

Business Intelligence Meeting



Creating a wealth of
information... and knowledge

Outline of Presentation:



Presentation of “Tourist Profile Year Report 2004”

- Main results and trends - Visitor Survey 1996 - 2004
- Repeat Visitors and trends
- Source of information used before coming to Aruba
- Satisfaction rates of the visitors
- Expenditures of the visitors and trends
- Hotel statistics and trends
- Stay-over Visitors, Visitor Nights
- Cruise visitors

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
(Stayover 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

TOURIST PROFILE YEAR REPORT 2004

Volume IV - Year Report 2004



April 2005

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 expenditures in every quarter starting from the years 1997 until 2004. It also gives quarterly percentage change 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 Tourism Indicators	2000	2001	2002	2003	2004
Stayover visitors	12,224	85,428	42,627	64,738	74,117
Tourism revenue	20,025	49,545	45,236	76,227	74,117
Total value of visitor	1,581,242	1,181,748	1,230,703	1,842,723	1,564,477
Estimated tourism expenditure (US\$)	1,241.1	1,244.4	1,483.4	1,991.4	1,999.9
Change of spending	77	79	76	83	81
<i>(%)(Year-over-change, as of 12/31/04)</i>					
Average daily expenditure in Aruba	104.2	127.0	125.4	129.0	123.8
Tourism expenditure in Aruba	429,818.0	600,158.0	562,038.0	760,424.0	674,454.0
Estimated total tourism expenditure	722,223.0	744,290.0	821,665.0	1,131,299.0	1,125,023.0
Tourism revenue (Aruba)	100,300.0	104,704.0	94,004.0	133,919.0	124,730.0
<i>Occupancy</i>					
Average Daily Rate in US\$	120.1	126.0	130.0	130.0	140.0
Revenue per Available Room (RPAR) in US\$	17.56	17.25	18.75	18.39	18.14

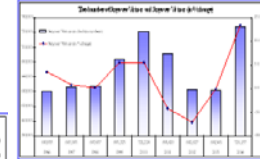
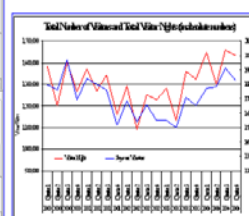
The following graph presents the total number of stayover visitors and visitor nights in absolute figures from the years 1996 until 2004, together with their respective percentage change over the years. In the year 2004, Aruba experienced a significant increase of 15.4% in number of stayover visitors after experiencing a decline in 2003 and after experiencing a decline in 2002 and 2001. The total number of visitor nights also increased significantly with 10.0% in 2004 which makes it the second consecutive increase after two consecutive years of decreases in 2002 and 2001.

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 2003. 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 59,000 in 2004. The total number of visitors from the U.S. and Venezuela alone stands for 81.0% of the total visitor market to Aruba.



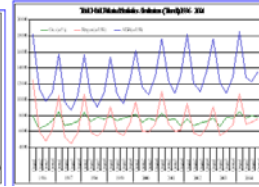
Several other graphs are presented in this section in order to show significant patterns (trends) in the tourism industry over the last years.

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.



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 (RPAR) 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 RPAR. In contrast to Occupancy, RPAR and ADR indicators reveal very steep patterns. What can be observed in the graph is that ADR and RPAR have very similar tendency, with the only difference that ADR have this tendency at a higher level. The difference in level between ADR and RPAR is logical because ADR is based on the occupied room nights while RPAR 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, 2.4% and 2.3% respectively. RPAR, on the other hand, increased reasonably with 13.9% in 2004.

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 5.0% 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%.



CENTRAL BUREAU OF STATISTICS - ARUBA

Statistics for progress

T.P.
2004



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: 2004 MONTH: _____

Confidential

Form I: Visitors leaving by Air

Atentie!

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 'N' in alle corresponderende hokjes of leeg laten.

Examples:

To indicate
Figures 3, 2, 7, 5
Writing ARUBA

Serial Number _____
Envelope 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: _____

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

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: _____

A5 Where did you stay in Aruba? (Please check only one!)

Hotel → Name: _____
 Guest House / Apartment / Villa (Go to question B7)
 Friend / Relative
 Other → Specify: _____
 Timeshare Resort → Name: _____ (Go to question B6)

A3 How many times have you been to Aruba?

First time 2-5 times 6 times and up

A6 Is this timeshare owned by you?

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

A4a Have you ever been to Aruba by cruise?

Yes No

A7 How many nights did you spend in Aruba?

Nights: _____

A4b Have you visited the Caribbean prior to this visit?

Yes (Go to question B10) No (Go to question B10)

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

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

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

A9 Person's sex? (by observation!!!)

Male Female

A4c Which other Caribbean island would you like to visit?

PLEASE CONTINUE ON THE OTHER SIDE

A10 What is your occupation?

Retired House wife Student
 Other: _____

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)
 Travel agency Name: _____
 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 (Go to question B10)

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

	(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: _____

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

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



“2004 – A Year in Review”

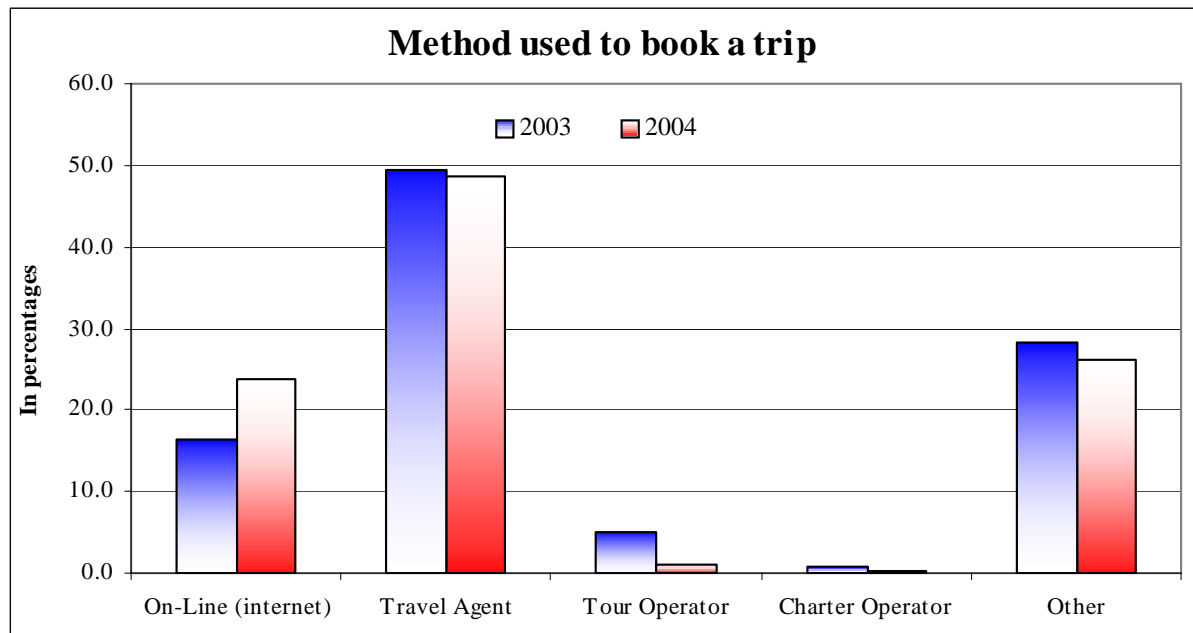


Method used to Book a trip?

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

	Qrt. 1 2003	Qrt. 2 2003	Qrt. 3 2003	Qrt. 4 2003	Year 2003	Qrt. 1 2004	Qrt. 2 2004	Qrt. 3 2004	Qrt. 4 2004	Year 2004
On-Line (internet)	12.8	17.7	14.7	20.4	16.5	21.0	28.2	21.2	24.8	23.8
Travel Agent	50.3	49.3	50.5	45.6	49.4	48.6	47.2	51.3	47.8	48.7
Tour Operator	2.5	4.2	7.6	5.4	5.0	0.9	0.9	0.7	1.3	1.0
Charter Operator	2.7	0.0	0.1	0.1	0.7	0.1	0.3	0.2	0.2	0.2
Other	31.8	28.7	27.1	28.5	28.3	29.3	23.4	26.6	25.9	26.1
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Source: Tourist Survey - Central Bureau of Statistics - Aruba

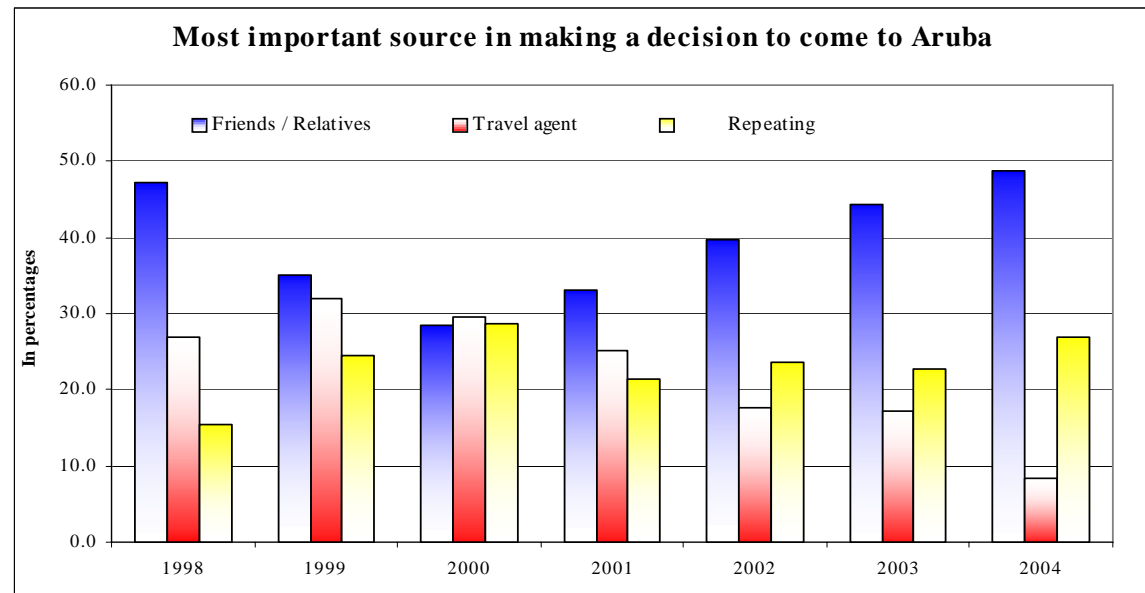


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Source of Information used before coming to Aruba?

