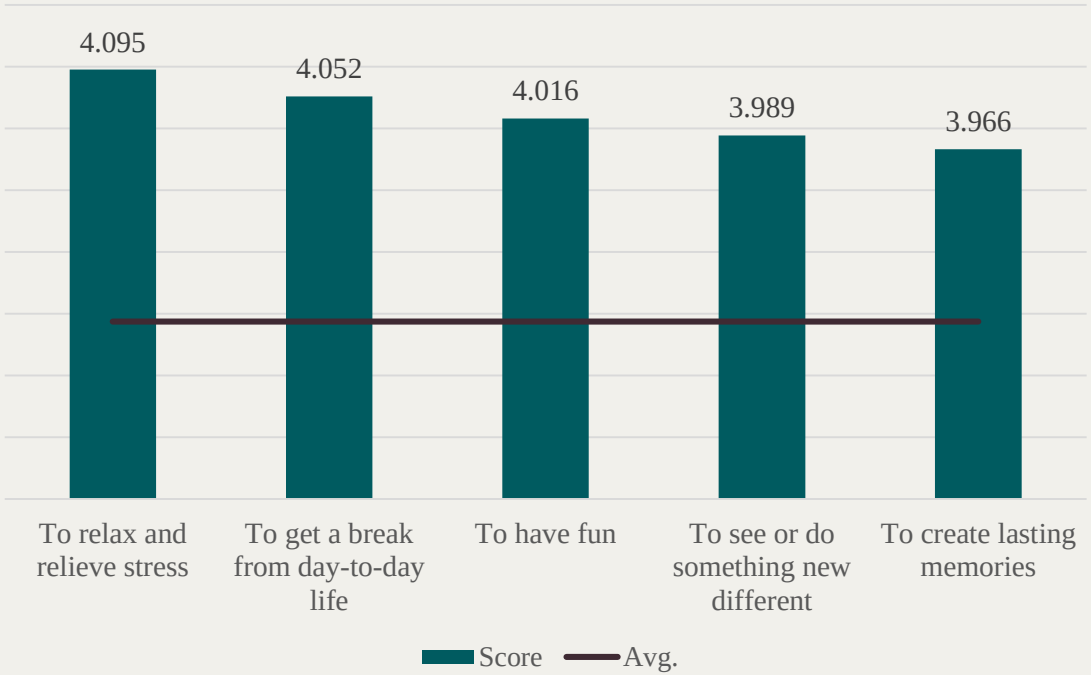
Key Highlights of *Important Benefits*



INSIGHT

- The graph shows the results of the categories that stood out.
- The deviations from the norm were calculated to determine the categories that stood out. The calculation was done by looking at the highest scores, those above the average (line in the graph).
- The more relevant categories that scored higher than average are relaxing and relieving stress, taking a break from day-to-day life, having fun, seeing or doing something new and different, and creating lasting memories.
- ATA can focus on the five benefits the Colombian traveler wants, which scored the highest.

N: 420

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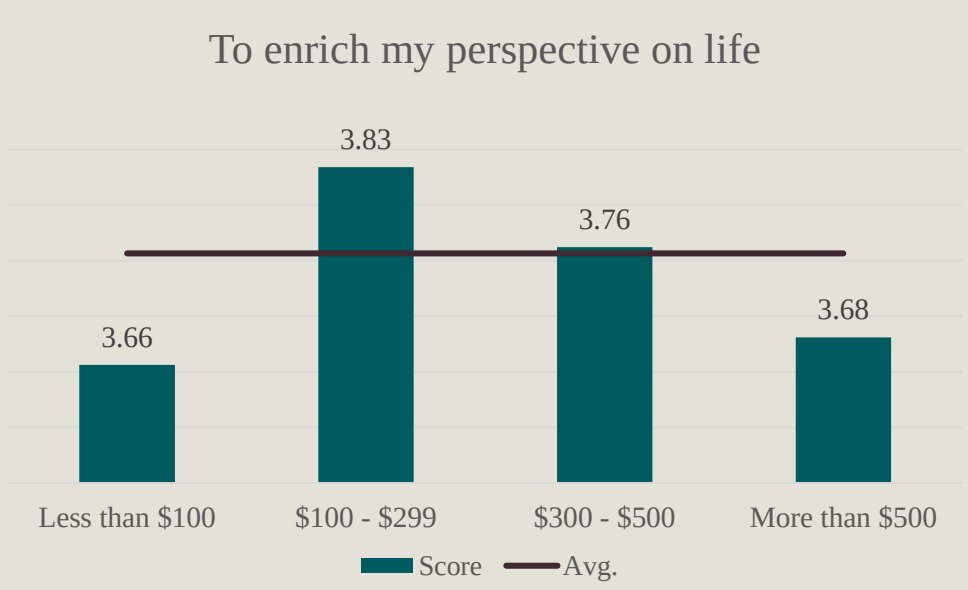
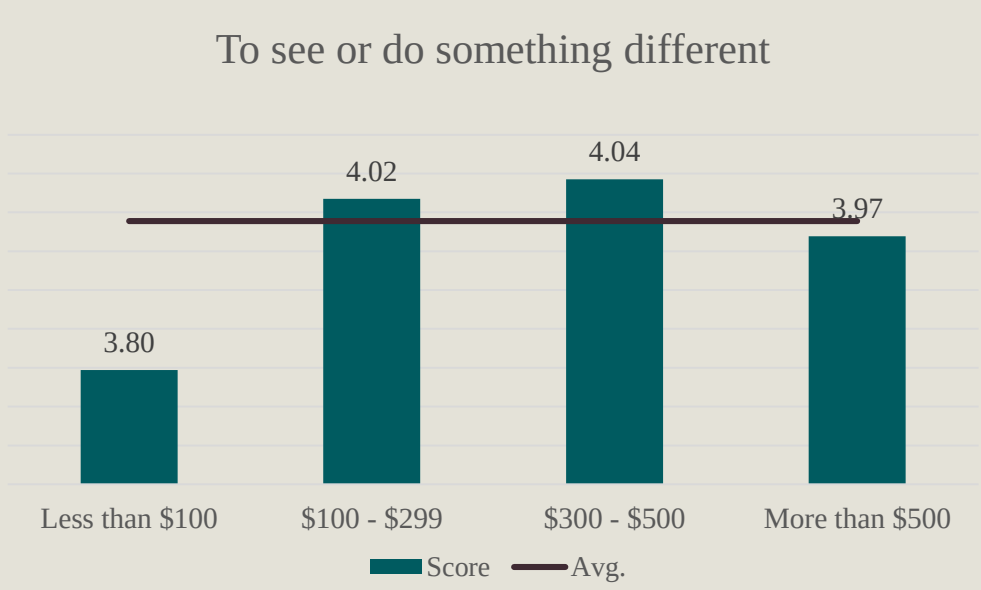
Key Highlights of *Important Benefits by Spending*





INSIGHT

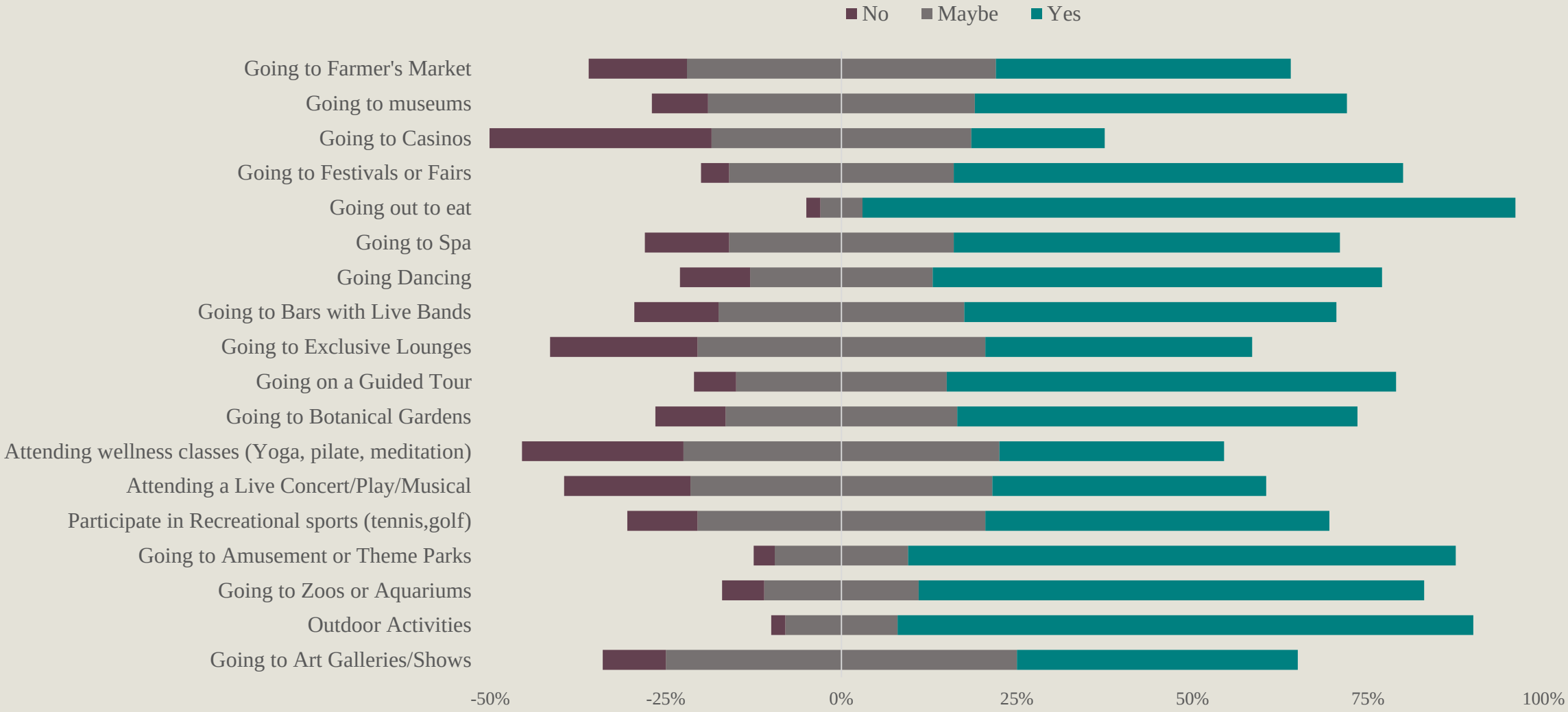
- The graph shows the results of the categories that stood out among the spend categories. The deviations from the norm were calculated to determine the types that stood out. The calculation was done by looking at the highest scores, those above the average (line in the graph).

- To enrich my perspective on life, scored the highest among those who spent less than $100-299, and to see or do something different, the highest among those who spent $300- 500 while on vacation.

N: 420

Travel *Preferences*

Preferred *Activities*



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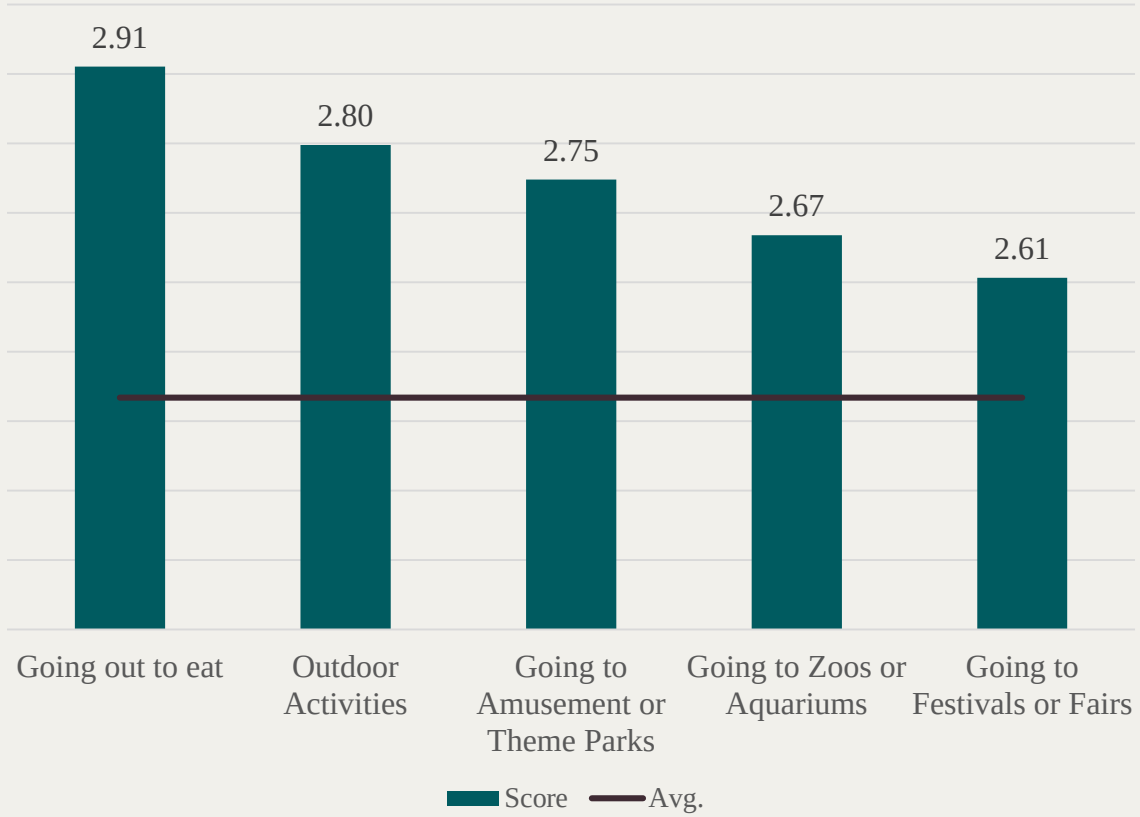
Key Highlights of *Preferred Activities*



INSIGHT

- The graph shows the results of the categories that stood out.
- The deviations from the norm were calculated to determine the categories that stood out. The calculation was done by looking at the highest scores, those above the average (line in the graph).
- The more relevant categories that scored higher than average are Going out to eat, Outdoor activities, Going to amusement or Theme Parks, Going to Zoos or Aquariums, and Going to Festivals or fairs.
- ATA can focus on the three components which scored the highest by including them in messaging geared towards Colombian travelers.

N: 420

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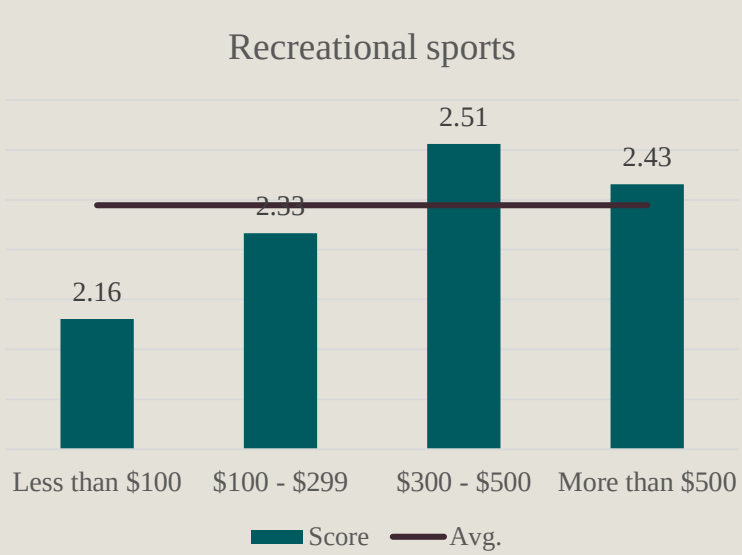
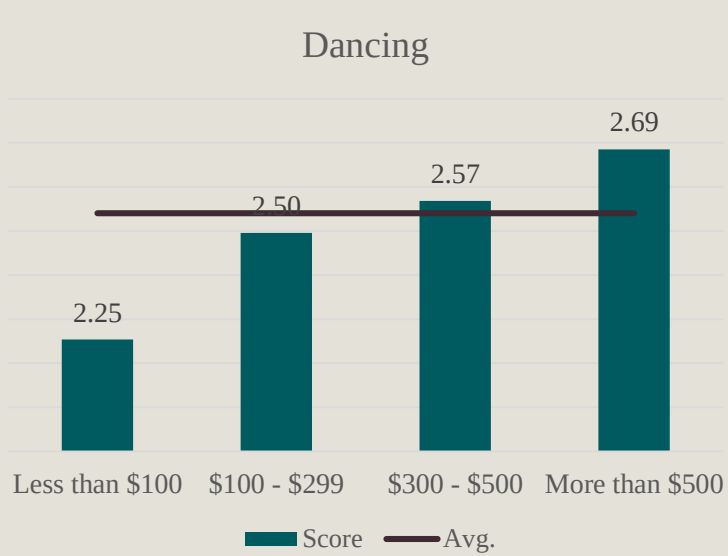
Key Highlights of *Important Activities by Spending*





INSIGHT

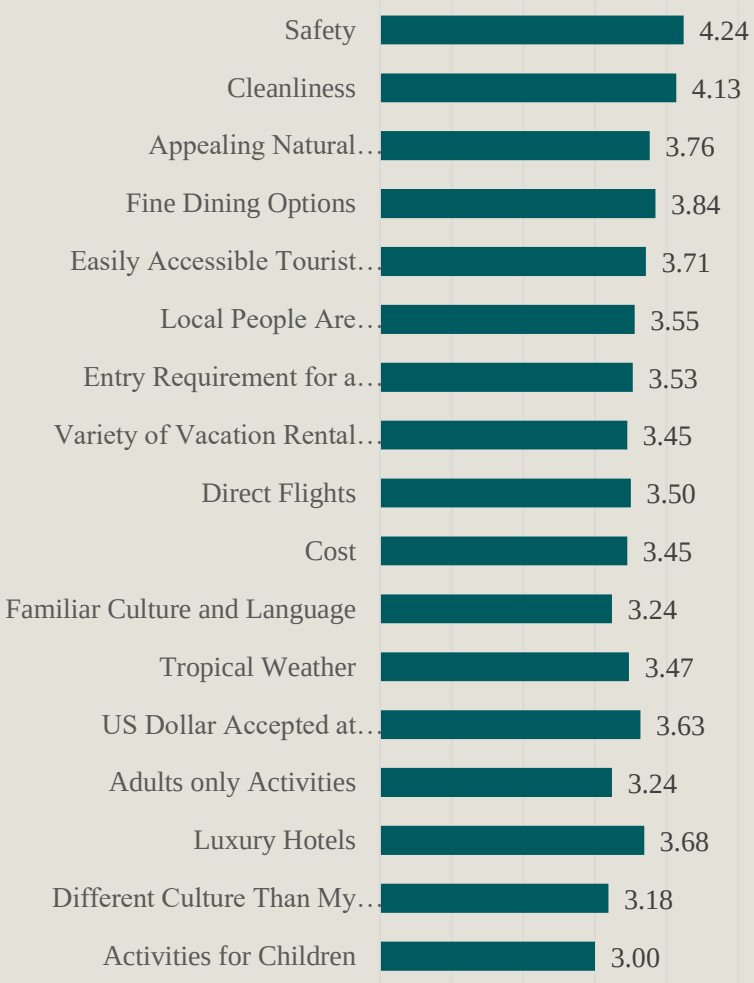
- The graph shows the results of the categories that stood out among the spend categories. The deviations from the norm were calculated to determine the types that stood out. The calculation was done by looking at the highest scores, those above the average (line in the graph).
- Exclusive Lounges scored the highest amongst those who spent $500 and above.
- Recreational Sports scored the highest amongst those who spent $300-500.
- Dancing scored the highest among those who spent above $500 and above while on vacation.

