



*Creating a wealth of
information... and knowledge!*

By: Louissette Christiaans-Yarzagaray



Objective of the Presentation:

Getting to know C.B.S....

Role of the C.B.S. in Tourism....

Why information, who benefits?



Getting to know the C.B.S.:

- **C.B.S. part of Ministry of Economic Affairs**
- **Institution officially assigned by the government to collect, process and publish actual and relevant statistics on a periodical basis.**

The collection of data / data sources:

- Readily available administrative information
- Collection from Survey



Role of C.B.S.:

- Responsible for the production and presentation of information mostly through publications and papers

Information on different areas such as:

- Population
- Economic Indicators
- Consumer Price Index
- Geographical Information System
- Business Statistics
- **TOURISM**
- Demographics
- Health
- Education
- National Accounts
- Foreign Trade

- Create a wealth of information **and knowledge**



Why Information: who benefits?

- Government: e.g. for policy makers
- Commerce and non-government institutions
 - For policy makers
 - Construct marketing plans
 - Feasibility studies of businesses
- Community: e.g. the academic world
- International Institutions:
e.g. U.N., I.M.F., W.B., W.T.O.



Tourism Statistics:

*An introduction to C.B.S.
related to Tourism Statistics*



Why Tourism Statistics?

- Determine the visitors characteristics
- To improve the marketing efforts to better promote Aruba
- To promote the use of Tourism statistics and Tourism indicators
- To measure the economic benefits that tourism provides to Aruba

The largest contributors to Aruba's Economy:

TOURISM?

Tourism Division – C.B.S.



All kind of Tourism Related data:

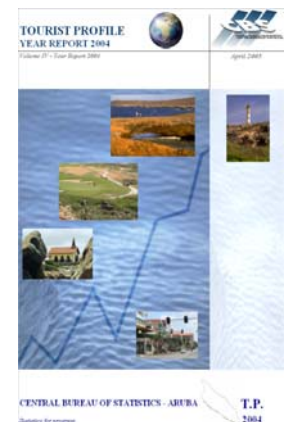
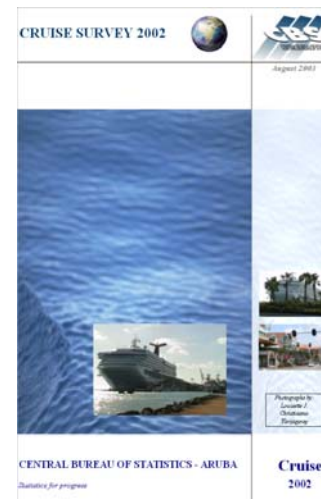
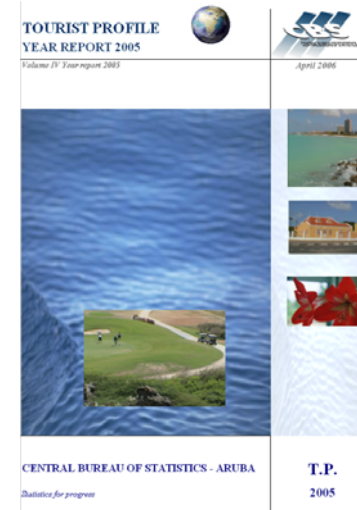
- Administrative Data

Stay-over visitors, Visitor nights, Arrivals by carrier, Cruise passengers, Cruise calls, Airport traffic and landings, Tourism receipts, Lodging tax, Casino tax.

(Source: ATA, CTA, AAA, Immigration, CBA, etc.)

- Survey Results done by C.B.S. (on Tourism)

- Visitor Survey (1996 until 2006)
- Cruise Survey (1997, 2002, 2005)
- Outbound Visitor Survey (2007/2008)
- Hotel Report (monthly since 1996)
- Other (Incidentals)





Hotel Related Statistics / Indicators:

Hotel Related Statistics / Indicators:



AHATA MONTHLY PERFORMANCE REPORT

NOT AVAILABLE
FOR PUBLICATION

SEPTEMBER 2006



Central Bureau of Statistics

L.G. Smith Boulevard # 160

Oranjestad, Aruba

Date: 20 October, 2006

REVISED

Contact Person: Louissette Christlaans-Yarzagaray /
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CURRENT MONTH

| | Number of rooms | Fair share | Occupancy % | | Rooms sold | Penetration Index | | Average Rate | | ADR Index | (x 1000) Room Revenue | Revpar | | Yield Index | |
|------------------|-----------------|------------|----------------|-----------------------|------------|-------------------|-----------------------|----------------|-----------------------|-----------|-----------------------|----------------|-----------------------|----------------|-----------------------|
| | | | Current Period | % Change to last year | | Current Period | % Change to last year | Current Period | % Change to last year | | | Current Period | % Change to last year | Current Period | % Change to last year |
| 275 Rooms and up | 3,006 | 43.8% | 62.7% | -4.4% | 56,514 | 94.1% | -0.8% | \$ 143.56 | -16.7% | 110.7% | \$ 8,113 | \$ 89.96 | -20.4% | 170.5% | -5.5% |
| Under 275 rooms | 871 | 12.7% | 71.4% | -10.1% | 18,644 | 107.2% | -6.7% | \$ 104.21 | 2.6% | 80.4% | \$ 1,943 | \$ 74.36 | -7.7% | 140.9% | 9.5% |
| HOTEL - TOTAL | 3,877 | 56.5% | 64.6% | -7.0% | 75,156 | 97.1% | -3.5% | \$ 134.18 | -10.1% | 103.5% | \$ 10,084 | \$ 86.70 | -16.4% | 164.3% | -0.8% |
| TIME SHARE | 2,981 | 43.5% | 69.1% | 0.9% | 61,803 | 103.8% | 4.6% | \$ 89.96 | -26.1% | 69.4% | \$ 770 | \$ 8.61 | -5.1% | 16.3% | 12.6% |
| GRAND TOTAL | 6,858 | 100.0% | 66.6% | -3.6% | 136,959 | 100.0% | 0.0% | \$ 129.66 | -11.9% | 100.0% | \$ 10,855 | \$ 52.76 | -15.7% | 100.0% | 0.0% |

LAST THREE MONTH

| | Number of rooms | Fair share | Occupancy % | | Rooms sold | Penetration Index | | Average Rate | | ADR Index | (x 1000) Room Revenue | Revpar | | Yield Index | |
|------------------|-----------------|------------|----------------|-----------------------|------------|-------------------|-----------------------|----------------|-----------------------|-----------|-----------------------|----------------|-----------------------|----------------|-----------------------|
| | | | Current Period | % Change to last year | | Current Period | % Change to last year | Current Period | % Change to last year | | | Current Period | % Change to last year | Current Period | % Change to last year |
| 275 Rooms and up | 2,753 | 40.7% | 71.9% | -11.4% | 181,067 | 95.8% | -6.2% | \$ 159.48 | -7.2% | 114.8% | \$ 28,876 | \$ 114.09 | -18.4% | 1.78 | -0.7% |
| Under 275 rooms | 896 | 13.2% | 79.7% | -3.7% | 65,903 | 107.1% | 3.1% | \$ 95.04 | -9.3% | 68.4% | \$ 4,491 | \$ 78.28 | -8.9% | 1.22 | 10.8% |
| HOTEL - TOTAL | 3,676 | 54.3% | 74.0% | -9.5% | 249,420 | 98.8% | -3.8% | \$ 143.75 | -5.9% | 103.5% | \$ 35,853 | \$ 106.13 | -15.1% | 1.65 | 3.2% |
| TIME SHARE | 3,094 | 45.7% | 75.5% | -1.5% | 215,507 | 101.4% | 5.2% | \$ 107.28 | -22.3% | 77.2% | \$ 4,067 | \$ 14.29 | -14.5% | 0.22 | 4.0% |
| GRAND TOTAL | 6,769 | 100.0% | 74.6% | -6.2% | 464,927 | 100.0% | 0.0% | \$ 138.94 | -8.2% | 100.0% | \$ 39,920 | \$ 64.14 | -17.8% | 1.00 | 0.0% |

YEAR TO DATE

| | Number of rooms | Fair share | Occupancy % | | Rooms sold | Penetration Index | | Average Rate | | ADR Index | (x 1000) Room Revenue | Revpar | | Yield Index | |
|------------------|-----------------|------------|----------------|-----------------------|------------|-------------------|-----------------------|----------------|-----------------------|-----------|-----------------------|----------------|-----------------------|----------------|-----------------------|
| | | | Current Period | % Change to last year | | Current Period | % Change to last year | Current Period | % Change to last year | | | Current Period | % Change to last year | Current Period | % Change to last year |
| 275 Rooms and up | 2,668 | 39.9% | 74.1% | -14.1% | 539,817 | 95.5% | -7.9% | \$213.64 | 7.9% | 117.6% | \$115,326 | \$158.35 | -7.3% | 1.8 | 4.4% |
| Under 275 rooms | 926 | 13.8% | 82.0% | -5.0% | 207,133 | 105.1% | 0.5% | \$122.00 | 2.1% | 67.1% | \$ 24,938 | \$90.99 | -1.4% | 1.2 | 7.9% |
| HOTEL - TOTAL | 3,622 | 54.1% | 76.3% | -11.7% | 753,977 | 98.1% | -5.8% | \$188.56 | 6.7% | 103.8% | \$142,171 | \$143.83 | -5.7% | 1.7 | 5.6% |
| TIME SHARE | 3,067 | 45.9% | 79.4% | 1.7% | 665,506 | 102.3% | 8.3% | \$133.61 | -16.2% | 73.5% | \$ 14,390 | \$17.17 | -12.9% | 0.2 | -1.4% |
| GRAND TOTAL | 6,689 | 100.0% | 77.7% | -6.2% | 1,419,483 | 100.0% | 0.0% | \$181.69 | 3.8% | 100.0% | \$156,560 | \$85.73 | -10.9% | 1.0 | 0.0% |

The Categories consist of the following properties that reported to the Central Bureau of Statistics:

275 Rooms and up = 7

Allegro Resort by Occidental
Aruba Marriott Resort
Aruba Renaissance Beach Resort
Aruba Resort Spa & Casino
Holiday Inn Hotel
Hyatt Regency Aruba
Radisson Hotel

Did Not Report !!!

Under 275 Rooms = 10

Amsterdam Manor
RIU Grand Resort & Casino
Manchebo Beach Resort & Spa
Talk of the Town Resorts
Bucuti Beach Resort
Tara Beach Hotel
Eushan Beach Hotel
Grape Holdings (Divi & Tamarijn)
Brickell Bay Beach Club
The Mill Condominiums

TIME SHARE = 13

Aruba Beach Club
Aruba Renaissance Beach Resort
Marriott Aruba Ocean Club
Marriott Aruba Surf Club
Aruba Poenix Beach Resort
Caribbean Palm Village
Casa Del Mar
Costa Linda Resort
Divi Village Apartments
Dutch Village Apartments
La Cabana Villas
La Cabana Beach & Racquet Club
Playa Linda Resort

Notes:

* Fair Share = Individual Total Rooms divided by Grand Total of Total Rooms.