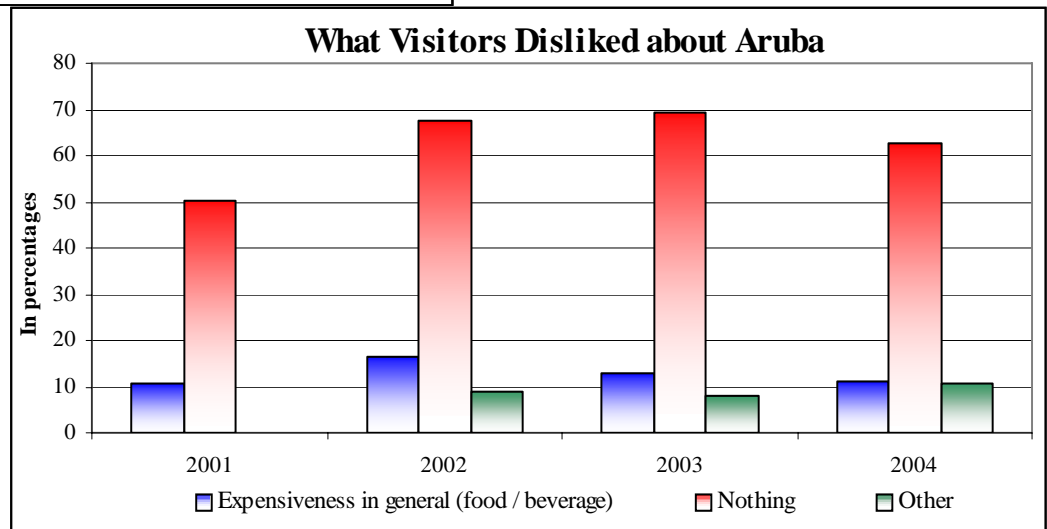
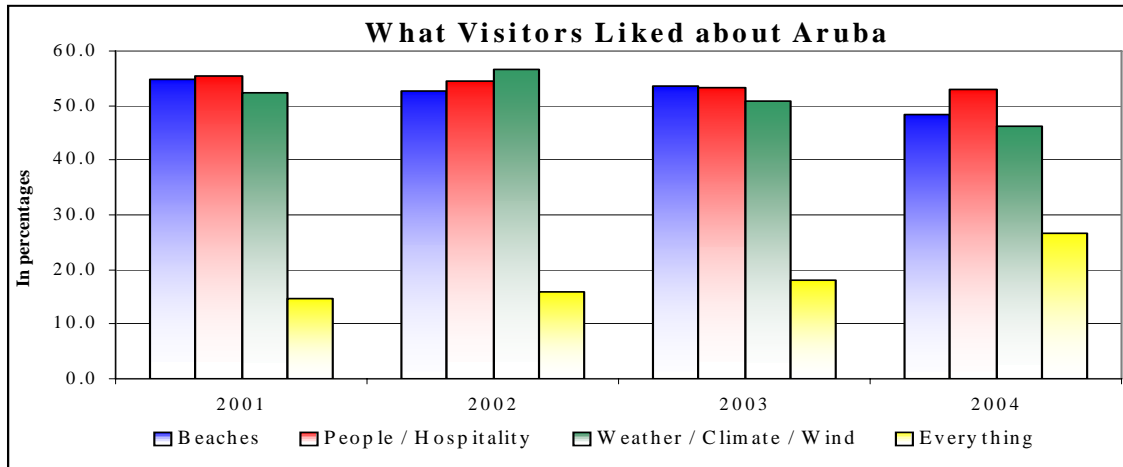
<u>Source of Information:</u>	Year 1997	Year 1998	Year 1999	Year 2000	Year 2001	Year 2002	Year 2003	Year 2004
Friends / Relatives	46.6	47.3	35.1	28.4	33.1	39.6	44.4	48.7
Travel agent	27.3	27.0	31.9	29.5	25.2	17.7	17.2	8.4
Newspaper / magazine	4.7	2.7	2.3	2.4	2.7	2.1	1.1	1.4
Television ad / Radio ad	1.6	0.7	0.4	0.7	0.8	0.6	0.5	0.8
Tourist board	1.2	0.9	0.6	1.1	1.1	0.6	0.6	0.6
Other	9.5	3.5	2.7	5.1	5.7	4.8	3.5	3.8
Repeating	8.0	15.5	24.5	28.6	21.4	23.7	22.8	26.9
Cruise	0.6	0.4	0.3	0.2	1.0	0.8	0.8	0.8
Internet	0.4	0.5	0.9	2.2	5.3	6.3	6.1	5.4
Business		1.1	1.4	1.4	3.7	3.8	2.8	3.0



“2004 – A Year in Review”



Likes and Dislikes of the Visitors?



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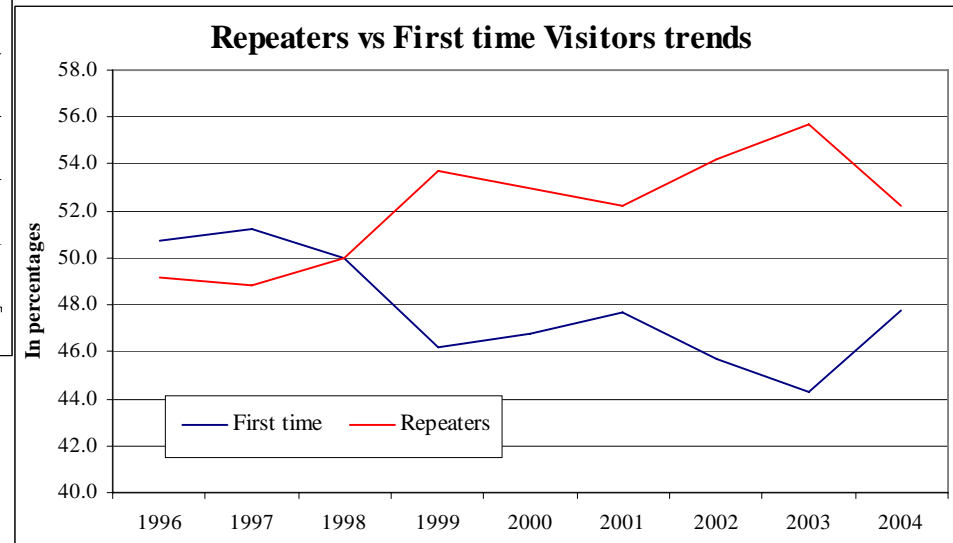
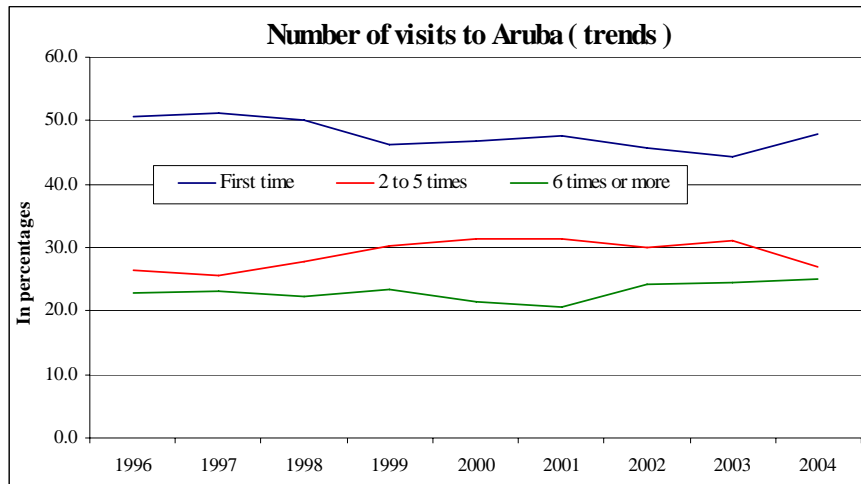


Repeat Visitors?

NUMBER OF VISITS TO ARUBA (In Percentages)

Number of visits	Year 2001	Year 2002	Qrt. 1 2003	Qrt. 2 2003	Qrt. 3 2003	Qrt. 4 2003	Year 2003	Qrt. 1 2004	Qrt. 2 2004	Qrt. 3 2004	Qrt. 4 2004	Year 2004
First time	47.7	45.7	42.9	43.1	46.1	45.0	44.3	42.2	52.8	50.8	45.5	47.8
2 to 5 times	31.5	29.9	31.9	33.4	31.2	28.0	31.1	27.4	26.9	25.4	28.8	27.1
6 times or more	20.7	24.3	25.2	23.5	22.6	27.0	24.6	30.4	20.3	23.9	25.7	25.1
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

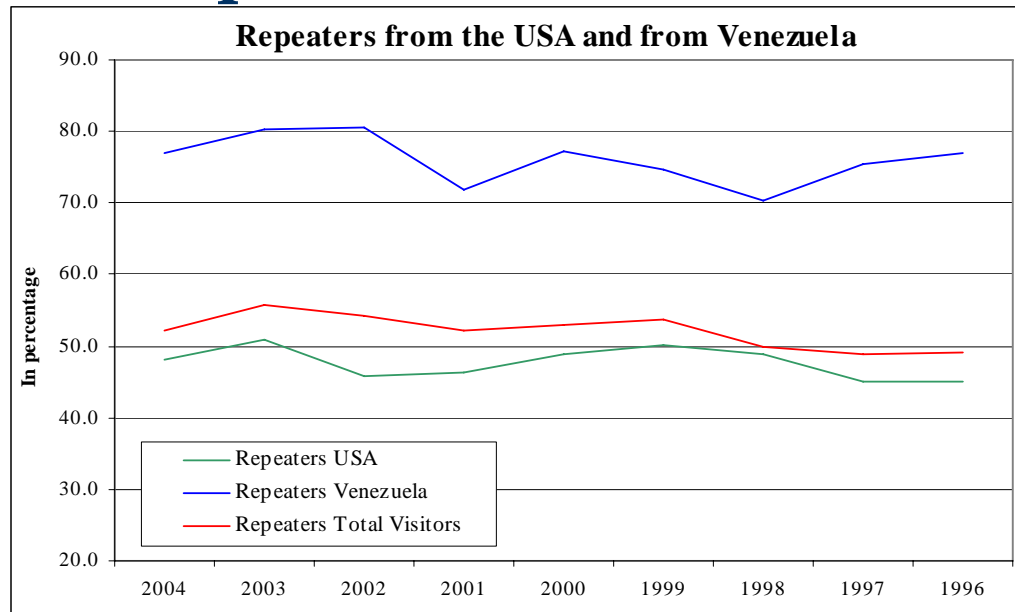
Source: Tourist Survey - Central Bureau of Statistics - Aruba



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Who are our Repeat Visitors?



