

TOURIST PROFILE FIRST QUARTER 2005



Volume I - First Quarter 2005

June 2005



*Photographs by:
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CENTRAL BUREAU OF STATISTICS - ARUBA

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PREFACE

In this present report you will find the preliminary results of the "Tourist Survey – First Quarter, 2005", executed by the Central Bureau of Statistics. Data from other sources as Aruba Tourism Authority, Cruise Tourism Authority, Department of Immigration at the International Airport of Aruba, Central Bank of Aruba, etc., can also be found. Much analysis is not really necessary since the tables are on themselves self explanatory.

Tourism is the main economic activity on the island. For that reason the Central Bureau of Statistics, in cooperation with other institutions, has chosen to conduct surveys, mainly to measure the tourist expenditures and the satisfaction levels among others. In the System of National Accounts framework, this data is very important for estimating the impact of the Tourism Industry on the island's economy.

The Central Bureau of Statistics published the results of several surveys over the years 1996 until 2004. The Tourist Profiles include results of the "Tourist Survey" for every quarter from 1996 until 2004. The reaction of the partners was very positive and demonstrated the existing necessity for such data.

The realization of the Tourist Survey for the year 2002 was possible thanks to the cooperation and excellent work of the interview-team and the Central Bureau of Statistics project group, which consists of Marleen Barendregt-Croes, Mary Geerman, and Louissette Christiaans-Yarzagaray M.Sc.

The Tourist Profile, Volume I – First Quarter 2005 is mainly a product of the Tourism Statistics division which is part of the Social Economic Statistics division of the Central Bureau of Statistics consisting of Marleen Barendregt-Croes (assistant) Mary Geerman (assistant) and Louissette Christiaans-Yarzagaray, M.Sc. (Tourist Profile project leader and editor).

A special thanks goes to all other Central Bureau of Statistics staff, specially Marjolene van der Biezen-Marques B.A. and Richard Werleman. Without them the scanning process, which replaced our data-entry system in the year 2000, could not be possible. Thanks also to all the data-suppliers and supporters who contributed in any other way to this publication. A word of thanks goes also to the hotels who are member of the AHATA, for their cooperation by sending their information every month. Last but not least, a word of thanks goes to the Aruba Airport Authority and the U.S. Department of Immigration and Customs for allowing our interview-team to conduct the survey in departure halls.

The Central Bureau of Statistics hopes that this Tourist Profile, Volume I – First Quarter 2005 will provide all the users with necessary information. Other information that you might need or for comments and further information, feel free to contact us.

Drs. R.A. Lee
Director of the Central Bureau of Statistics Aruba

FOREWORD

In the present and former publication the CBS used the macro-economic concept ATotal tourism expenditure@. This concept has been used as an indicator in former publications, but only in the last issue it is presented as an estimated macro-economic variable.

Initially, the only monetary indicator published by the CBS was the average daily expenditures in Aruba, which is the total consumption expenditure made by a stayover visitor (during his/her stay in Aruba) or on behalf of a visitor for and during his/her trip and stay at a destination. This information is presented per quarter and also a year figure is presented at the conclusion of each year.

To get a better picture of the visitor expenditures in Aruba, the average daily expenditure is multiplied by the average length of stay of the visitors and by the number of stayover visitors. This is then the tourism expenditures in Aruba which indicates the amount of money all visitors left behind in Aruba during their stay in Aruba, either per quarter or per year. To bring this figure to a higher stage (a macro total), a total tourism expenditure is estimated. This total tourism expenditure is all the travel related expenditures made by stayover visitors, before, during, and immediately after a trip, which is the tourism expenditure in Aruba plus an estimated accommodation calculation of the pre-paid packages.

Total tourism expenditure measures the total amount of money tourists visiting Aruba in a certain quarter spent in that quarter on tourism related goods and services. The amount of money value stayover visitors spent on tourism related goods and services should ideally be equal to goods and services produced in a certain quarter.

The total tourism expenditure is measured on an accrual basis. Accrual accounting records flows at the time economic value is created, transformed, exchanged, transferred or extinguished. This means that flows which imply a change of ownership are entered when ownership passes, services are rendered when provided, output at the time products are created and intermediate consumption when materials and supplies are being used. The System of National Accounts (SNA) favors accrual accounting because:

- (a) The timing of accrual accounting is in full agreement with the way economic activities and other flows are defined in the System. This agreement allows one, for instance, to evaluate the profitability of productive activities correctly (i.e., without the disturbing influence of leads and lags in cash flows) and to calculate a sector=s net worth correctly at any point in time;
- (b) Accrual accounting can be applied to non-monetary flows

The Central Bank of Aruba, on the other hand, measures the tourism receipts. A comparative analysis shows that the concepts of tourism receipts and total tourism expenditure are not identical. Differences in approach and operational definitions of the two concepts leads to differences in the figures measured. It is therefore methodologically not appropriate to correlate tourism receipts and tourism expenditure with each other, without indicating the difference in these two concepts. It is strongly recommended to users to clearly distinguish tourism receipt from tourism expenditure. For supplementary information please refer to the methodology.

