



Central Bureau of Statistics

Creating a wealth
of information....



Objective of the Presentation:

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

Role of the C.B.S.....

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 the 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 Statistics



The Real figures

Down to business...



Outline of Data:

- Hotel Related Information / Indicators (monthly)
- Visitor Survey 1996 - 2004
- Tourist Profile (quarterly and year reports)
- Aruba vs. the Caribbean
- Economic Indicator —→ PEA
- National Account Concept
- (Tourism Marketing Analysis:
Under construction – projected for 2005)
- (Tourist Satellite Account:
Under construction – projected for 2005)

Hotel Statistics / Indicators:



Trends....

Hotel Related Statistics / Indicators:

AHATA MONTHLY PERFORMANCE REPORT

NOT AVAILABLE
FOR PUBLICATION

SEPTEMBER 2004



Central Bureau of Statistics

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Oranjestad, Aruba

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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	3,021	48.1%	78.6%	13.8%	71,279	107.8%	3.7%	\$ 130.50	13.4%	110.1%	\$ 9,302	\$ 102.64	29.1%	162.2%	-1.9%
Under 275 rooms	867	13.8%	86.7%	39.8%	22,550	118.8%	27.3%	\$ 86.24	3.8%	72.8%	\$ 1,945	\$ 74.77	45.1%	118.2%	10.3%
HOTEL - TOTAL	3,888	61.9%	80.4%	19.6%	93,829	110.3%	8.9%	\$ 119.86	11.6%	101.1%	\$ 11,247	\$ 96.42	33.5%	152.4%	1.4%
TIME SHARE	2,392	38.1%	60.8%	-6.7%	43,632	83.3%	-15.0%	\$ 99.81	28.9%	84.2%	\$ 672	\$ 9.36	15.7%	14.8%	-12.1%
GRAND TOTAL	6,280	100.0%	73.0%	9.8%	137,461	100.0%	0.0%	\$ 118.52	13.1%	100.0%	\$ 11,918	\$ 63.26	31.6%	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	3,023	47.2%	85.9%	5.2%	239,183	107.5%	1.9%	\$ 135.79	12.2%	110.4%	\$ 32,479	\$ 116.77	16.4%	1.63	-1.1%
Under 275 rooms	934	14.6%	85.3%	13.2%	73,043	106.3%	9.2%	\$ 85.14	6.3%	69.2%	\$ 6,219	\$ 72.34	19.9%	1.01	1.9%
HOTEL - TOTAL	3,957	61.8%	85.7%	7.1%	312,226	107.2%	3.7%	\$ 123.94	11.7%	100.7%	\$ 38,698	\$ 106.28	18.4%	1.48	0.6%
TIME SHARE	2,449	38.2%	70.5%	-3.7%	159,239	88.4%	-6.5%	\$ 112.67	22.0%	91.6%	\$ 3,133	\$ 14.29	4.7%	0.20	-11.0%
GRAND TOTAL	6,406	100.0%	79.9%	3.1%	471,465	100.0%	0.0%	\$ 123.02	12.7%	100.0%	\$ 41,831	\$ 71.70	17.7%	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	3,026	46.4%	84.5%	16.6%	700,405	104.8%	7.2%	\$161.90	4.8%	111.5%	\$113,398	\$136.79	22.8%	1.7	2.4%
Under 275 rooms	1,023	15.7%	84.1%	10.6%	235,889	104.8%	1.4%	\$97.85	6.8%	67.4%	\$ 23,081	\$82.33	18.1%	1.0	-1.2%
HOTEL - TOTAL	4,049	62.1%	84.4%	15.0%	936,294	104.8%	5.6%	\$145.77	6.1%	100.4%	\$136,479	\$123.03	22.4%	1.5	2.0%
TIME SHARE	2,468	37.9%	74.4%	0.1%	502,866	92.2%	-9.0%	\$138.72	17.6%	95.5%	\$ 11,132	\$16.46	-0.1%	0.2	-16.5%
GRAND TOTAL	6,516	100.0%	80.6%	9.5%	1,439,160	100.0%	0.0%	\$145.21	7.2%	100.0%	\$147,612	\$82.68	19.9%	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 Beach Resort
Aruba Marriott Resort
Aruba Renaissance Beach Resort
Aruba Wyndham Hotel
Holiday Inn Hotel
Hyatt Regency Aruba
Radisson Hotel

Under 275 Rooms = 8

Amsterdam Manor
Aruba Grand Resort & Casino
B.W. Manchebo Hotel
Bucuti Beach Resort
Bushiri Beach Hotel
Caribbean Town Resorts
Grape Holdings (Divi & Tamarijn)
The Mill Condominiums

TIME SHARE = 11

Aruba Beach Club
Aruba Renaissance Beach Resort
Aruba Marriott Vacation Club
Aruba Phoenix Resort
Caribbean Palm Village
Casa Del Mar
Costa Linda Resort
Divi Village Apartments
Dutch Village Apartments
La Cabana all suite
Playa Linda Resort

Did Not Report !!!

CLOSED !!!

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)

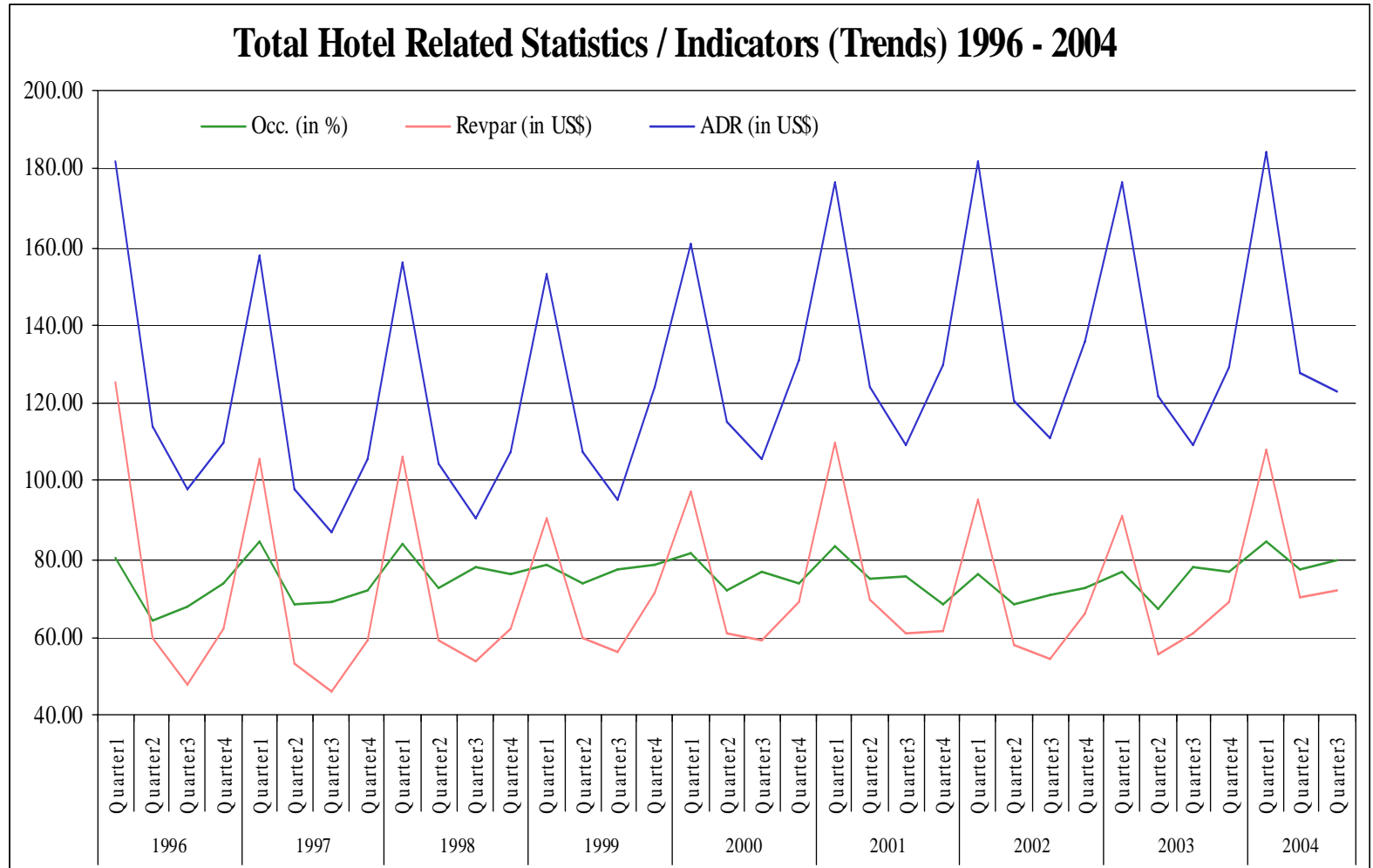
**** Penetration Index = Percentage of individual Rooms Sold divided by Fair Share

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

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

Hotel Related Statistics :



Seasonality pattern of the Hotel Industry!