VISTORS THAT HAVE BEEN TO ARUBA BY CRUISE AND HAVE BEEN TO THE CARIBBEAN PRIOR TO THIS VISIT

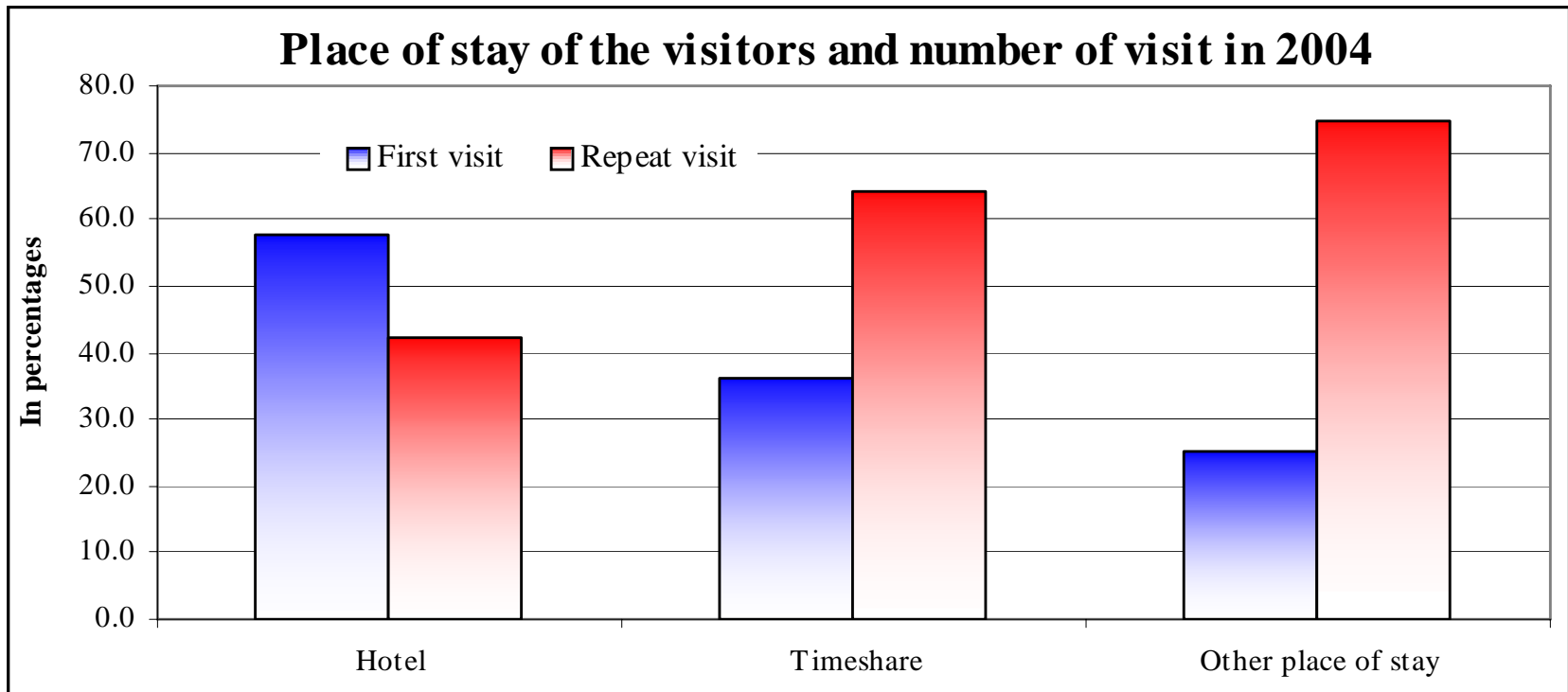
		Qrt. 1 2003	Qrt. 2 2003	Qrt. 3 2003	Qrt. 4 2003	Year 2003	Qrt. 1 2004	Qrt. 2 2004	Qrt. 3 2004	Qrt. 4 2004	Year 2004
<i>To Aruba (by cruise)</i>	Yes	7.5	7.0	2.9	7.7	6.3	11.4	7.7	5.9	10.3	8.8
	No	92.5	93.0	97.1	92.3	93.7	88.6	92.3	94.1	89.7	91.1
<i>To the Caribbean</i>	Yes	73.2	73.6	68.0	72.6	71.8	73.3	65.8	67.9	72.8	69.9
	No	26.8	26.4	32.0	27.4	28.2	26.7	34.2	32.1	27.2	29.9

Source: Tourist Survey - Central Bureau of Statistics - Aruba

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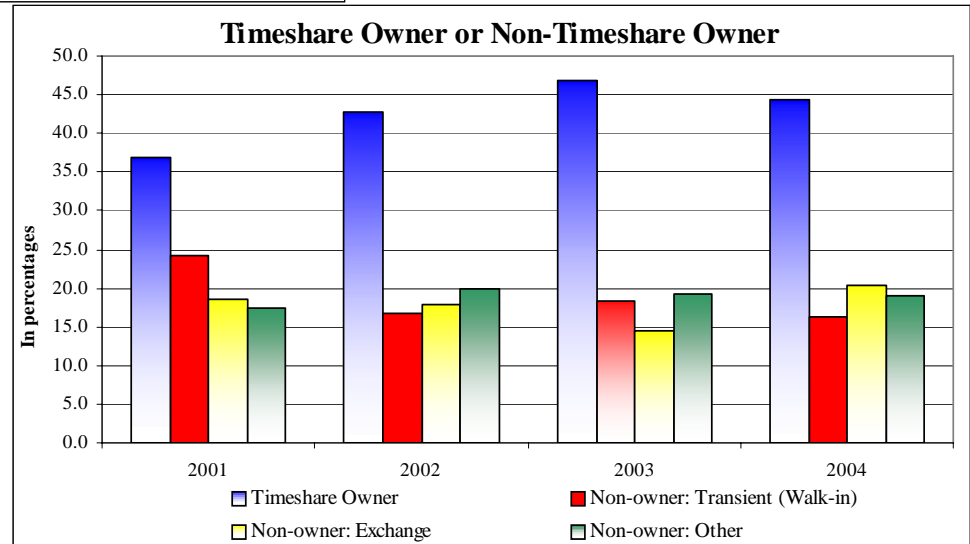
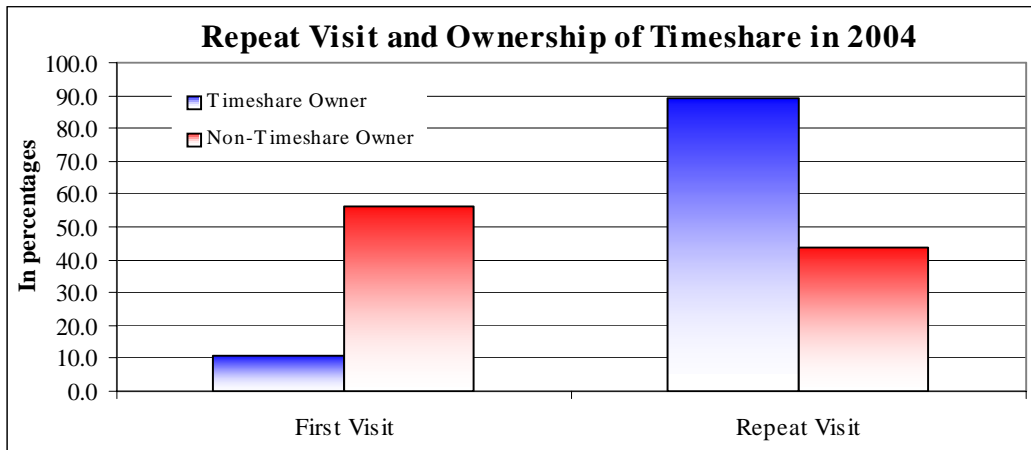
Who are our Repeat Visitors?



“2004 – A Year in Review”



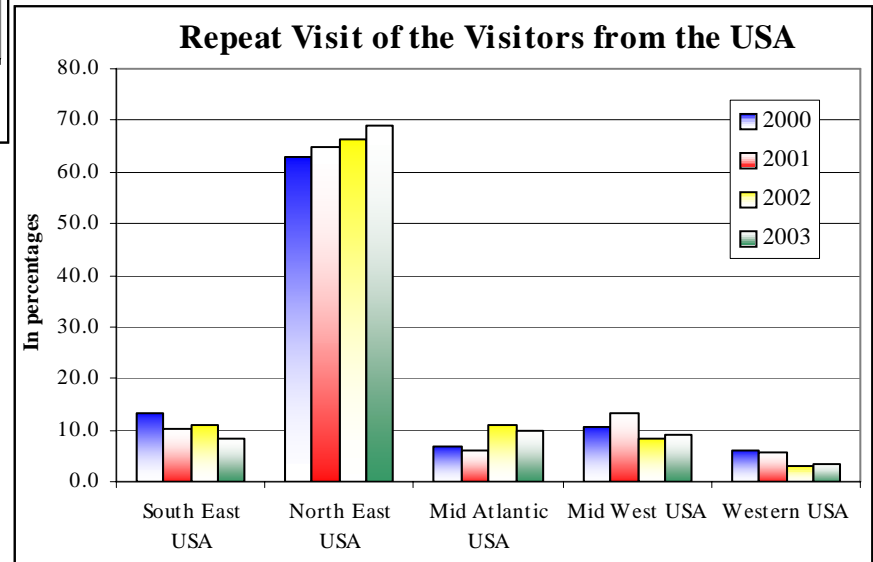
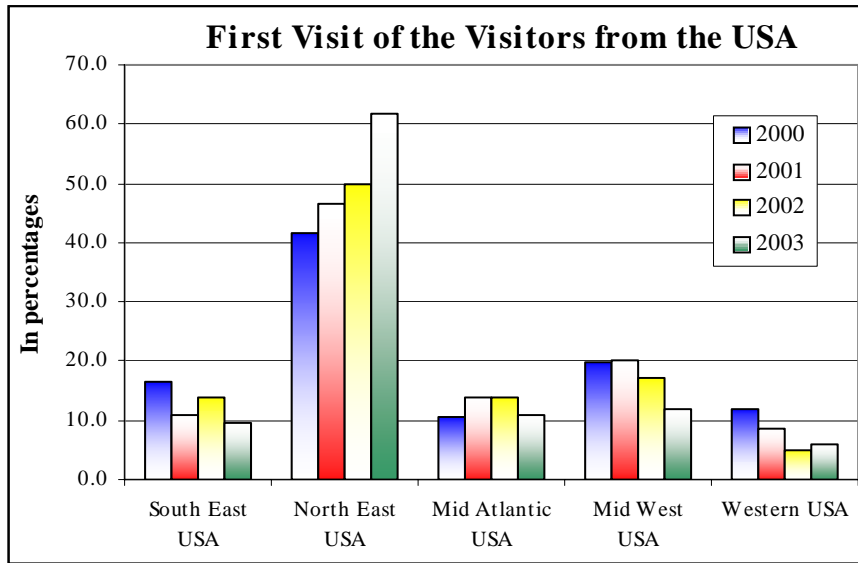
Repeat Visitors and Timeshare Ownership?



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Who are our Repeat Visitors?



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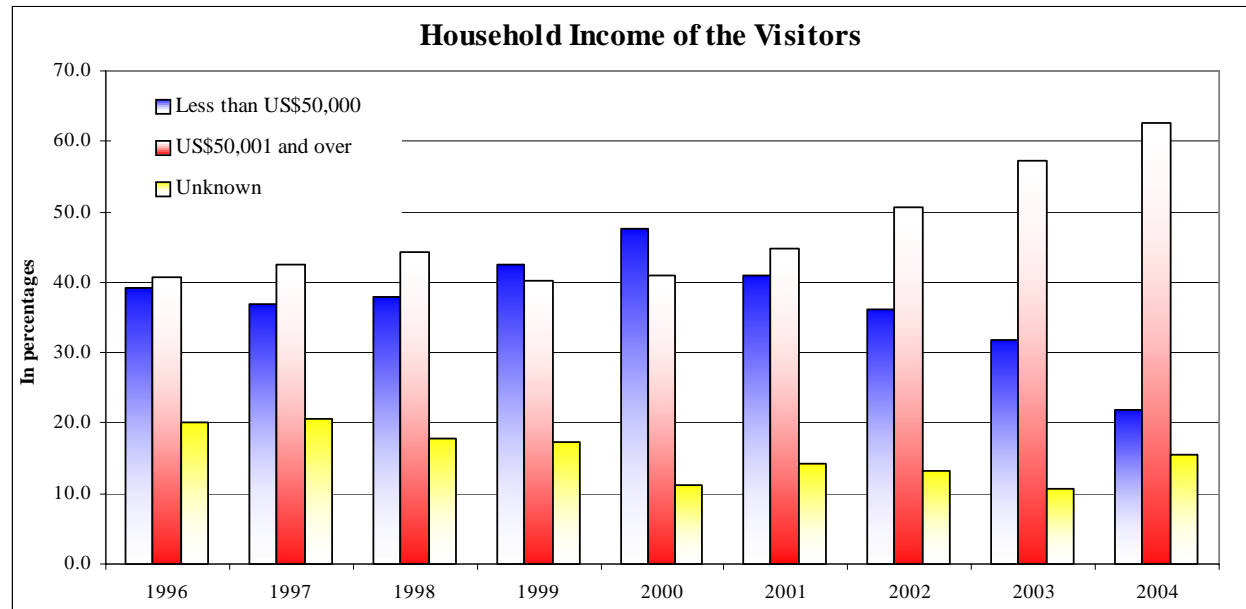


Household Income?