** Actual Share = Individual Occupied Rooms divided by Grand Total of Occupied Rooms.

*** The Average Daily Rate for Time Share = Net Revenue divided by Occupied Room Nights only
(Does not include rooms sold to Time Share owners)

**** Penetration Index = Percentage of individual Rooms Sold divided by Fair Share

***** Yield Index = Individual Revpar divided by the Grand Total Revpar

CLOSED



Hotel Related Statistics / Indicators:

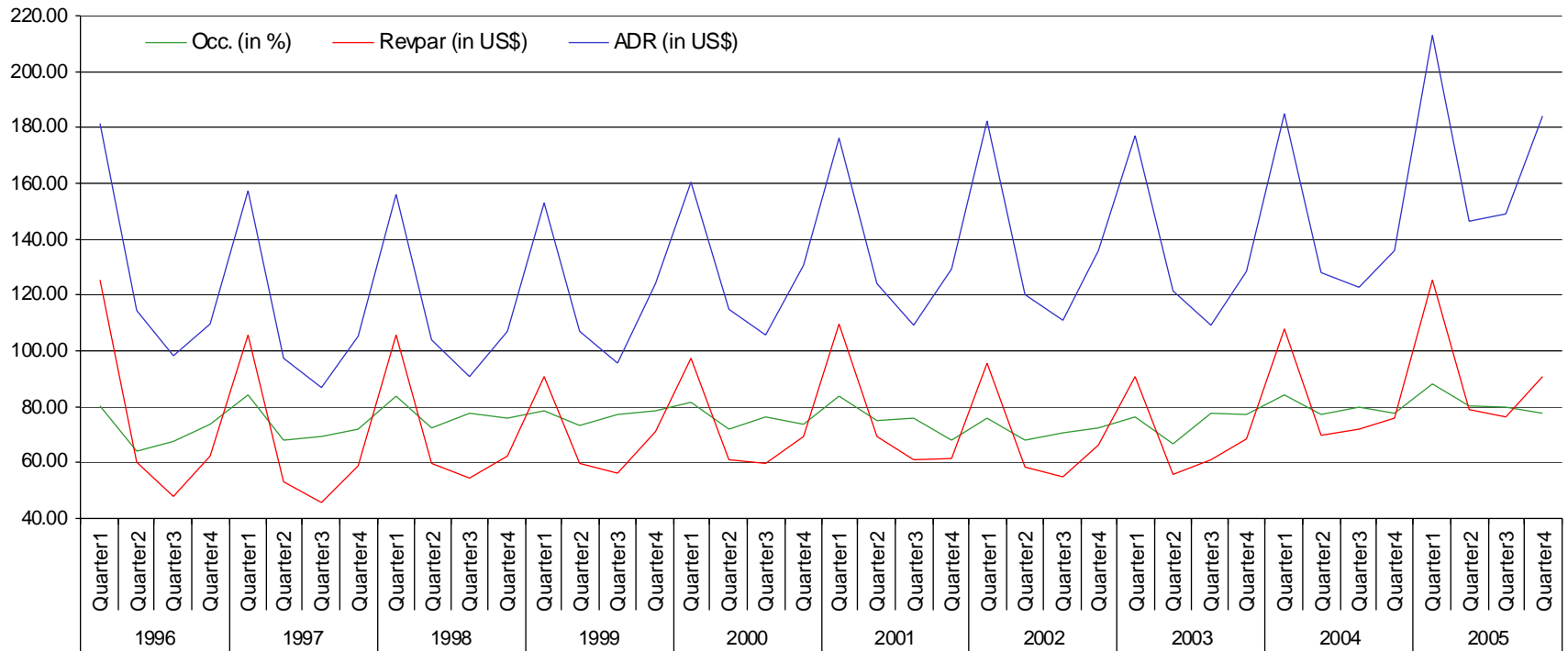


| ROOM STATISTICS | | | | | | | | | |
|----------------------|-------|-------|-----------|--------|--------|-----------|--------|--------|-----------|
| OCCUPANCY | | | ADR | | | REVPAR | | | |
| | TOTAL | HOTEL | TIMESHARE | TOTAL | HOTEL | TIMESHARE | TOTAL | HOTEL | TIMESHARE |
| 2000 Quarter1 | 81.5 | 82.3 | 81.5 | 160.64 | 164.62 | 138.54 | 97.38 | 134.25 | 34.62 |
| Quarter2 | 71.7 | 72.4 | 70.4 | 115.31 | 115.62 | 113.28 | 60.97 | 83.73 | 21.30 |
| Quarter3 | 76.8 | 77.3 | 75.8 | 105.81 | 107.02 | 97.44 | 59.32 | 82.73 | 18.90 |
| Quarter4 | 73.7 | 72.8 | 75.0 | 130.58 | 134.33 | 103.71 | 69.03 | 97.97 | 18.45 |
| 2001 Quarter1 | 83.6 | 83.8 | 82.9 | 176.62 | 180.55 | 150.37 | 110.00 | 151.64 | 34.33 |
| Quarter2 | 75.0 | 76.5 | 72.1 | 124.22 | 126.70 | 107.34 | 69.47 | 97.06 | 21.13 |
| Quarter3 | 75.7 | 77.6 | 72.1 | 109.26 | 111.00 | 96.22 | 61.05 | 86.21 | 17.30 |
| Quarter4 | 68.2 | 64.8 | 70.0 | 129.51 | 133.45 | 100.47 | 61.51 | 86.62 | 15.14 |
| 2002 Quarter1 | 75.8 | 74.0 | 78.9 | 182.07 | 185.72 | 152.66 | 95.54 | 137.44 | 23.92 |
| Quarter2 | 68.3 | 68.4 | 68.1 | 120.45 | 121.28 | 113.78 | 58.07 | 83.02 | 16.16 |
| Quarter3 | 70.9 | 70.5 | 71.6 | 110.92 | 112.57 | 97.23 | 54.68 | 79.44 | 13.74 |
| Quarter4 | 72.6 | 69.2 | 79.1 | 135.72 | 137.78 | 118.93 | 65.79 | 95.23 | 16.72 |
| 2003 Quarter1 | 76.4 | 74.8 | 79.1 | 176.83 | 178.01 | 165.65 | 90.86 | 132.88 | 21.45 |
| Quarter2 | 66.9 | 64.7 | 70.6 | 121.62 | 124.24 | 101.61 | 55.69 | 80.36 | 14.40 |
| Quarter3 | 77.6 | 80.8 | 73.2 | 109.12 | 111.55 | 92.36 | 60.94 | 89.79 | 13.64 |
| Quarter4 | 76.9 | 77.1 | 76.7 | 128.84 | 130.42 | 114.64 | 68.76 | 100.48 | 16.25 |
| 2004 Quarter1 | 84.5 | 87.1 | 80.3 | 184.61 | 184.33 | 188.36 | 107.80 | 160.60 | 20.48 |
| Quarter2 | 77.1 | 80.1 | 72.1 | 127.84 | 128.46 | 121.08 | 69.81 | 103.29 | 15.29 |
| Quarter3 | 79.9 | 85.7 | 70.5 | 123.02 | 123.94 | 112.67 | 71.70 | 106.28 | 14.29 |
| Quarter4 | 77.8 | 80.5 | 73.5 | 135.62 | 138.72 | 108.55 | 75.93 | 111.98 | 16.51 |
| 2005 Quarter1 | 88.10 | 91.20 | 83.60 | 212.76 | 212.53 | 215.41 | 125.38 | 193.80 | 25.72 |
| Quarter2 | 80.70 | 85.60 | 74.30 | 146.41 | 148.44 | 128.94 | 79.30 | 127.04 | 16.80 |
| Quarter3 | 79.50 | 81.70 | 76.50 | 148.66 | 149.87 | 138.02 | 76.68 | 122.67 | 16.70 |
| Quarter4 | 77.80 | 76.30 | 78.90 | 184.17 | 188.08 | 143.94 | 90.61 | 143.15 | 15.26 |
| 2006 Quarter1 | 84.4% | 82.2% | 87.1% | 233.93 | 242.21 | 168.77 | 119.94 | 198.91 | 21.87 |
| Quarter2 | 79.4% | 77.6% | 81.6% | 204.51 | 210.71 | 155.31 | 97.84 | 163.43 | 18.39 |

Hotel Related Statistics / Indicators:



Total Accommodation Related Statistics / Indicators (Trends) 1996 - 2005





Tourist Profile – Tourism Survey information:

Tourist Profile 2005



TOURIST PROFILE YEAR REPORT 2005



Volume IV Year report 2005



April 2006



TOURIST PROFILE YEAR REPORT 2004

April 2005



April 2005

CENTRAL BUREAU OF STATISTICS - ARUBA

Statistics for progress

T.P.
2005



CENTRAL BUREAU OF STATISTICS - ARUBA

Statistics for progress

T.P.
2004

Tourist Profile contains:

- Highlights
(A very short analysis)
- Administrative Data
(Stay-over visitors, visitor nights, cruise visitors, Airport traffic and landings, etc.)
- Survey Results
(Visitors characteristics, profile, behavior, expenditures, satisfaction rates, likes and dislikes)
- Hotel Statistics
- International Data



Visitor Survey 1996 – 2006:



Visitor Survey 2004

Central Bureau of Statistics / Ministry of Finance and Economic Affairs
L.G. Smith Boulevard 160, Oranjestad.
Tel: 5837433 / Fax: 5838057 E-mail: cbs@setarnet.aw

YEAR: 2004 MONTH: _____

Form I : Visitors leaving by Air

Attentie!

- a. Vul de antwoorden in de wit gelaten hokjes van de vragenlijst en met potlood.
b. Volg goed de aanwijzingen met pijltjes en de aanduidingen voor sprongen
c. Indien de respondent geen antwoord wil geven op een vraag, vul dan '9' in alle correspondentie hokjes of leg laten.

Examples:

To indicate ☒

Figures 3 2 7 5

Writing ARUBA

Confidential

Serial Number
Enquetric Number
TYPE

A. Characteristics of the visitor

A1

What was the main purpose of your visit to Aruba?

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

A2

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

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

A3

How many times have you been to Aruba?

- ☐ First time ☐ 2-5 times ☐ 6 times and up

A4a

Have you ever been to Aruba by cruise?

- ☐ Yes ☐ No

A4b

Have you visited the Caribbean prior to this visit?

- ☐ Yes (Go to question B10a) ☐ No (Go to question B10b)

A4ba

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

1. _____ (Write in block letters!)
2. _____

A4c

Which other Caribbean island would you like to visit?