N: 420

Affluent *HHI*

Mid High HHI
$8,000- $10,000

Consideration



Benefits

Activities/ Experiences

N: 620

TOP 5

Messaging When Choosing a Destination to Highlight

Mid High HHI
$8,000- $10,000

Consideration

1. Safety
2. Cleanliness
3. Fine Dining Options
4. Appealing Natural Environment
5. Easily Accessible Tourist Information

Benefits

1. To have fun
2. To get a break from day-today life
3. To relax and relieve stress
4. To keep family ties alive
5. To enrich my perspective on life

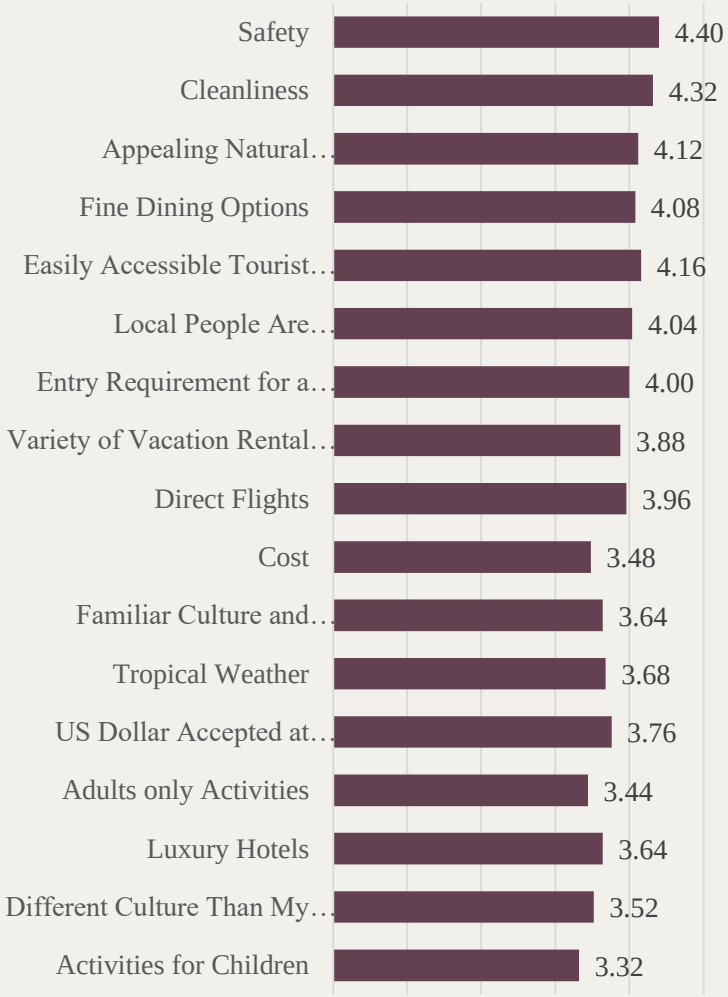
Activities/ Experiences

1. Going out to eat
2. Going to Amusemnet or Theme Parks
3. Outdoor Activities
4. Going on Guided Tour
5. Going Dancing

N: 420

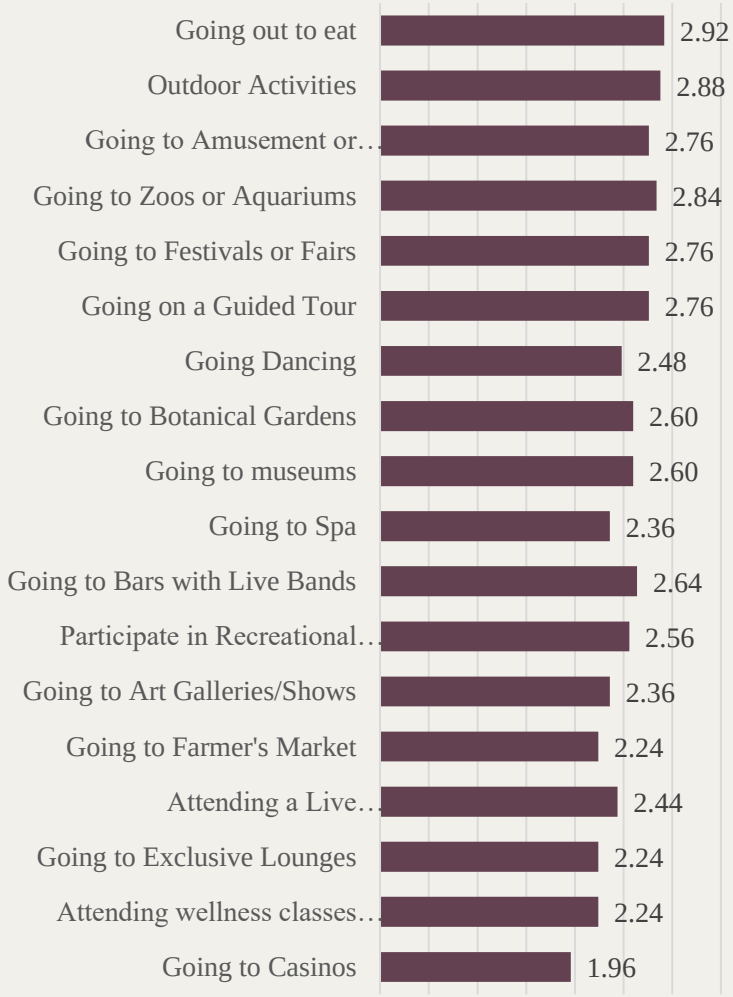
High HHI
More than *$10,000*

Consideration



Benefits

Activities/ Experiences



N: 620

TOP 5

Messaging When Choosing a Destination to Highlight

High HHI
More than $10,000

Consideration

1. Safety
2. Cleanliness
3. Easily Accessible Tourist Information
4. Appealing Natural Environment
5. Fine dinning Options

Benefits

1. To create lasting memories
2. To relax and relieve stress
3. To get a break from day-to-day life
4. To be adventurous
5. To have fun

Activities/ Experiences

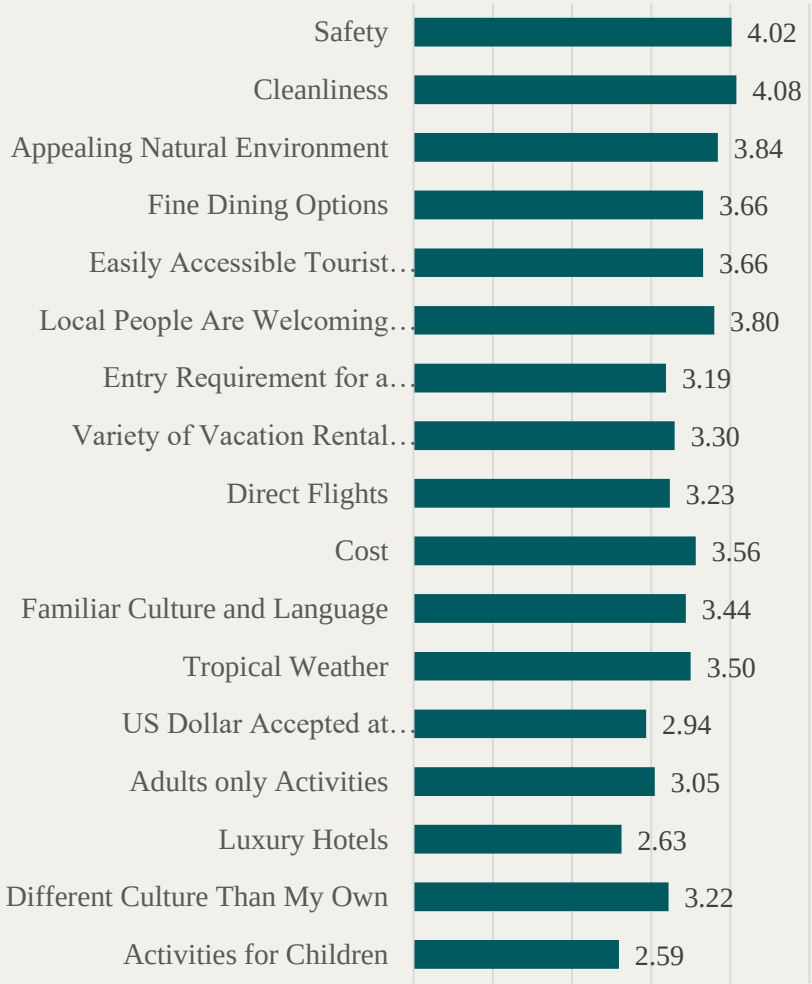
1. Going out to eat
2. Outdoor Activities
3. Going to Amusement or Theme Parks
4. Going to Zoos or Aquariums
5. Going to Festivals or Fairs

N: 420

Spending

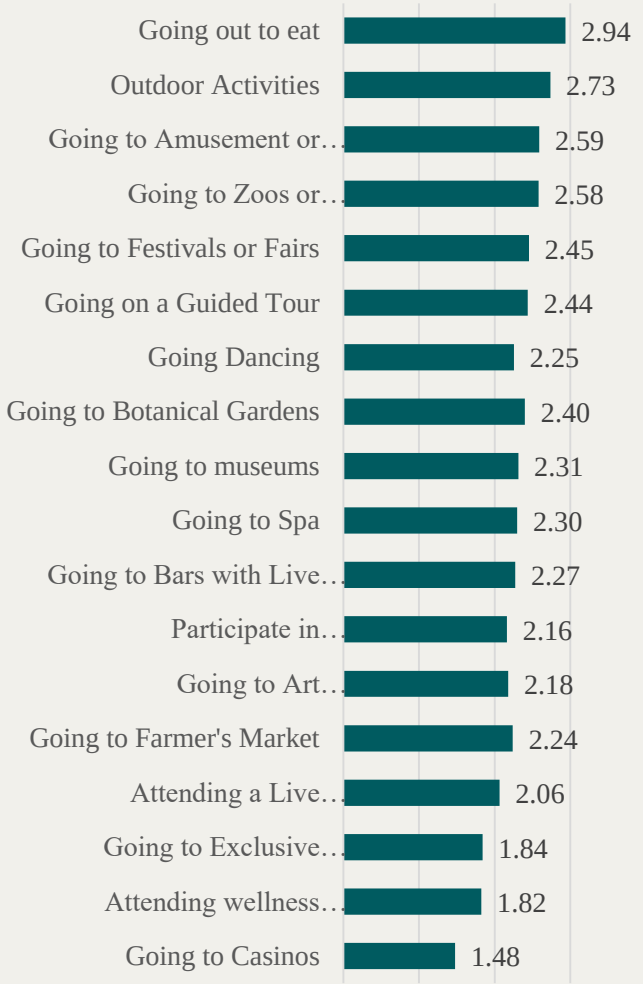
Spending
Less than $100

Consideration



Benefits

Activities/ Experiences



N: 620

Spending
Less than $100

TOP 5
Messaging When Choosing a Destination to Highlight

Consideration

1. Cleanliness
2. Safety
3. Appealing Natural Environment
4. Local People Are Welcoming & Hospitable
5. Easily Accessible Tourist Information

Benefits

1. To get a break from day-to-day life
2. To relax and relieve stress
3. To see or do something new different
4. To have fun
5. To keep family ties alive