TABLE OF CONTENTS

Preface.....	iii
Foreword.....	iv
Table of Contents.....	v
1. Highlights.....	TP – 1
2. Tourism in Aruba	2
2.1 Number of stay over visitors by market	2
2.2 Cruise passengers	2
2.3 Total number of visitors	2
2.4 Average length of stay by place of residence.....	2
2.5 Number of visitor nights by market.....	3
2.6 Airport traffic / number of passengers traveling by air	3
2.7 Aircraft landings.....	3
3. Visitor Profile.....	4
3.1 Characteristics of the visitors	4
3.1.1 Age groups of the visitors.....	4
3.1.2 Yearly household income of the visitors	4
3.1.3 Occupation of the visitors.....	4
3.1.4 Method visitors used to book a ticket.....	4
3.2 Behavior of the visitors	5
3.2.1 Purpose of visit	5
3.2.2 Number of visits to Aruba	5
3.2.3 Type of accommodation used by the visitors	5
3.2.4 Travel arrangement of the visitors.....	5
3.2.5 Single most important source of information in making a decision to visit Aruba	5
3.3 Satisfaction of the visitors	6
3.3.1 Rating of service related to different aspects.....	6
3.3.2 What visitors liked about Aruba.....	7
4. Money Aspects of the Visitors	8
4.1 Average daily expenditure spent in Aruba per category.....	8
4.2 Average daily expenditure by place of residence.....	8
4.3 Average daily expenditure by purpose of visit.....	8
4.4 Average daily expenditure by number of visits to Aruba.....	8
4.5 Hotel related statistics	9
4.6 Average expenditure per person per trip by the major markets (Budget)	9
4.7 Tourism expenditure in Aruba by the major markets.....	9
4.8 Lodging tax	10
4.9 Casino tax.....	10
4.10 Tourism receipts	10
4.11 Estimated total tourism expenditure.....	10

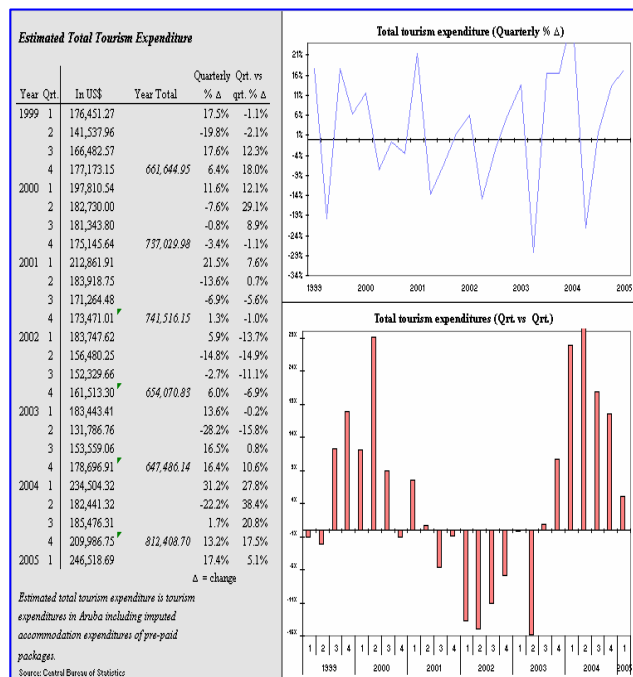
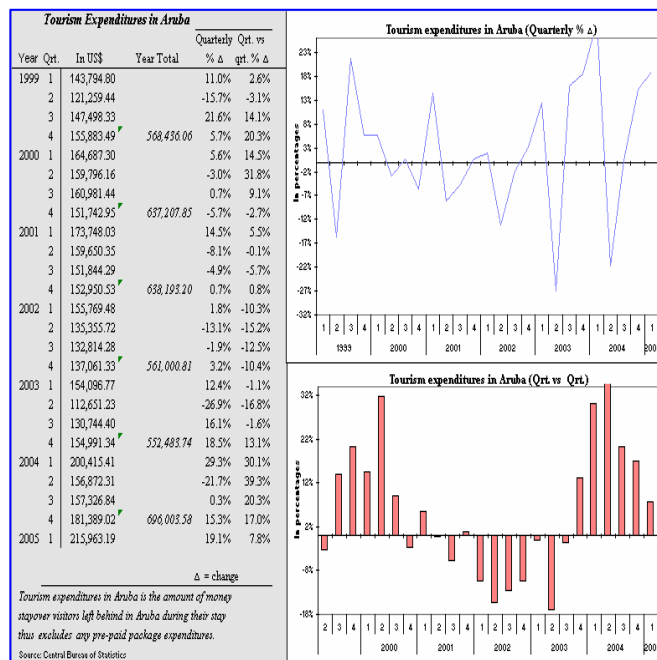
1. Highlights

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 tourism indicators. They give a general view of how tourism developed in the first quarter of the year 2005 compared to the year 2004, 2003 and 2002.