A3a

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

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

A5

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

- ☐ Hotel → Name: _____
☐ Guest House / Apartment / Villa (Go to question A7)
☐ Friend / Relative
☐ Other → Specify: _____
☐ Timeshare Resort → Name: _____ (Go to question B6)

A6

Is this timeshare owned by you?

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

A7

How many nights did you spend in Aruba?

Nights: _____

A8

In which age group are you?

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

A9

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

- ☐ Male ☐ Female

PLEASE CONTINUE ON THE OTHER SIDE

A10 What is your occupation?

- ☐ Retired ☐ House wife ☐ Student

A11

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

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

B. Expenditure of the Visitor

B4a

How did you book your trip?

- ☐ On-line (internet) Name: _____
☐ Travel agency
☐ Tour operator
☐ Charter operator
☐ Other

B1

What type of flight did you use?

- ☐ Charter ☐ Scheduled

B3

Did you travel on a pre-paid package? (Go to question B5a)

- ☐ Yes ☐ No

B5

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

US\$: _____ (In US\$ please)

B6

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

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

B8a

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

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

B9

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

Total: _____ Adults: _____ Children: _____

B7

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

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

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

B10

(A) Pre-Trip US\$ (B) During Trip US\$

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

C. Satisfaction of the Visitor:

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

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

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

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

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

Liked: _____

Disliked: _____

☐ Beach ☐ People / Hospitality ☐ Weather / Climate / Wind

☐ Expensiveness (in general) ☐ Service (Hotel/Restaurant) ☐ Nothing

END OF FORM

The Central Bureau of Statistics thanks you for your co-operation



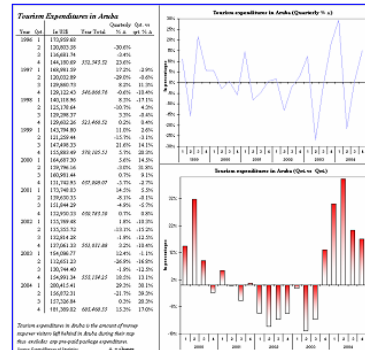
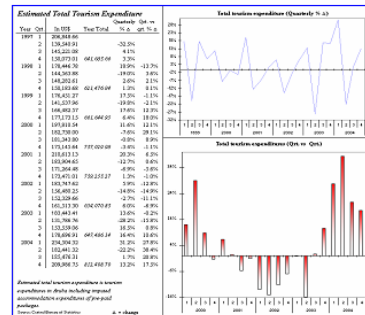
Tourist Profile - Highlights



1. Highlights

Tourism has assumed considerable importance in many countries and regions and its role in economic development have become particularly significant through its potential to increase governments' revenues and stimulate investment. The goal of this publication is to measure the economic benefit that tourism provides by promoting tourism statistics as a means for public policy-makers and the private sector to gain a better perspective of tourism's overall economic impact. It also provides a strategic tool to better formulate their marketing and development plans. The following presents tables and graphs with comparisons and percentage changes of the most important indicators. They give a general view of how tourism developed in the year 2004 compared to the year 2003, and it also compares year figures in some cases from 1997 until 2004.

An important indicator is the estimated total tourism expenditure which indicates all travel related expenditures made by stay-over visitors, before, during, and immediately after a trip (refer to methodology for further explanations).



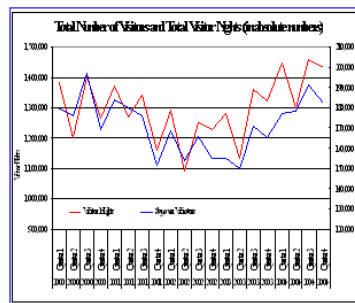
The combination of table and graphs present the estimated total tourism expenditure in every quarter starting from the years 1997 until 2004. It also gives quarterly percentage changes and quarter to quarter comparisons. Beside estimated total tourism expenditure, tourism expenditures that took place in Aruba is also used as an indicator, which is also illustrated in a combination of table and graphs. This indicator gives the amount of money stay-over visitors left behind during their stay in Aruba.

The following table presents the different main tourism indicators from the year 2000 until 2004. The data presented in this table are related to the visitors, stay over visitors as well as cruise passengers, the duration of their stay in Aruba, the expenditures that they made in US dollars, and hotel related statistics as occupancy in percentage, average daily rate and revenue per available room both in US dollars.

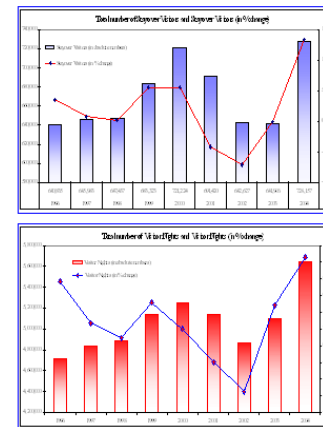
| Main Economic Indicators | | | | | |
|--|-------------|-------------|-------------|-------------|-------------|
| Year | 2000 | 2001 | 2002 | 2003 | 2004 |
| Total stayover visitors | 723,224 | 691,400 | 660,027 | 641,996 | 720,157 |
| Total cruise visitors | 299,000 | 460,146 | 487,296 | 542,537 | 576,320 |
| Total number of visitors | 1,022,224 | 1,151,546 | 1,147,323 | 1,184,533 | 1,296,477 |
| Total number of visitor nights (x 1,000) | 5,347.8 | 5,144.6 | 4,962.6 | 5,087.6 | 5,659.9 |
| Average length of stay | 7.7 | 7.9 | 7.6 | 8.3 | 8.1 |
| (The following indicators are all in US dollars) | | | | | |
| Average daily expenditure in Aruba | 114.39 | 117.71 | 115.46 | 100.82 | 115.88 |
| Tourism expenditure in Aruba | 437,996,070 | 639,763,590 | 561,031,889 | 553,134,252 | 603,460,540 |
| Estimated total tourism expenditure | 737,039,980 | 741,516,160 | 654,070,134 | 647,466,133 | 812,408,693 |
| Tourism receipts (taxes x 1,000) | 839,385 | 896,704 | 904,004 | 833,073 | 1,042,793 |
| Occupancy | 72.0% | 75.5% | 71.9% | 74.4% | 74.4% |
| Average Daily Rate (in US\$) | 128.71 | 136.01 | 138.09 | 133.69 | 144.78 |
| Revenue per Available Room (in US\$) | 71.54 | 75.26 | 68.78 | 68.99 | 81.94 |

Several other graphs are presented in this section in order to show significant pattern (trends) in the tourism industry over the last years.

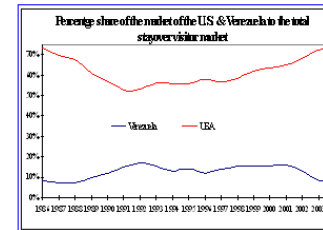
The graph below presents the number of stayover visitors and the number of visitor nights by quarter in absolute numbers. Seasonal patterns are very noticeable in this graph.



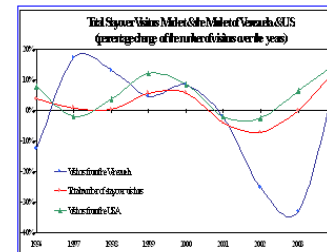
The following graphs presents the total number of stayover visitors and visitor nights in absolute figures from the years 1996 until 2004, together with their respective percentage change over the years. In the year 2004, Aruba experienced a significant increase of 13.4% in number of stayover visitors after experiencing stabilization in 2003 and after experiencing declines in 2002 and 2001. The total number of visitor nights also increased significantly with 10.6% in 2004 which makes it the second consecutive increase after two consecutive years of decreases in 2002 and 2001.



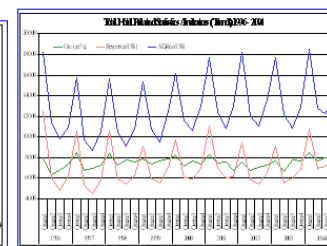
The graph below shows the market share of the visitors from the U.S. and the visitors from Venezuela to Aruba. From this graph can be concluded that Aruba is not only very dependent on the U.S. market, but that the share of the U.S. market and the share of the Venezuelan market complement each other. When the market share of the U.S. market decreases, the market share of the market of Venezuela increases and the other way around. In 2004 the market of Venezuela increased with 8.6% compared to 2003, and had a market share of 8.1%. The U.S. market increased with 15.2% in 2004 and had a market share of 73.5%.



The next graph shows the relative change of the total stayover visitors market, the U.S. and the market of the visitors from Venezuela to Aruba. Notable is that in 2004 the total visitors' market, the U.S. and the Venezuelan market experienced positive changes at the same time again since the year 2000. The market of Venezuela finally experienced an increase after 3 consecutive decreases. Despite this increase, still the market of Venezuela did not reach the number of visitors that Aruba received in the year 2000. Aruba received around 112,000 visitors from Venezuela in 2000 and around 59,000 in 2004. The total number of visitors from the U.S. and Venezuela alone stands for 81.6% of the total visitors market to Aruba.



Other indicators that can be observed in the graph below are the occupancy rate, the average daily rate (ADR) and the revenue per available room (Revpar) of the total accommodation market of Aruba. As can be seen from this graph, there are very regular seasonal patterns. While occupancy leads a less steep trend, same cannot be said for the ADR and Revpar. In contrast to Occupancy, Revpar and ADR indicators reveal very steep patterns. What can be observed in the graph is that ADR and Revpar have very similar tendency, with the only difference that ADR have this tendency at a higher level. The difference in level between ADR and Revpar is logical because ADR is based on the occupied room nights while Revpar is based on the total available room nights. All the three hotel related indicator experienced increase in 2004. Occupancy and ADR increased almost at the same rate, 8.4% and 8.3% respectively. Revpar, on the other hand, increased remarkably with 18.9% in 2004.