YEARLY HOUSEHOLD INCOME OF THE VISITORS (In Percentages)

Yearly household income	Year 2001	Year 2002	Qrt. 1 2003	Qrt. 2 2003	Qrt. 3 2003	Qrt. 4 2003	Year 2003	Qrt. 1 2004	Qrt. 2 2004	Qrt. 3 2004	Qrt. 4 2004	Year 2004
Less than US\$20,000	9.5	8.9	8.1	7.6	9.9	5.6	7.8	4.3	5.8	5.5	4.4	4.9
US\$20,001 - US\$30,000	11.8	9.4	5.9	8.4	10.1	5.8	7.6	4.0	4.6	5.0	3.8	4.3
US\$30,001 - US\$50,000	19.6	17.8	12.6	14.4	21.1	17.3	16.4	9.5	14.2	14.9	12.1	12.7
US\$50,001 - US\$75,000	18.0	21.5	24.6	30.7	28.2	28.8	28.1	26.9	24.8	24.5	24.0	25.1
US\$75,001 - US\$100,000	13.9	15.1	19.4	17.3	11.9	17.5	16.5	19.9	16.3	18.4	18.8	18.4
US\$100,001 and over	13.0	14.1	18.2	12.3	6.6	14.3	12.8	18.5	18.5	17.5	21.5	19.0
Unknown	14.3	13.3	11.2	9.2	12.2	10.7	10.8	16.9	15.7	14.2	15.5	15.6
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Source: Tourist Survey - Central Bureau of Statistics - Aruba



“2004 – A Year in Review”



Expenditures of the Visitors?

AVERAGE DAILY EXPENDITURE SPENT IN ARUBA PER CATEGORY ¹⁾ (In US\$)

Categories of expenditures	Year 2001	Year 2002	Qrt. 1 2003	Qrt. 2 2003	Qrt. 3 2003	Qrt. 4 2003	Year 2003	Qrt. 1 2004	Qrt. 2 2004	Qrt. 3 2004	Qrt. 4 2004	Year 2004
Accommodation ²⁾	27.11	28.85	29.23	21.35	20.47	27.83	24.73	35.21	29.61	23.01	31.19	29.75
Food & beverage	24.29	25.82	27.53	22.53	21.28	26.57	24.49	28.86	25.78	24.12	29.26	27.01
Groceries / sundries	3.24	3.42	4.03	3.03	2.80	2.80	3.17	3.19	2.60	2.83	3.24	2.96
Entertainment / recreation	8.79	8.28	7.22	6.84	6.62	7.81	7.12	9.27	8.04	7.58	7.28	8.04
Taxis	2.76	2.96	2.99	2.50	3.43	3.59	3.12	3.02	2.84	2.87	3.33	3.02
Car rental	4.69	4.56	4.15	4.00	3.51	3.75	3.85	4.20	3.77	3.33	3.58	3.72
Public transportation	0.35	0.27	0.28	0.24	0.24	0.29	0.26	0.22	0.21	0.24	0.31	0.25
Tax free shopping	7.22	5.87	4.97	3.47	4.91	7.99	5.33	3.59	3.27	4.00	10.74	5.40
Shopping	19.00	18.20	14.66	13.39	15.64	16.28	14.96	15.06	12.50	15.49	24.89	17.00
Casinos	15.45	13.75	15.90	13.57	12.02	15.97	14.36	16.10	13.18	11.06	14.88	13.71
Telephone / Internet	n.a.	n.a.	2.12	0.71	0.74	0.85	1.11	0.98	0.71	0.72	0.90	0.83
Departure tax	1.61	1.63	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Other ³⁾	3.19	1.89	1.75	0.92	1.02	1.59	1.32	0.76	1.02	3.75	1.43	1.71
Total (In US\$)	117.71	115.48	114.81	92.54	92.70	115.32	103.82	124.77	106.06	104.11	128.52	115.88

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

Place of residence	Year 2001	Year 2002	Qrt. 1 2003	Qrt. 2 2003	Qrt. 3 2003	Qrt. 4 2003	Year 2003	Qrt. 1 2004	Qrt. 2 2004	Qrt. 3 2004	Qrt. 4 2004	Year 2004
USA	112.97	117.43	114.31	94.49	94.23	113.78	104.37	128.59	108.57	104.78	132.01	118.75
Venezuela	163.77	143.09	157.48	119.32	102.16	138.29	124.90	163.72	145.40	124.55	202.60	155.28
Netherlands	52.61	67.04	60.14	55.66	47.70	96.44	66.13	65.31	52.57	97.93	54.21	67.36
Brazil	170.09	219.68	*	*	*	*	157.17	*	*	*	*	176.12
Netherlands Antilles	112.24	123.73	135.03	72.57	81.55	92.82	93.18	97.74	123.72	85.77	82.08	94.82
Canada	82.66	55.82	72.44	58.69	62.20	72.09	68.12	83.34	114.02	81.54	109.19	95.95
Colombia	122.79	86.15	66.50	91.11	84.21	114.50	89.61	121.30	72.38	70.84	86.60	93.40
Other	106.26	93.04	133.83	65.02	99.80	145.90	110.45	105.55	95.81	70.29	112.63	93.76
Total visitors	117.71	115.48	114.81	92.54	92.70	115.32	103.82	124.77	106.06	104.11	128.52	115.88

Source: Tourist Survey - Central Bureau of Statistics - Aruba

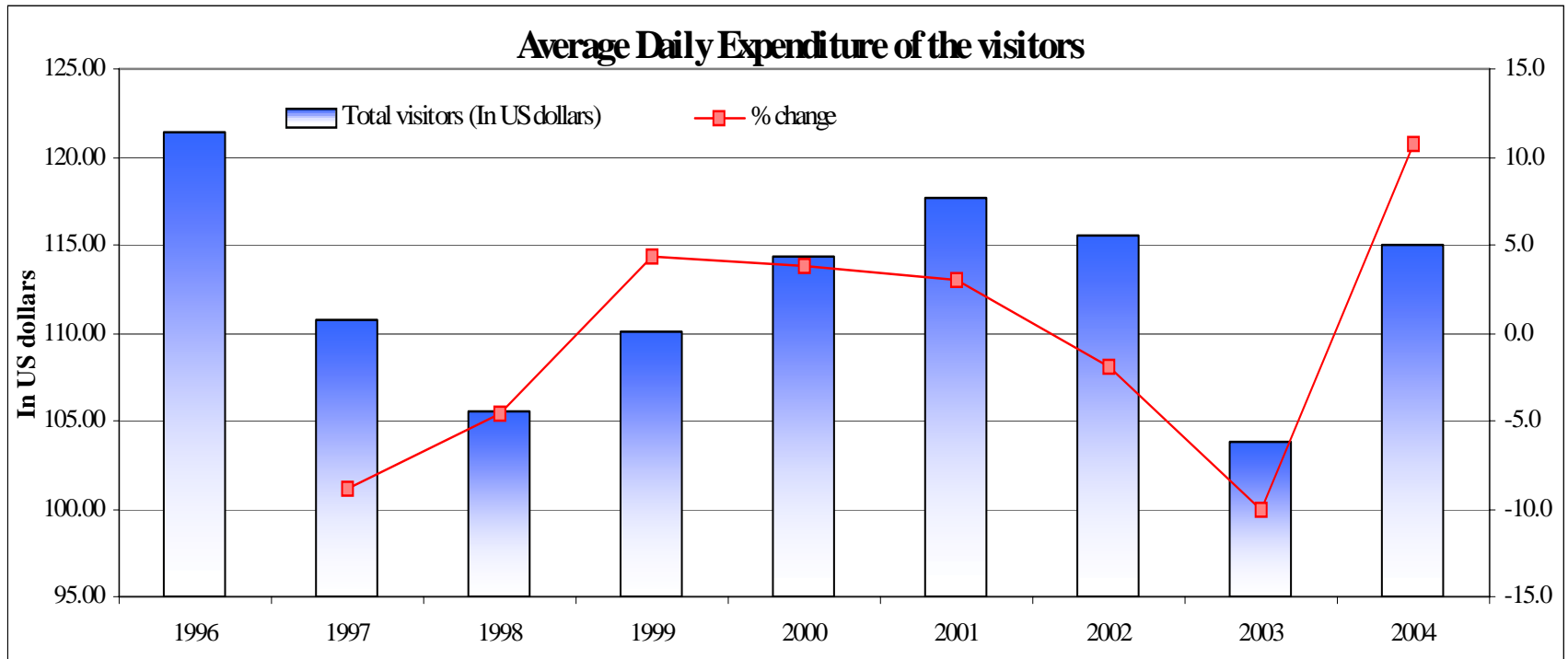
* = not representative due to a small sample

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

“2004 – A Year in Review”



Expenditures of the Visitors?



“2004 – A Year in Review”

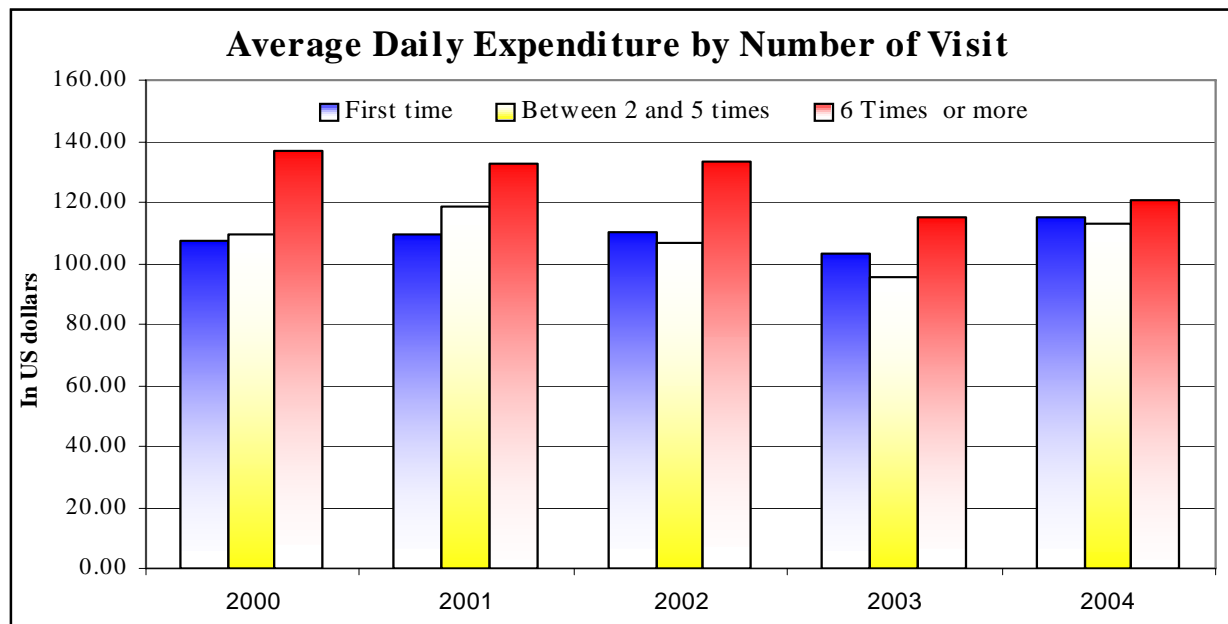


Expenditures of the Visitors?