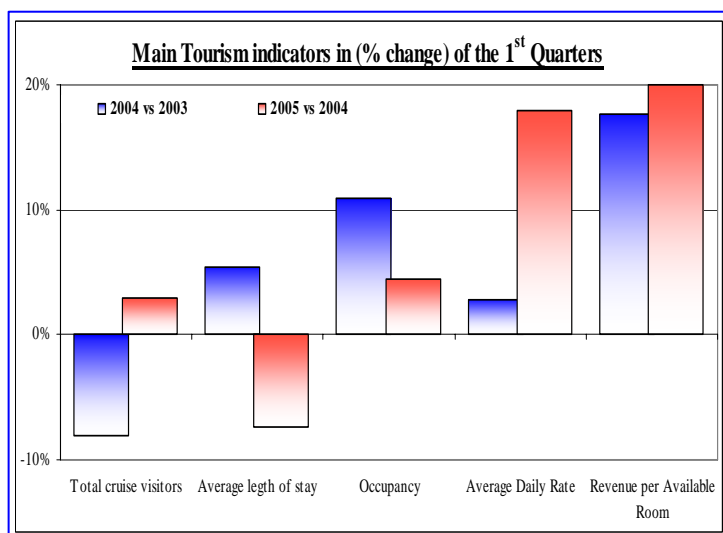
An important indicator is the estimated total tourism expenditure which indicates all travel related expenditures made by stay-over visitors, before, during, and immediately after a trip (refer to methodology for further explanations).



The first combination of table and graphs present the estimated total tourism expenditure in every quarter starting from the years 1999 until 2005. It also gives quarterly percentage changes and quarter to quarter comparisons. Beside estimated total tourism expenditure, tourism expenditures that took place in Aruba are also used as an indicator since 1996, which is 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 of the first quarter of 1999 until 2005. The table contains absolute data related to the visitors (stay-over-visitors and cruise visitors), 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:	Qrt. 1 2000	Qrt. 1 2001	Qrt. 1 2002	Qrt. 1 2003	Qrt. 1 2004	Qrt. 1 2005
Total stayover visitors	179,192	183,572	168,427	155,346	177,098	200,868
Total cruise visitors	208,735	195,713	215,381	201,400	185,161	190,639
Total number of visitors	387,927	379,285	384,008	356,746	362,259	391,527
Total number of visitor nights	1,380.9	1,371.4	1,290.2	1,279.4	1,446.5	1,169.0
Average length of stay	7.90	7.90	7.70	8.60	9.10	8.40
Average daily expenditure in Aruba	115.75	119.96	120.48	114.81	124.77	127.69
Tourism expenditure in Aruba	164,687,300	173,748,030	155,769,480	154,096,770	200,415	215,963
Estimated total tourism expenditure	197,810,540	212,861,910	183,747,620	183,443,409	234,504	246,519
Tourism receipts	254,022	261,620	262,346	246,592.00	549.50	549.50
Occupancy	81.5%	83.6%	75.8%	76.4%	84.5%	83.3%
Average Daily Rate	162.62	176.62	182.07	176.83	183.18	207.89
Revenue per Available Room	98.54	110.00	95.54	90.86	106.96	123.65



2. TOURISM IN ARUBA

2.1 NUMBER OF STAYOVER VISITORS BY MARKET

Country	Qrt. 1 2001	Qrt. 1 2002	Qrt. 1 2003	Qrt. 1 2004	Qrt. 1 2005
Total Visitors	183,572	168,427	155,346	177,098	200,868
United States	131,479	116,167	119,400	135,565	155,375
Venezuela	16,637	19,142	8,268	8,620	11,266
Netherlands	7,112	7,195	7,261	9,725	9,315
Neth. Antilles	3,795	3,977	3,817	5,074	4,064
Colombia	5,011	5,806	4,294	1,967	2,118
Brazil	1,065	748	391	970	1,476
Canada	9,099	7,664	6,189	8,213	8,068
Argentina	2,054	565	323	401	468
Germany	689	691	434	618	891
Rest of Europe	1,639	1,657	1,322	1,905	3,417
Italy	447	354	223	248	435
Peru	663	733	283	187	169
Rest of the World	812	757	687	460	517
So - Cent. America	453	537	460	806	797
Caribbean General	404	338	258	215	163
United Kingdom	809	854	654	676	840
Surinam	184	226	199	421	448
Switzerland	249	236	142	159	320
Dominican Republic	290	188	187	279	224
Trinidad / Tobago	226	270	339	320	238
Chile	276	153	64	80	80
Ecuador	133	115	131	154	112
Japan	46	54	20	35	67

Source: Aruba Tourism Authority (ATA)

2.2 CRUISE PASSENGERS

Cruise	Qrt. 1 2001	Qrt. 1 2002	Qrt. 1 2003	Qrt. 1 2004	Qrt. 1 2005
Number of passengers	195,713	215,581	201,400	185,161	190,659
Number of calls	125	128	126	100	108
Crew members	81,291	89,639	88,936	78,987	79,454
Number of passengers per ship	1,566	1,684	1,598	1,852	1,765

Source: Aruba Tourism Authority (ATA) & Cruise Tourism Authority N.V. - Aruba

2.3 TOTAL NUMBER OF VISITORS

	Qrt. 1 2001	Qrt. 1 2002	Qrt. 1 2003	Qrt. 1 2004	Qrt. 1 2005
Total stayover visitors	183,572	168,427	155,346	177,098	200,868
Total cruise visitors	195,713	215,581	201,400	185,161	190,659
Total number of visitors	379,285	384,008	356,746	362,259	391,527