Tourist Profile – Administrative data

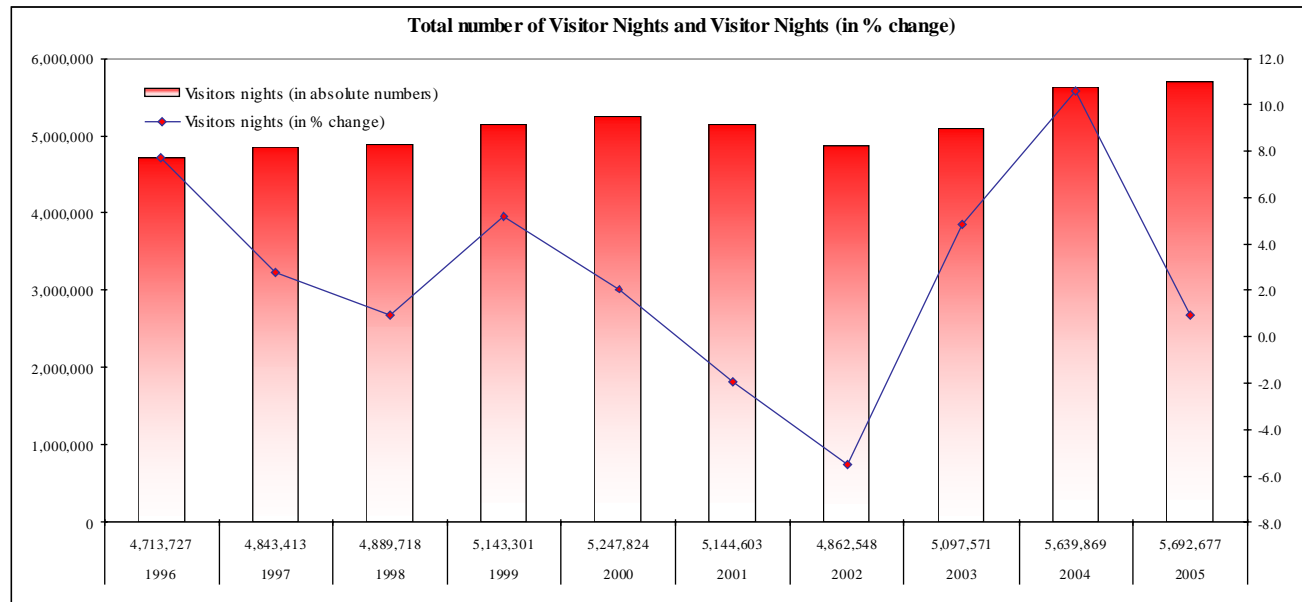
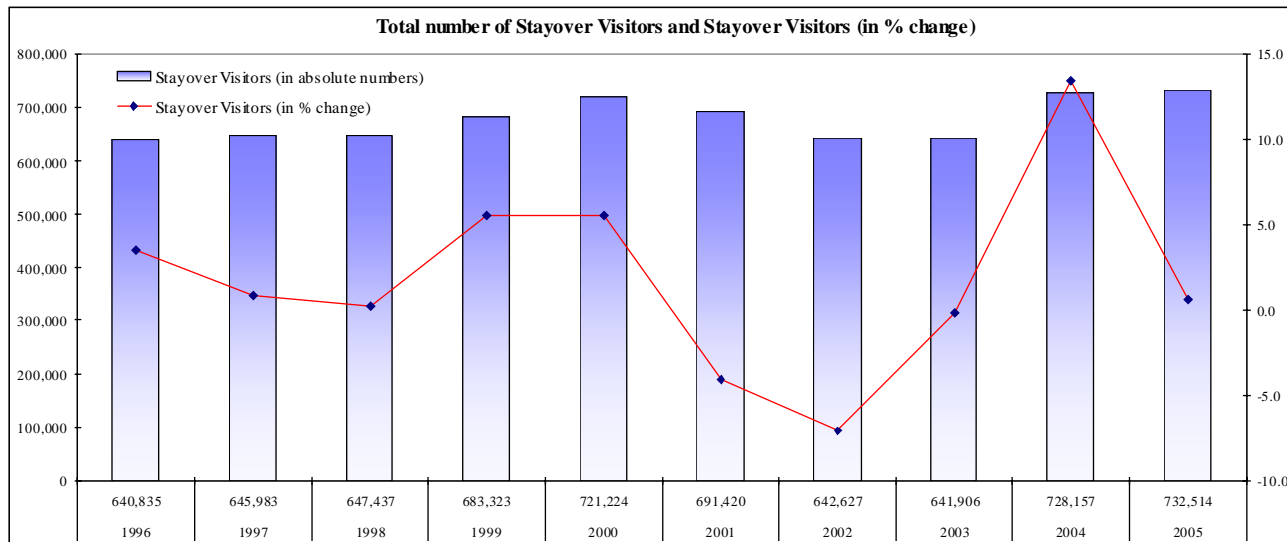


Visitors per Country / Region (Absolute: 1990 - 2005)

| | 1990 | 1991 | 1992 | 1993 | 1994 | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 |
|--------------------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| U.S.A. | 245,916 | 263,449 | 286,536 | 315,332 | 324,337 | 344,885 | 371,523 | 364,896 | 377,108 | 422,186 | 458,132 | 448,492 | 436,660 | 464,466 | 535,133 | 535,368 |
| Canada | 14,384 | 18,589 | 20,170 | 22,144 | 23,594 | 27,169 | 24,568 | 25,176 | 24,439 | 20,647 | 20,594 | 18,926 | 17,601 | 17,218 | 8,068 | 21,343 |
| Total North America | 260,300 | 282,038 | 306,706 | 337,476 | 347,931 | 372,054 | 396,091 | 390,072 | 401,547 | 442,833 | 478,726 | 467,418 | 454,261 | 481,684 | 543,201 | 556,711 |
| Venezuela | 50,406 | 74,708 | 90,316 | 84,732 | 75,205 | 85,640 | 74,822 | 88,398 | 99,128 | 103,601 | 112,018 | 109,338 | 81,665 | 54,554 | 59,218 | 59,895 |
| Colombia | 8,935 | 11,181 | 14,454 | 16,986 | 21,568 | 26,785 | 29,868 | 33,819 | 30,367 | 29,482 | 31,367 | 23,948 | 23,362 | 11,397 | 10,648 | 9,861 |
| Argentina | | | 8,865 | 10,065 | 11,845 | 8,619 | 11,357 | 12,309 | 8,929 | 8,136 | 7,371 | 5,390 | 1,727 | 1,761 | 2,071 | 2,568 |
| Brazil | | | 19,707 | 17,273 | 29,652 | 29,837 | 25,412 | 21,113 | 15,893 | 5,470 | 3,309 | 3,028 | 2,314 | 2,785 | 4,762 | 6,064 |
| Rest of S.&C. America | 29,307 | 36,931 | 9,114 | 8,445 | 8,988 | 8,323 | 9,068 | 8,996 | 7,991 | 8,482 | 8,409 | 8,956 | 8,500 | 6,722 | 7,010 | 7,721 |
| Total S.&C. America | 88,648 | 122,820 | 142,456 | 137,501 | 147,258 | 159,204 | 150,527 | 164,635 | 162,308 | 155,171 | 162,474 | 150,660 | 117,568 | 77,219 | 83,709 | 86,109 |
| Netherlands | 28,019 | 35,308 | 34,233 | 32,457 | 32,241 | 33,275 | 36,196 | 33,286 | 30,959 | 32,014 | 30,575 | 28,457 | 27,992 | 36,415 | 38,122 | 38,673 |
| Caribbean | 38,305 | 38,480 | 36,363 | 31,157 | 33,105 | 33,727 | 35,522 | 33,069 | 31,331 | 31,593 | 29,071 | 24,918 | 23,521 | 25,748 | 26,087 | 23,483 |
| R.O.W. | 17,490 | 22,678 | 21,956 | 23,443 | 21,601 | 20,657 | 22,499 | 28,831 | 21,291 | 21,712 | 20,378 | 19,967 | 19,285 | 20,840 | 37,038 | 27,416 |
| Total Other | 83,814 | 96,466 | 92,552 | 87,057 | 86,947 | 87,659 | 94,217 | 95,186 | 83,581 | 85,319 | 80,024 | 73,342 | 70,798 | 83,003 | 101,247 | 89,572 |
| GRAND TOTAL | 432,762 | 501,324 | 541,714 | 562,034 | 582,136 | 618,917 | 640,835 | 649,893 | 647,436 | 683,323 | 721,224 | 691,420 | 642,627 | 641,906 | 728,157 | 732,392 |

Source: ATA

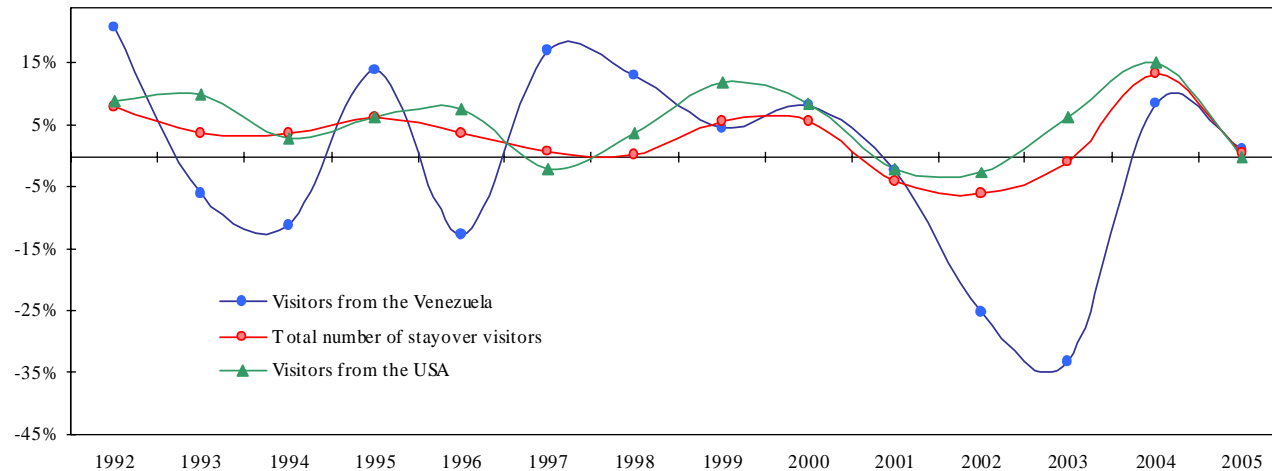
Tourist Profile - Administrative data



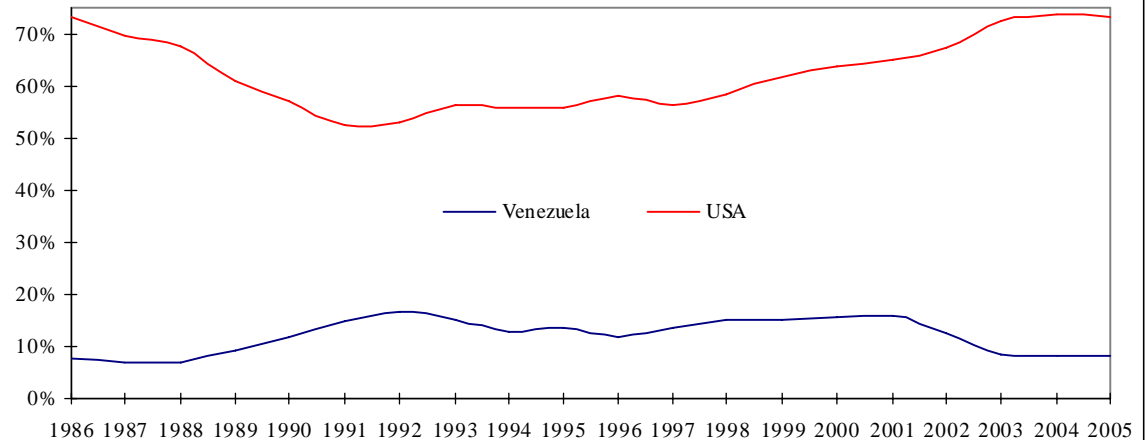
Tourist Profile - Administrative data



Total Stayover Visitors Market & the Market of Venezuela & U.S.
(percentage change of the number of visitors over the years)