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

Number of visits	Year 2000	Year 2001	Year 2002	Year 2003	Year 2004
First time	107.37	109.79	110.37	103.37	114.97
Between 2 and 5 times	109.15	118.71	106.38	95.69	113.10
6 Times or more	137.16	132.52	133.03	115.07	120.59

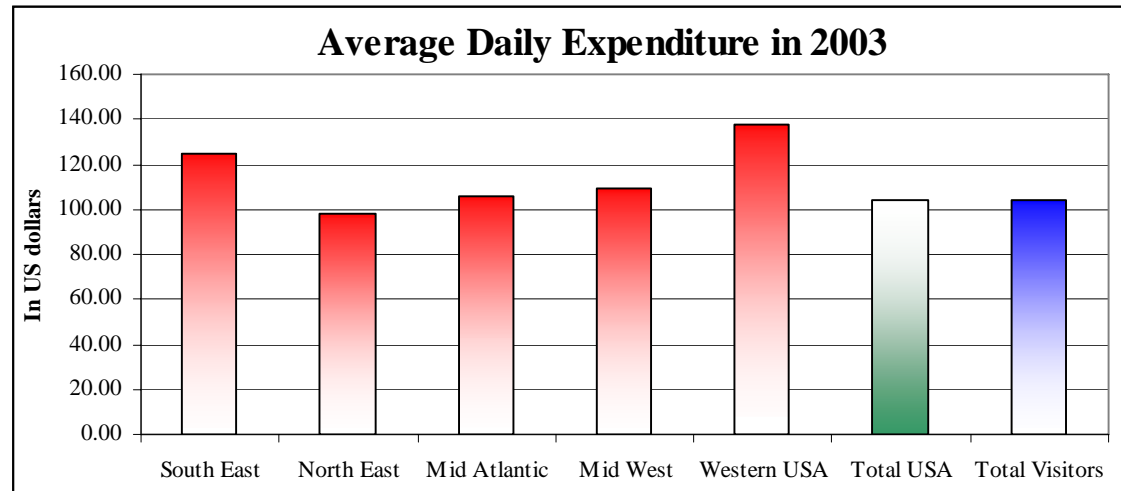
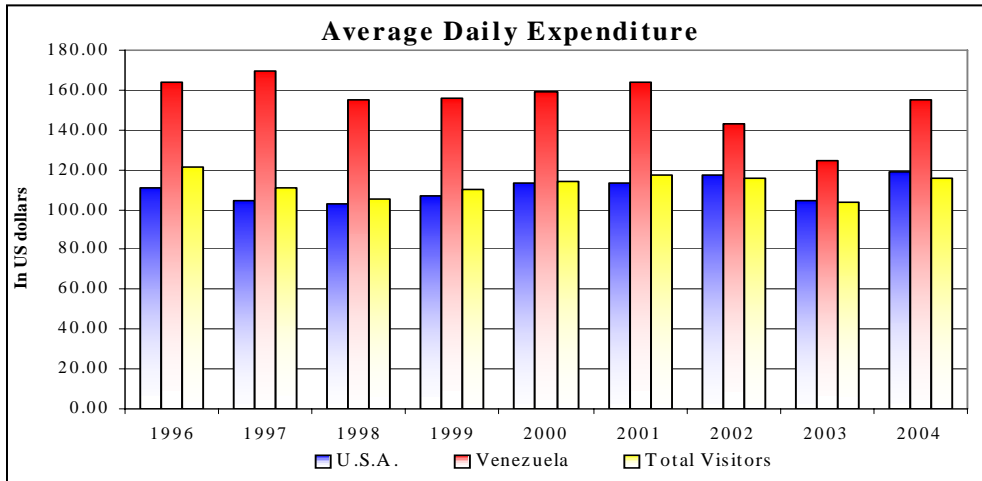
Source: Tourist Survey - Central Bureau of Statistics - Aruba



“2004 – A Year in Review”



Expenditures of the Visitors?



“2004 – A Year in Review”

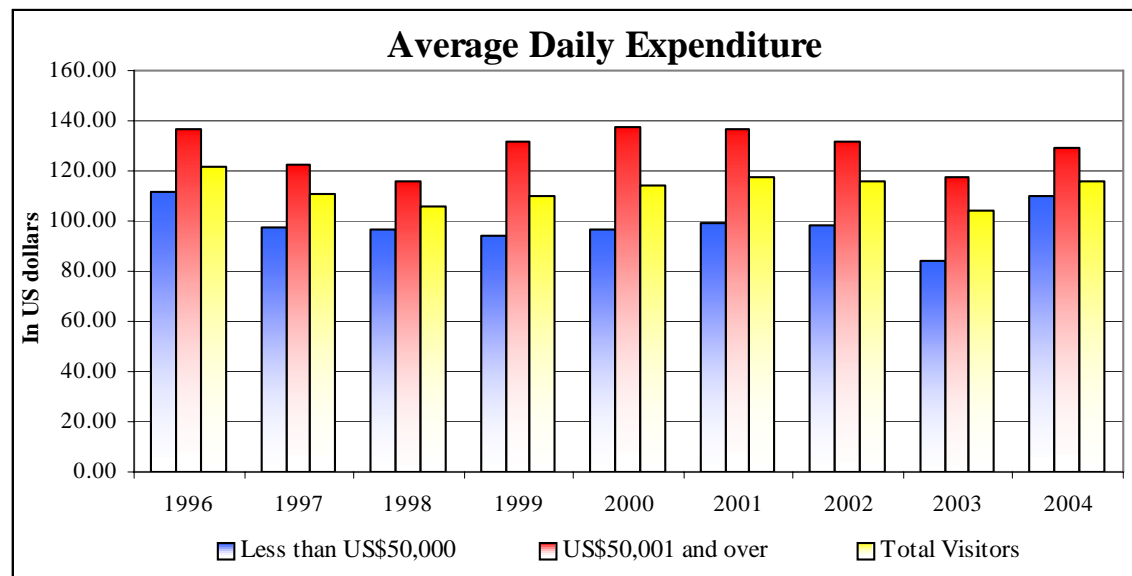


Expenditures of the Visitors?

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

Number of visits	Year 2001	Year 2002	Year 2003	Year 2004
Less than US\$20,000	87.07	70.88	61.78	80.54
US\$20,001 - US\$30,000	95.85	117.2	94.30	110.48
US\$30,001 - US\$50,000	106.82	101.03	89.72	98.82
US\$50,001 - US\$75,000	110.21	104.91	98.91	106.29
US\$75,001 - US\$100,000	137.94	137.43	119.88	122.60
US\$100,001 and over	171.22	164.92	157.12	149.67
Unknown	109.91	102.56	87.33	115.88

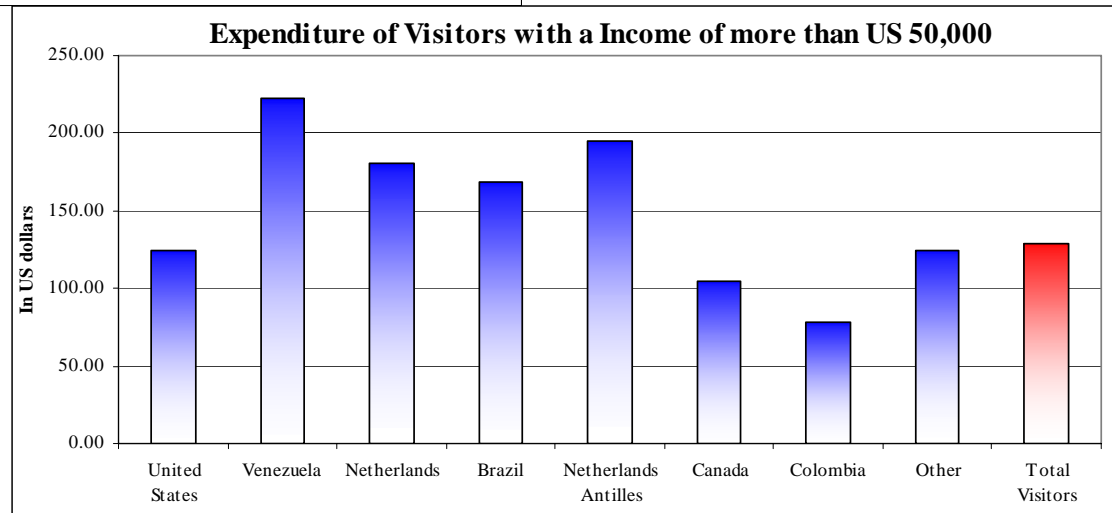
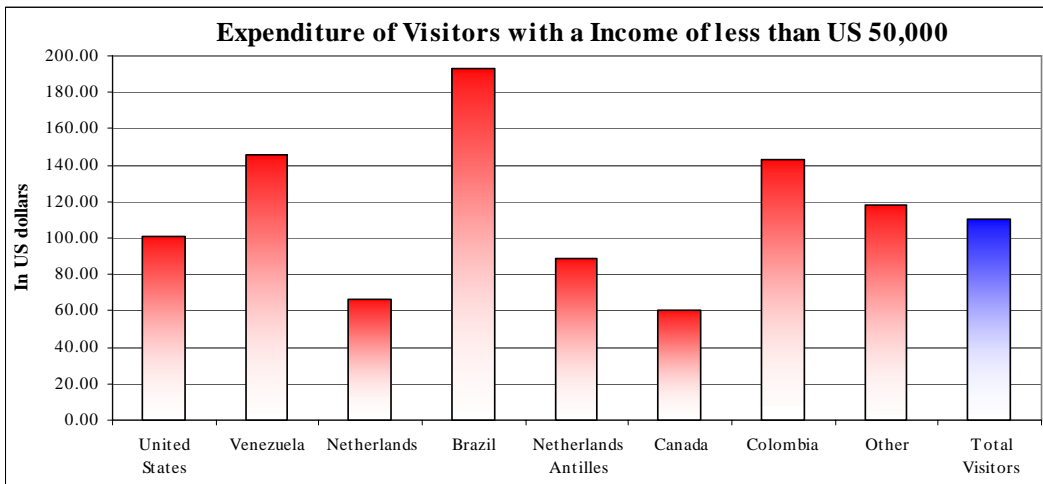
Source: Tourist Survey - Central Bureau of Statistics - Aruba



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Expenditures of the Visitors?



“2004 – A Year in Review”



Expenditures of the Visitors?

AVERAGE EXPENDITURE PER PERSON PER TRIP BY THE MAJOR MARKETS ¹⁾ (BUDGET) (In US\$)

Place of residence	Year 2001	Year 2002	Year 2003	Year 2004
U.S.A.	862.98	854.89	783.82	866.88
Venezuela	891.73	911.48	1,049.16	1,173.92
Netherlands	647.68	756.21	820.01	899.26
Brazil	1,306.97	1,414.74	916.30	1,516.39
Netherl. Antilles	614.74	553.07	522.74	705.46
Canada	669.22	452.70	565.40	811.74
Colombia	1,636.55	966.60	1,263.50	1,247.82
Other	1,102.66	937.84	1,296.68	1,054.80
Total visitors	925.32	873.03	861.71	938.63

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.