Source: Aruba Tourism Authority (ATA) & Cruise Tourism Authority N.V. - Aruba

2.4 AVERAGE LENGTH OF STAY BY PLACE OF RESIDENCE OF VISITORS TO ARUBA (In days)

Place of residence	Qrt. 1 2001	Qrt. 1 2002	Qrt. 1 2003	Qrt. 1 2004	Qrt. 1 2005
U.S.A.	7.9	7.5	7.9	8.2	7.7
Venezuela	5.7	6.8	6.8	7.8	6.0
Netherlands	12.6	9.7	13.8	15.6	16.6
Brazil	4.2	7.3	5.0	7.5	6.5
Netherlands Antilles	3.8	5.2	3.4	11.8	9.3
Canada	8.2	7.8	9.1	8.9	11.0
Colombia	13.1	7.8	21.4	18.7	13.5
Other	7.3	11.5	11.1	12.6	8.9
General	7.9	7.7	8.6	9.1	8.4

Source: Tourist Survey - Central Bureau of Statistics - Aruba

2.5 NUMBER OF VISITOR NIGHTS BY MARKET (* 1.000)

Country	Qrt. 1 2001	Qrt. 1 2002	Qrt. 1 2003	Qrt. 1 2004	Qrt. 1 2005
Total Visitor Nights	1,371.38	1,290.24	1,279.39	1,446.51	1,574.89
United States	974.40	889.53	925.13	1,035.28	1,170.78
Venezuela	75.20	96.77	62.71	69.94	72.77
Netherlands	88.48	92.45	94.48	122.25	103.98
Neth. Antilles	19.94	19.97	20.51	28.01	23.72
Colombia	43.58	50.93	45.60	32.01	30.34
Brazil	6.50	4.81	2.82	6.82	10.18
Canada	79.81	64.61	56.68	72.42	74.67
Argentina	18.14	5.76	3.46	4.48	4.76
Germany	7.39	7.43	5.00	8.22	8.93
Rest of Europe	13.31	12.94	13.05	17.26	31.66
Italy	3.69	3.00	2.28	2.52	3.98
Peru	4.19	4.64	2.85	3.33	2.48
Rest of the World	10.08	9.66	12.54	4.61	4.07
So - Cent. America	2.72	3.90	2.23	8.60	6.88
Caribbean General	4.34	2.93	3.14	2.54	1.60
United Kingdom	6.03	8.34	6.47	6.70	8.04
Surinam	2.24	2.67	2.31	3.70	4.27
Switzerland	2.76	2.49	1.64	1.78	2.80
Dominican Republic	2.73	2.91	3.30	5.60	3.79
Trinidad / Tobago	2.65	1.77	11.49	8.07	3.10
Chile	2.03	1.55	0.54	0.57	0.55
Ecuador	0.96	0.93	1.10	1.70	1.26
Japan	0.23	0.26	0.08	0.11	0.29

Source: Aruba Tourism Authority (ATA)

2.6 AIRPORT TRAFFIC / NUMBER OF PASSENGERS TRAVELING BY AIR

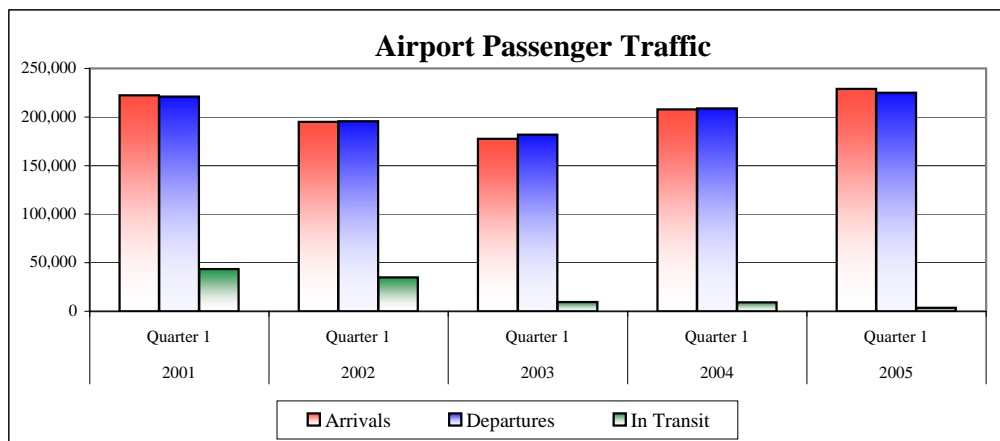
Traffic	Qrt. 1 2001	Qrt. 1 2002	Qrt. 1 2003	Qrt. 1 2004	Qrt. 1 2005
Arrived	222,336	194,990	177,601	207,690	228,941
Departed	220,993	195,789	181,763	208,730	225,128
In transit	43,343	34,945	9,481	9,186	3,721
Total Traffic	486,672	425,724	368,845	425,606	457,790

Source: Aruba Airport Authority N.V. (AAA) & Department of Immigration - International Airport of Aruba

2.7 AIRCRAFT LANDINGS

Landings	Qrt. 1 2001	Qrt. 1 2002	Qrt. 1 2003	Qrt. 1 2004	Qrt. 1 2005
Commercial landings	3,967	3,632	3,110	3,362	3,317
Non-commercial landings	924	777	679	619	858
Total	4,891	4,409	3,789	3,981	4,175

Source: Aruba Airport Authority N.V. (AAA) & Department of Immigration - International Airport of Aruba