Percentage share of the market of the U.S. & Venezuela to the total stayover visitor market



Tourist Profile – Survey Results



3. VISITOR PROFILE

3.1 CHARACTERISTICS OF THE VISITORS

3.1.1. AGE GROUPS OF THE VISITORS (In Percentages)

| Age groups | Year 2001 | Year 2002 | Year 2003 | Qrt. 1 2004 | Qrt. 2 2004 | Qrt. 3 2004 | Qrt. 4 2004 | Year 2004 | Qrt. 1 2005 | Qrt. 2 2005 | Qrt. 3 2005 | Qrt. 4 2005 | Year 2005 |
|----------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| Under 20 years | 1.0 | 0.8 | 0.8 | 0.9 | 0.6 | 1.6 | 0.3 | 0.8 | 0.6 | 0.3 | 1.1 | 0.4 | 0.6 |
| 20 - 29 years | 14.3 | 15.0 | 13.8 | 8.7 | 15.6 | 16.9 | 11.9 | 13.2 | 8.8 | 13.0 | 14.9 | 10.0 | 11.7 |
| 30 - 39 years | 22.4 | 21.5 | 21.5 | 16.2 | 22.0 | 22.2 | 20.3 | 20.2 | 16.3 | 20.7 | 20.4 | 19.9 | 19.3 |
| 40 - 49 years | 27.7 | 26.9 | 26.8 | 25.0 | 24.1 | 24.8 | 21.6 | 23.9 | 24.0 | 24.0 | 26.4 | 21.9 | 24.1 |
| 50 - 64 years | 27.5 | 28.4 | 29.2 | 34.8 | 25.1 | 24.3 | 30.3 | 28.7 | 33.1 | 31.0 | 25.9 | 31.3 | 30.3 |
| Over 64 years | 7.0 | 7.4 | 7.8 | 14.4 | 12.5 | 10.2 | 15.6 | 13.2 | 17.1 | 11.0 | 11.3 | 16.4 | 14.0 |
| Unknown | 0.1 | 0.1 | 0.1 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.1 | 0.0 | 0.0 | 0.0 | 0.0 |
| Total | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |

Source: Tourist Survey - Central Bureau of Statistics - Aruba

3.1.2. YEARLY HOUSEHOLD INCOME OF THE VISITORS (In Percentages)

| Yearly household income | Year 2001 | Year 2002 | Year 2003 | Qrt. 1 2004 | Qrt. 2 2004 | Qrt. 3 2004 | Qrt. 4 2004 | Year 2004 | Qrt. 1 2005 | Qrt. 2 2005 | Qrt. 3 2005 | Qrt. 4 2005 | Year 2005 |
|--------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| Less than US\$20,000 | 9.5 | 8.9 | 7.8 | 4.3 | 5.8 | 5.5 | 4.4 | 4.9 | 5.7 | 6.6 | 7.5 | 5.8 | 6.4 |
| US\$20,001 - US\$30,000 | 11.8 | 9.4 | 7.6 | 4.0 | 4.6 | 5.0 | 3.8 | 4.3 | 3.9 | 4.2 | 5.3 | 5.2 | 4.6 |
| US\$30,001 - US\$50,000 | 19.6 | 17.8 | 16.4 | 9.5 | 14.2 | 14.9 | 12.1 | 12.7 | 7.8 | 13.2 | 13 | 12.1 | 11.5 |
| US\$50,001 - US\$75,000 | 18.0 | 21.5 | 28.1 | 26.9 | 24.8 | 24.5 | 24.0 | 25.1 | 19.7 | 25.6 | 24.1 | 26.8 | 24.1 |
| US\$75,001 - US\$100,000 | 13.9 | 15.1 | 16.5 | 19.9 | 16.3 | 18.4 | 18.8 | 18.4 | 19.4 | 20.2 | 17.9 | 18.9 | 19.1 |
| US\$100,001 and over | 13.0 | 14.1 | 12.8 | 18.5 | 18.5 | 17.5 | 21.5 | 19.0 | 27.6 | 19.1 | 17.7 | 17.5 | 20.5 |
| Unknown | 14.3 | 13.3 | 10.8 | 16.9 | 15.7 | 14.2 | 15.5 | 15.6 | 15.9 | 11.0 | 14.5 | 13.8 | 13.8 |
| Total | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |

Source: Tourist Survey - Central Bureau of Statistics - Aruba

3.1.3. OCCUPATION OF THE VISITORS (In Percentages)

| Occupation | Year 2001 | Year 2002 | Year 2003 | Qrt. 1 2004 | Qrt. 2 2004 | Qrt. 3 2004 | Qrt. 4 2004 | Year 2004 | Qrt. 1 2005 | Qrt. 2 2005 | Qrt. 3 2005 | Qrt. 4 2005 | Year 2005 |
|--|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| Legislators, senior officials and managers | 13.6 | 13.1 | 14.6 | 14.6 | 14.0 | 12.2 | 13.6 | 13.6 | 14.0 | 14.0 | 13.7 | 13.4 | 13.8 |
| Professionals | 23.3 | 21.4 | 20.5 | 20.6 | 21.7 | 29.1 | 19.7 | 22.8 | 15.0 | 19.8 | 22.3 | 19.9 | 19.3 |
| Technicians and associate professionals | 15.6 | 17.3 | 16.8 | 14.6 | 18.0 | 15.7 | 18.6 | 16.7 | 19.7 | 17.3 | 18.4 | 16.6 | 18.0 |
| Clerks | 7.6 | 7.1 | 8.9 | 7.2 | 7.6 | 9.3 | 10.7 | 8.7 | 6.7 | 8.8 | 7.6 | 8.1 | 7.8 |
| Service workers, shop & market sales workers | 4.5 | 6.3 | 6.3 | 4.7 | 4.5 | 4.2 | 3.5 | 4.2 | 3.9 | 5.9 | 3.6 | 4.0 | 4.3 |
| Skilled agricultural and fishery workers | 0.4 | 0.2 | 0.2 | 0.4 | 0.2 | 0.1 | 0.1 | 0.2 | 0.1 | 0.1 | 2.3 | 0.2 | 0.1 |
| Craft and related trades workers | 2.0 | 2.4 | 2.5 | 2.8 | 2.6 | 2.4 | 2.4 | 2.5 | 2.2 | 2.5 | 1.8 | 3.0 | 2.5 |
| Plant and machine operators and assemblers | 0.9 | 1.0 | 1.1 | 1.2 | 1.3 | 0.4 | 1.0 | 1.0 | 0.4 | 1.2 | 0.6 | 1.2 | 1.1 |
| Elementary occupations | 0.8 | 0.9 | 0.9 | 0.5 | 0.5 | 1.2 | 1.0 | 0.8 | 0.7 | 1.1 | 0.2 | 1.2 | 0.9 |
| Armed forces | 0.2 | 0.4 | 0.2 | 0.2 | 0.4 | 0.4 | 0.2 | 0.3 | 0.3 | 0.2 | 0.3 | 0.1 | 0.4 |
| Not economically active (Retired) | 30.8 | 29.8 | 28.0 | 33.2 | 29.2 | 25.0 | 29.3 | 29.2 | 37.0 | 29.3 | 29.1 | 31.6 | 31.7 |
| Unknown | 0.4 | 0.0 | 0.1 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.1 | 0.7 | 0.1 |
| Total | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |

Source: Tourist Survey - Central Bureau of Statistics - Aruba

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

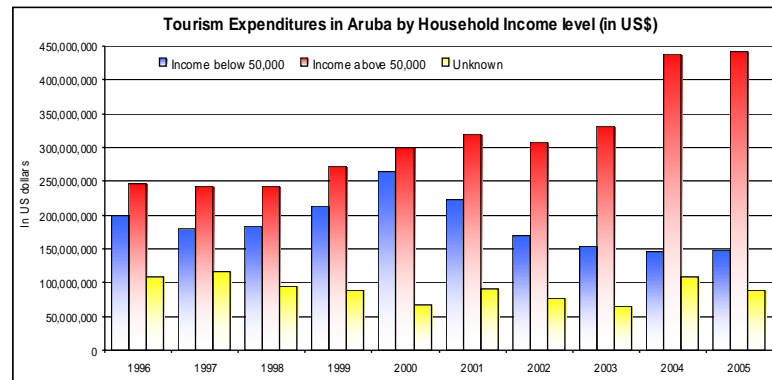
| | Year 2003 | Qrt. 1 2004 | Qrt. 2 2004 | Qrt. 3 2004 | Qrt. 4 2004 | Year 2004 | Qrt. 1 2005 | Qrt. 2 2005 | Qrt. 3 2005 | Qrt. 4 2005 | Year 2005 |
|--------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| On-Line (internet) | 16.5 | 21.0 | 28.2 | 21.2 | 24.8 | 23.8 | 38.2 | 33.7 | 36.0 | 36.4 | 36.1 |
| Travel Agent | 49.4 | 48.6 | 47.2 | 51.3 | 47.8 | 49.7 | 40.9 | 41.9 | 45.6 | 36.5 | 41.3 |
| Tour Operator | 5.0 | 0.9 | 0.9 | 0.7 | 1.3 | 1.0 | 1.0 | 0.4 | 1.1 | 0.6 | 0.8 |
| Charter Operator | 0.7 | 0.1 | 0.3 | 0.2 | 0.2 | 0.2 | 0.3 | 0.3 | 0.1 | 0.2 | 0.2 |
| Other | 28.3 | 29.3 | 23.4 | 26.6 | 25.9 | 26.1 | 19.5 | 23.7 | 17.2 | 25.0 | 21.2 |
| Total | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |

Source: Tourist Survey - Central Bureau of Statistics - Aruba

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

| | Year 2003 | Qrt. 1 2004 | Qrt. 2 2004 | Qrt. 3 2004 | Qrt. 4 2004 | Year 2004 | Qrt. 1 2005 | Qrt. 2 2005 | Qrt. 3 2005 | Qrt. 4 2005 | Year 2005 |
|----------------------|-----------|-------------|-------------|-------------|-------------|-----------|-------------|-------------|-------------|-------------|-----------|
| to Aruba (by cruise) | Yes | 6.3 | 11.4 | 7.7 | 5.9 | 10.3 | 8.8 | 10.8 | 8.4 | 7.1 | 7.7 |
| | No | 93.7 | 88.6 | 92.3 | 94.1 | 89.7 | 91.1 | 89.1 | 91.5 | 92.1 | 91.4 |
| the Caribbean | Yes | 71.8 | 73.3 | 65.8 | 67.9 | 72.8 | 69.9 | 79.8 | 65.8 | 70.5 | 73.7 |
| | No | 28.2 | 26.7 | 34.2 | 32.1 | 27.2 | 29.9 | 20.1 | 33.5 | 29.5 | 27.0 |