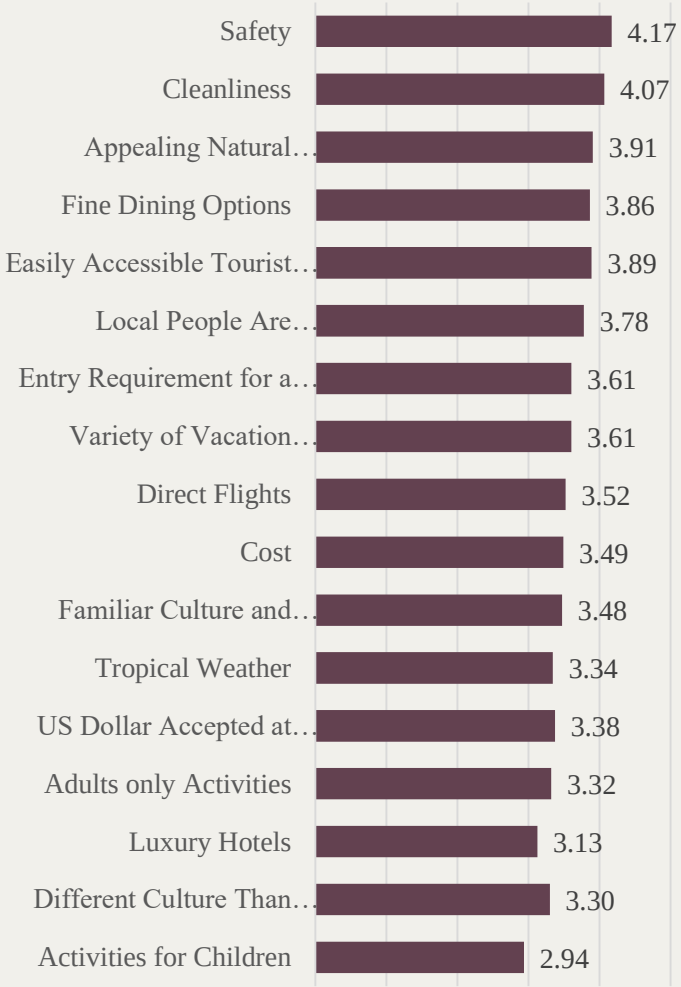
Activities/ Experiences

1. Going out to eat
2. Outdoor Activities
3. Amusement or Theme Parks
4. Zoos or Aquariums
5. Festivals/Fairs

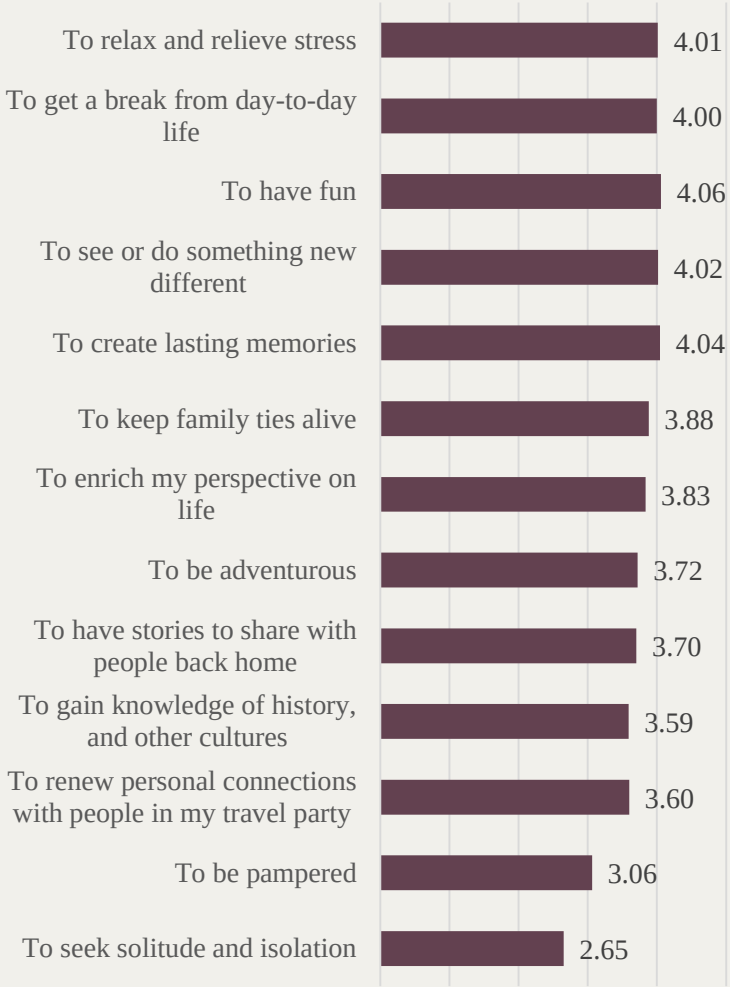
N: 620

Spending
$100 - $299

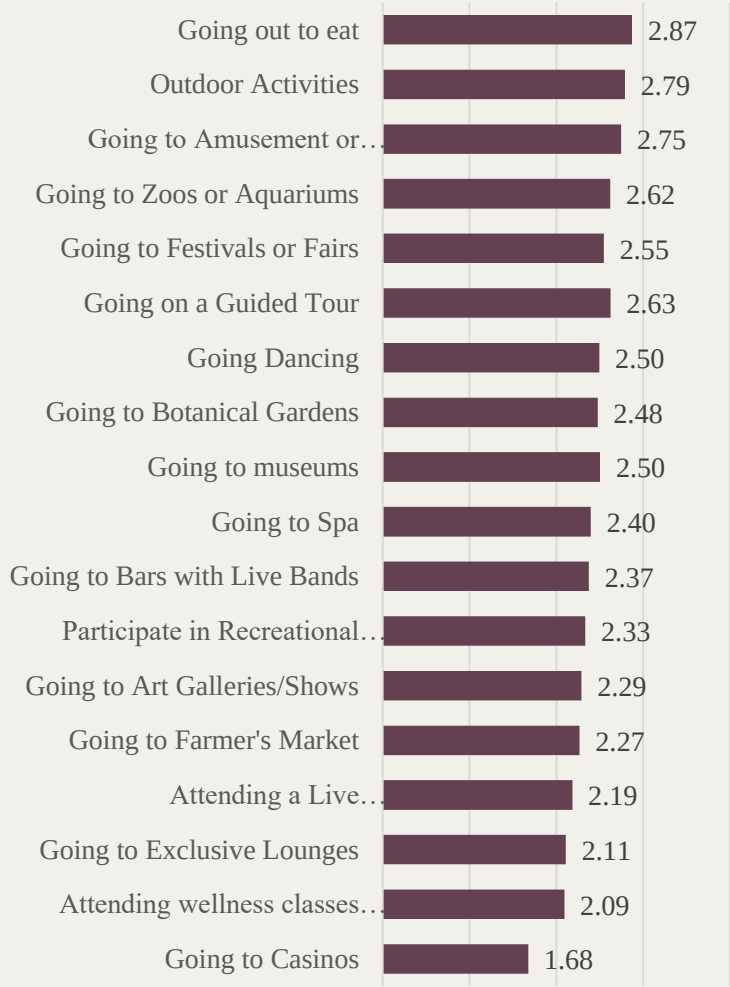
Consideration



Benefits



Activities/ Experiences



N: 620

Spending
$100–299

TOP 5
Messaging When Choosing a Destination to Highlight

Consideration

1. Safety
2. Cleanliness
3. Appealing Natural Environment
4. Easily Accessible Tourist Information
5. Fine dinning options

Benefits

1. To have fun
2. To create lasting memories
3. To see or do something new different
4. To relax and relieve stress
5. To get a break from day-to-day life

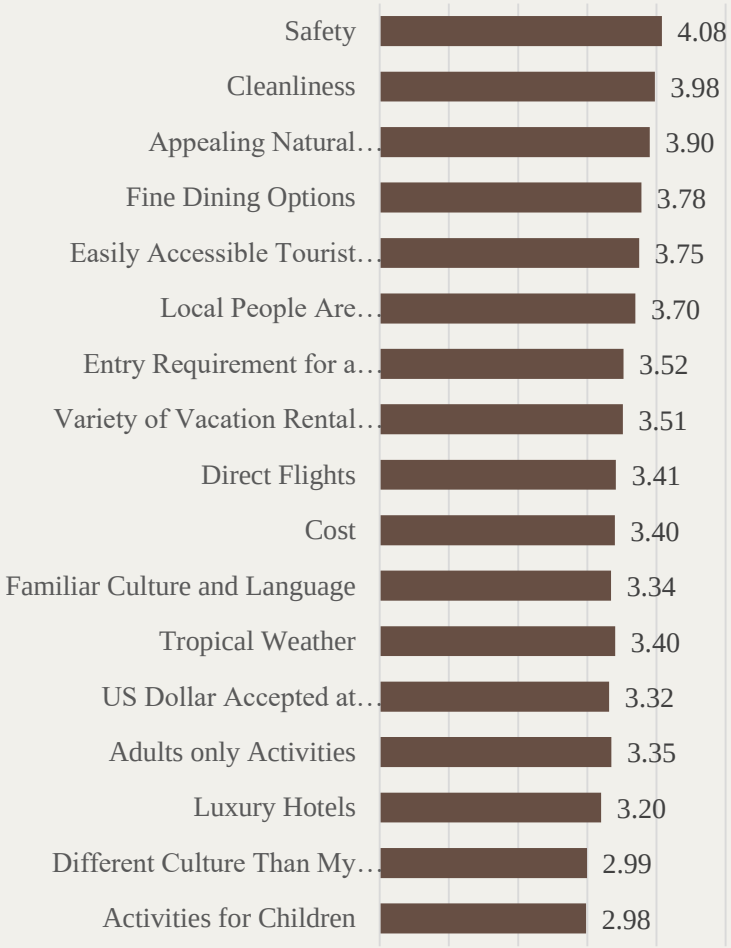
Activities/ Experiences

1. Going out to eat
2. Outdoor Activities
3. Amusement or Theme Parks
4. Guided Tour
5. Zoos or Aquariums

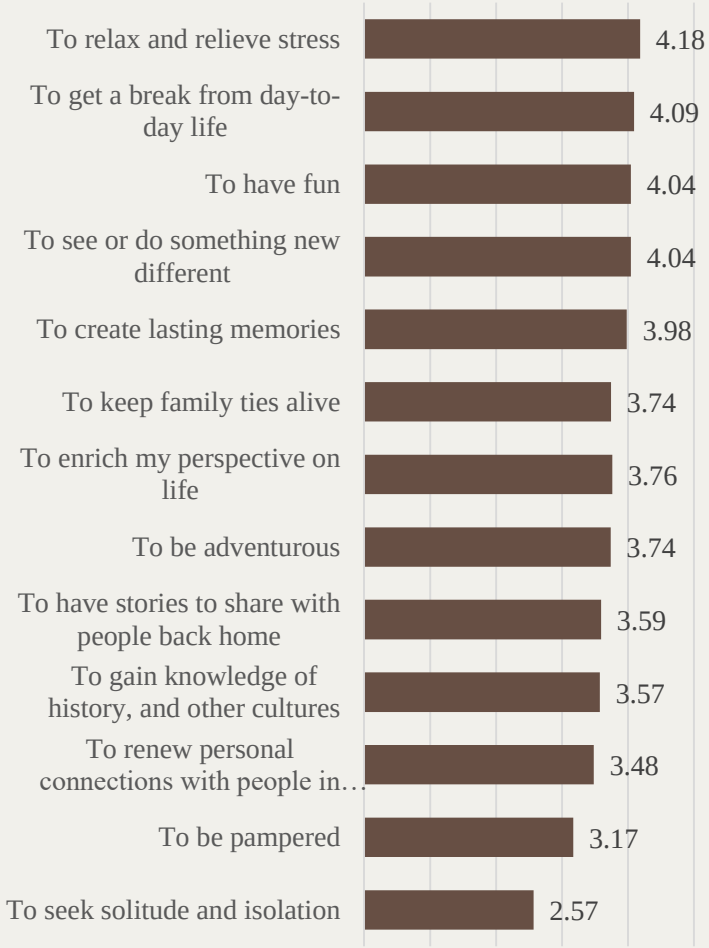
N: 620

Spending
$300- $499

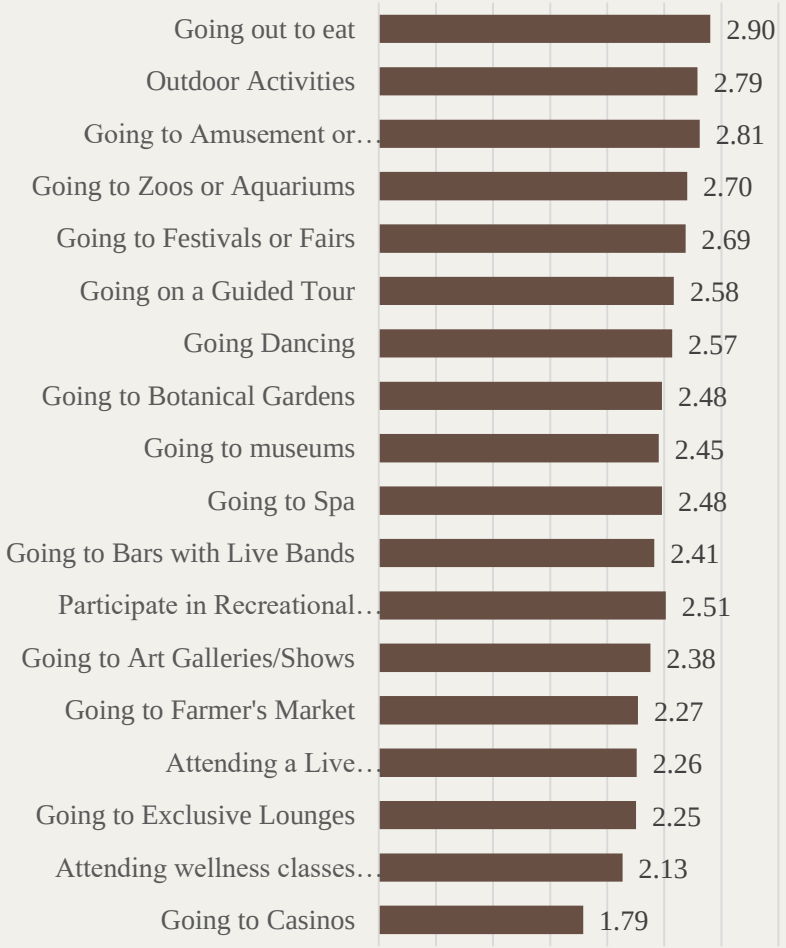
Consideration



Benefits



Activities/ Experiences



N: 620

Spending
$300-500

TOP 5
Messaging When Choosing a Destination to Highlight

Consideration

1. Safety
2. Cleanliness
3. Appealing Natural Environment
4. Fine Dinning options
5. Easily Accessible Tourist Information

Benefits

1. To Relax and Relieve Stress
2. To Get a Break From Day-to-Day Life
3. To see or do something new different
4. To have fun
5. To create lasting memories

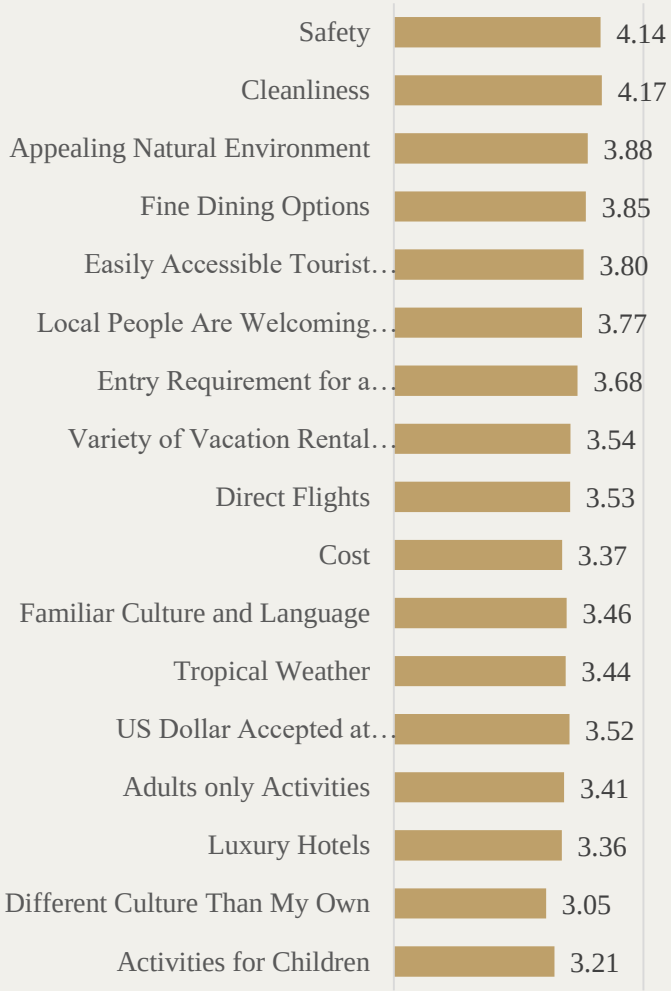
Activities/ Experiences

1. Going out to eat
2. Amusement or Theme Parks
3. Outdoor Activities
4. Zoos or Aquariums
5. Festivals or Fairs

N: 420

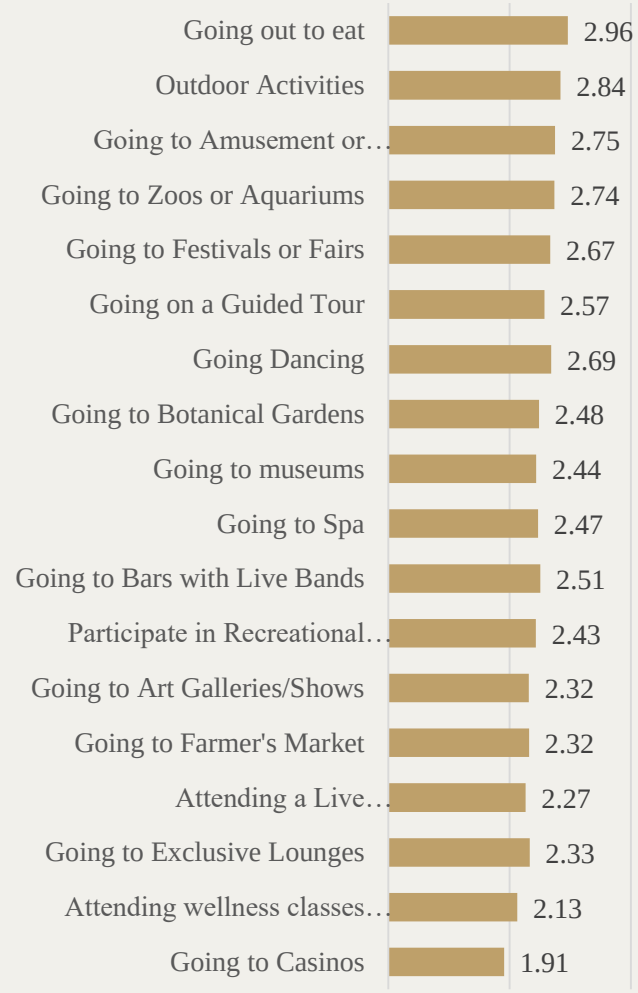
Spending
More than $500

Consideration



Benefits

Activities/ Experiences



N: 420

Spending
Above $500

TOP 5
Messaging When Choosing a Destination to Highlight

Consideration

1. Cleanliness
2. Safety
3. Appealing Natural Environment
4. Fine dinning options
5. Easily Accessible Tourist Information

Benefits

1. To Relax and Relieve Stress
2. To get a break from day-to-day life
3. To have fun
4. To create lasting memories
5. To see or do something new different