3. VISITOR PROFILE

3.1 CHARACTERISTICS OF THE VISITORS

3.1.1. AGE GROUPS OF THE VISITORS (In Percentages)

Age groups	Qrt. 1 2001	Qrt. 1 2002	Qrt. 1 2003	Qrt. 1 2004	Qrt. 1 2005
Under 20 years	1.3	0.7	1.2	0.9	0.6
20 - 29 years	10.5	10.2	11.0	8.7	8.8
30 - 39 years	17.0	18.3	18.0	16.2	16.3
40 - 49 years	28.6	27.5	25.8	25.0	24.0
50 - 64 years	33.0	32.4	32.4	34.8	33.1
Over 64 years	9.7	10.8	11.5	14.4	17.1
Unknown	0.0	0.0	0.1	0.0	0.1
Total	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	Qrt. 1 2001	Qrt. 1 2002	Qrt. 1 2003	Qrt. 1 2004	Qrt. 1 2005
Less than US\$20,000	7.6	8.1	8.1	4.3	5.7
US\$20,001 - US\$30,000	9.2	7.8	5.9	4.0	3.9
US\$30,001 - US\$50,000	17.9	15.7	12.6	9.5	7.8
US\$50,001 - US\$75,000	20.5	18.4	24.6	26.9	19.7
US\$75,001 - US\$100,000	16.1	16.1	19.4	19.9	19.4
US\$100,001 and over	15.0	20.2	18.2	18.5	27.6
Unknown	13.6	13.7	11.2	16.9	15.9
Total	100%	100%	100%	100%	100%

Source: Tourist Survey - Central Bureau of Statistics - Aruba

3.1.3. OCCUPATION OF THE VISITORS (In Percentages)

Occupation	Qrt. 1 2001	Qrt. 1 2002	Qrt. 1 2003	Qrt. 1 2004	Qrt. 1 2005
Legislators, senior officials and managers	15.2	13.6	13.8	14.6	14.0
Professionals	18.4	17.1	17.9	20.6	15.0
Technicians and associate professionals	14.7	16.3	18.2	14.6	19.7
Clerks	7.5	5.9	6.2	7.2	6.7
Service workers, shop & market sales workers	3.7	6.9	5.7	4.7	3.9
Skilled agricultural and fishery workers	0.6	0.2	0.2	0.4	0.1
Craft and related trades workers	1.7	2.3	2.1	2.8	2.2
Plant and machine operators and assemblers	0.9	1.1	1.4	1.2	0.4
Elementary occupations	0.6	1.0	1.0	0.5	0.7
Armed forces	0.3	0.2	0.4	0.2	0.3
Not economically active (Retired)	36.3	35.1	33.1	33.2	37.0
Unemployed	0.0	0.0	0.0	0.0	0.0
Unknown	0.1	0.2	0.0	0.0	0.2
Total	100%	100%	100%	100%	100%

Source: Tourist Survey - Central Bureau of Statistics - Aruba

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

	Qrt. 1 2003	Qrt. 1 2004	Qrt. 1 2005
On-Line (internet)	12.8	21.0	38.2
Travel Agent	50.3	48.6	40.9
Tour Operator	2.5	0.9	1.0
Charter Operator	2.7	0.1	0.3
Other	31.8	29.3	19.5
Total	100%	100%	100%

Source: Tourist Survey - Central Bureau of Statistics - Aruba

3.2 BEHAVIOR OF THE VISITORS

3.2.1. PURPOSE OF VISIT (In Percentages)

Purpose of visit	Qrt. 1 2001	Qrt. 1 2002	Qrt. 1 2003	Qrt. 1 2004	Qrt. 1 2005
Vacation	86.5	85.4	86.3	89.1	84.9
Honeymoon	3.9	3.1	2.5	2.0	4.1
Visit friends / relatives	3.9	4.7	3.9	2.7	3.3
Business / leisure	2.6	3.6	2.6	2.8	3.3
Other ¹⁾	1.9	1.4	3.3	1.9	1.8
Business only / Convention	1.2	1.7	1.5	1.4	1.4
Wedding			0.1	0.2	1.1
Total	100%	100%	100%	100%	100%

Source: Tourist Survey - Central Bureau of Statistics - Aruba

1) Other also include incentive and golf

3.2.2. NUMBER OF VISITS TO ARUBA (In Percentages)

Number of visits	Qrt. 1 2001	Qrt. 1 2002	Qrt. 1 2003	Qrt. 1 2004	Qrt. 1 2005
First time	46.1	41.8	42.7	42.2	41.2
2 to 5 times	32.6	32.1	31.8	27.4	28.8
6 times or more	21.3	26.0	25.1	30.4	30.0
Total	100%	100%	100%	100%	100%

Source: Tourist Survey - Central Bureau of Statistics - Aruba

3.2.3. TYPE OF ACCOMMODATION USED BY THE VISITORS (In Percentages)

Type of accommodation	Qrt. 1 2001	Qrt. 1 2002	Qrt. 1 2003	Qrt. 1 2004	Qrt. 1 2005
Hotel	56.3	53.4	57.2	59.1	56.1
Timeshare	28.8	29.0	25.7	26.5	30.3
Guest house/Apartment	3.4	4.4	4.1	3.9	3.1
Friends / Relatives	9.2	11.5	11.3	9.1	8.3
Other	2.4	1.8	1.8	1.4	2.2
Total	100%	100%	100%	100%	100%

