



## Creating a wealth of information... and knowledge

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# Tourism Division – C.B.S.



## All kind of Tourism Related data:

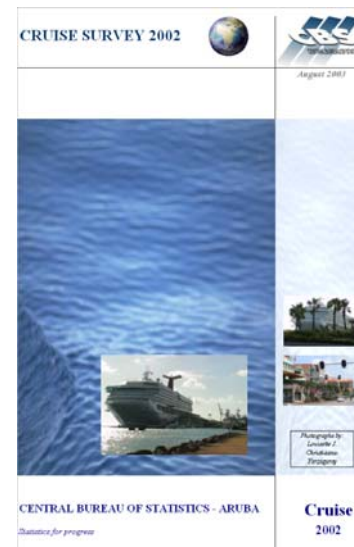
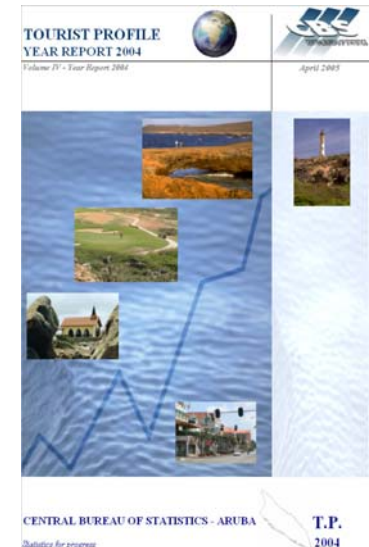
- Administrative Data

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)

- Survey Results done by C.B.S.

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



# Tourist Profile 2004



## TOURIST PROFILE YEAR REPORT 2004

Volume IV - Year Report 2004



April 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



# Tourist Profile 2004



## 1. Highlights

Tourism has assumed considerable importance in many countries and regions and its role in economic development has 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).

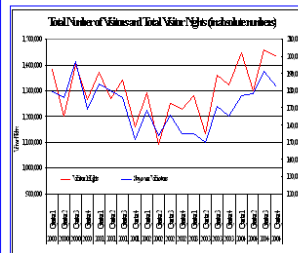
The combination of table and graphs present the estimated total tourism expenditure in every quarter starting from the years 1997 until 2004. It also gives quarterly percentage changes and quarter to quarter comparisons. Beside estimated total tourism expenditure, tourism expenditures that took place 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.

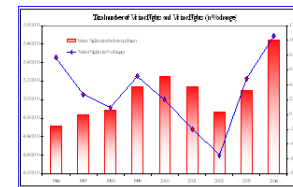
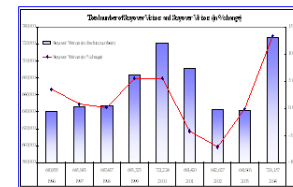
Main Economic Indicators:	2000	2001	2002	2003	2004
Total stayover visitors	723,224	691,420	640,257	640,956	720,157
Total cruise visitors	209,038	480,148	487,296	742,527	576,520
Total number of visitors	1,032,262	1,171,568	1,127,553	1,383,483	1,296,677
Total number of visitor nights (x 1,000)	5,247.8	5,344.6	4,862.4	5,097.6	5,639.9
Average length of stay	17	19	16	13	11
(The following indicators are all in US dollars)					
Average daily expenditure in Aruba	114.29	117.71	115.48	110.82	115.88
Tourism expenditure in Aruba	82,960,070	81,923,390	74,053,100	73,524,252	83,465,549
Estimated total tourism expenditure	770,920,390	941,561,160	674,070,594	676,861,123	824,645,693
Tourism receipts (night x 1,000)	89,385	896,704	924,034	553,073	1,042,993
Occupancy	75.9%	75.5%	71.9%	74.4%	74.4%
Average Daily Rate (in US\$)	128.71	138.51	138.89	133.89	144.76
Revenue per Available Room (in US\$)	71.54	75.26	69.79	69.99	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.

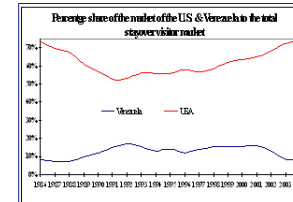
The graph below presents the number of stayover visitors and the number of visitor nights by quarter in absolute numbers. Seasonal patterns are very noticeable in this graph.



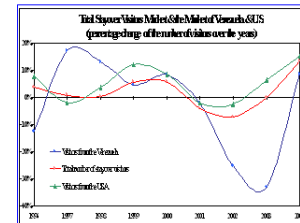
The following graph presents the total number of stayover visitors and visitor nights in absolute figures from the years 1996 until 2004, together with their respective percentage change over the years. In the year 2004, Aruba experienced a significant increase of 13.4% in number of stayover visitors 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.



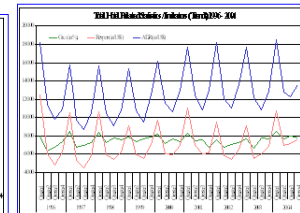
The graph below shows the market share of the visitors from the U.S. and the visitors from Venezuela to Aruba. From this graph can be concluded that Aruba is not only very dependent on the U.S. market but that the share of the U.S. market and the share of the Venezuelan market complement each other. 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 has 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 indicators 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 15.9% in 2004.



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Statistics for progress

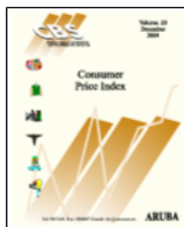
T.P.  
2004



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Government sector of Aruba  
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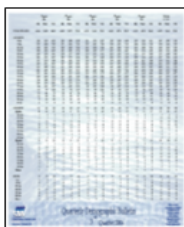


Tourist Profile  
Year report 2003, English  
**Afls. 25.00**



Foreign Trade Statistics  
Years 2000-2004, English  
**Afls. 15.00**

## Quarterly Publications CBS



Quarterly Demographic Bulletin  
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Tourist Profile  
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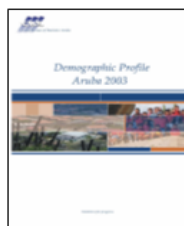


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Onderwijs op Aruba, Context en  
Output, Dutch, Incidental,  
**Afls.30.00**



Ontwikkelingen in de Hotel- en  
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# C.B.S. Publications:



## Incidental Publications CBS



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## Incidental Publications CBS



Leefomstandigheden van bejaarden op Aruba  
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Fourth Population and Housing Census, Oct. 14, 2000, Selected Tables  
English, Incidental,  
Afls. 40.00 (CDROM Afls. 30.00)



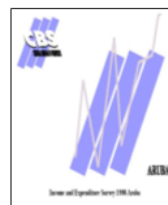
Cruise Survey 2002  
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Mapping Census 2000: Social-Demographic diversity on Aruba, 2002  
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