Source: Tourist Survey - Central Bureau of Statistics - Aruba



Tourist Profile – Survey Results



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

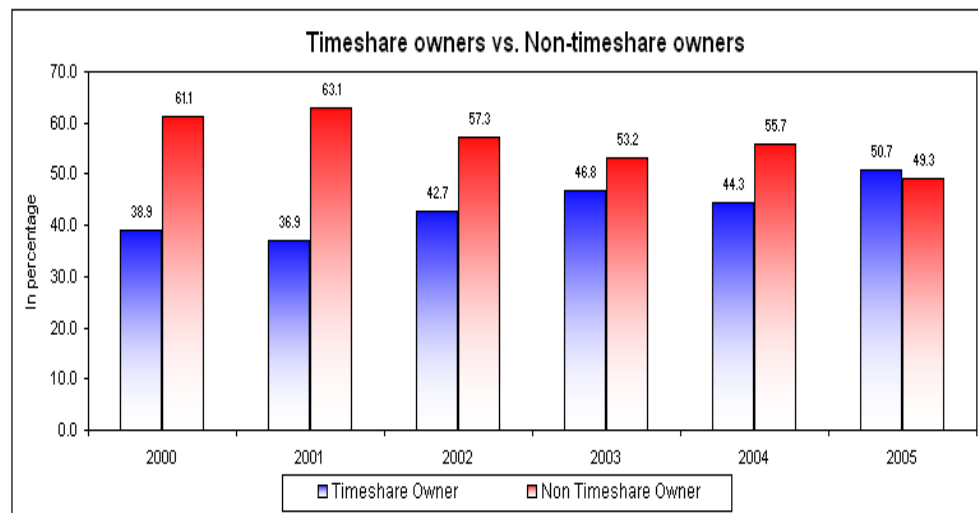
| Timeshare owner | Year 2001 | Year 2002 | Year 2003 | Qrt. 1 2004 | Qrt. 2 2004 | Qrt. 3 2004 | Qrt. 4 2004 | Year 2004 | Qrt. 1 2005 | Qrt. 2 2005 | Qrt. 3 2005 | Qrt. 4 2005 | Year 2005 |
|--------------------------------|--------------|--------------|--------------|----------------|----------------|----------------|----------------|--------------|----------------|----------------|----------------|----------------|--------------|
| Owner | 36.9 | 42.7 | 46.8 | 48.8 | 39.4 | 42.7 | 46.7 | 44.3 | 50.4 | 47.2 | 51.0 | 54.0 | 50.7 |
| <i>Non-timeshare owner:</i> | | | | | | | | | | | | | |
| Non-owner: Transient (Walk-in) | 24.1 | 16.8 | 18.4 | 14.5 | 14.4 | 15.9 | 20.2 | 16.3 | 15.8 | 14.4 | 16.5 | 9.3 | 14.0 |
| Non-owner: Exchange | 18.6 | 17.8 | 14.4 | 16.6 | 26.6 | 21.5 | 16.4 | 20.3 | 11.4 | 16.1 | 15.1 | 18.1 | 15.2 |
| Non-owner: Other | 17.5 | 19.8 | 19.2 | 20.1 | 19.6 | 19.9 | 16.7 | 19.0 | 20.5 | 23.3 | 16.8 | 17.7 | 19.6 |
| Unknown | 2.9 | 2.9 | 1.3 | 0.0 | 0.0 | 0.0 | 0.0 | 0.1 | 0.0 | 0.0 | 0.6 | 0.9 | 0.4 |
| Total Timeshare user | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |

Source: Tourist Survey - Central Bureau of Statistics - Aruba

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

| Type of flight | Year 2001 | Year 2002 | Year 2003 | Qrt. 1 2004 | Qrt. 2 2004 | Qrt. 3 2004 | Qrt. 4 2004 | Year 2004 | Qrt. 1 2005 | Qrt. 2 2005 | Qrt. 3 2005 | Qrt. 4 2005 | Year 2005 |
|----------------|--------------|--------------|--------------|----------------|----------------|----------------|----------------|--------------|----------------|----------------|----------------|----------------|--------------|
| Charter | 19.7% | 14.1% | 16.9% | 14.0% | 7.3% | 11.0% | 9.1% | 10.3% | 8.6% | 9.3% | 4.9% | 5.9% | 7.2% |
| Scheduled | 79.5% | 85.6% | 82.6% | 86.0% | 92.7% | 88.7% | 90.9% | 89.7% | 91.4% | 90.7% | 95.1% | 94.1% | 92.8% |
| Unknown | 0.8% | 0.3% | 0.5% | 0.0% | 0.0% | 0.3% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Total | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |

Source: Tourist Survey - Central Bureau of Statistics - Aruba



Tourist Profile – Survey Results



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

| Place of residence | Year 2001 | Year 2002 | Year 2003 | Qrt. 1 2004 | Qrt. 2 2004 | Qrt. 3 2004 | Qrt. 4 2004 | Year 2004 | Qrt. 1 2005 | Qrt. 2 2005 | Qrt. 3 2005 | Qrt. 4 2005 | Year 2005 |
|---------------------------------------|---------------|---------------|---------------|----------------|----------------|----------------|----------------|---------------|----------------|----------------|----------------|----------------|---------------|
| U.S.A. | 112.97 | 117.43 | 104.37 | 128.59 | 108.57 | 104.78 | 132.01 | 118.75 | 134.95 | 125.00 | 128.95 | 117.07 | 124.30 |
| Venezuela | 163.77 | 143.09 | 124.90 | 163.72 | 145.40 | 124.55 | 202.60 | 155.28 | 153.68 | 145.15 | 180.90 | 183.81 | 170.02 |
| Netherlands | 52.61 | 67.04 | 66.13 | 65.31 | 52.57 | 97.93 | 54.21 | 67.36 | 57.52 | 49.78 | 54.11 | 51.43 | 53.31 |
| Brazil | 170.09 | 219.68 | 157.17 | * | * | * | * | 176.12 | * | * | * | * | 136.14 |
| Netherlands Antilles | 112.24 | 123.73 | 93.18 | 97.74 | 123.72 | 85.77 | 82.08 | 94.82 | 104.87 | 82.07 | 91.74 | 100.21 | 94.46 |
| Canada | 82.66 | 55.82 | 68.12 | 83.34 | 114.02 | 81.54 | 109.19 | 95.95 | 93.84 | 75.91 | 78.35 | 90.35 | 87.57 |
| Colombia | 122.79 | 86.15 | 89.61 | 121.30 | 72.38 | 70.84 | 86.60 | 93.40 | 58.90 | 71.15 | 68.83 | 98.97 | 74.84 |
| Other | 106.26 | 93.04 | 110.45 | 105.55 | 95.81 | 70.29 | 112.63 | 93.76 | 139.37 | 86.94 | 68.58 | 72.06 | 86.38 |
| Total visitors (In US dollars) | 117.71 | 115.48 | 103.82 | 124.77 | 106.06 | 104.11 | 128.52 | 115.88 | 127.69 | 117.18 | 124.99 | 114.82 | 119.55 |

Source: Tourist Survey - Central Bureau of Statistics - Aruba

* = not representative due to a small sample

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

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

| Purpose of visit | Year 2001 | Year 2002 | Year 2003 | Qrt. 1 2004 | Qrt. 2 2004 | Qrt. 3 2004 | Qrt. 4 2004 | Year 2004 | Qrt. 1 2005 | Qrt. 2 2005 | Qrt. 3 2005 | Qrt. 4 2005 | Year 2005 |
|--|--------------|--------------|--------------|----------------|----------------|----------------|----------------|--------------|----------------|----------------|----------------|----------------|--------------|
| Vacation | 116.85 | 115.22 | 99.78 | 123.72 | 108.36 | 102.38 | 128.91 | 114.47 | 128.60 | 116.26 | 122.75 | 115.49 | 118.87 |
| Honeymoon | 96.41 | 103.96 | 106.46 | 116.34 | 142.40 | 99.44 | 127.37 | 110.09 | 90.91 | 146.85 | 105.86 | 119.60 | 115.61 |
| Visit friends / relatives | 57.15 | 55.48 | 55.84 | 72.38 | 89.57 | 51.81 | 57.95 | 57.42 | 46.55 | 54.94 | 86.80 | 84.19 | 67.36 |
| Other | 119.42 | 107.90 | 115.39 | 127.81 | 130.40 | 92.21 | 133.67 | 117.32 | 97.29 | 113.17 | 352.41 | 90.97 | 152.57 |
| Business & leisure | 226.11 | 203.50 | 203.20 | 183.46 | 250.41 | 126.35 | 135.21 | 157.52 | 211.09 | 171.26 | 139.49 | 144.49 | 181.67 |
| Business Only / Convention ²⁾ | 209.28 | 225.62 | 291.99 | 164.37 | 255.41 | 350.41 | 179.07 | 245.95 | 217.23 | 181.20 | 236.32 | 209.99 | 208.90 |
| Wedding | n.a | n.a | n.a | n.a | n.a | n.a | n.a | n.a | 105.38 | 197.80 | 251.71 | 67.80 | 115.03 |

Source: Tourist Survey - Central Bureau of Statistics - Aruba

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

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

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

| Number of visits | Year 2001 | Year 2002 | Year 2003 | Qrt. 1 2004 | Qrt. 2 2004 | Qrt. 3 2004 | Qrt. 4 2004 | Year 2004 | Qrt. 1 2005 | Qrt. 2 2005 | Qrt. 3 2005 | Qrt. 4 2005 | Year 2005 |
|-----------------------|--------------|--------------|--------------|----------------|----------------|----------------|----------------|--------------|----------------|----------------|----------------|----------------|--------------|
| First time | 109.79 | 110.37 | 103.37 | 123.17 | 114.58 | 106.22 | 129.41 | 114.97 | 132.70 | 115.85 | 106.02 | 109.78 | 115.60 |
| Between 2 and 5 times | 118.71 | 106.38 | 95.69 | 123.52 | 107.45 | 99.73 | 121.38 | 113.10 | 131.12 | 117.72 | 138.10 | 125.13 | 122.07 |
| 6 Times or more | 132.52 | 133.03 | 115.07 | 128.08 | 125.05 | 104.25 | 134.99 | 120.59 | 117.69 | 119.44 | 144.90 | 112.59 | 123.57 |