Source: Tourist Survey - Central Bureau of Statistics - Aruba

3.2.4. TRAVEL ARRANGEMENT OF THE VISITORS (In Percentages)

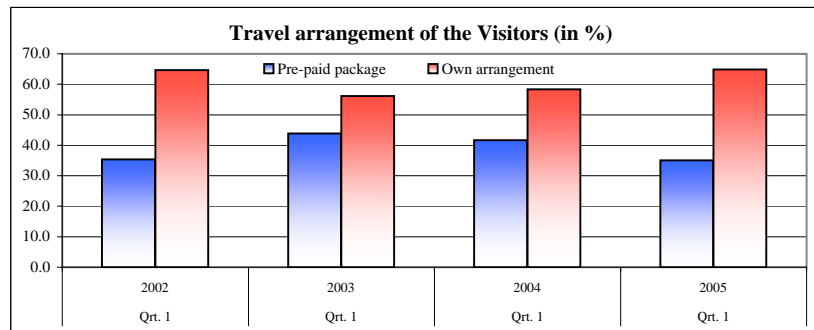
Type of arrangement	Qrt. 1 2001	Qrt. 1 2002	Qrt. 1 2003	Qrt. 1 2004	Qrt. 1 2005
Pre-paid package	44.1	35.4	43.9	41.7	35.1
Own arrangement	55.9	64.6	56.1	58.3	64.9
Total	100%	100%	100%	100%	100%

Source: Tourist Survey - Central Bureau of Statistics - Aruba

3.2.5. SINGLE MOST IMPORTANT SOURCE OF INFORMATION IN MAKING A DECISION TO VISIT ARUBA (In Percentages)

Source of information	Qrt. 1 2001	Qrt. 1 2002	Qrt. 1 2003	Qrt. 1 2004	Qrt. 1 2005
Friends / Relatives	30.5	33.7	45.9	45.8	43.0
Travel agent	26.1	17.4	15.7	8.7	7.2
Newspaper / magazine	2.4	2.5	1.2	1.2	1.3
Television ad / Radio ad	0.8	0.4	0.5	0.9	0.5
Tourist board	1.1	0.4	0.8	0.7	0.2
Other	6.4	6.1	3.6	5.0	3.5
Repeating	21.5	26.6	24.1	28.8	32.9
Cruise	2.0	1.4	0.4	0.4	1.7
Internet	6.1	6.7	3.8	5.3	5.3
Business	3.1	4.4	3.6	3.3	4.4
Unknown	0.0	0.4	0.4	0.0	0.0
Total	100%	100%	100%	100%	100%

Source: Tourist Survey - Central Bureau of Statistics - Aruba



3.3 SATISFACTION OF VISITORS

3.3.1. RATING OF SERVICE RELATED TO THE FOLLOWING:

Rating	Qrt. 1 2001	Qrt. 1 2002	Qrt. 1 2003	Qrt. 1 2004	Qrt. 1 2005
<u>ACCOMMODATION</u>					
Good	88.8	92.0	89.9	89.9	86.0
Average	9.9	6.7	9.1	9.1	12.8
Poor	0.6	0.8	0.5	0.7	0.6
Unknown / n.a.	0.6	0.4	0.4	0.4	0.5
Total	100%	100%	100%	100%	100%
<u>MEALS & DRINKS</u>					
Good	87.3	89.3	92.2	89.6	84.6
Average	11.6	10.1	7.5	9.8	13.9
Poor	0.6	0.3	0.0	0.4	1.1
Unknown / n.a.	0.4	0.4	0.3	0.2	0.4
Total	100%	100%	100%	100%	100%
<u>LOCAL TRANSPORTATION</u>					
Good	85.5	83.1	85.3	78.0	69.2
Average	3.5	3.9	3.7	6.2	11.1
Poor	0.6	4.1	0.4	0.1	0.6
Unknown / n.a.	10.4	8.9	10.5	15.7	19.0
Total	100%	100%	100%	100%	100%
<u>SHOPPING</u>					
Good	76.6	78.6	81.5	76.2	71.0
Average	11.4	10.8	8.2	9.2	14.4
Poor	0.6	4.8	0.1	0.6	0.9
Unknown / n.a.	11.5	5.8	10.2	14.0	13.7
Total	100%	100%	100%	100%	100%
<u>ENTERTAINMENT / RECREATION</u>					
Good	75.5	80.3	81.0	72.1	67.4
Average	9.2	8.3	6.7	7.6	13.1
Poor	0.5	5.3	0.3	0.3	1.2
Unknown / n.a.	14.7	6.0	12.0	20.1	18.3
Total	100%	100%	100%	100%	100%
<u>QUALITY OF SERVICE</u>					
Good	90.1	93.7	94.0	91.6	85.6
Average	8.8	5.2	5.2	6.9	13.3
Poor	0.5	0.7	0.4	0.9	0.9
Unknown / n.a.	0.6	0.4	0.4	0.6	0.2
Total	100%	100%	100%	100%	100%