TOURISM EXPENDITURE IN ARUBA BY THE MAJOR MARKETS ¹⁾ (In 000 US\$)

Place of residence	Year 2001	Year 2002	Year 2003	Year 2004
U.S.A.	387,038.65	373,296.44	364,057.14	463,893.42
Venezuela	97,499.72	74,436.28	57,235.87	69,517.01
Netherlands	18,431.08	21,167.86	29,860.74	34,281.44
Brazil	3,957.51	3,273.71	2,551.90	7,221.06
Netherl. Antilles	12,097.44	10,841.34	10,957.67	15,147.65
Canada	12,665.57	7,967.98	9,734.99	16,689.31
Colombia	39,191.98	22,581.78	14,400.12	13,286.83
Other	43,612.41	31,353.04	44,228.56	35,978.17
Total visitors	639,783.59	561,031.88	553,134.25	683,468.55

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. (see highlights for further explanation and comments.)

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Expenditures of the Visitors?

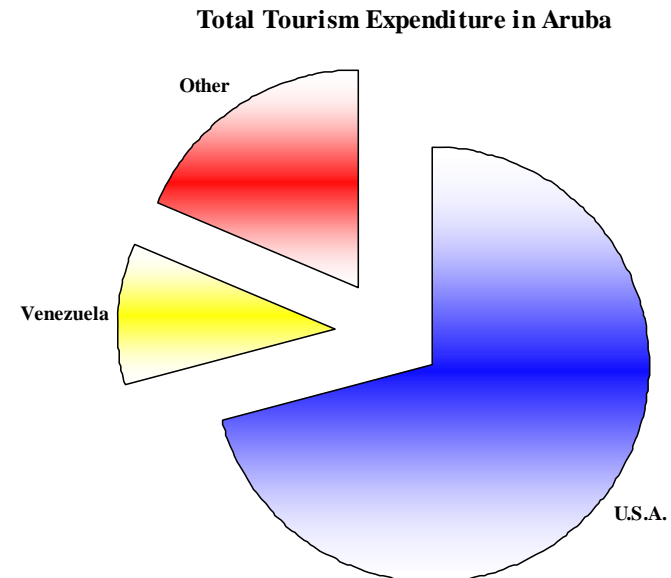
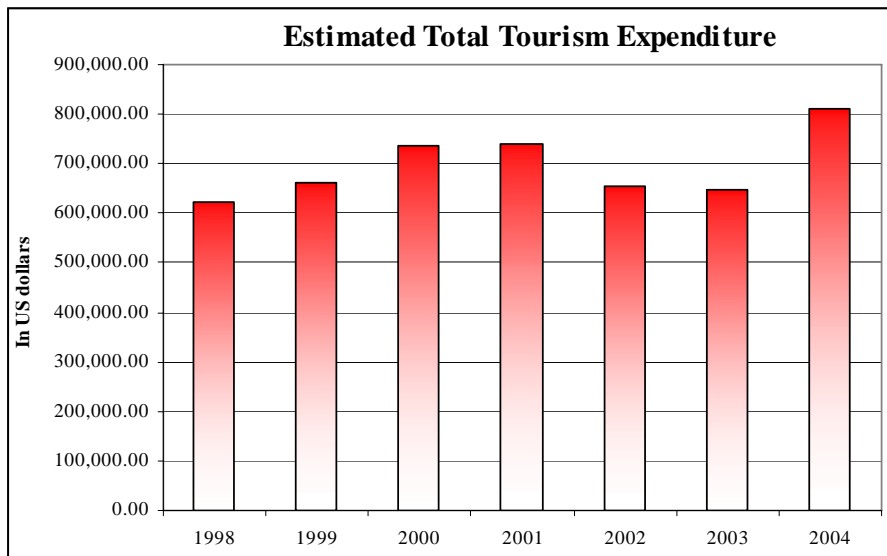
ESTIMATED TOTAL TOURISM EXPENDITURE ¹⁾ (In 000 US\$)

Estimated total tourism expenditure	1998	1999	2000	2001	2002	2003	2004
Quarter 1	178,446.78	176,451.27	197,810.54	210,613.13	183,747.62	183,443.41	234,504.32
Quarter 2	144,563.88	141,537.96	182,730.00	183,904.65	156,480.25	131,786.76	182,441.32
Quarter 3	148,282.61	166,482.57	181,343.80	171,264.48	152,329.66	153,559.06	185,476.31
Quarter 4	150,183.67	177,173.15	175,145.64	173,471.01	161,513.30	178,696.91	209,986.75 *
Total	621,476.94	661,644.95	737,029.98	739,253.27	654,070.83	647,486.13	812,408.69 *

Source: Tourist Survey - Central Bureau of Statistics - Aruba

* Provisional

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



“2004 – A Year in Review”



Hotel Related Statistics?

**AHATA
MONTHLY
PERFORMANCE
REPORT**

NOT AVAILABLE
FOR PUBLICATION

DECEMBER 2004



Central Bureau of Statistics REvised
L.G. Smith Boulevard # 160 Date: 18 January, 2005
Oranjestad, Aruba
Contact Person: Louissette Christiaans-Yarzagaray /
Marlen Barendregt - Croes
Tel: 583-7433 / Fax: 583-8057 / cbs@setarnet.aw

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	43.9%	72.9%	0.0%	68,225	96.3%	-2.5%	\$ 226.65	15.0%	116.3%	\$ 15,463	\$ 165.11	15.0%	1.74	4.6%
Under 275 rooms	1,057	15.3%	81.0%	12.9%	26,544	107.1%	10.1%	\$ 111.85	9.6%	57.4%	\$ 2,969	\$ 90.61	23.8%	0.95	12.6%
HOTEL - TOTAL	4,078	59.2%	75.0%	3.3%	94,769	99.1%	0.7%	\$ 194.49	12.7%	99.8%	\$ 18,432	\$ 145.80	16.4%	1.53	5.9%
TIME SHARE	2,808	40.8%	76.6%	1.2%	66,663	101.3%	-1.3%	\$ 199.51	16.0%	102.3%	\$ 1,857	\$ 21.33	-4.0%	0.22	-12.7%
GRAND TOTAL	6,886	100.0%	75.6%	2.6%	161,432	100.0%	0.0%	\$ 194.94	13.0%	100.0%	\$ 20,289	\$ 95.04	9.9%	1.00	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	3,021	45.8%	80.9%	3.1%	224,684	101.1%	-0.9%	\$ 161.30	10.8%	112.4%	\$ 36,242	\$ 130.40	14.2%	1.65	-0.4%
Under 275 rooms	990	15.0%	86.2%	17.8%	78,123	107.2%	12.7%	\$ 96.33	14.3%	67.1%	\$ 7,526	\$ 82.66	34.1%	1.05	16.9%
HOTEL - TOTAL	4,011	60.8%	82.2%	6.6%	302,807	102.6%	2.4%	\$ 144.54	10.8%	100.7%	\$ 43,767	\$ 118.62	18.1%	1.50	3.0%
TIME SHARE	2,587	39.2%	76.8%	0.1%	182,816	96.0%	-3.7%	\$ 133.31	16.3%	92.9%	\$ 4,111	\$ 17.25	6.2%	0.22	-7.4%
GRAND TOTAL	6,599	100.0%	80.1%	4.1%	485,623	100.0%	0.0%	\$ 143.50	11.4%	100.0%	\$ 47,879	\$ 78.84	14.7%	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	3,024	46.4%	83.6%	13.0%	925,089	103.5%	4.8%	\$161.76	6.4%	111.7%	\$149,640	\$135.18	20.6%	1.6	1.3%
Under 275 rooms	1,018	15.6%	84.6%	12.3%	315,190	105.2%	3.8%	\$97.64	8.7%	67.4%	\$ 30,775	\$82.59	22.0%	1.0	3.2%
HOTEL - TOTAL	4,043	62.0%	83.8%	12.8%	1,240,279	103.9%	4.5%	\$145.46	7.3%	100.5%	\$180,415	\$121.94	21.3%	1.5	1.9%
TIME SHARE	2,481	38.0%	75.5%	0.8%	685,682	93.5%	-7.3%	\$137.21	17.2%	94.8%	\$ 15,243	\$16.78	2.2%	0.2	-13.9%
GRAND TOTAL	6,524	100.0%	80.7%	8.4%	1,925,961	100.0%	0.0%	\$144.78	8.3%	100.0%	\$195,658	\$81.94	18.9%	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
Hvatt Regency Aruba
Radisson Hotel

Under 275 Rooms = 8

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

TIME SHARE = 12

Aruba Beach Club
Aruba Renaissance Beach Resort
Aruba Marriott Ocean Club
Aruba (Marriott) Surf 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

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

Did Not Report !!!

CLOSED !!!

“2004 – A Year in Review”



Hotel Related Statistics?