Source: Tourist Survey - Central Bureau of Statistics - Aruba

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

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

| Number of visits | Year 2001 | Year 2002 | Year 2003 | Qrt. 1 2004 | Qrt. 2 2004 | Qrt. 3 2004 | Qrt. 4 2004 | Year 2004 | Qrt. 1 2005 | Qrt. 2 2005 | Qrt. 3 2005 | Qrt. 4 2005 | Year 2005 |
|--------------------------|--------------|--------------|--------------|----------------|----------------|----------------|----------------|--------------|----------------|----------------|----------------|----------------|--------------|
| Less than US\$20,000 | 87.07 | 70.88 | 61.78 | 97.21 | 60.18 | 79.64 | 90.94 | 80.54 | 83.66 | 82.74 | 104.90 | 79.30 | 88.66 |
| US\$20,001 - US\$30,000 | 95.85 | 117.2 | 94.30 | 97.60 | 88.66 | 88.08 | 178.65 | 110.48 | 83.88 | 94.69 | 109.94 | 100.52 | 98.29 |
| US\$30,001 - US\$50,000 | 106.82 | 101.03 | 89.72 | 92.62 | 106.90 | 83.14 | 113.95 | 98.82 | 118.48 | 106.63 | 102.30 | 123.12 | 111.67 |
| US\$50,001 - US\$75,000 | 110.21 | 104.91 | 98.91 | 108.67 | 101.44 | 106.26 | 108.64 | 106.29 | 117.38 | 105.55 | 122.34 | 97.69 | 110.07 |
| US\$75,001 - US\$100,000 | 137.94 | 137.43 | 119.88 | 131.13 | 97.39 | 109.11 | 148.53 | 122.60 | 138.13 | 126.14 | 155.66 | 114.93 | 124.79 |
| US\$100,001 and over | 171.22 | 164.92 | 157.12 | 166.30 | 143.33 | 128.84 | 157.77 | 149.67 | 152.68 | 158.43 | 135.72 | 145.51 | 148.81 |
| Unknown | 109.91 | 102.56 | 87.33 | 123.83 | 107.21 | 104.68 | 133.04 | 115.88 | 130.30 | 119.56 | 126.64 | 113.72 | 120.60 |

Source: Tourist Survey - Central Bureau of Statistics - Aruba

Tourist Profile – Survey Results



4.14 TOURISM RECEIPTS (In million US\$)

| In million US\$ | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 |
|-----------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|-----------------|-------------------|
| Quarter 1 | 148.27 | 186.93 | 205.98 | 215.42 | 224.47 | 254.02 | 261.62 | 245.03 | 246.59 | 305.25 | 303.80 |
| Quarter 2 | 120.50 | 129.55 | 158.60 | 170.45 | 186.37 | 208.04 | 230.17 | 196.37 | 193.69 | 236.31 | 262.12 * |
| Quarter 3 | 116.20 | 140.89 | 147.49 | 167.49 | 173.74 | 197.21 | 207.71 | 175.25 | 198.55 | 232.68 | 250.39 * |
| Quarter 4 | 135.59 | 156.09 | 156.26 | 178.94 | 204.02 | 200.11 | 197.21 | 207.99 | 214.25 | 268.55 | 264.97 * |
| Total | 520.56 | 613.46 | 668.32 | 732.29 | 788.60 | 859.39 | 896.70 | 824.64 | 853.07 | 1,042.79 | 1,081.28 * |

Source: Central Bank of Aruba

* Provisional

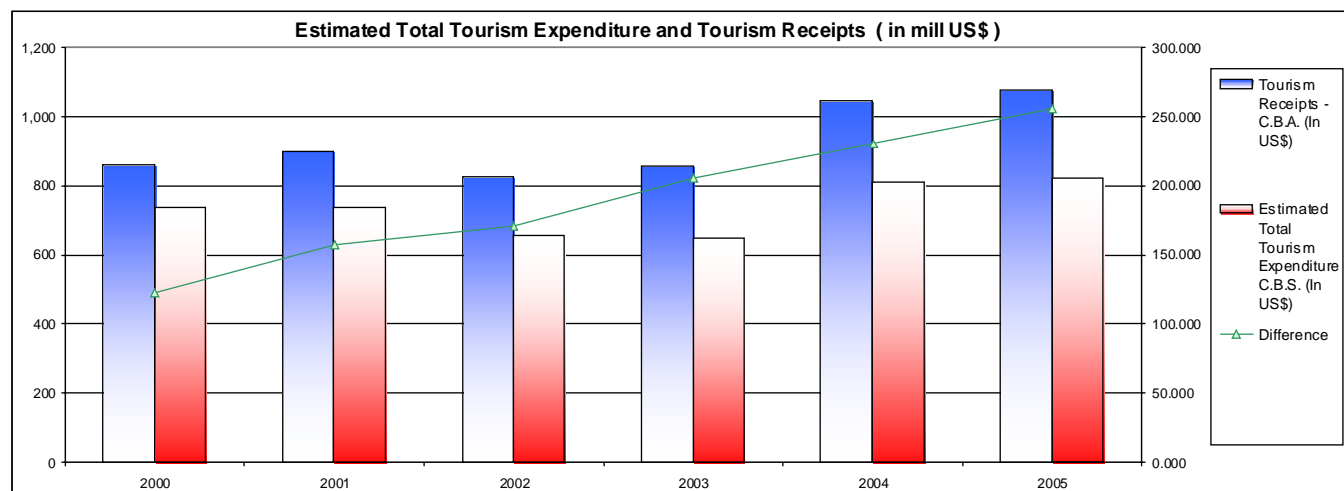
4.15 ESTIMATED TOTAL TOURISM EXPENDITURE ¹⁾ (In 000 US\$)

| Estimated total tourism expenditure | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 |
|-------------------------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|---------------------|
| Quarter 1 | 178,446.78 | 176,451.27 | 197,810.54 | 210,613.13 | 183,747.62 | 183,443.41 | 234,504.32 | 246,518.69 |
| Quarter 2 | 144,563.88 | 141,537.96 | 182,730.00 | 183,904.65 | 156,480.25 | 131,786.76 | 182,441.32 | 193,609.53 |
| Quarter 3 | 148,282.61 | 166,482.57 | 181,343.80 | 171,264.48 | 152,329.66 | 153,559.06 | 185,476.31 | 198,843.22 |
| Quarter 4 | 150,183.67 | 177,173.15 | 175,145.64 | 173,471.01 | 161,513.30 | 178,896.91 | 209,986.75 | 182,092.73 * |
| Total | 621,476.94 | 661,644.95 | 737,029.98 | 739,253.27 | 654,070.83 | 647,486.14 | 812,408.69 | 821,064.17 * |