Activities/ Experiences

1. Going out to eat
2. Outdoor Activities
3. Amusement or Theme Parks
4. Zoos or Aquariums
5. Dancing

N: 620

Andean Region

Gender

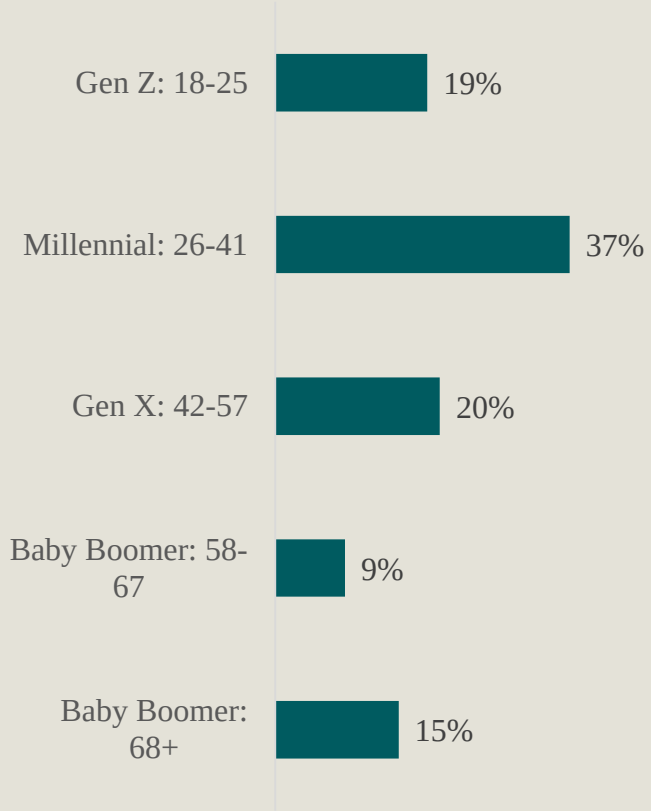
54%

Male

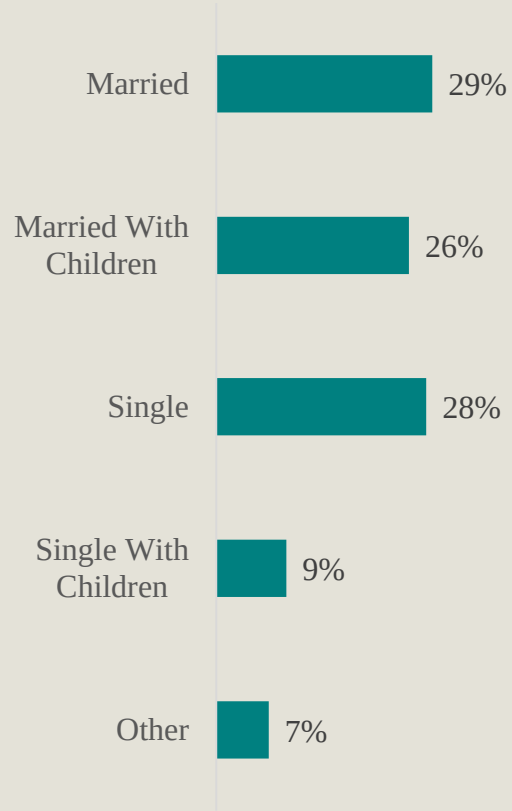
46%

Female

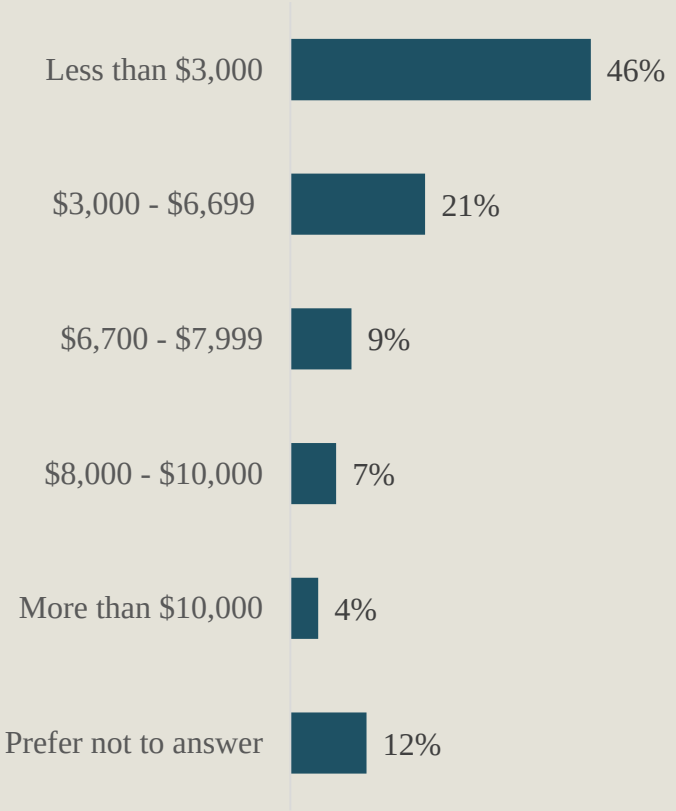
Age *Range*



Household



Average *Monthly Income*



N: 254

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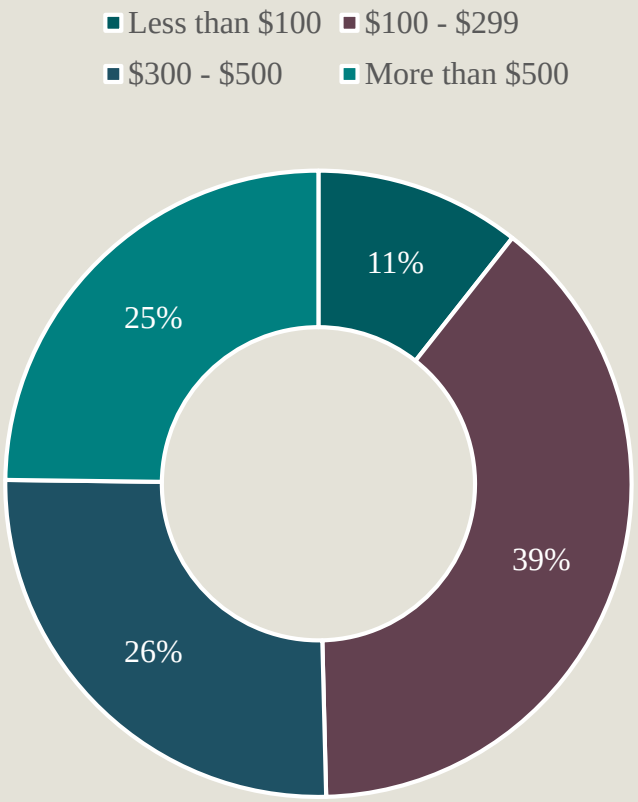
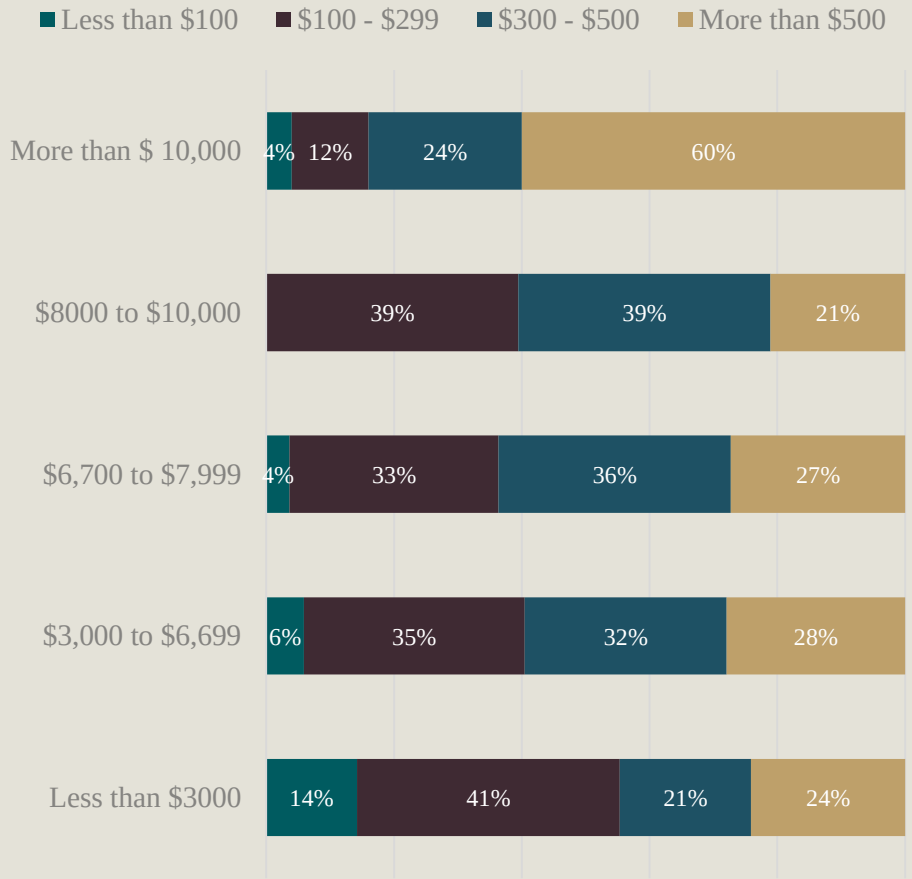
Avg. Per Day Spend



Avg. Per Day Spend
By Monthly Income



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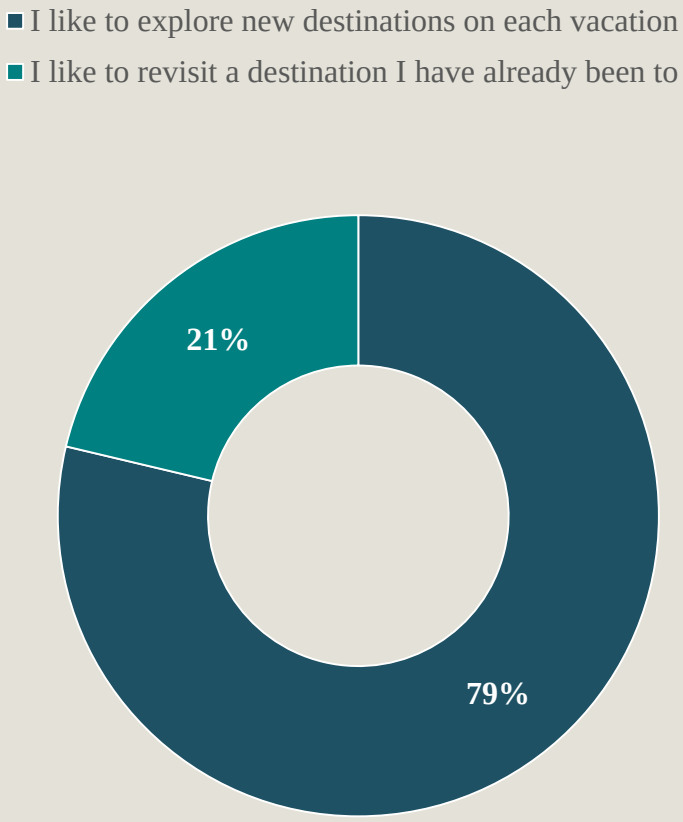
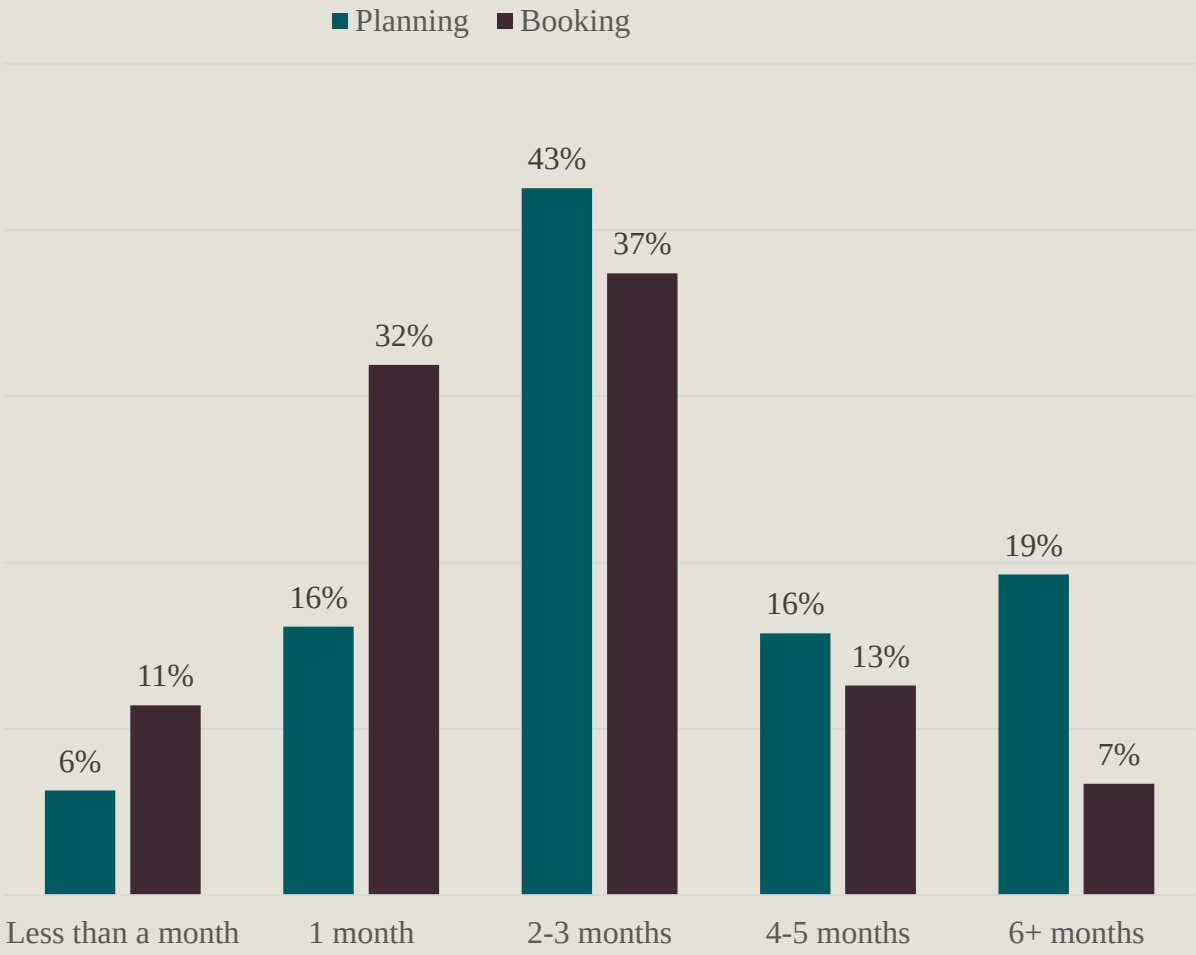
Type of Traveler



Planning & Booking Behavior



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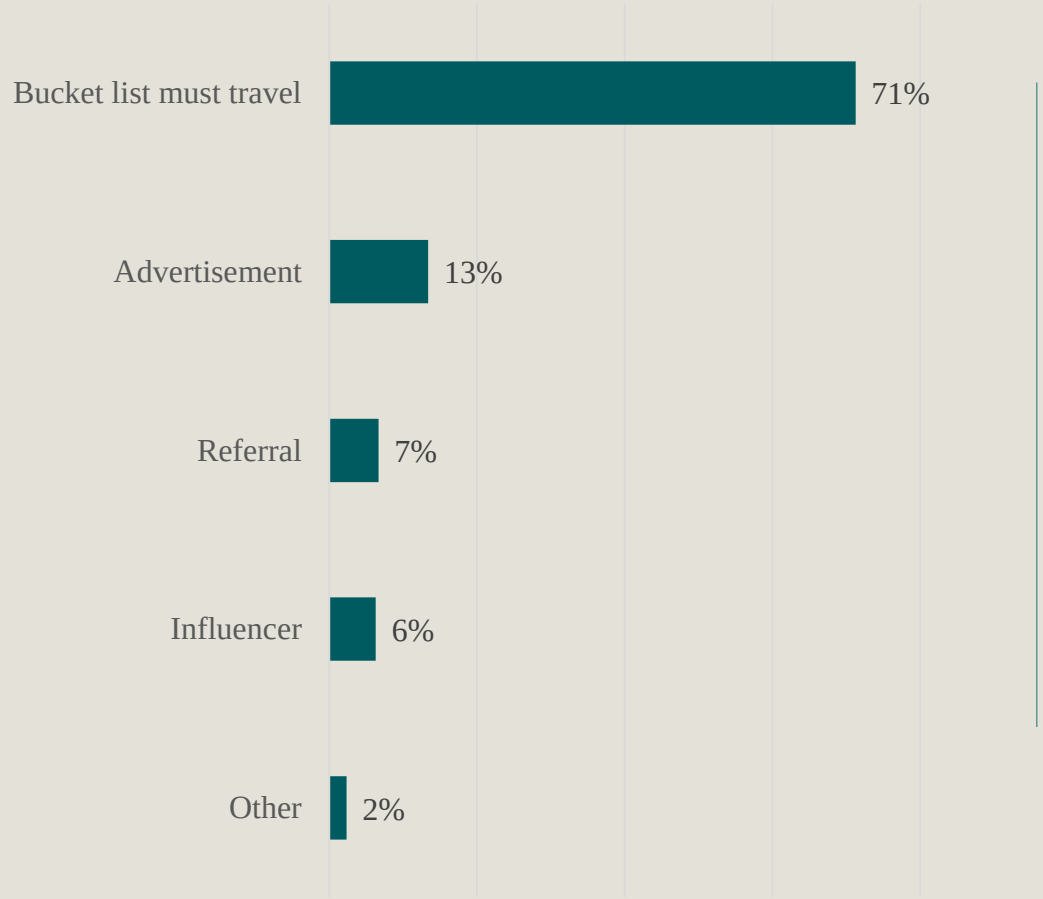
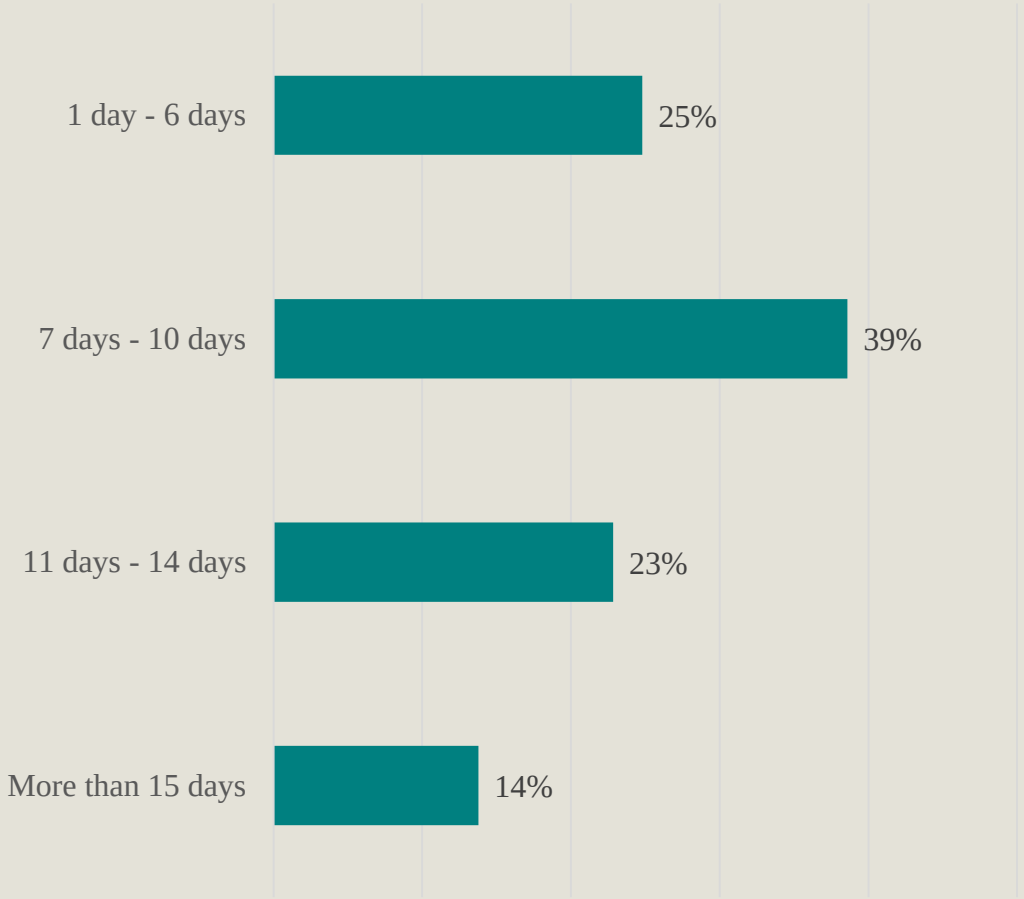
Define your next Vacation Destination