OCCUPANCY AND OTHER HOTEL STATISTICS

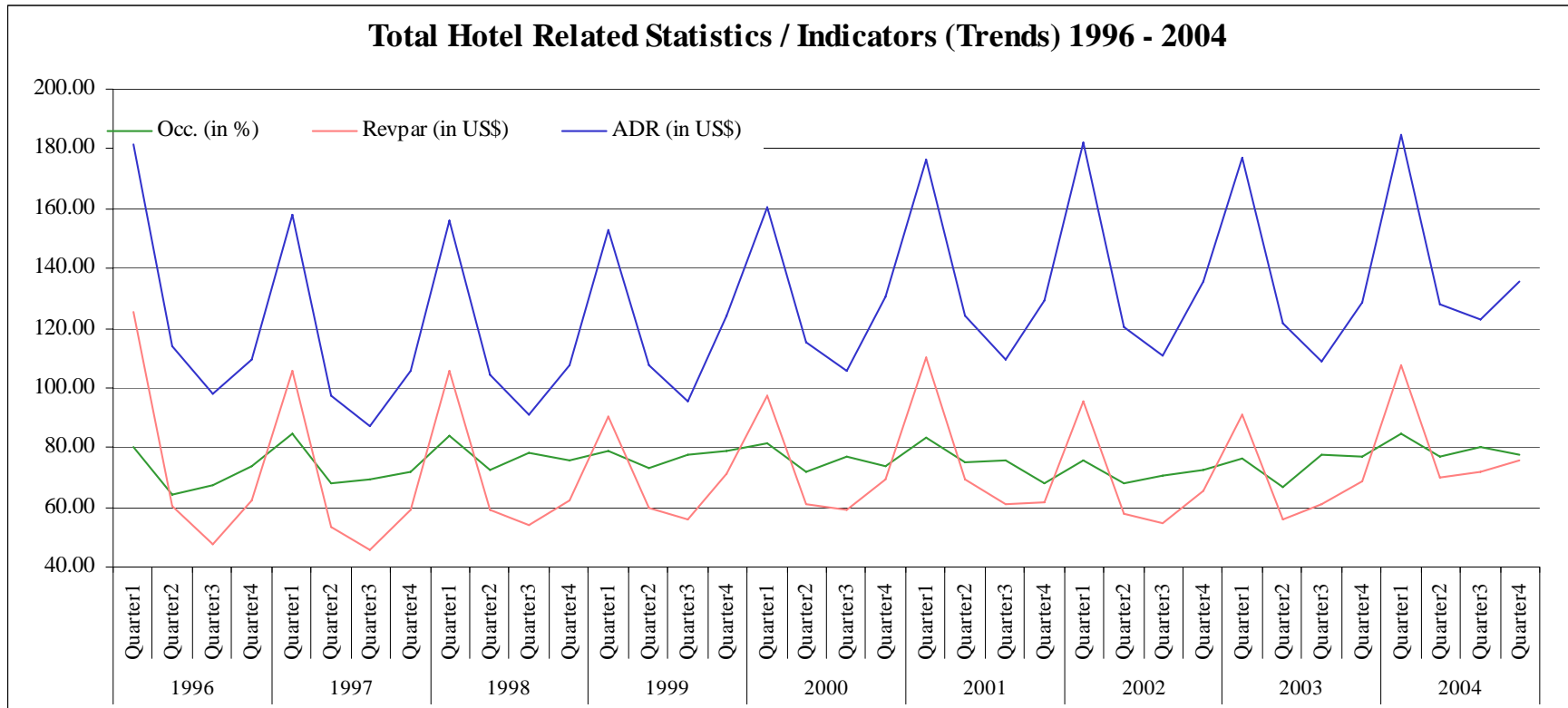
Categories:	Year 2001	Year 2002	Qrt. 1 2003	Qrt. 2 2003	Qrt. 3 2003	Qrt. 4 2003	Year 2003	Qrt. 1 2004	Qrt. 2 2004	Qrt. 3 2004	Qrt. 4 2004	Year 2004
<i>Hotel :</i>												
Occupancy	75.7%	70.5%	74.8%	64.7%	80.0%	77.1%	74.3%	87.1%	80.3%	85.8%	82.2%	83.8%
Average Daily Rate	\$138.89	\$140.40	\$178.01	\$124.24	\$110.99	\$130.42	\$135.58	\$182.79	\$128.36	\$124.01	\$144.54	\$145.46
Revenue per available room	\$105.25	\$99.00	\$132.88	\$80.36	\$89.79	\$100.48	\$100.52	\$159.26	\$103.29	\$106.38	\$118.62	\$121.94
<i>Timeshare :</i>												
Occupancy	74.2%	73.4%	79.1%	70.6%	73.2%	76.7%	74.9%	80.2%	72.3%	72.6%	76.8%	75.5%
Average Daily Rate	\$115.71	\$121.31	\$165.65	\$101.61	\$92.36	\$114.64	\$117.09	\$188.36	\$121.08	\$112.67	\$133.31	\$137.21
Revenue per available room	\$21.78	\$17.61	\$21.45	\$14.40	\$13.64	\$16.25	\$16.42	\$20.48	\$15.00	\$14.29	\$17.25	\$16.78
<i>Total :</i>												
Occupied Room Nights	1,833,045	1,725,310	451,205	400,035	468,769	465,034	1,785,043	505,479	462,216	472,643	485,623	1,925,961
Occupancy	75.5%	71.9%	76.4%	66.9%	77.4%	76.9%	74.4	84.5%	77.3%	80.9%	80.1	80.7
Average Daily Rate	\$136.01	\$138.09	\$176.83	\$121.62	\$109.12	\$128.84	133.69	\$183.18	\$127.74	\$123.09	143.50	144.78
Rev. per avail. room	\$75.26	\$68.78	\$90.86	\$55.69	\$60.94	\$68.76	68.89	\$106.96	\$69.91	\$71.85	\$78.84	\$81.94
Total Room Revenue	\$182,673,631	\$ 165,077,427	\$53,735,790	\$33,297,890	\$36,623,005	\$41,573,836	\$ 165,230,521	\$63,978,401	\$41,801,932	\$41,999,212	\$47,878,552	\$ 195,658,097

Source: Central Bureau of Statistics - Aruba

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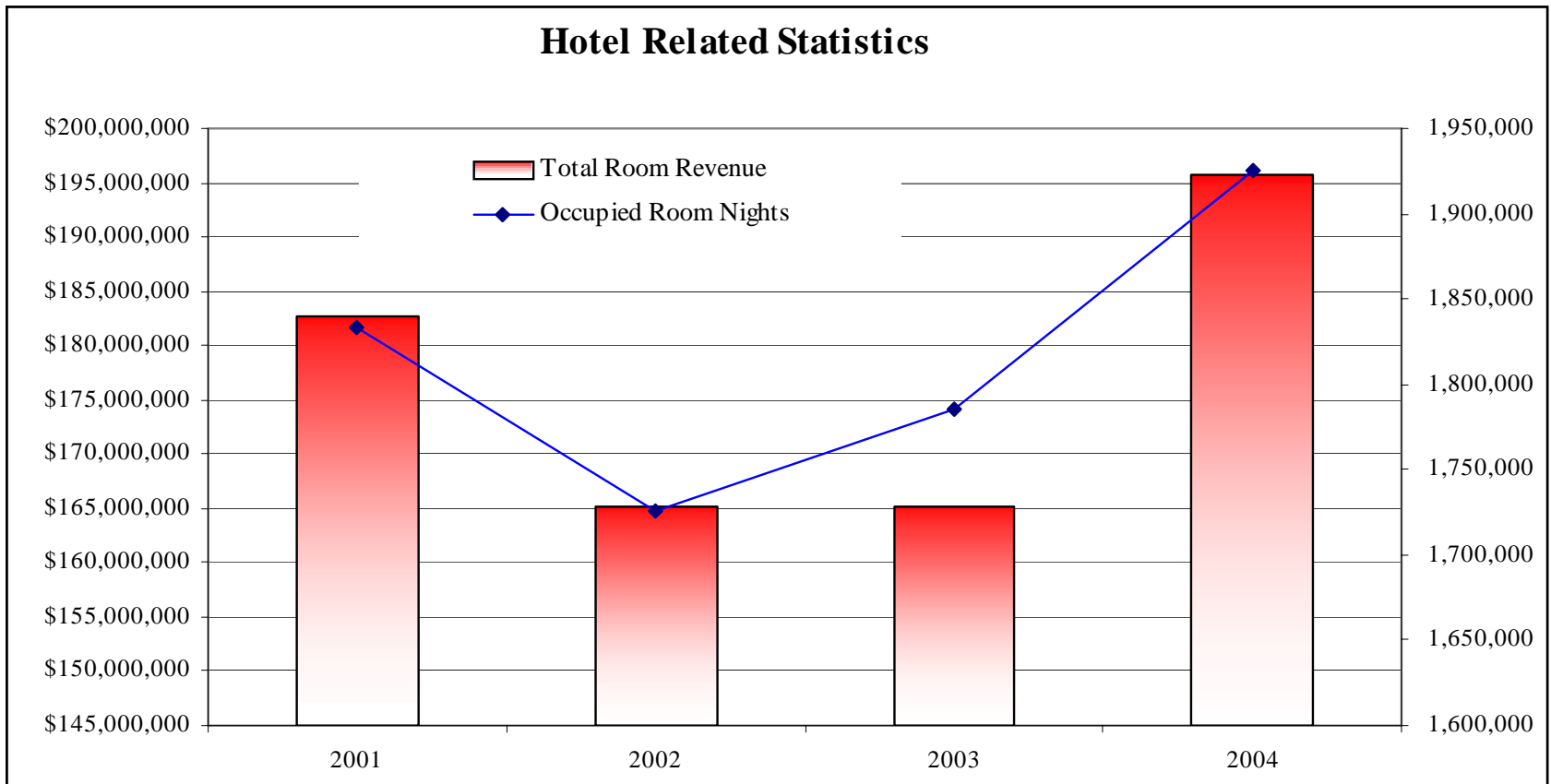
Hotel Related Statistics?



“2004 – A Year in Review”



Hotel Related Statistics?



“2004 – A Year in Review”



Stayover Visitors?

Stayover Visitors per Country / Region (In absolute numbers: 1986 - 2004)

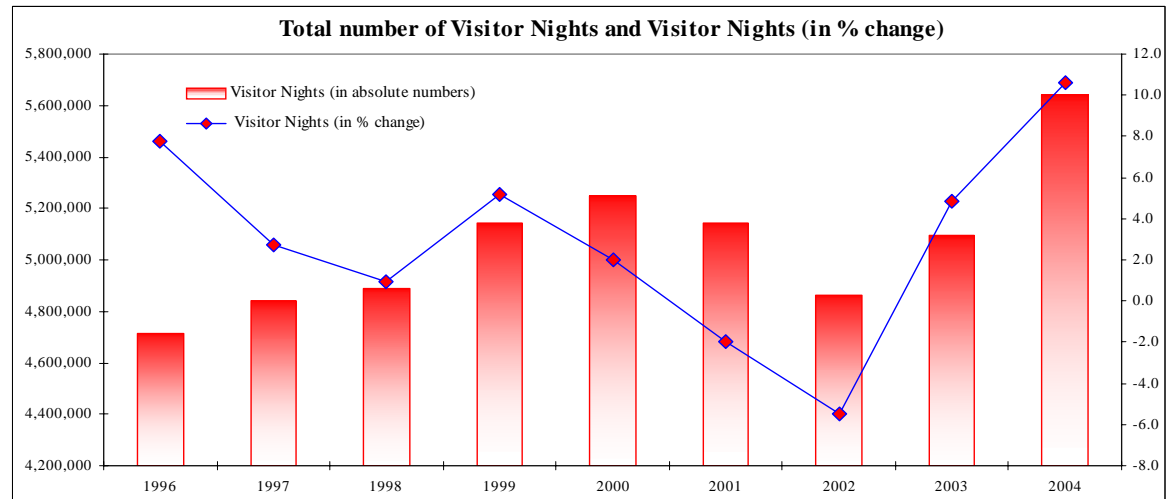
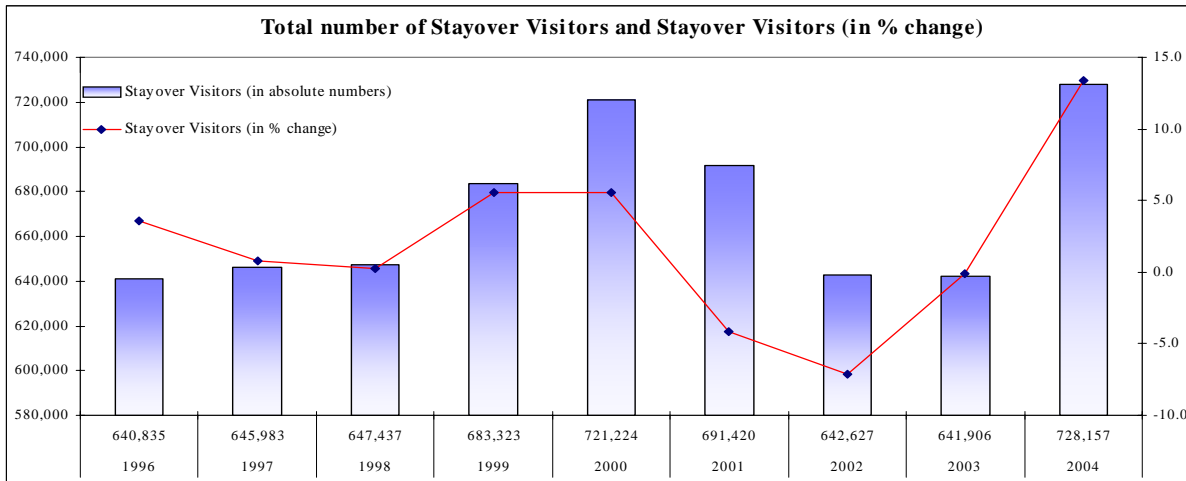
	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004
U.S.A.	132,359	161,056	187,930	210,541	245,916	263,449	286,536	315,332	324,337	344,885	371,523	364,896	377,108	422,186	458,132	448,492	436,660	464,466	535,133
Canada	2,556	3,966	6,729	7,249	14,384	18,589	20,170	22,144	23,594	27,169	24,568	25,176	24,439	20,647	20,594	18,926	17,601	17,218	20,560
Total North America	134,915	165,022	194,659	217,790	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	555,693
Venezuela	14,363	16,536	19,694	32,293	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
Colombia	7,441	9,144	7,050	6,569	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
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
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
Rest of S.&C. America	8,683	7,066	11,322	22,280	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	7,756
Total S.&C. America	30,487	32,746	38,066	61,142	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	84,455
Netherlands	6,184	9,424	15,064	25,297	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
Caribbean	5,854	17,455	20,123	26,272	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	25,341
R.O.W.	3,572	6,935	10,061	13,835	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	24,546
Total Other	15,610	33,814	45,248	65,404	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	88,009
GRAND TOTAL	181,012	231,582	277,973	344,336	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