Source: Tourist Survey - Central Bureau of Statistics - Aruba

* Provisional

1) For further explanation on total tourism expenditure refer to methodology



Tourist Profile – International Data



5. INTERNATIONAL ASPECTS

5.1 TOURIST ARRIVALS IN THE CARIBBEAN BY DESTINATION (thousands)

| Country | 1999 | % Share | 2000 | % Share | 2001 | % Share | 2002 | % Share | 2003 | % Share | 2004 | % Share | 2005 | % Share |
|----------------------------|-----------------|--------------|-----------------|--------------|-----------------|--------------|-----------------|--------------|-----------------|--------------|-----------------|--------------|-----------------|--------------|
| Caribbean | 19,119.0 | 100.0 | 20,384.5 | 100.0 | 19,702.4 | 100.0 | 19,040.5 | 100.0 | 17,208.5 | 100.0 | 15,662.3 | 100.0 | 18,646.8 | 100.0 |
| Anguila | 46.8 | 0.2 | 43.8 | 0.2 | 48.0 | 0.2 | 44.0 | 0.2 | 46.9 | 0.3 | 54.0 | 0.3 | 62.1 | 0.3 |
| Antigua / Barbuda | 239.6 | 1.3 | 236.7 | 1.2 | 222.0 | 1.1 | 227.0 | 1.2 | 224.0 | 1.3 | 221.5 | 1.4 | 245.4 | 1.3 |
| Aruba | 683.3 | 3.6 | 721.2 | 3.5 | 691.4 | 3.5 | 642.6 | 3.4 | 641.9 | 3.7 | 728.2 | 4.6 | 732.5 | 3.9 |
| Bahamas | 1,577.1 | 8.2 | 1,544.0 | 7.6 | 1,537.8 | 7.8 | 1,513.1 | 7.9 | 1,428.6 | 8.3 | 1,450.0 | 9.3 | 1,514.5 | 8.1 |
| Barbados | 514.6 | 2.7 | 544.7 | 2.7 | 507.1 | 2.6 | 497.9 | 2.6 | 531.2 | 3.1 | 552.0 | 3.5 | 547.5 | 2.9 |
| Belize | 180.8 | 0.9 | 195.8 | 1.0 | 196.0 | 1.0 | 199.5 | 1.0 | 220.6 | 1.3 | 230.8 | 1.5 | 236.6 | 1.3 |
| Bermuda | 354.8 | 1.9 | 332.2 | 1.6 | 278.1 | 1.4 | 284.0 | 1.5 | 256.6 | 1.5 | 271.6 | 1.7 | 269.6 | 1.4 |
| Bonaire | 61.5 | 0.3 | 51.3 | 0.3 | 50.4 | 0.3 | 52.1 | 0.3 | 64.2 | 0.4 | 62.5 | 0.4 | 58.6 | 0.3 |
| Br. Virgin Island | 285.9 | 1.5 | 281.1 | 1.4 | 295.6 | 1.5 | 284.7 | 1.5 | 278.1 | 1.6 | 304.5 | 1.9 | 337.1 | 1.8 |
| Cayman Island | 345.0 | 1.8 | 354.1 | 1.7 | 334.1 | 1.7 | 302.8 | 1.6 | 293.5 | 1.7 | 237.9 | 1.5 | 167.8 | 0.9 |
| Cuba | 1,602.8 | 8.4 | 1,774.0 | 8.7 | 1,774.5 | 9.0 | 1,686.2 | 8.9 | 1,907.3 | 11.1 | 1,848.9 | 11.8 | 2,319.3 | 12.4 |
| Curacao | 198.3 | 1.0 | 191.2 | 0.9 | 204.6 | 1.0 | 218.0 | 1.1 | 221.4 | 1.3 | 223.4 | 1.4 | 222.1 | 1.2 |
| Dominica | 73.5 | 0.4 | 69.6 | 0.3 | 66.4 | 0.3 | 69.2 | 0.4 | 72.9 | 0.4 | 31.0 | 0.2 | n.a. | n.a. |
| Dom. Republic | 2,649.4 | 13.9 | 2,972.6 | 14.6 | 2,882.0 | 14.6 | 2,793.6 | 14.7 | 3,268.2 | 19.0 | 3,443.2 | 22.0 | 3,690.7 | 19.8 |
| Grenada | 125.3 | 0.7 | 128.9 | 0.6 | 123.4 | 0.6 | 132.4 | 0.7 | 142.3 | 0.8 | 89.9 | 0.6 | 98.2 | 0.5 |
| Guyana | 74.9 | 0.4 | 105.0 | 0.5 | 95.1 | 0.5 | 104.3 | 0.5 | 100.9 | 0.6 | 122.0 | 0.8 | 116.6 | 0.6 |
| Haiti | 143.4 | 0.8 | 140.5 | 0.7 | 141.6 | 0.7 | 142.4 | 0.7 | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| Jamaica | 1,248.4 | 6.5 | 1,322.7 | 6.5 | 1,276.5 | 6.5 | 1,266.4 | 6.7 | 1,350.3 | 7.8 | 1,414.8 | 9.0 | 1,478.7 | 7.9 |
| Martinique | 564.3 | 3.0 | 526.3 | 2.6 | 460.4 | 2.3 | 446.7 | 2.3 | 453.2 | 2.6 | 470.9 | 3.0 | 474.1 | 2.5 |
| Mexico (Cancun) | 2,072.2 | 10.8 | 2,255.3 | 11.1 | 2,178.7 | 11.1 | 1,965.4 | 10.3 | 2,076.5 | 12.1 | n.a. | n.a. | 2,134.2 | 11.4 |
| Mexico (Cruz del Sur) | 324.7 | 1.7 | 230.0 | 1.1 | 240.5 | 1.2 | 205.6 | 1.1 | 304.2 | 1.8 | 368.6 | 2.4 | 276.5 | 1.5 |
| Montserrat | 9.9 | 0.1 | 10.3 | 0.1 | 9.8 | 0.0 | 9.6 | 0.1 | 8.4 | 0.0 | 7.1 | 0.0 | 9.7 | 0.1 |
| Puerto Rico | 3,138.7 | 16.4 | 3,466.1 | 17.0 | 3,303.8 | 16.8 | 3,230.5 | 17.0 | 1,321.8 | 7.7 | 1,411.7 | 9.0 | 1,449.8 | 7.8 |
| Saba | 9.3 | 0.0 | 9.1 | 0.0 | 9.0 | 0.0 | 10.8 | 0.1 | 10.3 | 0.1 | 11.0 | 0.1 | 11.5 | 0.1 |
| St. Eustatius | 9.2 | 0.0 | 8.9 | 0.0 | 9.6 | 0.0 | 9.8 | 0.1 | 10.8 | 0.1 | 6.8 | 0.0 | 10.4 | 0.1 |
| St. Maarten | 444.8 | 2.3 | 432.3 | 2.1 | 402.6 | 2.0 | 380.8 | 2.0 | 427.6 | 2.5 | 475.0 | 3.0 | 467.9 | 2.5 |
| St. Kitts / Nevis | 84.0 | 0.4 | 73.1 | 0.4 | 70.6 | 0.4 | 67.5 | 0.4 | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| St. Lucia | 260.6 | 1.4 | 269.9 | 1.3 | 250.1 | 1.3 | 253.5 | 1.3 | 276.9 | 1.6 | 298.4 | 1.9 | 317.9 | 1.7 |
| St. Vincent and Grenadines | 68.3 | 0.4 | 72.9 | 0.4 | 70.7 | 0.4 | 77.6 | 0.4 | 78.5 | 0.5 | 86.7 | 0.6 | 95.5 | 0.5 |
| Suriname | 57.3 | 0.3 | 56.8 | 0.3 | 58.4 | 0.3 | 58.2 | 0.3 | n.a. | n.a. | 111.4 | 0.7 | 144.9 | 0.8 |
| Trinidad / Tobago | 358.2 | 1.9 | 398.6 | 2.0 | 383.1 | 1.9 | 384.2 | 2.0 | 409.0 | 2.4 | 393.6 | 2.5 | 460.2 | 2.5 |
| Turks / Caicos | 117.6 | 0.6 | 151.4 | 0.7 | 165.2 | 0.8 | 154.3 | 0.8 | 163.6 | 1.0 | 132.0 | 0.8 | n.a. | n.a. |
| U.S. Virgin Islands | 483.8 | 2.5 | 607.2 | 3.0 | 591.9 | 3.0 | 552.6 | 2.9 | 618.7 | 3.6 | 602.9 | 3.8 | 697.0 | 3.7 |

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

* n.a. = data not available

Tourist Profile – International Data



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

| Country | 1999 | % Share | 2000 | % Share | 2001 | % Share | 2002 | % Share | 2003 | % Share | 2004 | % Share | 2005 | % Share |
|----------------------------|------------------|---------------|------------------|---------------|------------------|---------------|------------------|---------------|------------------|---------------|------------------|---------------|------------------|---------------|
| Caribbean | 12,154.50 | 100.00 | 14,538.40 | 100.00 | 14,892.20 | 100.00 | 16,186.20 | 100.00 | 17,129.83 | 100.00 | 19,166.25 | 100.00 | 18,105.36 | 100.00 |
| Antigua / Barbuda | 328 | 2.70 | 429.4 | 2.95 | 408.8 | 2.75 | 309.7 | 1.91 | 385.69 | 2.25 | 522.753 | 2.73 | 466.851 | 2.6 |
| Aruba | 289 | 2.38 | 490.2 | 3.37 | 487.3 | 3.27 | 582.2 | 3.60 | 542.30 | 3.17 | 576.320 | 3.01 | 552.819 | 3.1 |
| Bahamas | 1981.5 | 16.30 | 2512.6 | 17.28 | 2551.7 | 17.13 | 2802.1 | 17.31 | 2,970.20 | 17.34 | 3,360.012 | 17.53 | 3,349.998 | 18.5 |
| Barbados | 432.9 | 3.56 | 533.3 | 3.67 | 527.6 | 3.54 | 523.3 | 3.23 | 559.10 | 3.26 | 721.270 | 3.76 | 563.588 | 3.1 |
| Belize | 34.1 | 0.28 | 58.1 | 0.40 | 48.1 | 0.32 | 319.7 | 1.98 | 575.20 | 3.36 | 851.436 | 4.44 | 800.331 | 4.4 |
| Bermuda | 195.6 | 1.61 | 207.9 | 1.43 | 180 | 1.21 | 200.1 | 1.24 | 226.10 | 1.32 | 206.133 | 1.08 | 247.259 | 1.4 |
| Bonaire | 14.8 | 0.12 | 43.5 | 0.30 | 40.5 | 0.27 | 42.2 | 0.26 | 44.60 | 0.26 | 53.343 | 0.28 | 40.077 | 0.2 |
| Br. Virgin Island | 180.7 | 1.49 | 188.5 | 1.30 | 202.5 | 1.36 | 180.8 | 1.12 | 304.34 | 1.78 | 466.601 | 2.43 | 449.152 | 2.5 |
| Cayman Island | 1035.5 | 8.52 | 1030.9 | 7.09 | 1214.8 | 8.16 | 1574.8 | 9.73 | 1,819.00 | 10.62 | 1,693.293 | 8.83 | 1,798.999 | 9.9 |
| Curacao | 220.7 | 1.82 | 308.3 | 2.12 | 300.1 | 2.02 | 319.1 | 1.97 | 279.40 | 1.63 | 219.385 | 1.14 | 276.217 | 1.5 |
| Dominica | 202 | 1.66 | 239.8 | 1.65 | 207.6 | 1.39 | 136.9 | 0.85 | 177.04 | 1.03 | 383.614 | 2.00 | n.a. | n.a. |
| Dom. Republic | 283.4 | 2.33 | 183.2 | 1.26 | 208.2 | 1.40 | 247 | 1.53 | 398.26 | 2.32 | 456.321 | 2.38 | 289.805 | 1.6 |
| Grenada | 245.5 | 2.02 | 180.3 | 1.24 | 147.4 | 0.99 | 135.1 | 0.83 | 146.90 | 0.86 | 229.800 | 1.20 | 275.082 | 1.5 |
| Guadeloupe | 292.7 | 2.41 | 392.3 | 2.70 | 361.7 | 2.43 | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| Haiti | 243.3 | 2.00 | 304.5 | 2.09 | 357.4 | 2.40 | 354.1 | 2.19 | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| Jamaica | 764.3 | 6.29 | 907.6 | 6.24 | 840.3 | 5.64 | 865.4 | 5.35 | 1,132.60 | 6.61 | 1,099.773 | 5.74 | 1,135.843 | 6.3 |
| Martinique | 339.8 | 2.80 | 286.2 | 1.97 | 202.4 | 1.36 | 207.4 | 1.28 | 286.20 | 1.67 | 159.416 | 0.83 | 93.064 | 0.5 |
| Mexico (Conzumel) | 1304.1 | 10.73 | 1504.6 | 10.35 | 1595.4 | 10.71 | 2343.1 | 14.48 | 2,708.91 | 15.81 | 2,862.036 | 14.93 | 2,519.179 | 13.9 |
| Puerto Rico | 1148.6 | 9.45 | 1301.9 | 8.95 | 1350.3 | 9.07 | 1203.9 | 7.44 | 1,234.99 | 7.21 | 1,381.411 | 7.21 | 1,315.079 | 7.3 |
| St. Maarten | 615.6 | 5.06 | 868.3 | 5.97 | 867.8 | 5.83 | 1055 | 6.52 | 1,171.70 | 6.84 | 1,348.450 | 7.04 | 1,488.461 | 8.2 |
| St. Kitts / Nevis | 137.3 | 1.13 | 164.6 | 1.13 | 252.2 | 1.69 | 166.6 | 1.03 | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| St. Lucia | 351.2 | 2.89 | 443.6 | 3.05 | 489.9 | 3.29 | 387.2 | 2.39 | 393.30 | 2.30 | 481.279 | 2.51 | 394.364 | 2.2 |
| St. Vincent and Grenadines | 47.7 | 0.39 | 86.2 | 0.59 | 76.5 | 0.51 | 70.3 | 0.43 | n.a. | n.a. | 74.657 | 0.39 | 69.391 | 0.4 |
| Trinidad / Tobago | 63.3 | 0.52 | 104.1 | 0.72 | 82.3 | 0.55 | 60 | 0.37 | n.a. | n.a. | 54.254 | 0.28 | 67.193 | 0.4 |
| U.S. Virgin Islands | 1402.7 | 11.54 | 1768.4 | 12.16 | 1891.4 | 12.70 | 1738.7 | 10.74 | 1,774.00 | 10.36 | 1,964.689 | 10.25 | 1,912.539 | 10.6 |

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

* n.a. = data not available



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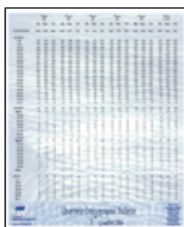


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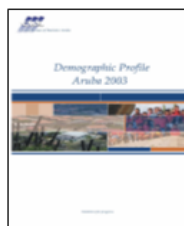


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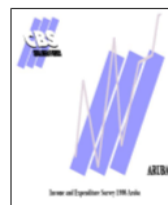
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