Avg. Vacation Days per Year



N: 254

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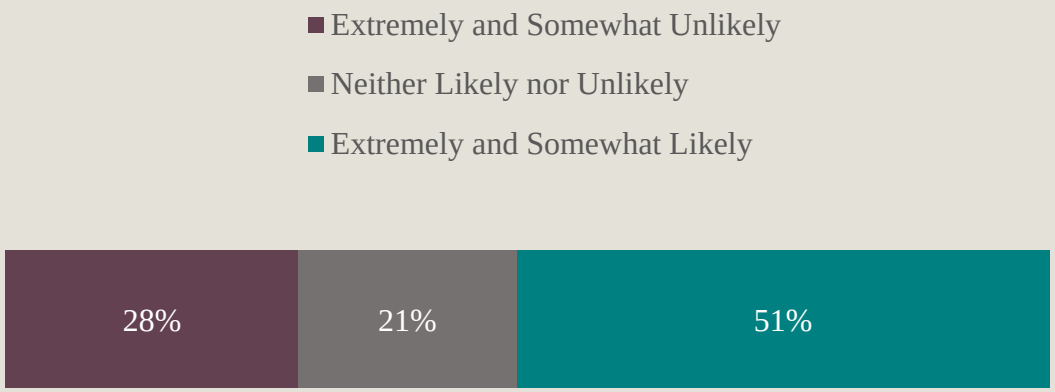
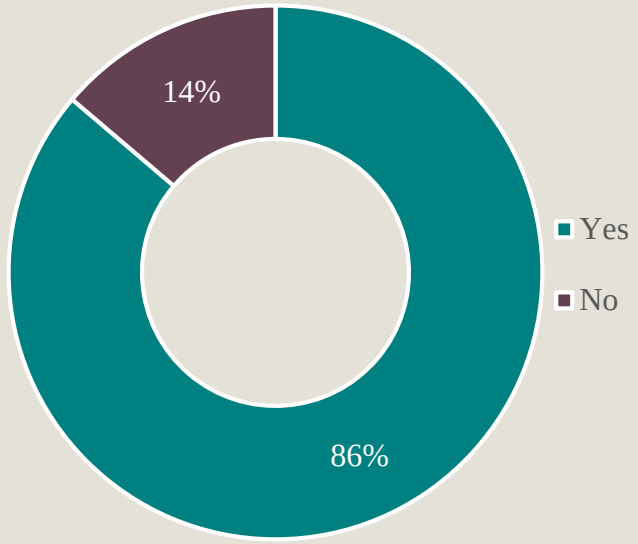
Likelihood of Traveling to a Caribbean Island Next Year



Have you heard about Aruba before?



Top channels when *hearing about Aruba*

Friends & Family	Internet	Social Media	Newspaper & Magazine Ads
27%	21%	17%	8%

N: 254

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Caribbean Region

Gender

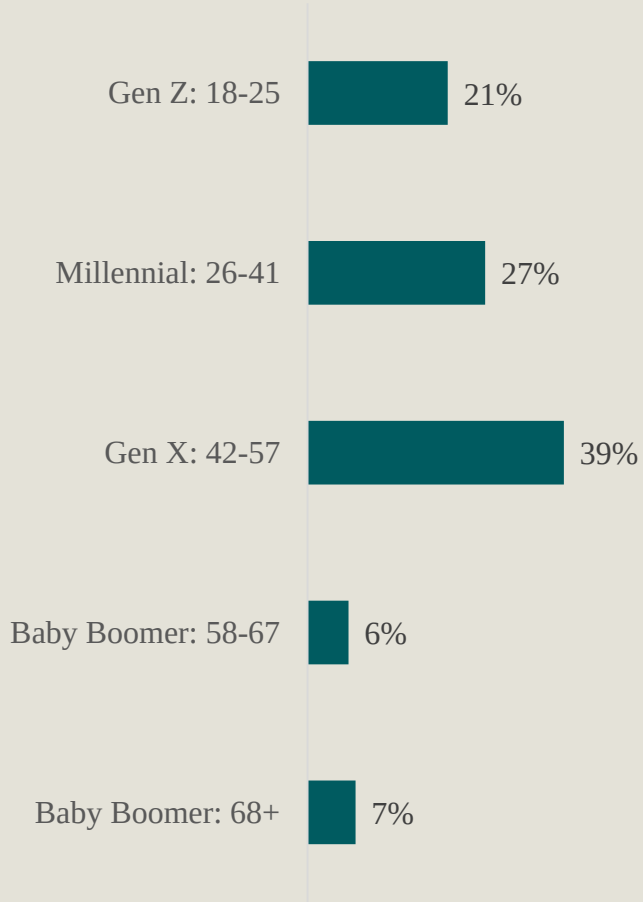
50%

Male

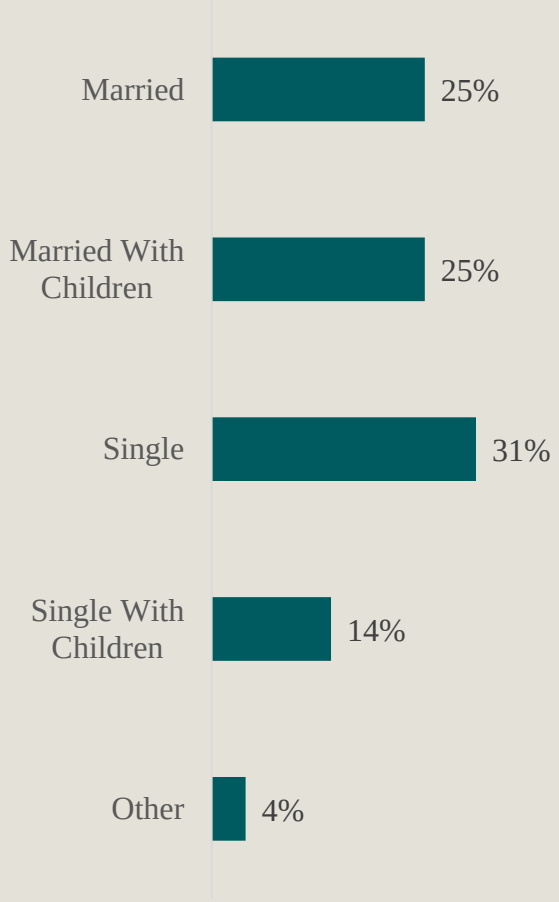
50%

Female

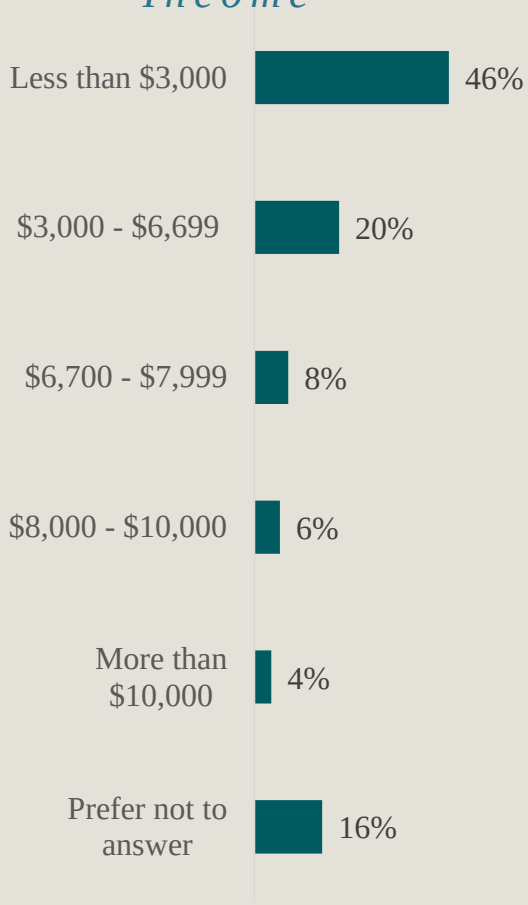
Age *Range*



Household



Average *Monthly Income*



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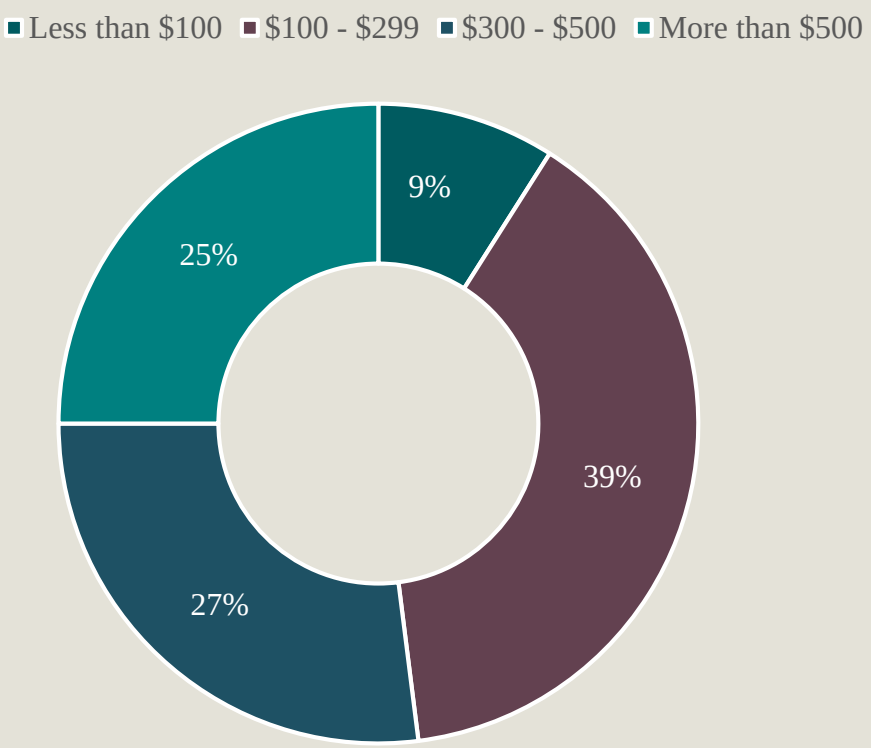
Avg. Per Day Spend



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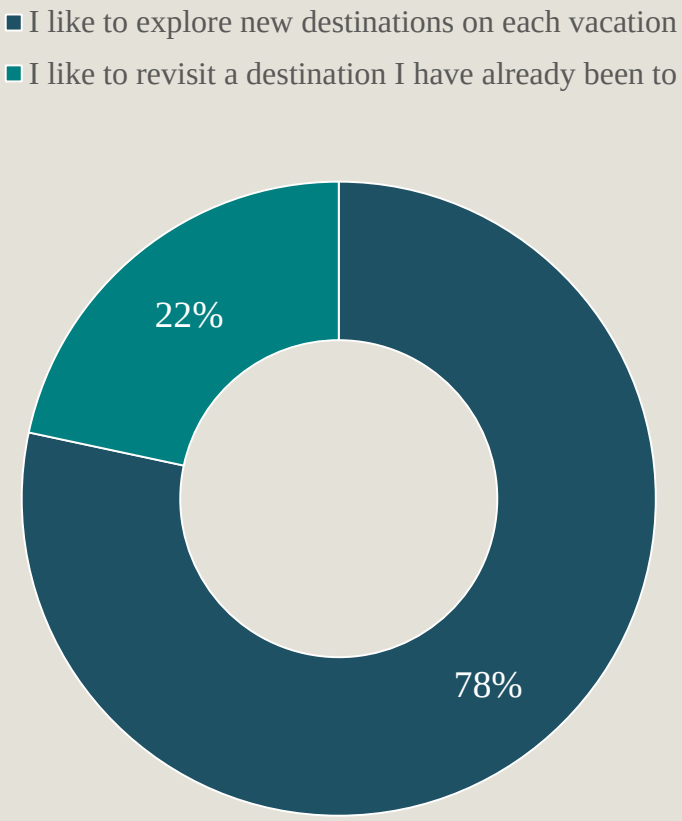
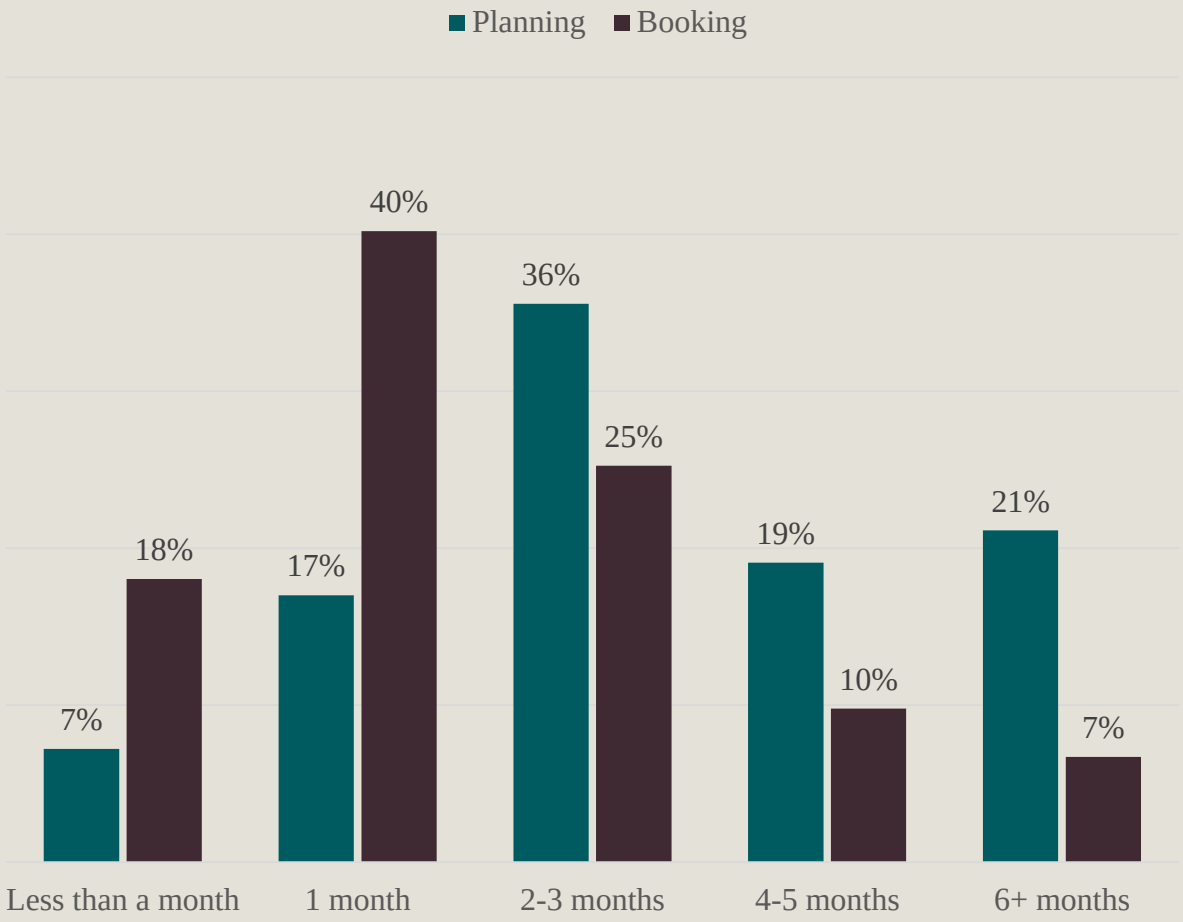
Type of Traveler