Source: Tourist Survey - Central Bureau of Statistics - Aruba

3.3.2. RATING OF VALUE FOR MONEY OF THE FOLLOWING:

Rating	Qrt. 1 2001	Qrt. 1 2002	Qrt. 1 2003	Qrt. 1 2004	Qrt. 1 2005
<u>ACCOMMODATION</u>					
Good	72.8	78.2	73.9	72.6	69.7
Average	16.4	12.4	14.1	16.1	20.0
Poor	3.4	2.5	2.5	2.8	4.2
Unknown / n.a.	7.4	6.9	9.5	8.5	6.0
Total	100%	100%	100%	100%	100%
<u>MEALS & DRINKS</u>					
Good	66.8	71.4	70.7	70.6	64.9
Average	25.0	22.6	22.4	21.0	26.4
Poor	6.3	3.4	3.7	6.1	7.0
Unknown / n.a.	1.9	2.7	3.2	2.3	1.7
Total	100%	100%	100%	100%	100%
<u>LOCAL TRANSPORTATION</u>					
Good	75.0	77.7	75.8	69.8	58.4
Average	10.5	10.5	9.8	11.3	18.8
Poor	2.5	2.5	2.3	2.5	2.7
Unknown / n.a.	12.0	9.3	12.1	16.4	20.1
Total	100%	100%	100%	100%	100%
<u>SHOPPING</u>					
Good	60.6	71.8	68.1	66.5	59.3
Average	23.1	19.9	17.6	16.8	23.2
Poor	3.5	2.0	2.3	2.5	3.1
Unknown / n.a.	12.9	6.4	12.1	14.2	14.3
Total	100%	100%	100%	100%	100%
<u>ENTERTAINMENT / RECREATION</u>					
Good	51.6	69.3	60.7	54.4	51.6
Average	14.9	18.4	15.5	14.0	22.1
Poor	2.2	2.0	1.4	1.8	3.2
Unknown / n.a.	31.3	10.3	22.3	29.9	23.1
Total	100%	100%	100%	100%	100%
<u>QUALITY OF SERVICE</u>					
Good	82.9	89.4	87.7	85.3	77.3
Average	14.2	8.4	10.6	11.9	18.8
Poor	1.6	1.4	0.8	1.7	3.1
Unknown / n.a.	1.2	0.7	0.9	1.1	0.9
Total	100%	100%	100%	100%	100%

Source: Tourist Survey - Central Bureau of Statistics - Aruba

4. MONEY ASPECTS OF THE VISITORS

4.1 AVERAGE DAILY EXPENDITURE SPENT IN ARUBA PER CATEGORY¹⁾ (In US\$)

Categories of expenditures	Qrt. 1 2001	Qrt. 1 2002	Qrt. 1 2003	Qrt. 1 2004	Qrt. 1 2005
Accommodation ²⁾	30.88	36.69	28.59	35.21	43.09
Food & beverage	25.71	25.94	26.92	28.86	29.99
Groceries / sundries	3.44	3.23	3.94	3.19	3.74
Entertainment / recreation	7.85	7.72	7.06	9.27	8.04
Taxis	2.67	2.73	2.93	3.02	3.15
Car rental	5.03	5.06	4.06	4.20	4.47
Public transportation	0.25	0.27	0.27	0.22	0.24
Tax free shopping	6.28	4.42	4.86	3.59	4.64
Shopping	16.76	15.69	14.34	15.06	13.60
Casinos	15.65	15.45	15.55	16.10	13.39
Internet/Telephone	n.a.	n.a.	2.07	0.98	0.93
Departure tax	1.26	1.15	n.a.	n.a.	n.a.
Other ³⁾	4.19	2.15	1.71	0.76	1.70
Total (In US\$)	119.96	120.48	114.81	124.77	127.69

Source: Tourist Survey - Central Bureau of Statistics - Aruba

Notes : (All these notes apply to tables 4.1, 4.2 and 4.3)

1) The expenditures above mentioned are expenditures that took place while the visitors were IN ARUBA, excluding thus anything spent on pre-paid package outside of Aruba(see highlights for further explanation and comments.).

2) The expenditure category "accommodation" does not include any expenses made on a pre-paid package for accommodation.

3) The expenditures belonging to the category "other" also includes expenditures which were unknown or that cannot be specified anymore by the interviewed visitors. For this reason the amount does not represent expenditures belonging to the category other only.

4.2 AVERAGE DAILY EXPENDITURE BY PLACE OF RESIDENCE¹⁾ (In US\$)

Place of residence	Qrt. 1 2001	Qrt. 1 2002	Qrt. 1 2003	Qrt. 1 2004	Qrt. 1 2005
U.S.A.	120.34	128.11	114.31	128.59	134.95
Venezuela	171.11	155.91	157.48	163.72	153.68
Netherlands	48.28	69.30	60.14	65.31	57.52
Netherlands Antilles	110.54	88.96	135.03	97.74	104.87
Canada	88.39	54.36	72.44	83.34	93.84
Colombia	113.32	94.26	66.50	121.30	58.90
Other	114.86	83.97	133.83	105.55	139.37
Total visitors (In US dollars)	119.96	120.58	114.81	124.77	127.69

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.

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

Purpose of visit	Qrt. 1 2001	Qrt. 1 2002	Qrt. 1 2003	Qrt. 1 2004	Qrt. 1 2005
Vacation	119.43	119.96	108.36	123.72	128.60
Honeymoon	95.58	116.96	142.40	116.34	90.91
Visit friends / relatives	41.78	40.10	89.75	72.38	46.55
Other ²⁾	122.38	99.97	130.40	127.81	97.29
Business & leisure	248.81	202.65	250.38	183.46	211.09
Business Only / Convention	132.42	232.61	255.41	164.37	217.23

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.

