ARUBA
2020 ANNUAL RESEARCH: KEY HIGHLIGHTS

GLOBAL DATA 2019

10.3%
Total GDP contribution

330MN
Jobs globally (1 in 10 jobs)

While the global economy grew by 2.5%, Travel & Tourism grew significantly more at 3.5%

1 in 4 net new jobs were created by Travel & Tourism over the last five years

Global GDP impact by sector (2018 data). Share of total economy GDP

<table>
<thead>
<tr>
<th>Sector</th>
<th>Share of GDP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mining</td>
<td>0%</td>
</tr>
<tr>
<td>Automotive</td>
<td>5%</td>
</tr>
<tr>
<td>Agriculture</td>
<td>8%</td>
</tr>
<tr>
<td>Travel &amp; Tourism</td>
<td>10%</td>
</tr>
<tr>
<td>Retail</td>
<td>15%</td>
</tr>
<tr>
<td>Financial Services</td>
<td>15%</td>
</tr>
</tbody>
</table>

Note: Data are average shares over the 2016-2018 period
Source: Oxford Economics, national sources and UNWTO

ARUBA 2019 KEY DATA

73.6% OF TOTAL ECONOMY
Total T&T GDP = AWG3,833.3MN (USD2,141.5MN)

+1.6%
2019 Travel & Tourism GDP growth vs +1.1% real economy GDP growth

35.0 JOBS (000's)
(84.3% of total employment)

AWG3,529.3MN
in visitor spend (85.9% of total exports) (USD1,971.7MN)

INBOUND ARRIVALS

1. UNITED STATES 63%
2. VENEZUELA 11%
3. CANADA 4%
4. NETHERLANDS 3%
5. COLOMBIA 3%
REST OF WORLD 16%

OUTBOUND DEPARTURES

1. UNITED STATES 25%
2. COLOMBIA 15%
3. DOMINICAN REPUBLIC 4%
4. JAMAICA 1%
5. MEXICO 1%
REST OF WORLD 54%

Note: Data are average shares over the 2016-2018 period
Source: Oxford Economics, national sources and UNWTO

SECTOR CHARACTERISTICS (2019)

<table>
<thead>
<tr>
<th>Category</th>
<th>Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leisure Spending</td>
<td>93%</td>
</tr>
<tr>
<td>Business Spending</td>
<td>7%</td>
</tr>
<tr>
<td>Domestic Spending</td>
<td>8%</td>
</tr>
<tr>
<td>International Spending</td>
<td>92%</td>
</tr>
</tbody>
</table>

1All values are in constant 2019 prices & exchange rates
As reported in March 2020