Tourist Profile



Visitor Survey...

Administrative data...

Highlights...



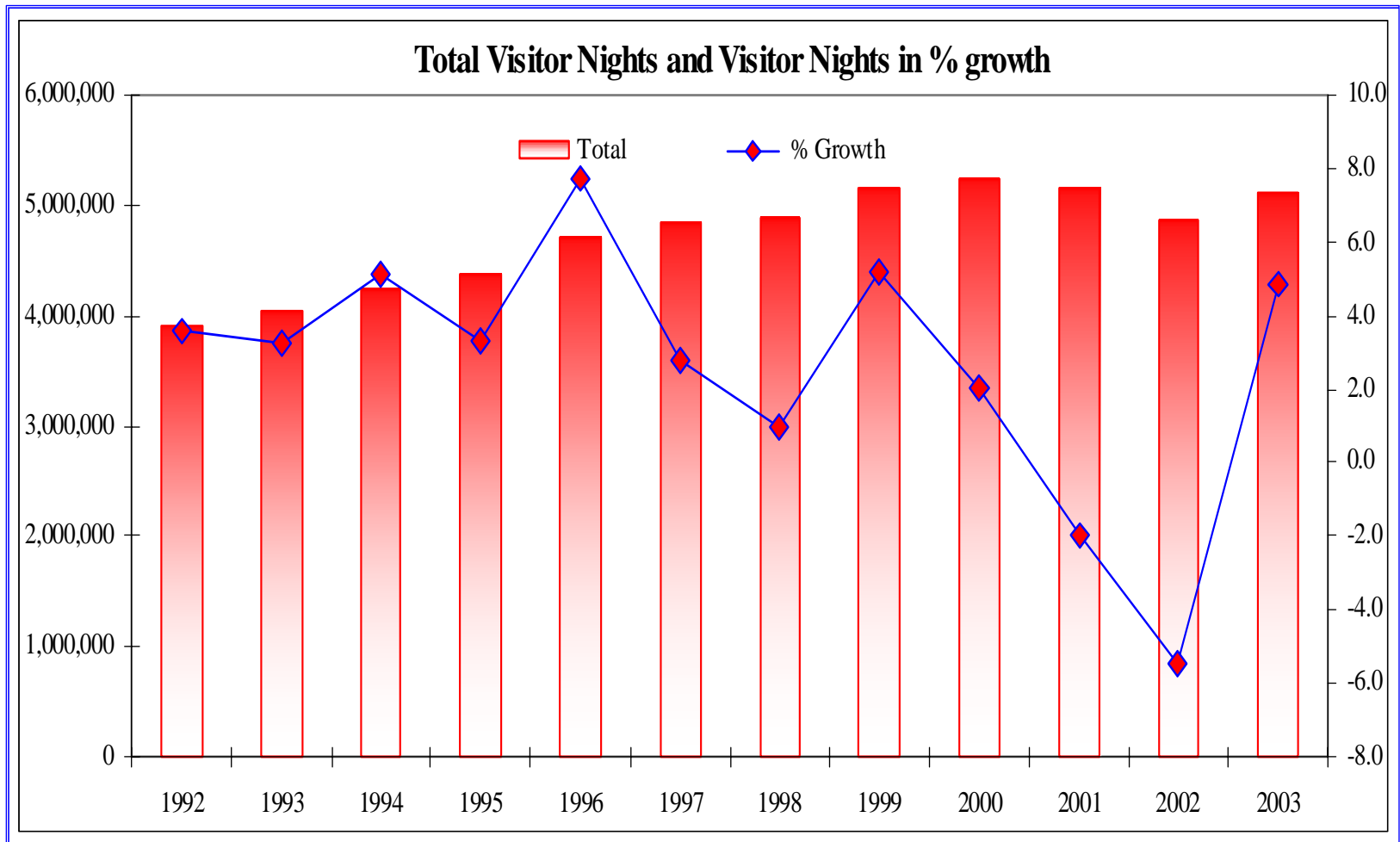
Tourist Profile:

- Administrative information
 - Stayover visitors
 - Visitor Nights
 - Cruise Passengers and calls
 - Airport landings and traffic
- Survey Information
 - Highlights
 - Visitor Profile
 - Behavior of the visitors
 - Satisfaction of the visitors
 - Money Aspects of the visitors
- International Aspects – Aruba vs. the Caribbean

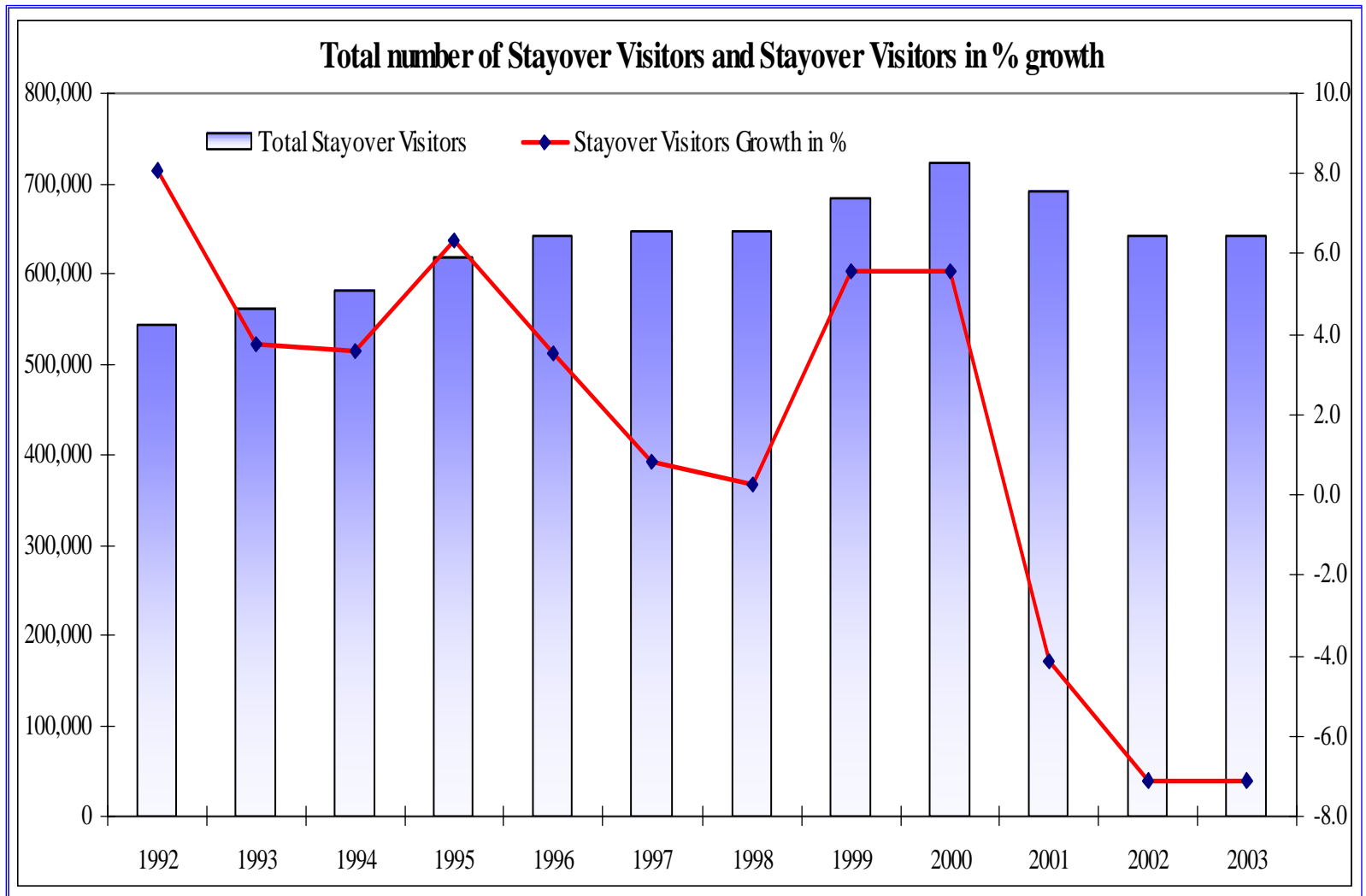
Tourist Profile:

Visitors per Country / Region (Absolute: 1990 - 2003)															
	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	
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	
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	
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	
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	
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	
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	
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	
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	
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	
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	
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	
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	
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	
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	
Source: A.T.A. NV															

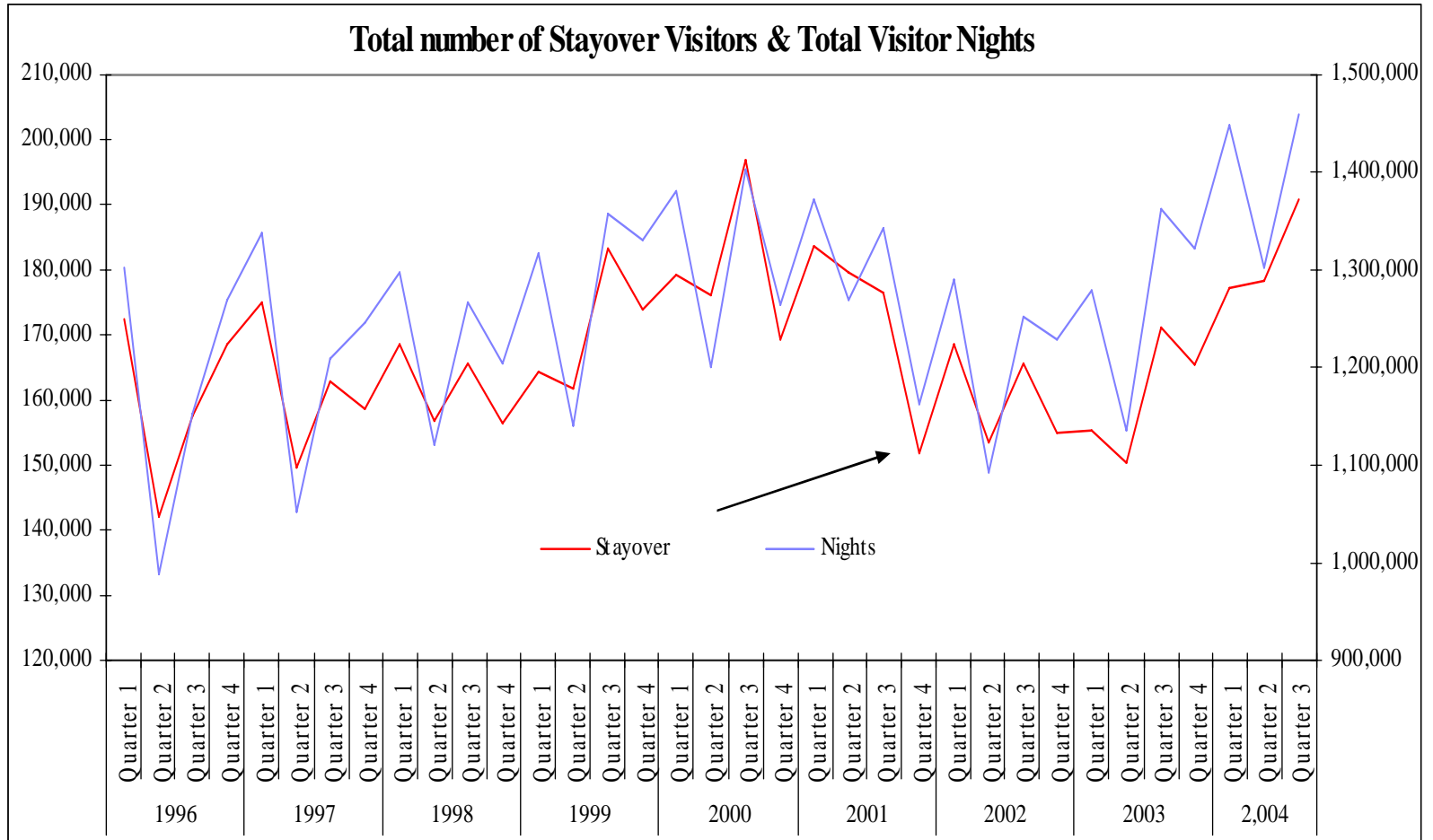
Tourist Profile:



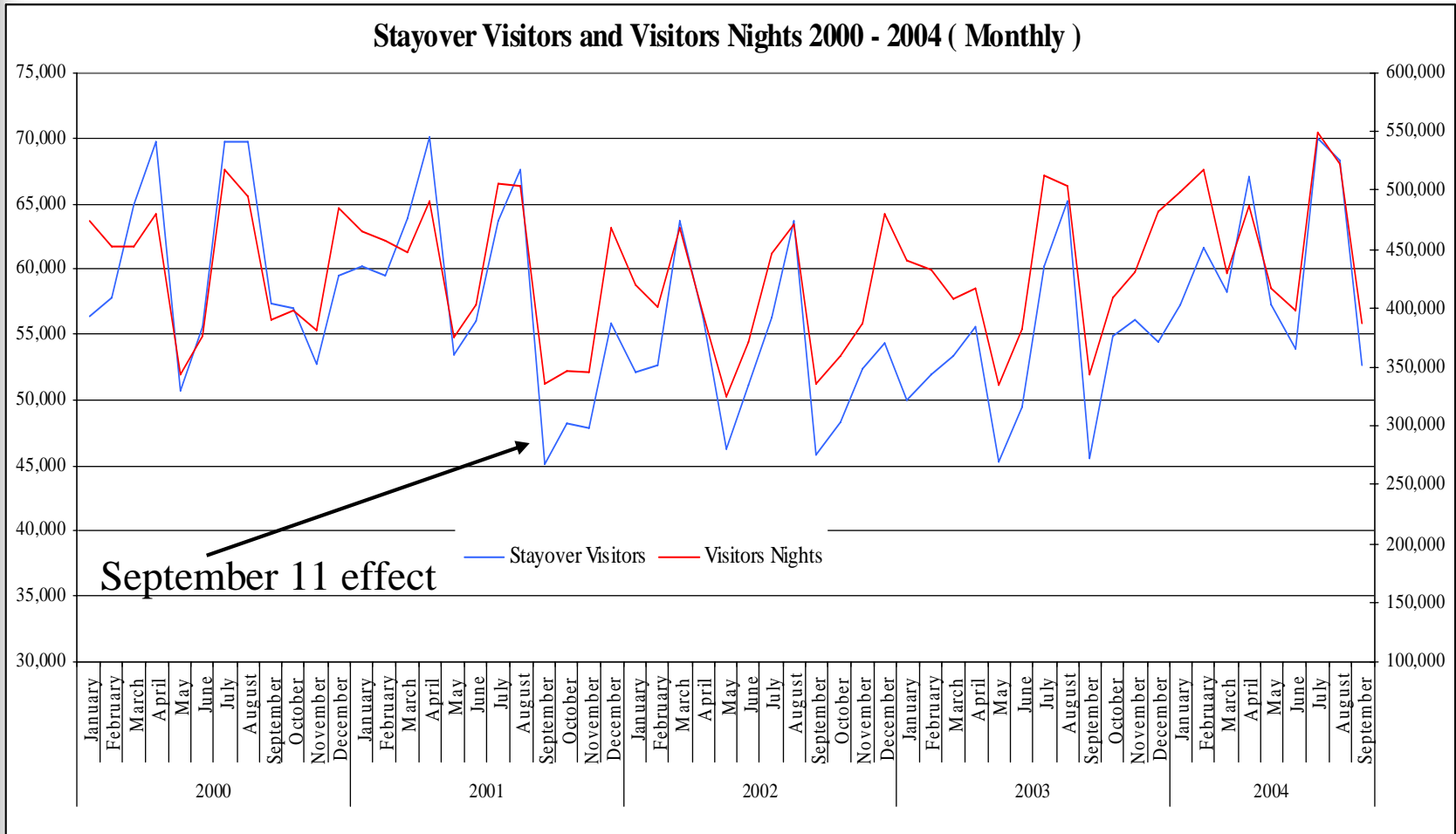
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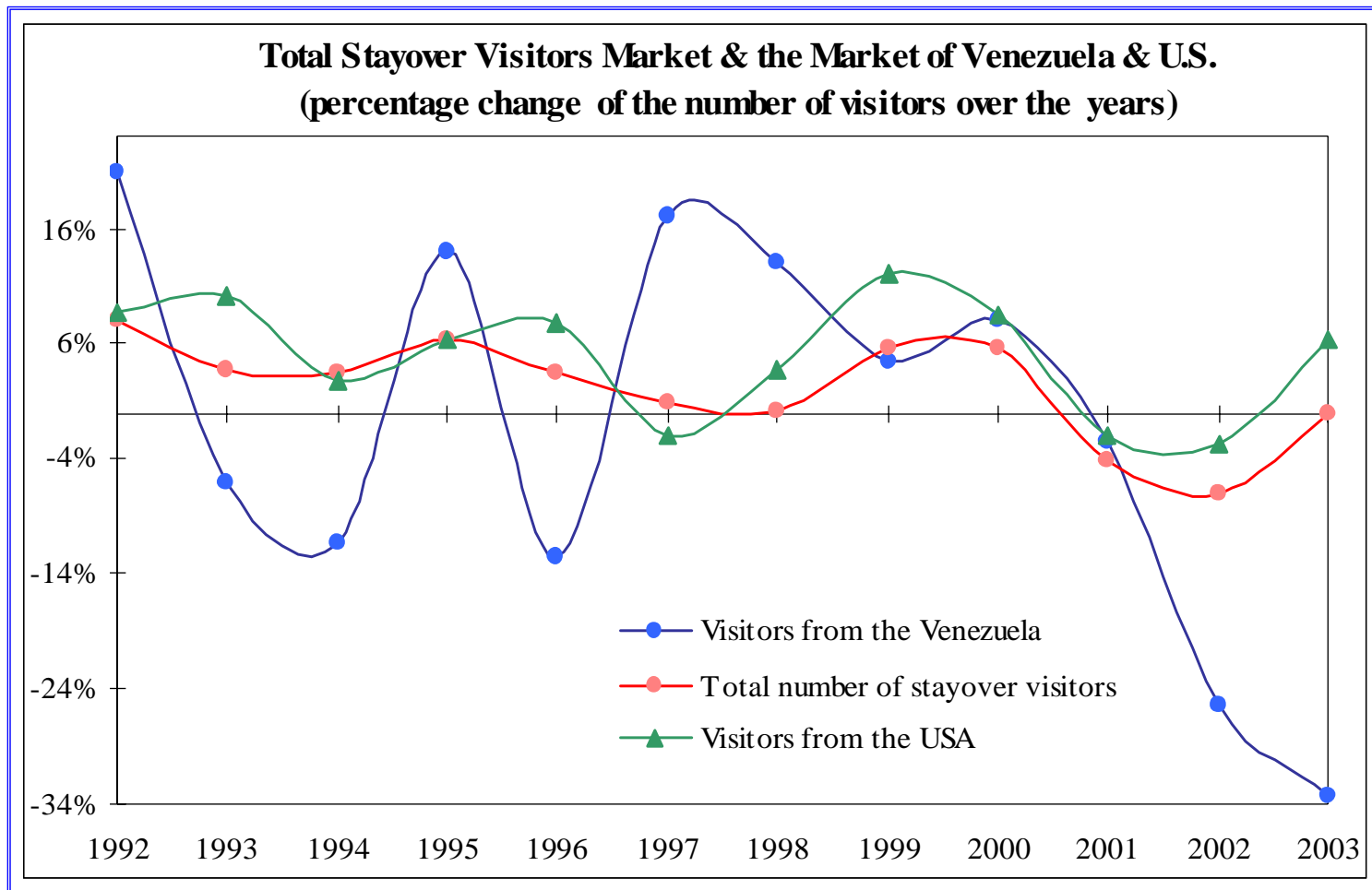
Tourist Profile:



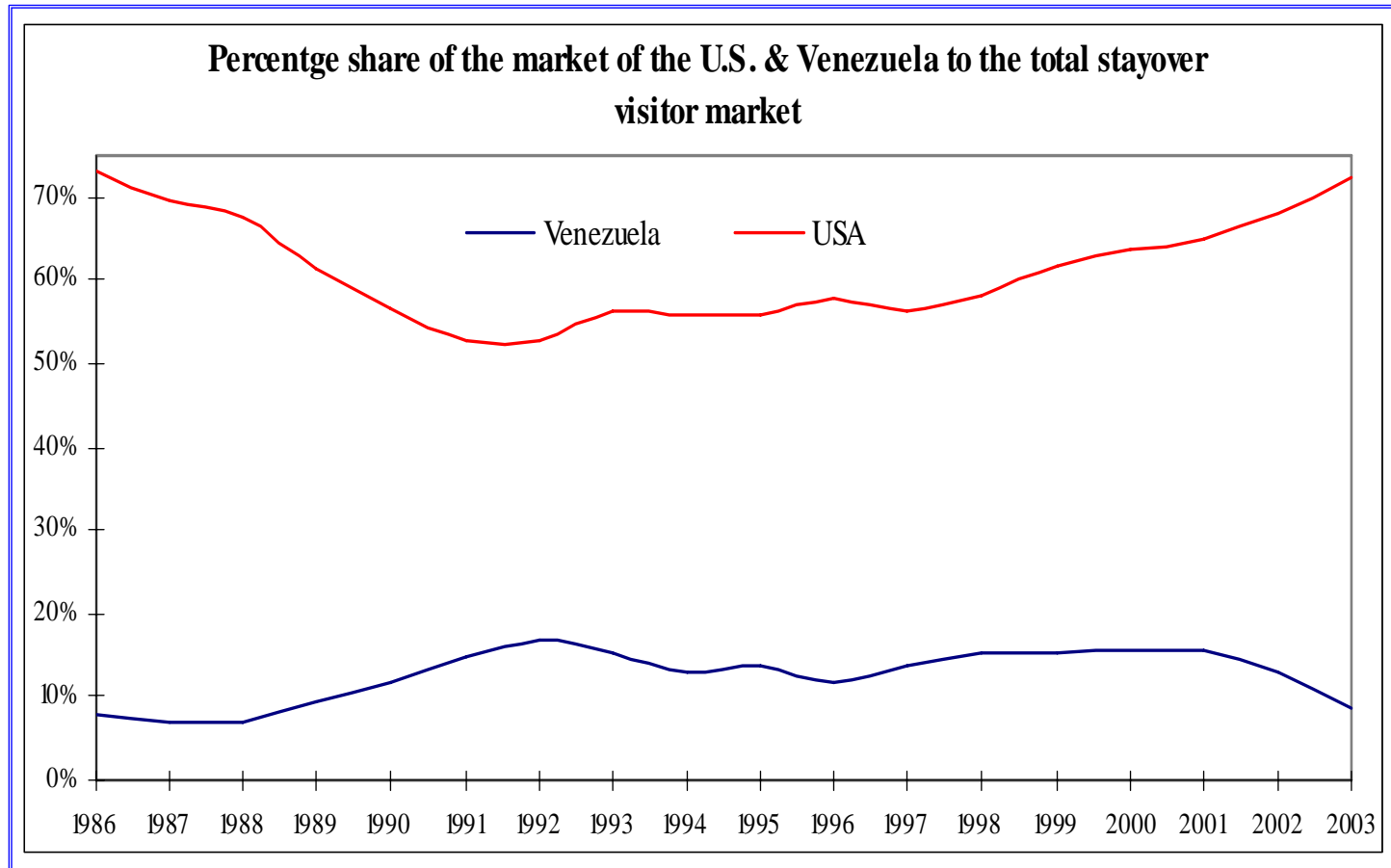
Tourist Profile:



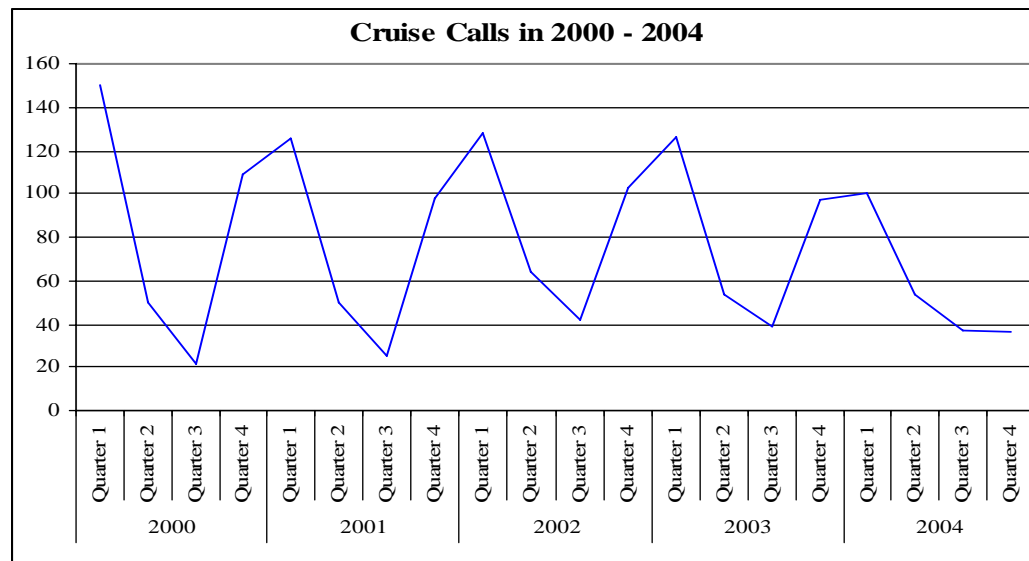
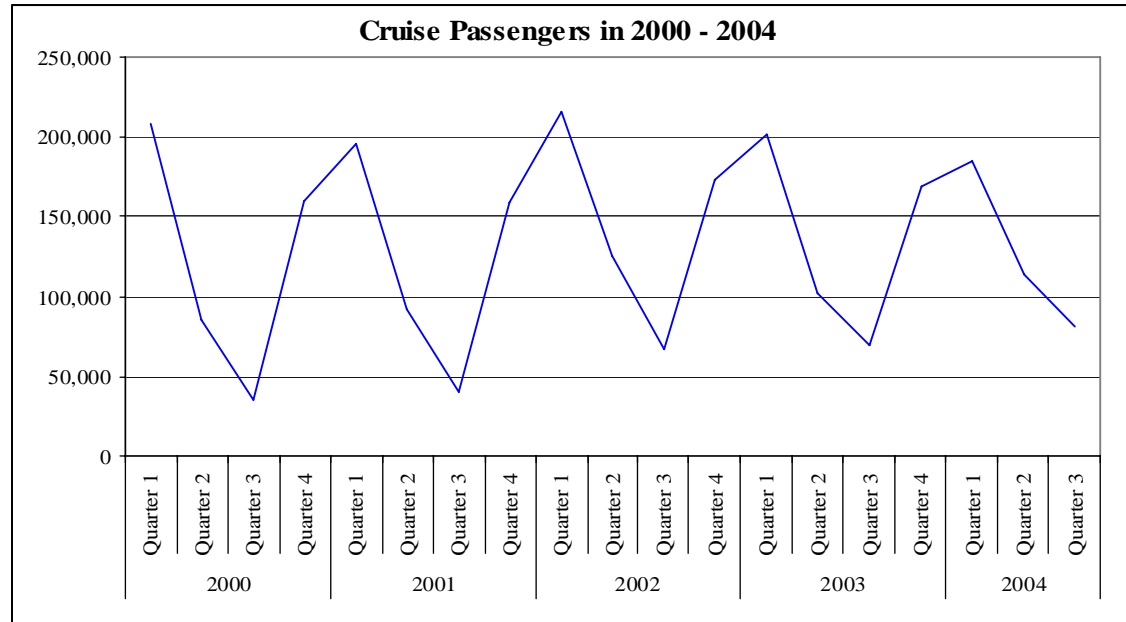
Tourist Profile:



Tourist Profile:



Tourist Profile:



Tourist Profile:

<i>Main Economic Indicators:</i>	1999	2000	2001	2002	2003
Total stayover visitors	683,323	721,224	691,420	642,627	641,906
Total cruise visitors	257,829	289,038	490,148	487,296	542,327
Total number of visitors	941,152	1,010,262	1,181,568	1,129,923	1,184,233
Total number of visitor nights (x 1,000)	5,143.3	5,247.8	5,144.6	4,862.6	5,097.6
Average length of stay	7.7	7.7	7.9	7.6	8.3
Average daily expenditure in Aruba	110.08	114.29	117.71	115.48	103.82
Tourism expenditure in Aruba	579,195,510	637,998,070	639,783,590	561,031,880	552,483,745
Estimated total tourism expenditure	661,644,950	737,029,980	741,516,160	654,070,834	647,486,133
Tourism receipts (units x 1,000)	788,603	859,385	896,704	904,804	842,346
Occupancy	77.0%	75.9%	75.5%	71.9%	74.4%
Average Daily Rate	121.08	128.71	136.01	138.09	133.69
Revenue per Available Room	69.34	71.54	75.26	68.78	68.99

Visitor Survey 1996 – 2004:



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: 2 0 0 4 MONTH: _____

Form 1 : 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 sproongen
c. Indien de respondent geen antwoord wil geven op een vraag, vul dan '9' in alle corresponderende hokjes of leeg laten.

Examples:

To indicate ☒

Figures 3 2 7 5

Writing ARUBA

Confidential

Serial Number
Enquirer 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 → 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 ☐ No

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

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

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
☐ Friend / Relative
☐ Other → Specify: _____
☐ Timeshare Resort → Name: _____

A6 Is this timeshare owned by you?

☐ Yes ☐ No
☐ Transient (Rented as a Hotel / Walk-in)
☐ 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?

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

B10 GRAND TOTAL:

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

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!)