Planning & Booking Behavior



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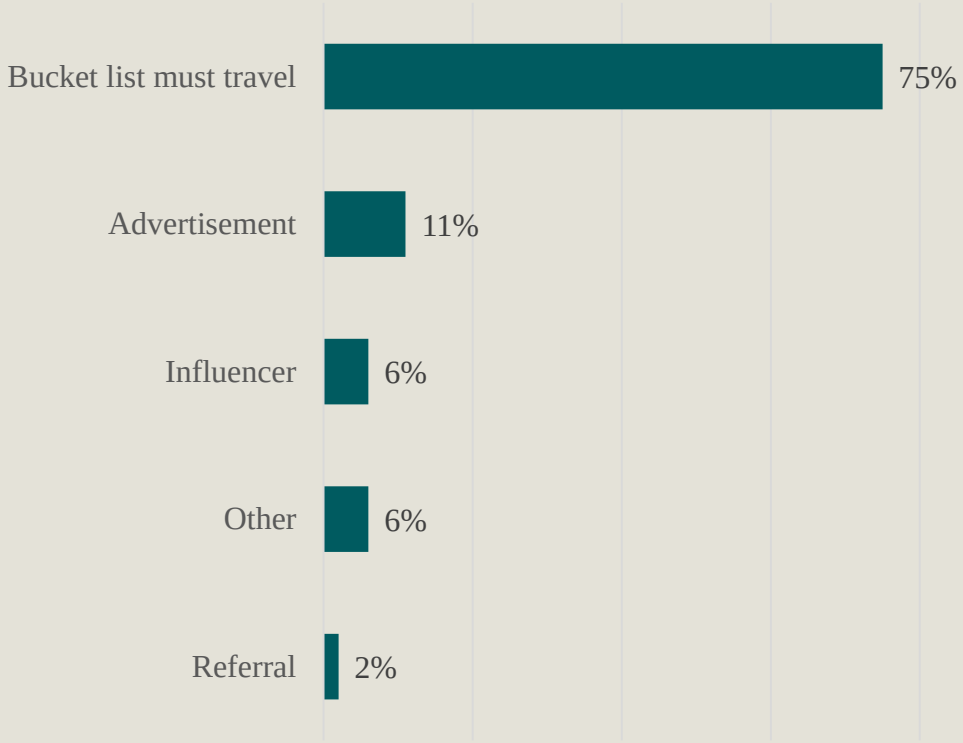
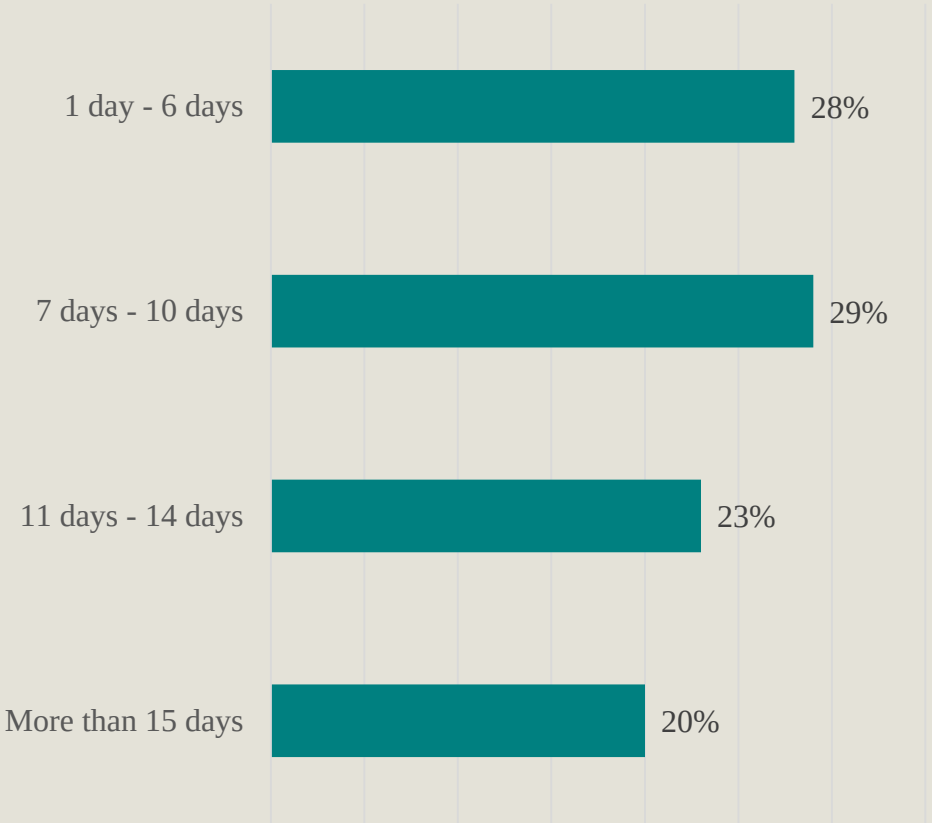
Define your next Vacation Destination



Avg. Vacation Days per Year



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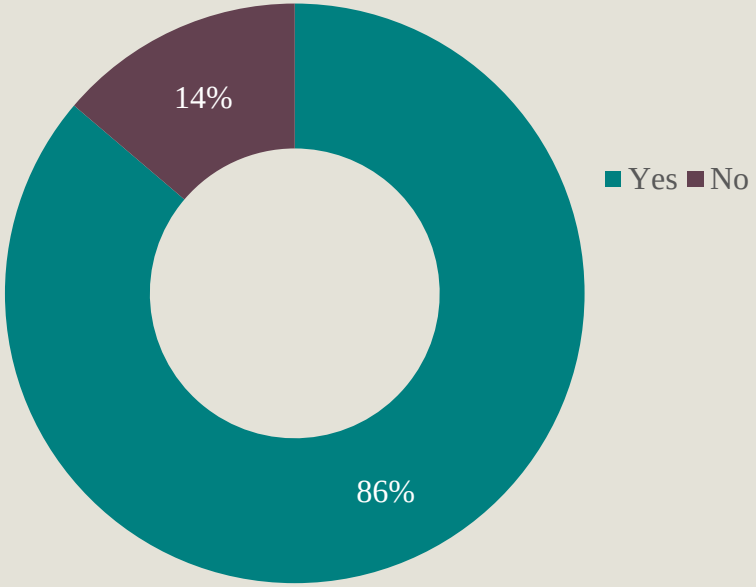
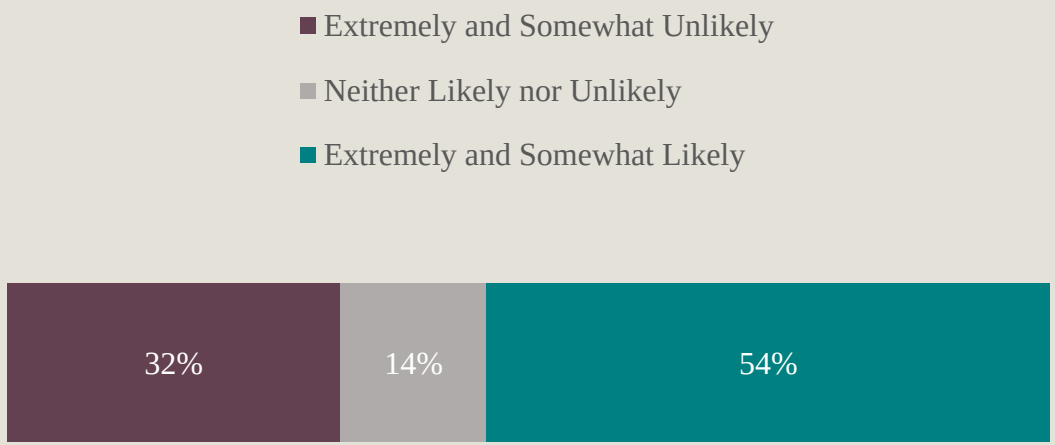
Likelihood of Traveling to a Caribbean Island Next Year



Have you heard about Aruba before?



Top channels when *hearing about Aruba*

Friends & Family — **31%**

Social Media — **22%**

Internet — **20%**

Movie/Tv Shows — **7%**

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High Spenders

$300+ PP/PD

Gender

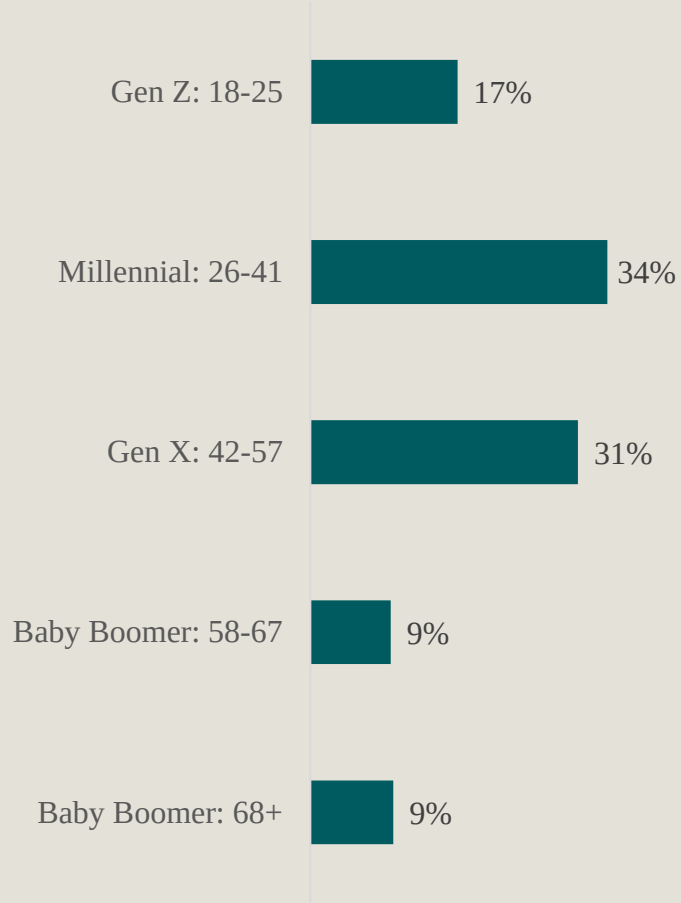
53%

Male

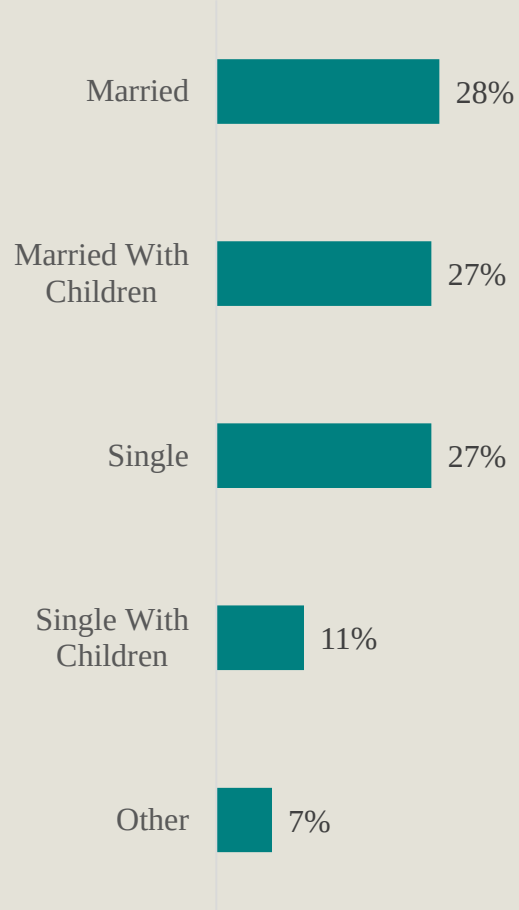
47%

Female

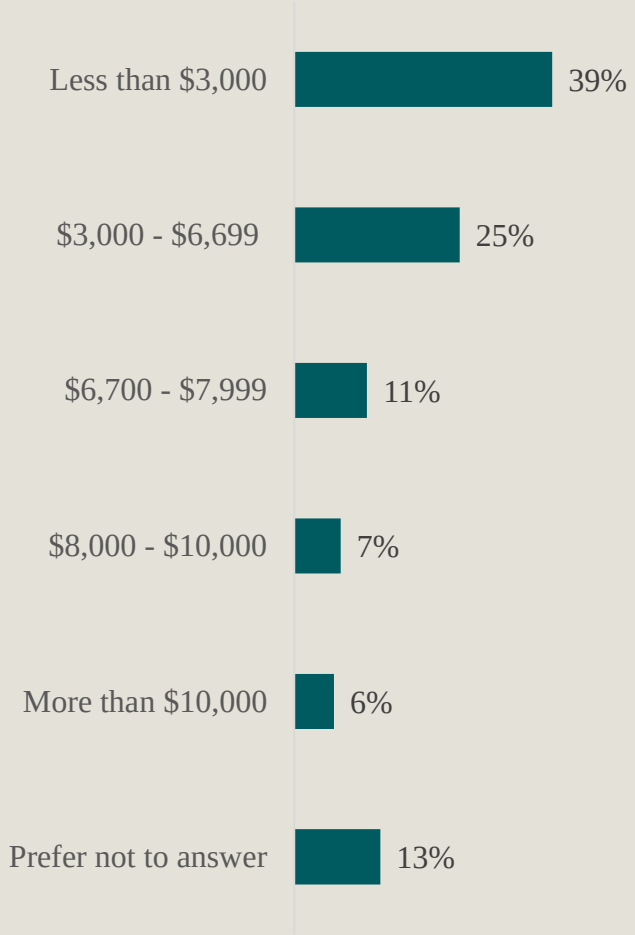
Age *Range*



Household



Average *Monthly Income*



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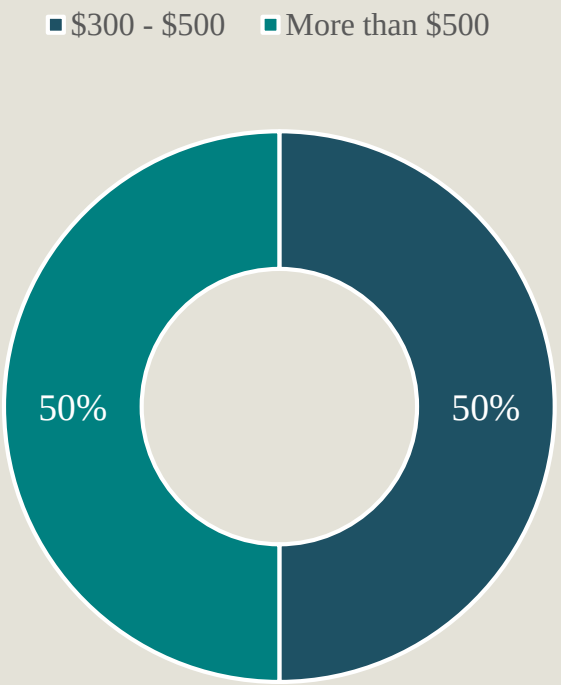
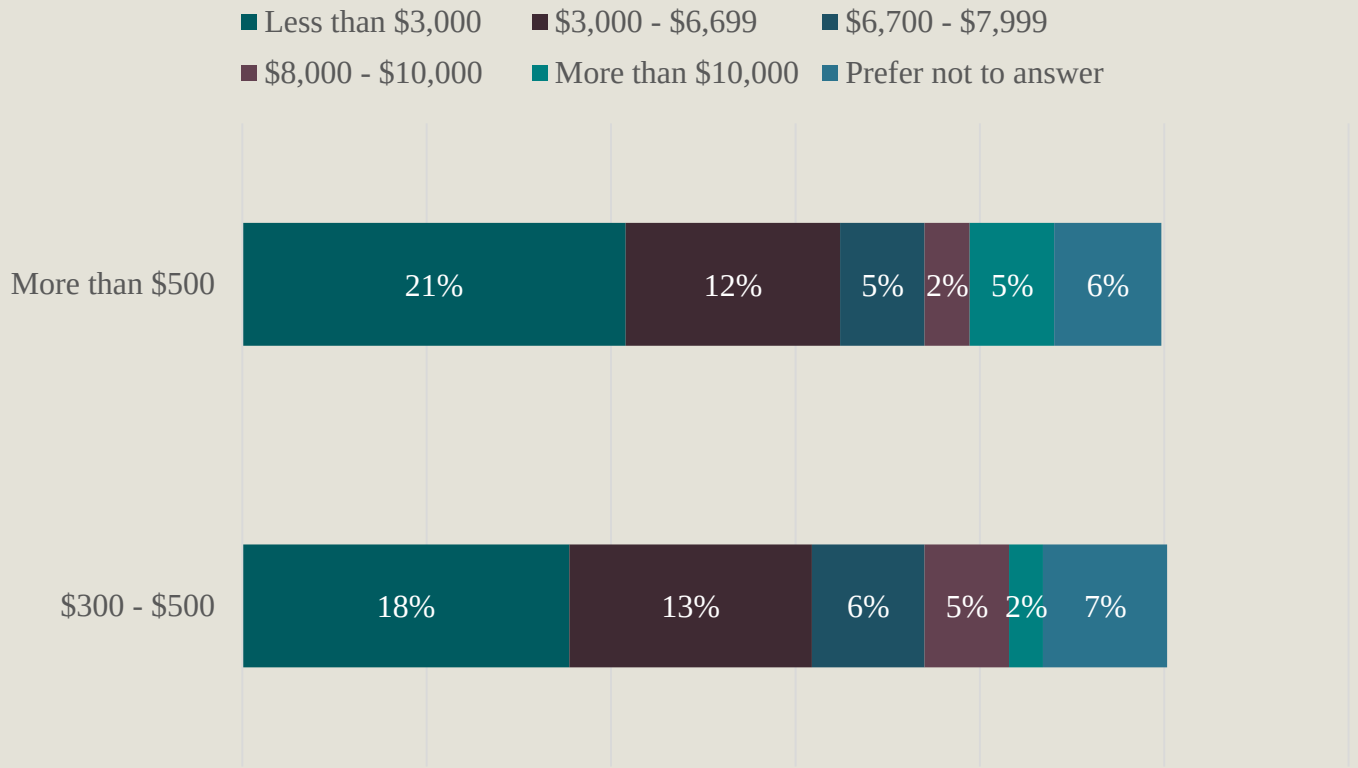
Avg. Per Day Spend