Source: ATA NV

“2004 – A Year in Review”



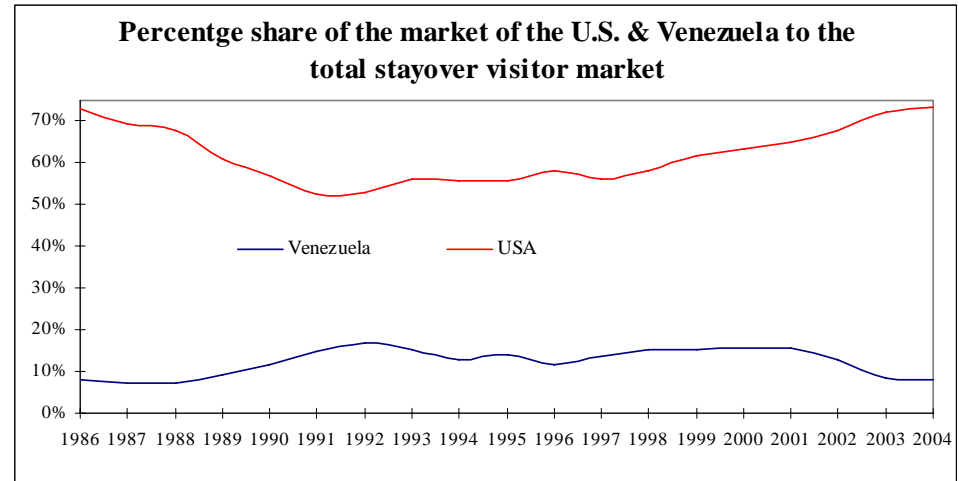
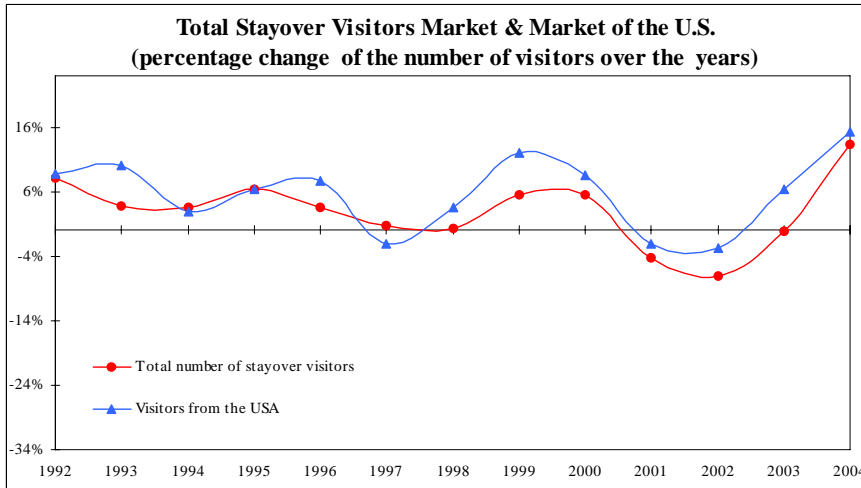
Stayover Visitors and Visitor Nights?



“2004 – A Year in Review”



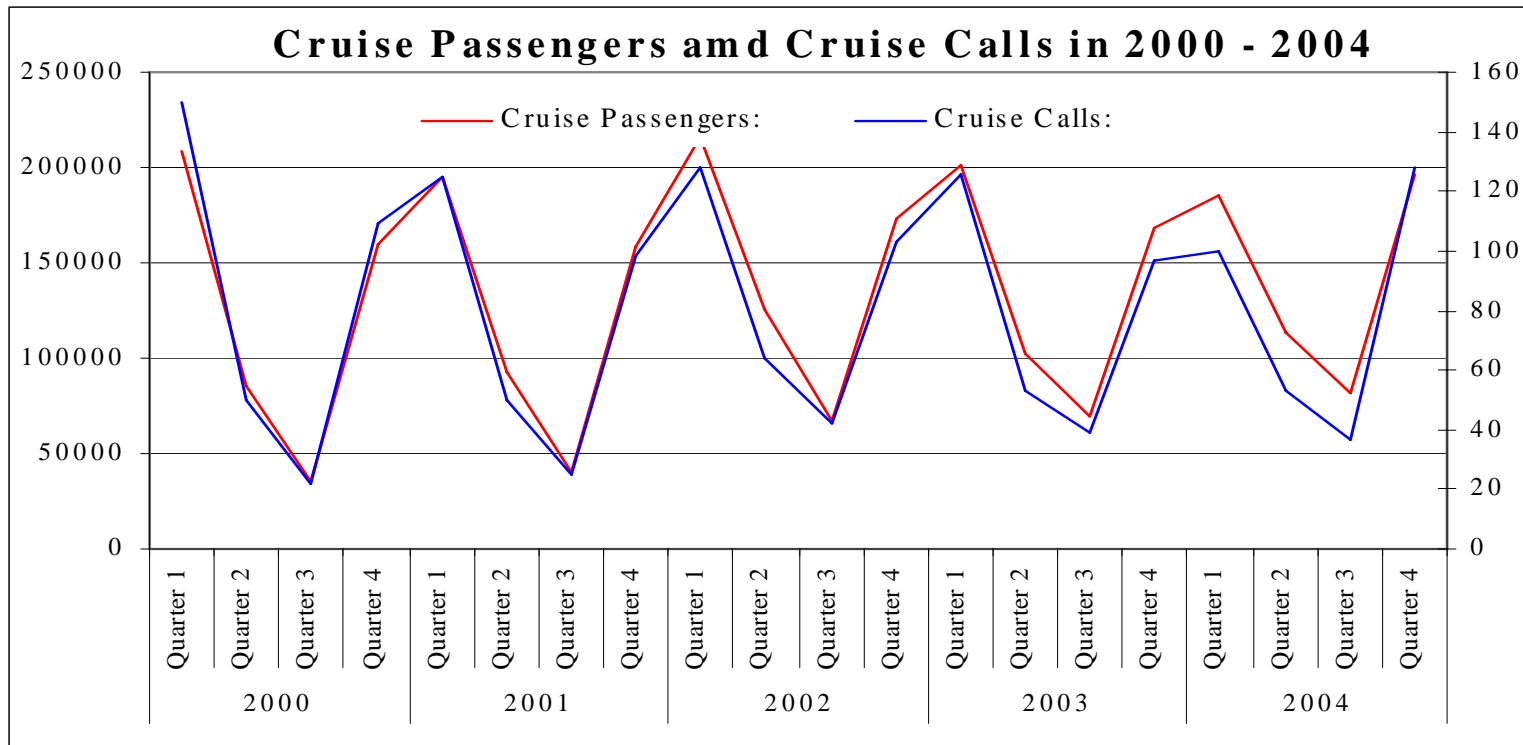
Stayover Visitors and Visitor Nights?



“2004 – A Year in Review”



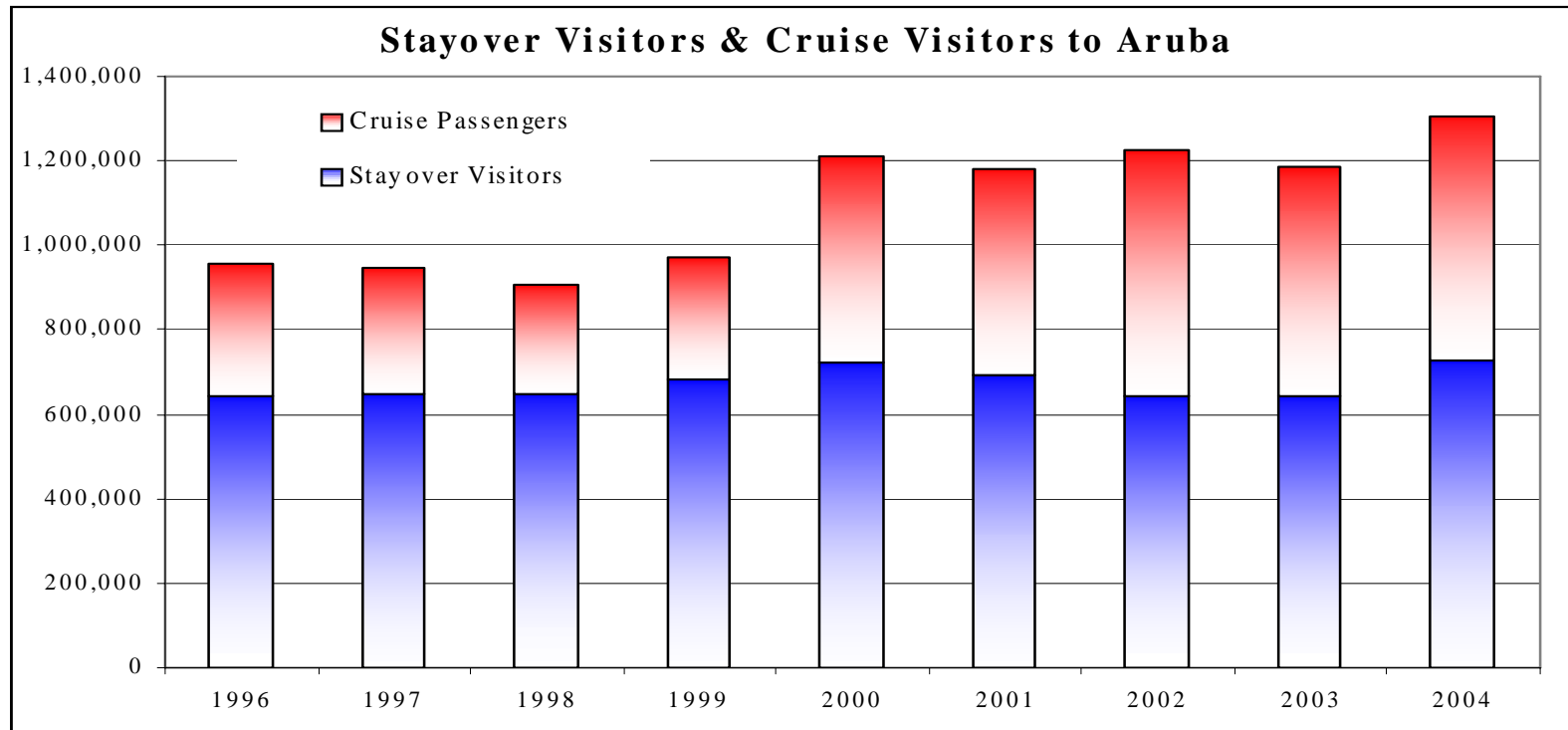
Cruise Passengers?



“2004 – A Year in Review”



Stayover Visitors and Cruise Passengers?



“2004 – A Year in Review”



The End . . .

“Information, the KEY to

progress”

CBS

CENTRAL BUREAU OF STATISTICS