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

Likes: _____
Dislikes: _____

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

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

Tourist Profile:

Tourism Expenditures in Aruba

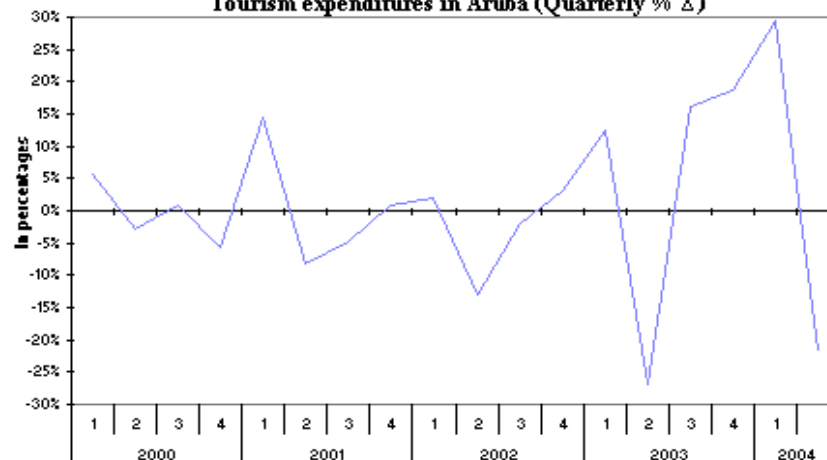
Year	Qrt.	In US\$	Year Total	Quarterly % Δ	Qrt. vs qrt. % Δ
1998	1	140,118.96	521,460.52	8.5%	-17.1%
	2	125,178.64		-10.7%	4.3%
	3	129,298.37		3.3%	-0.4%
	4	129,602.26		0.2%	0.4%
1999	1	143,794.80	579,195.51	11.0%	2.6%
	2	121,259.44		-15.7%	-3.1%
	3	147,498.33		21.6%	14.1%
	4	155,883.49		5.7%	20.3%
2000	1	164,687.30	637,998.07	5.6%	14.5%
	2	159,796.16		-3.0%	31.8%
	3	160,981.44		0.7%	9.1%
	4	151,742.95		-5.7%	-2.7%
2001	1	173,748.03	637,998.07	14.5%	5.5%
	2	159,650.35		-8.1%	-0.1%
	3	151,844.29		-4.9%	-5.7%
	4	152,950.53		0.7%	0.8%
2002	1	155,769.48	637,998.07	1.8%	-10.3%
	2	135,355.72		-13.1%	-15.2%
	3	132,814.28		-1.9%	-12.5%
	4	137,061.33		3.2%	-10.4%
2003	1	154,096.77	637,998.07	12.4%	-1.1%
	2	112,651.23		-26.9%	-16.8%
	3	130,744.40		16.1%	-1.6%
	4	154,991.34		18.5%	13.1%
2004	1	200,415.41		29.3%	30.1%
	2	156,872.31		-21.7%	39.3%

Tourism expenditures in Aruba is the amount of money stayover visitors left behind in Aruba during their stay thus excludes any pre-paid package expenditures.

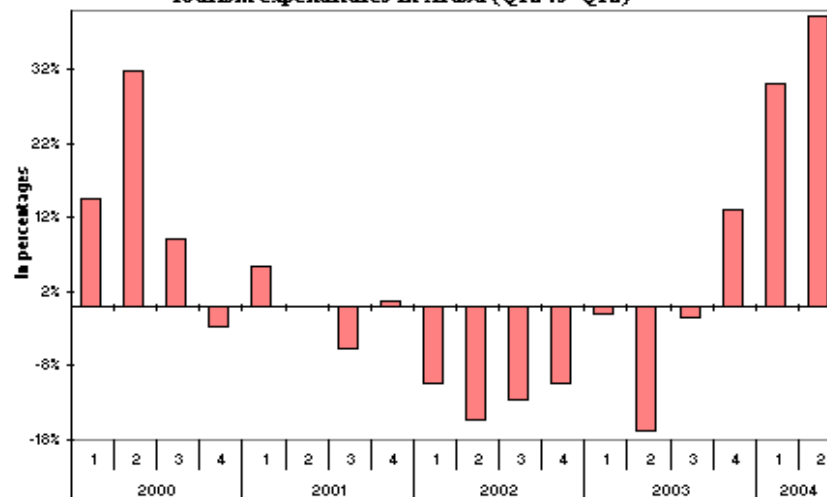
Source: Central Bureau of Statistics

Δ = change

Tourism expenditures in Aruba (Quarterly % Δ)



Tourism expenditures in Aruba (Qrt. vs Qrt.)



Tourist Profile:

Estimated Total Tourism Expenditure

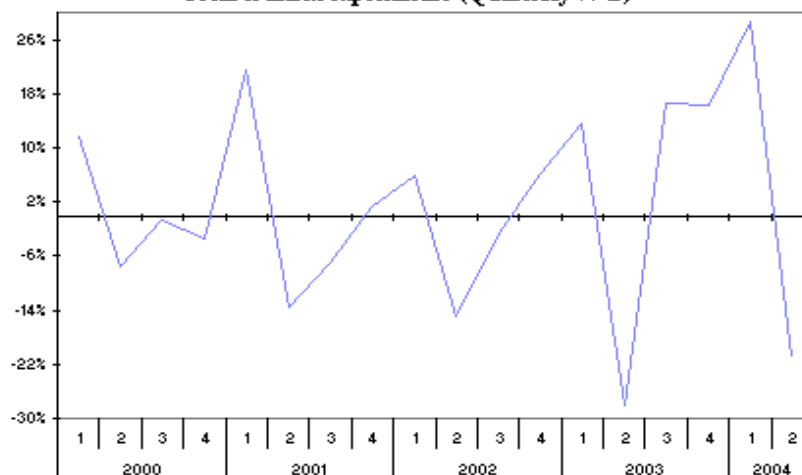
Year	Qrt.	In US\$	Year Total	Quarterly % Δ	Qrt. vs qrt. % Δ
1998	1	178,446.78	621,476.94	18.9%	-13.7%
	2	144,563.88		-19.0%	3.6%
	3	148,282.61		2.6%	2.1%
	4	150,183.68		1.3%	0.1%
1999	1	176,451.27	661,644.95	17.5%	-1.1%
	2	141,537.96		-19.8%	-2.1%
	3	166,482.57		17.6%	12.3%
	4	177,173.15		6.4%	18.0%
2000	1	197,810.54	737,029.98	11.6%	12.1%
	2	182,730.00		-7.6%	29.1%
	3	181,343.80		-0.8%	8.9%
	4	175,145.64		-3.4%	-1.1%
2001	1	212,861.91	741,516.15	21.5%	7.6%
	2	183,918.75		-13.6%	0.7%
	3	171,264.48		-6.9%	-5.6%
	4	173,471.01		1.3%	-1.0%
2002	1	183,747.62	654,070.83	5.9%	-13.7%
	2	156,480.25		-14.8%	-14.9%
	3	152,329.66		-2.7%	-11.1%
	4	161,513.30		6.0%	-6.9%
2003	1	183,443.41	647,457.39	13.6%	-0.2%
	2	131,758.01		-28.2%	-15.8%
	3	153,559.06		16.5%	0.8%
	4	178,696.91		16.4%	10.6%
2004	1	229,655.67		28.5%	25.2%
	2	181,244.66		-21.1%	37.6%

Estimated total tourism expenditure is tourism expenditures in Aruba including imputed accommodation expenditures of pre-paid packages.

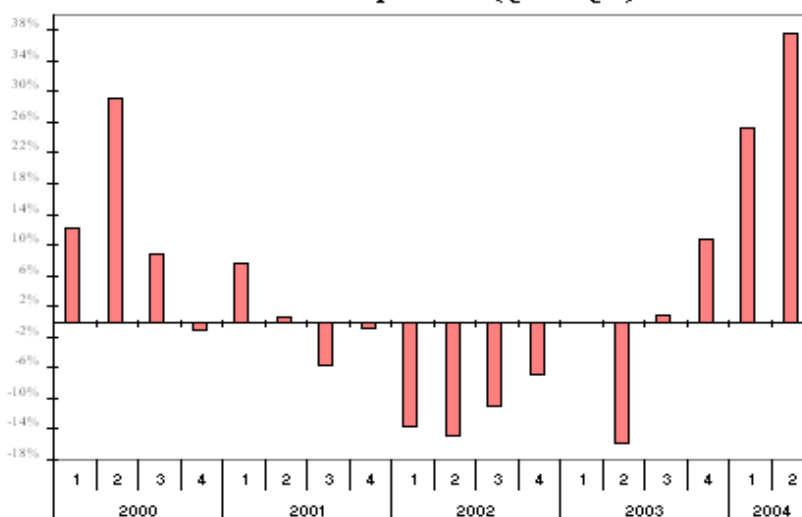
Source: Central Bureau of Statistics

Δ = change

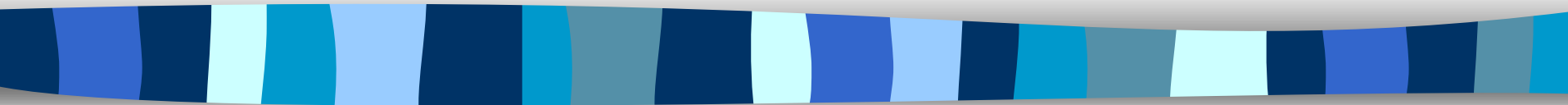
Total tourism expenditure (Quarterly % Δ)



Total tourism expenditures (Qrt vs Qrt.)