Avg. Per Day Spend By Monthly Income



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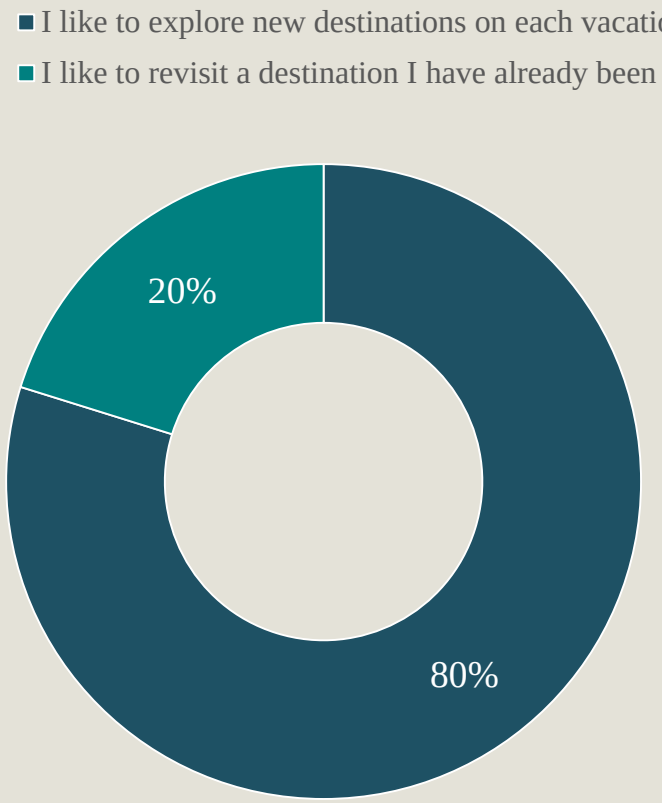
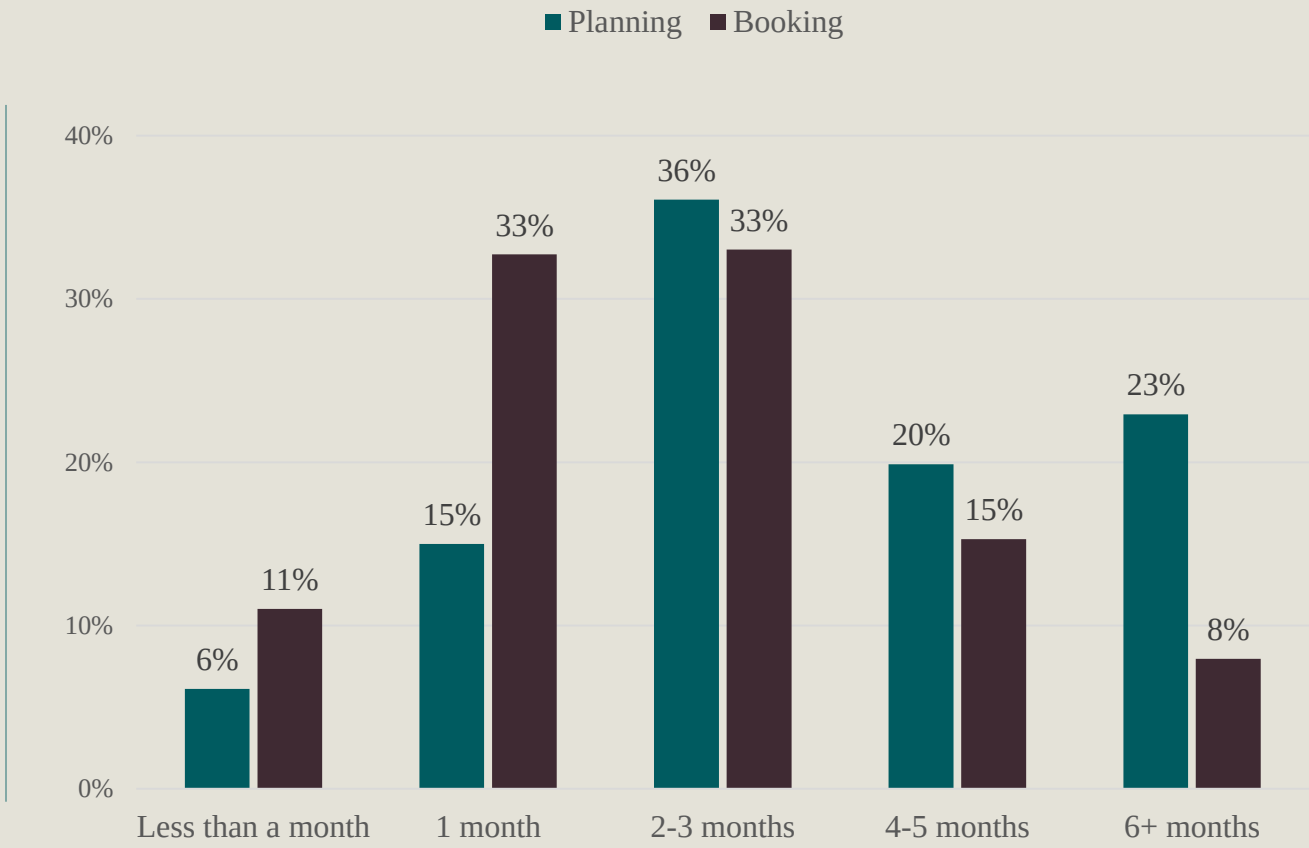
Type of Traveler



Planning & Booking Behavior



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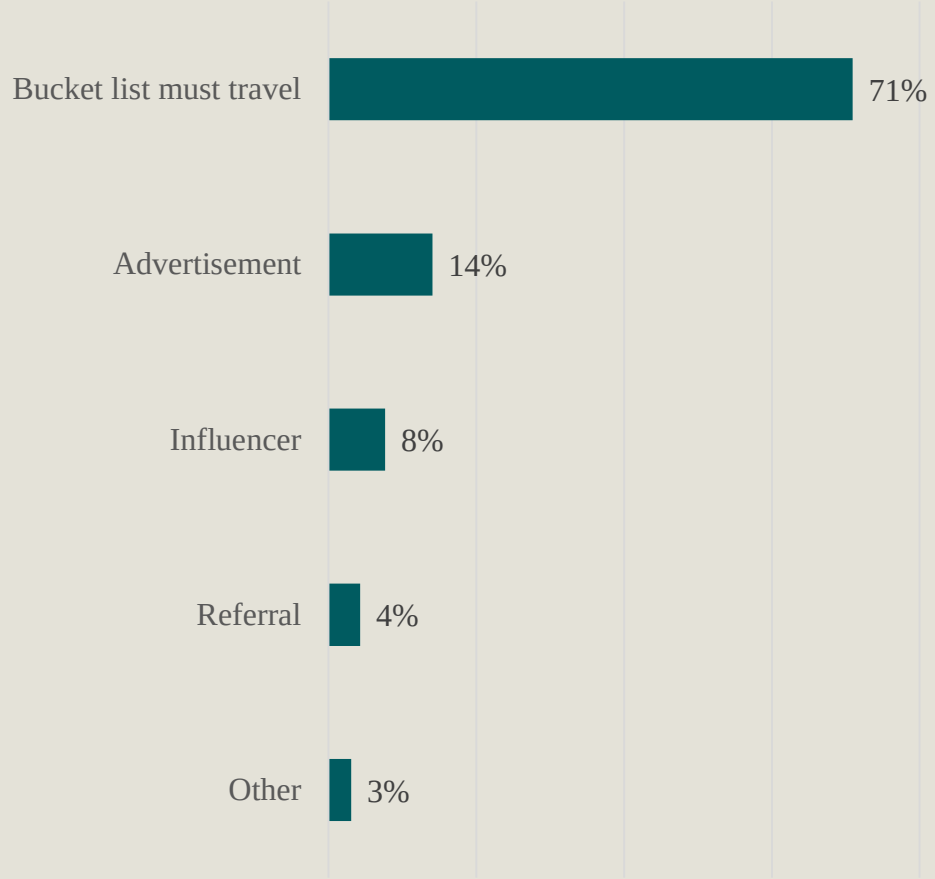
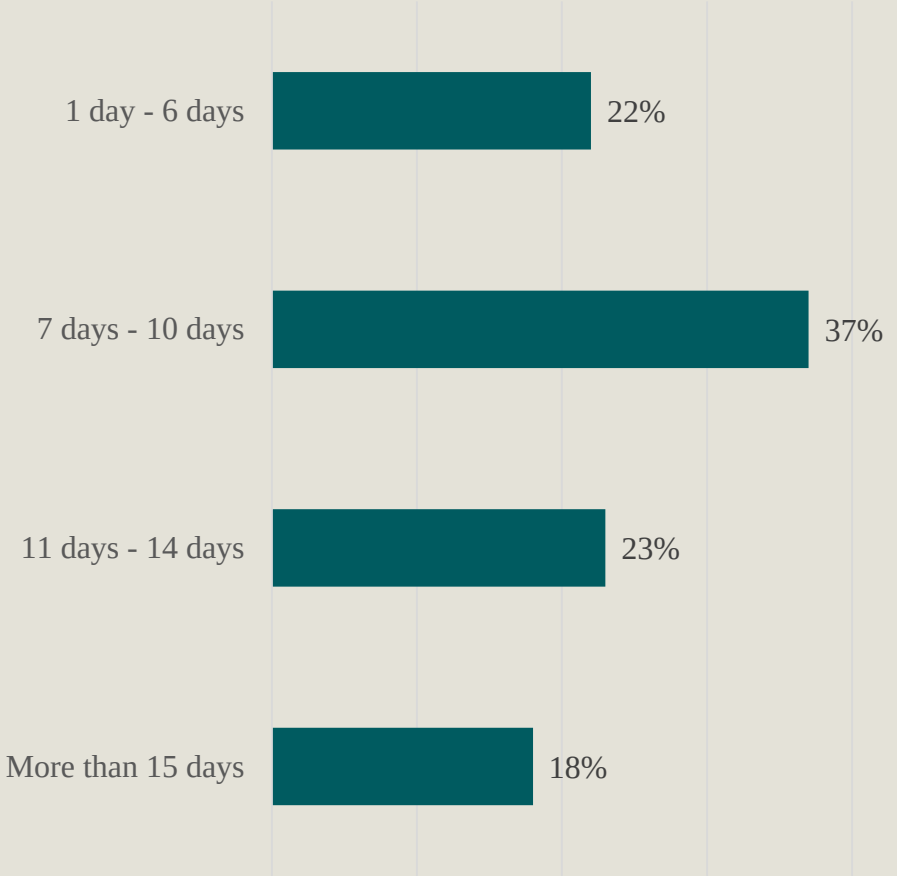
Define your next Vacation Destination



Avg. Vacation Days per Year



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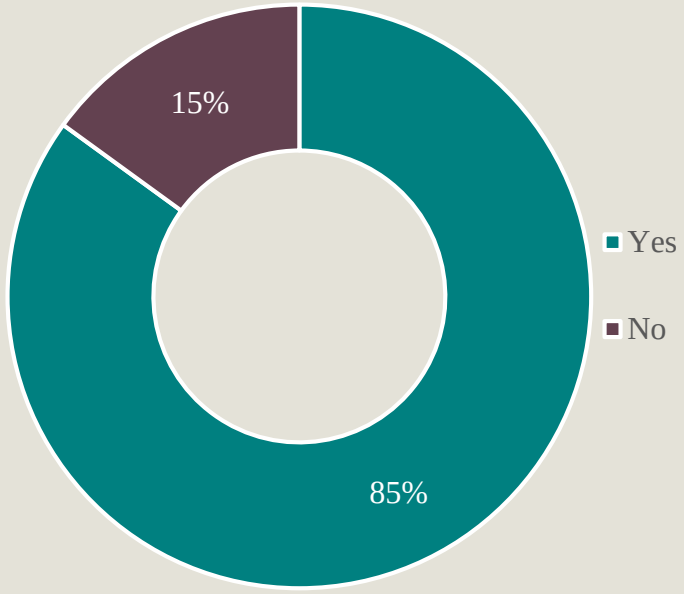
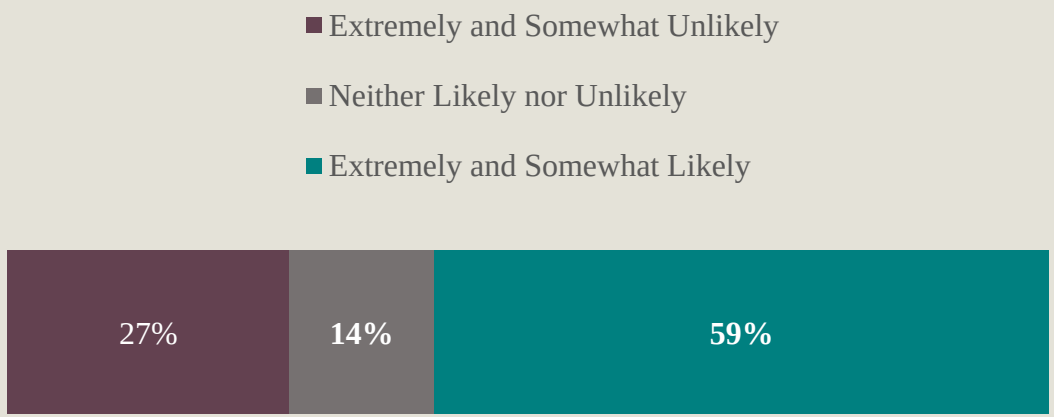
Likelihood of Traveling to a Caribbean Island Next Year



Have you heard about Aruba before?