Tourist Profile



International
Aspects...

Aruba vs. the

International Aspects:

TOURIST ARRIVALS IN THE CARIBBEAN BY DESTINATION

Country	2000	% Share	2001	% Share	2002	% Share	2003
Caribbean	20,384.5	100.0	19,702.4	100.0	19,040.5	100.0	n.a.
Anguila	43.8	0.2	48.0	0.2	44.0	0.2	46.9
Antigua / Barbuda	236.7	1.2	222.0	1.1	227.0	1.2	n.a.
Aruba	721.2	3.5	691.4	3.5	642.6	3.4	642
Bahamas	1,544.0	7.6	1,537.8	7.8	1,513.1	7.9	1,429
Barbados	544.7	2.7	507.1	2.6	497.9	2.6	531
Belize	195.8	1.0	196.0	1.0	199.5	1.0	n.a.
Bermuda	332.2	1.6	278.1	1.4	284.0	1.5	n.a.
Bonaire	51.3	0.3	50.4	0.3	52.1	0.3	64
Br. Virgin Island	281.1	1.4	295.6	1.5	284.7	1.5	n.a.
Cayman Island	354.1	1.7	334.1	1.7	302.8	1.6	294
Cuba	1,774.0	8.7	1,774.5	9.0	1,686.2	8.9	n.a.
Curacao	191.2	0.9	204.6	1.0	218.0	1.1	221
Dominica	69.6	0.3	66.4	0.3	69.2	0.4	n.a.
Dom. Republic	2,972.6	14.6	2,882.0	14.6	2,793.6	14.7	3,268
Grenada	128.9	0.6	123.4	0.6	132.4	0.7	142
Guadeloupe	807.0	4.0	773.4	3.9	n.a.	n.a.	n.a.
Guyana	105.0	0.5	95.1	0.5	104.3	0.5	101
Haiti	140.5	0.7	141.6	0.7	142.4	0.7	n.a.
Jamaica	1,322.7	6.5	1,276.5	6.5	1,266.4	6.7	1,350
Martinique	526.3	2.6	460.4	2.3	446.7	2.3	n.a.
Mexico (Cancun)	2,255.3	11.1	2,178.7	11.1	1,965.4	10.3	n.a.
Mexico (Conzumel)	230.0	1.1	240.5	1.2	205.6	1.1	n.a.
Montserrat	10.3	0.1	9.8	0.0	9.6	0.1	n.a.
Puerto Rico	3,466.1	17.0	3,303.8	16.8	3,230.5	17.0	n.a.
Saba	9.1	0.0	9.0	0.0	10.8	0.1	n.a.
St. Eustatius	8.9	0.0	9.6	0.0	9.8	0.1	n.a.
St. Maarten	432.3	2.1	402.6	2.0	380.8	2.0	428
St. Kitts / Nevis	73.1	0.4	70.6	0.4	67.5	0.4	n.a.
St. Lucia	269.9	1.3	250.1	1.3	253.5	1.3	277
St. Vincent and Grenadines	72.9	0.4	70.7	0.4	77.6	0.4	n.a.
Suriname	56.8	0.3	58.4	0.3	58.2	0.3	n.a.
Trinidad / Tobago	398.6	2.0	383.1	1.9	384.2	2.0	n.a.
Turks / Caicos	151.4	0.7	165.2	0.8	154.3	0.8	n.a.
U.S. Virgin Islands	607.2	3.0	591.9	3.0	552.6	2.9	619

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

* n.a. = data not available

International Aspects:

CRUISE PASSENGER ARRIVALS TO THE CARIBBEAN BY DESTINATION (thousands)

Country	2000	% Share	2001	% Share	2002	% Share	2003
Caribbean	14,538.4	100.0	14,892.2	100.0	16,186.2	100.0	n.a.
Antigua / Barbuda	429.4	3.0	408.8	2.7	309.7	1.9	n.a.
Aruba	490.2	3.4	487.3	3.3	582.2	3.6	542.3
Bahamas	2,512.6	17.3	2,551.7	17.1	2,802.1	17.3	2,970.2
Barbados	533.3	3.7	527.6	3.5	523.3	3.2	559.1
Belize	58.1	0.4	48.1	0.3	319.7	2.0	575.2
Bermuda	207.9	1.4	180.0	1.2	200.1	1.2	n.a.
Bonaire	43.5	0.3	40.5	0.3	42.2	0.3	n.a.
Br. Virgin Island	188.5	1.3	202.5	1.4	180.8	1.1	n.a.
Cayman Island	1,030.9	7.1	1,214.8	8.2	1,574.8	9.7	1,819.0
Curacao	308.3	2.1	300.1	2.0	319.1	2.0	279.4
Dominica	239.8	1.6	207.6	1.4	136.9	0.8	n.a.
Dom. Republic	183.2	1.3	208.2	1.4	247.0	1.5	n.a.
Grenada	180.3	1.2	147.4	1.0	135.1	0.8	146.9
Guadeloupe	392.3	2.7	361.7	2.4	n.a.	n.a.	n.a.
Haiti	304.5	2.1	357.4	2.4	354.1	2.2	n.a.
Jamaica	907.6	6.2	840.3	5.6	865.4	5.3	1,132.6
Martinique	286.2	2.0	202.4	1.4	207.4	1.3	286.2
Mexico (Conzumel)	1,504.6	10.3	1,595.4	10.7	2,343.1	14.5	n.a.
Puerto Rico	1,301.9	9.0	1,350.3	9.1	1,203.9	7.4	n.a.
St. Maarten	868.3	6.0	867.8	5.8	1,055.0	6.5	1,171.7
St. Kitts / Nevis	164.6	1.1	252.2	1.7	166.6	1.0	n.a.
St. Lucia	443.6	3.1	489.9	3.3	387.2	2.4	393.3
St. Vincent and Grenadines	86.2	0.6	76.5	0.5	70.3	0.4	n.a.
Trinidad / Tobago	104.1	0.7	82.3	0.6	60.0	0.4	n.a.
U.S. Virgin Islands	1,768.4	12.2	1,891.4	12.7	1,738.7	10.7	1,774.0

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

* n.a. = data not available

International Aspects:

CRUISE SHIP CALLS TO THE CARIBBEAN BY DESTINATION

Country	2000	2001	2002
Caribbean	9,885	9,079	9,155
Antigua / Barbuda	331	271	217
Aruba	330	298	337
Bahamas	1,892	1,586	1,759
Barbados	484	453	423
Belize	70	48	200
Bermuda	165	156	145
Bonaire	71	64	81
Br. Virgin Island	230	256	330
Cayman Island	605	612	731
Curacao	213	213	220
Dominica	287	231	187
Grenada	360	288	259
Guadeloupe	249	249	n.a.
Jamaica	504	426	397
Martinique	281	234	191
Mexico (Conzumel)	885	795	1,168
Puerto Rico	689	680	625
St. Maarten	492	507	531
St. Kitts / Nevis	343	358	264
St. Lucia	389	378	245
U.S. Virgin Islands	1,014	976	845

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

* n.a. = data not available

International Aspects:

OCCUPANCY RATES IN THE CARIBBEAN BY DESTINATION

Country	1998	1999	2000	2001	2002
Caribbean	64.9	64.0	63.5	62.7	n.a.
Anguila	80.3	80.3	75.9	49.7	n.a.
Aruba	79.2	77.0	75.9	75.6	71.7
Bahamas	68.7	68.6	62.5	62.6	60.5
Barbados	58.6	55.9	56.9	51.1	42.5
Belize	29.9	31.4	29.0	44.8	40.1
Bermuda	59.9	59.6	61.6	51.9	55.0
Br. Virgin Island	60.2	58.8	66.1	59.5	61.4
Cayman Island	62.6	n.a.	62.4	52.1	n.a.
Cuba	76.1	71.7	74.2	64.7	59.7
Curacao	60.4	71.0	60.8	65.8	57.3
Dom. Republic	69.7	66.9	73.0	66.3	62.8
Grenada	62.3	64.8	71.0	69.0	71.0
Guadeloupe	65.3	66.3	57.0	n.a.	n.a.
Jamaica	58.7	57.0	58.5	56.3	55.5
Martinique	58.0	58.1	52.0	42.6	42.7
Mexico (Cancun)	76.4	73.0	73.8	71.8	66.7
Mexico (Conzumel)	n.a.	n.a.	63.5	60.8	52.7
Puerto Rico	68.8	72.1	65.9	63.4	n.a.
St. Maarten	57.9	59.3	67.1	n.a.	n.a.
St. Lucia	75.3	72.5	67.0	57.0	56.1
Trinidad / Tobago	52.2	59.5	n.a.	45.0	41.2
Turks / Caicos	72.0	70.0	65.0	75.0	70.0
U.S. Virgin Islands	52.5	55.8	58.4	56.6	57.0

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

* n.a. = data not available

International Aspects:

NUMBER OF ROOMS IN THE CARIBBEAN BY DESTINATION

Country	1998	% Share	1999	% Share	2000	% Share	2001	% Share	2002
Caribbean	234,092	100.0	242,177	100.0	253,602	100.0	261,866	100.0	261,003
Anguila	1,045	0.4	1,120	0.5	1,067	0.4	1,069	0.4	1,037
Antigua / Barbuda	3,185	1.4	3,185	1.3	3,185	1.3	3,185	1.2	3,185
Aruba	7,212	3.1	7,320	3.0	7,500	3.0	7,500	2.9	7,500
Bahamas	14,243	6.1	14,153	5.8	14,701	5.8	15,195	5.8	15,145
Barbados	5,752	2.5	5,643	2.3	6,456	2.5	6,781	2.6	6,742
Belize	3,921	1.7	3,963	1.6	4,106	1.6	4,463	1.7	4,705
Bermuda	3,857	1.6	3,276	1.4	3,339	1.3	3,337	1.3	3,251
Bonaire	1,086	0.5	989	0.4	1,050	0.4	1,001	0.4	1,070
Br. Virgin Island	1,592	0.7	1,643	0.7	1,661	0.7	1,688	0.6	1,765
Cayman Island	4,216	1.8	4,318	1.8	5,364	2.1	5,494	2.1	5,238
Cuba	35,708	15.3	37,114	15.3	38,072	15.0	40,158	15.3	41,323
Curacao	2,528	1.1	2,768	1.1	2,941	1.2	3,203	1.2	3,238
Dominica	847	0.4	867	0.4	890	0.4	899	0.3	889
Dom. Republic	44,665	19.1	49,623	20.5	51,916	20.5	53,964	20.6	54,730
Grenada	1,802	0.8	1,928	0.8	1,822	0.7	1,734	0.7	1,777
Guadeloupe	8,371	3.6	8,260	3.4	8,136	3.2	8,019	3.1	8,019
Guyana	730	0.3	730	0.3	730	0.3	730	0.3	730
Haiti	1,758	0.8	1,758	0.7	1,758	0.7	1,758	0.7	1,758
Jamaica	22,715	9.7	23,067	9.5	23,630	9.3	24,007	9.2	24,239
Martinique	7,400	3.2	7,341	3.0	8,733	3.4	8,733	3.3	8,733
Mexico (Cancun)	23,581	10.1	24,610	10.2	25,434	10.0	26,194	10.0	25,829
Mexico (Conzumel)	3,704	1.6	3,956	1.6	4,101	1.6	4,826	1.8	4,007
Montserrat	221	0.1	243	0.1	264	0.1	242	0.1	257
Puerto Rico	11,444	4.9	11,634	4.8	12,183	4.8	12,753	4.9	12,788
Saba	91	0.0	87	0.0	80	0.0	85	0.0	85
St. Eustatius	73	0.0	62	0.0	62	0.0	62	0.0	62
St. Maarten	4,174	1.8	3,065	1.3	3,545	1.4	3,548	1.4	3,548
St. Kitts / Nevis	1,762	0.8	1,754	0.7	1,754	0.7	1,754	0.7	1,754
St. Lucia	3,769	1.6	4,125	1.7	4,525	1.8	4,525	1.7	3,711
St. Vincent and Grenadines	1,550	0.7	1,540	0.6	1,747	0.7	1,762	0.7	1,504
Suriname	1,276	0.5	1,276	0.5	1,276	0.5	1,276	0.5	1,276
Trinidad / Tobago	3,323	1.4	4,236	1.7	4,532	1.8	4,850	1.9	4,387
Turks / Caicos	1,562	0.7	1,674	0.7	2,023	0.8	2,023	0.8	1,629
U.S. Virgin Islands	4,929	2.1	4,849	2.0	5,019	2.0	5,048	1.9	5,092

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



Economic Profile:

National Account concept!

Tourism:

All activities of visitors, including both “tourist” and “same-day visitors”. The activities of persons traveling to and staying in places outside their usual environment for not more than on consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited.

W.T.O.

Tourism:

By definition for National Accounts the visitors must generate additional consumption expenditure = Tourism Expenditure

Must generate economic activity!

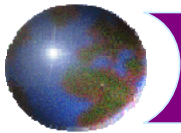
National Account:

Tourism is seen in National Accounts as an export of Goods and Services!

Tourist Satellite Account: *under construction (2005)*

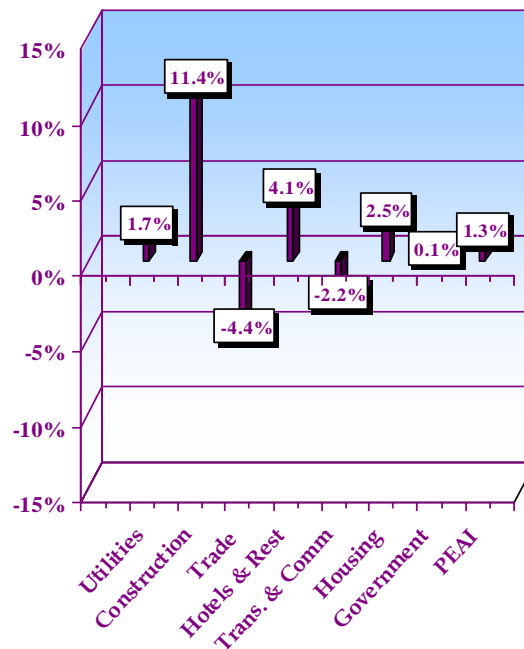
- National Accounts framework (Balance tourism consumption (demand) with the domestic supply and imports of goods and services)
- Gives the economic importance of Tourism (direct and induced)
- Internationally comparative instrument
- Consistent over time
- Offers a country a guide in the compilation of economic information concerning tourism

Economic Profile: the PEAI



Real developments of the industries of Aruba

2002 - 2003



- ☆ *Utilities* increased by 1.7% compared to 2002
- ☆ *Construction* registered a growth of 11.4% in 2003
- ☆ The downfall in the *Trade* industry persisted in 2003 at 4.4%
- ☆ *Hotels & Restaurants* showed a positive growth of 4.1% in 2003
- ☆ *Transport, Storage & Communication* decreased by 2.2% in 2003
- ☆ *Housing and Public Administration & Education* increased by 2.5% and 0.1% respectively
- ☆ The *PEAI* increased by 1.3% compared to 2002

Key Indicator: **GDP**

GDP 2001: Afl. 3,398.7 mill

GDP 2002: Afl. 3,421.2 mill



Central Bureau of Statistics

The End

“Information, the KEY to
progress!”