Top channels when *hearing about Aruba*

Friends & Family	Social Media	Internet	Travel Agency
32%	20%	18%	6%

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Millennials

Age: 26 - 41

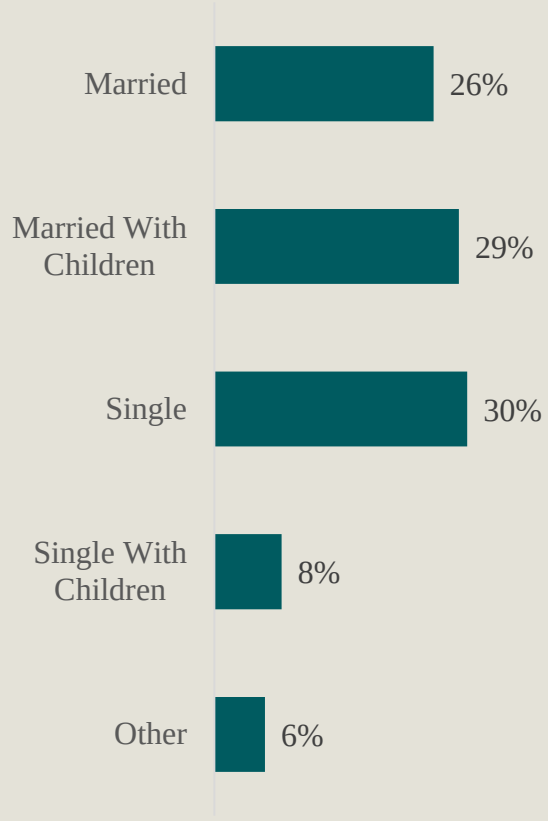
Gender

54%
Male

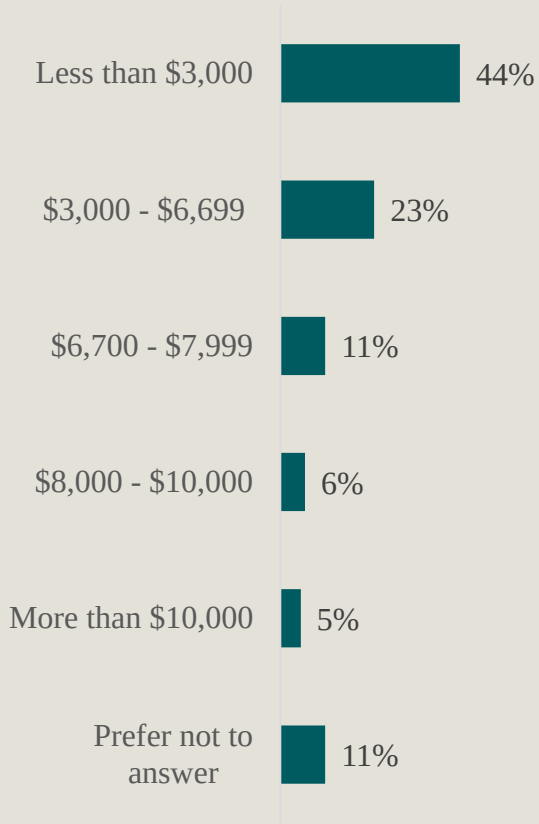
45%
Female

1%
Prefer not to say

Household



Average *Monthly Income*



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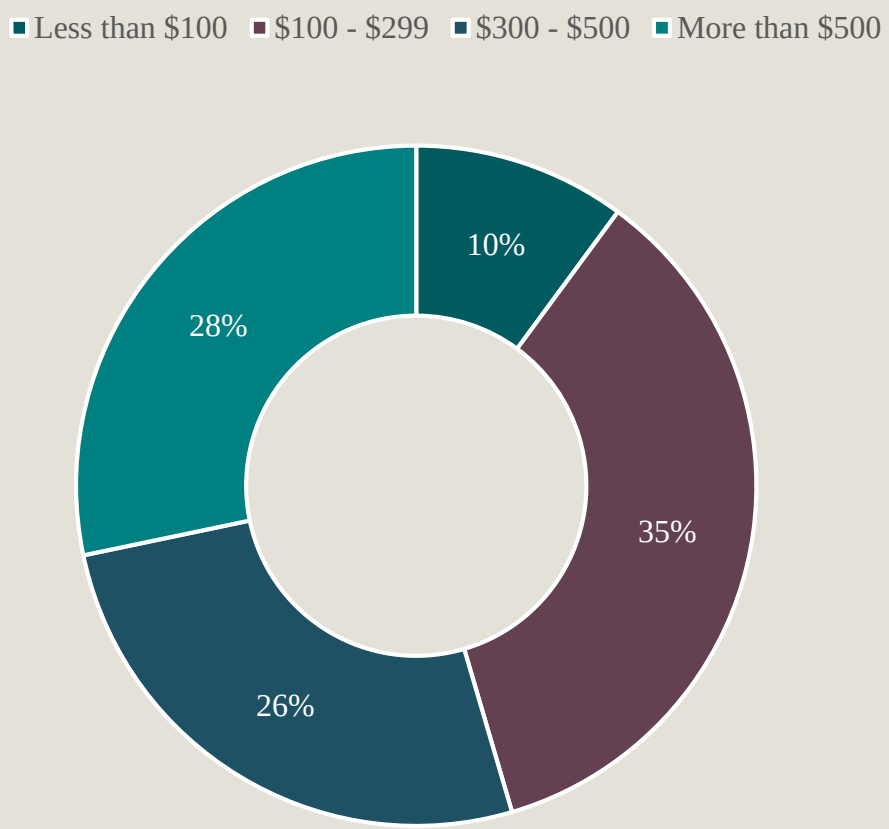
Avg. Per Day Spend



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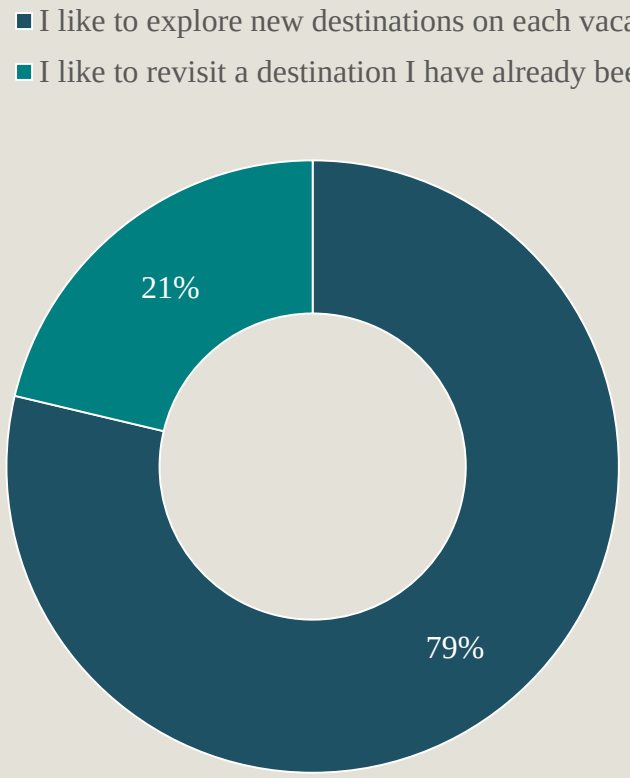
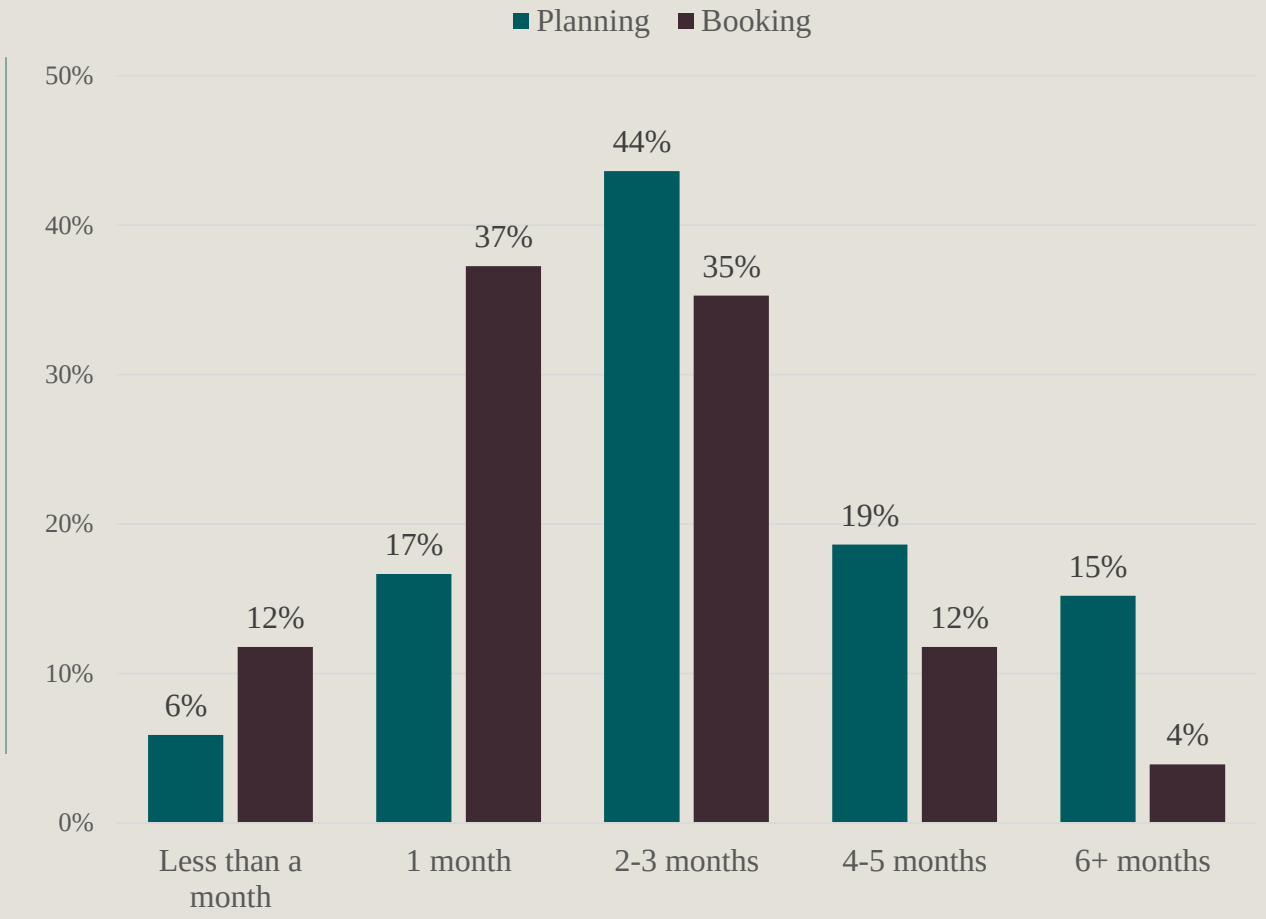
Type of Traveler



Planning & Booking Behavior



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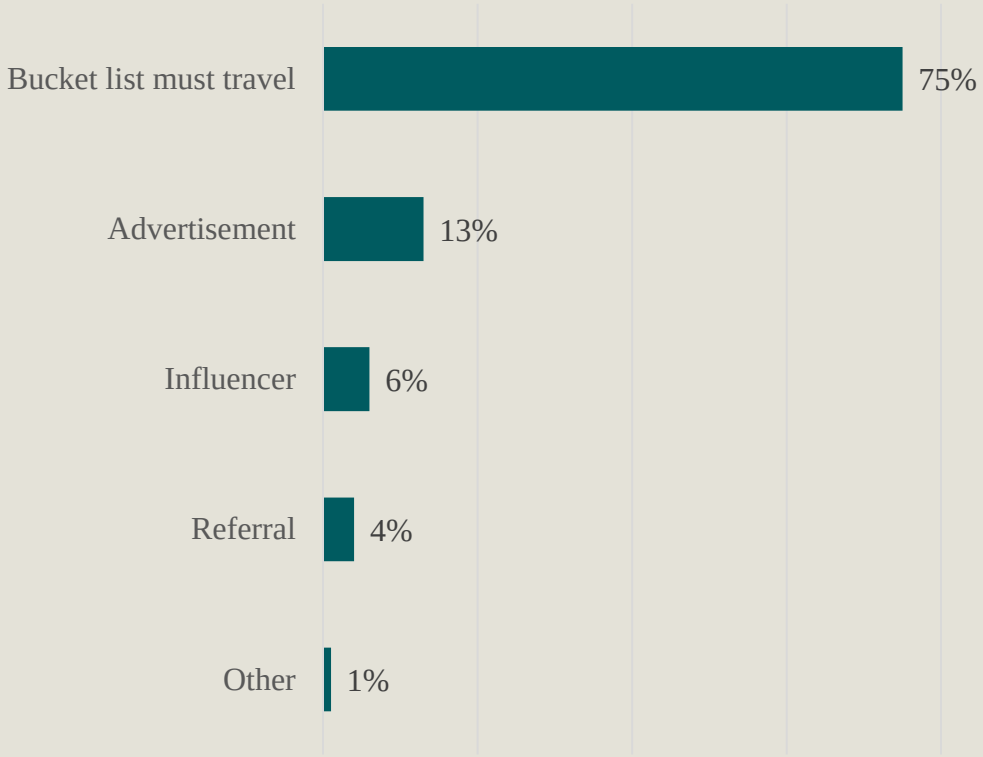
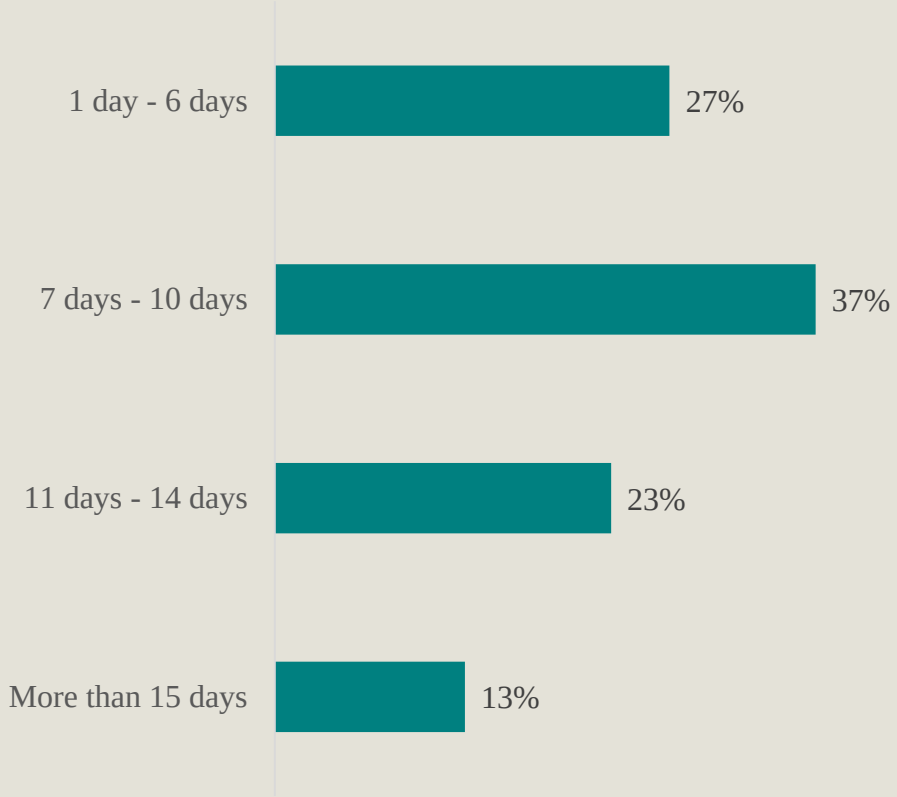
Define your next Vacation Destination



Avg. Vacation Days per Year



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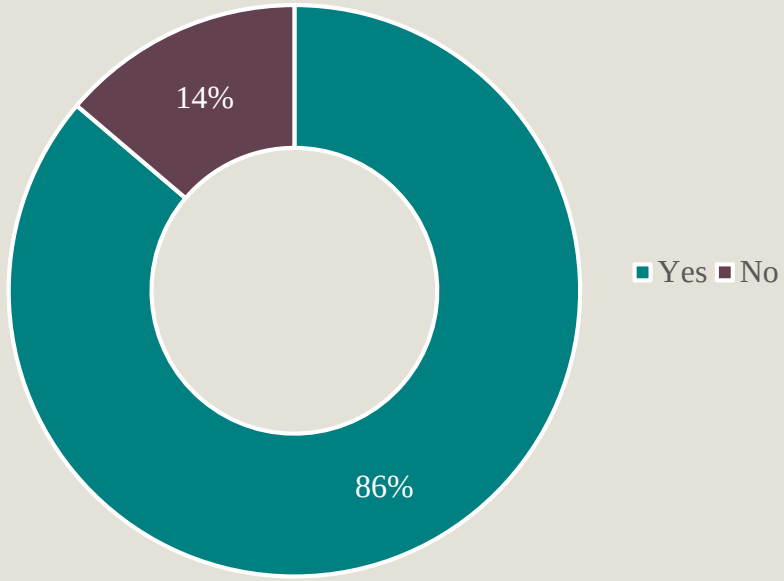
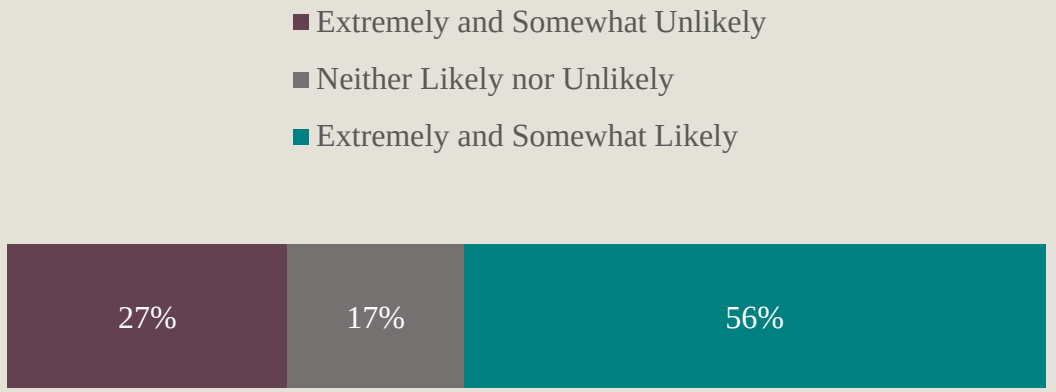
Likelihood of Traveling to a Caribbean Island Next Year



Have you heard about Aruba before?



Top channels when *hearing about Aruba*

Friends & Family

27%

Social Media

27%

Internet

21%

Travel Agency

6%

N: 204

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Thank *You*