4.4 AVERAGE DAILY EXPENDITURE BY NUMBER OF VISITS TO ARUBA¹⁾ (In US\$)

Number of visits	Qrt. 1 2001	Qrt. 1 2002	Qrt. 1 2003	Qrt. 1 2004	Qrt. 1 2005
First time	118.72	119.19	114.58	123.17	132.70
Between 2 and 5 times	120.49	113.20	107.45	123.52	131.12
6 Times or more	122.05	131.96	125.05	128.08	117.69

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.

4.5 HOTEL RELATED STATISTICS

Categories:	Qrt. 1 2001	Qrt. 1 2002	Qrt. 1 2003	Qrt. 1 2004	Qrt. 1 2005
<i>Hotel :</i>					
Occupancy	83.8%	74.0%	74.8%	87.1%	91.8%
Average Daily Rate	\$180.55	\$185.72	\$178.01	\$182.79	\$215.80
Revenue per available room	\$151.64	\$137.44	\$132.88	\$159.26	\$198.07
<i>Timeshare :</i>					
Occupancy	82.9%	78.8%	79.1%	80.3%	83.3%
Average Daily Rate	\$150.37	\$152.66	\$165.65	\$188.36	\$215.91
Revenue per available room	\$34.33	\$23.92	\$21.45	\$20.48	\$26.90
<i>Total :</i>					
Occupancy	83.6%	75.8%	76.4%	84.5%	88.3%
Average Daily Rate	\$176.62	\$182.07	\$176.83	\$183.18	\$215.91
Rev. per avail. room	\$110.00	\$95.54	\$90.86	\$106.96	\$128.36

Source: Central Bureau of Statistics - Aruba

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

Place of residence	Qrt. 1 2001	Qrt. 1 2002	Qrt. 1 2003	Qrt. 1 2004	Qrt. 1 2005
U.S.A.	944.67	954.42	906.48	1,049.29	1,037.77
Venezuela	970.19	1,063.31	1,070.86	1,281.93	915.93
Netherlands	609.78	670.13	828.73	1,019.49	953.68
Netherl. Antilles	423.37	459.03	460.45	1,150.40	975.29
Canada	725.68	425.10	659.93	742.56	1,030.36
Colombia	1,478.83	736.17	1,423.10	2,264.67	793.38
Other	840.78	966.49	1,485.51	1,330.99	1,234.82
Total visitors	946.48	924.85	991.96	1,131.66	1,075.15

Source: Tourist Survey - Central Bureau of Statistics - Aruba

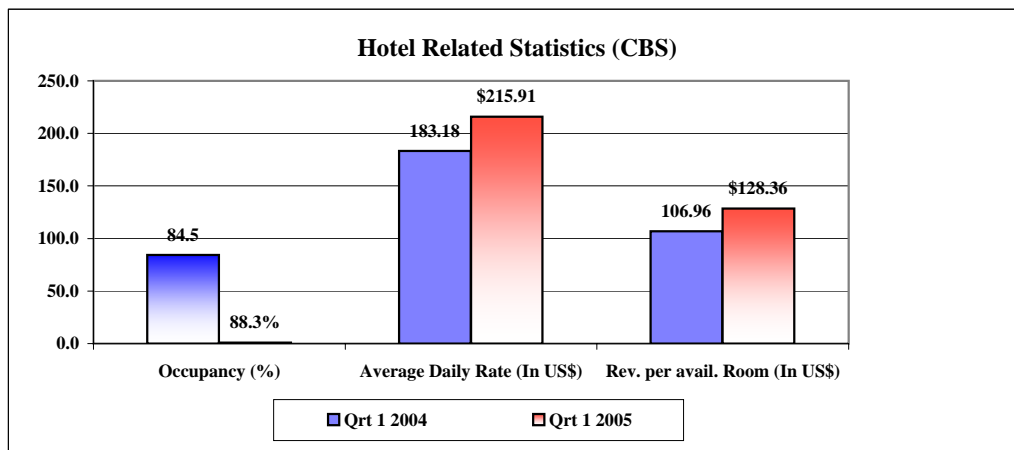
1) The expenditures above mentioned are expenditures that took place while the visitors were IN ARUBA, excluding thus anything spent on pre-paid package.

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

Place of residence	Qrt. 1 2001	Qrt. 1 2002	Qrt. 1 2003	Qrt. 1 2004	Qrt. 1 2005
U.S.A.	124,204.14	110,872.05	108,233.51	142,247.60	161,242.81
Venezuela	16,141.11	20,353.81	8,853.90	11,050.22	10,318.90
Netherlands	4,336.73	4,821.59	6,017.40	9,914.53	8,883.54
Netherl. Antilles	1,606.68	1,825.58	1,757.55	5,837.13	3,963.58
Canada	6,602.98	3,257.93	4,084.30	6,098.64	2,182.31
Colombia	7,410.40	4,274.21	6,110.79	4,454.61	1,171.03
Other	7,881.43	7,469.07	8,506.05	7,621.22	9,962.51
Total visitors	173,748.03	155,769.48	154,096.77	200,415.41	215,963.19

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. (see highlights for further explanation and comments.)



4.8 LODGING TAX

In US dollars	2001	2002	2003	2004	2005
Quarter 1	4,939,402	4,185,643	4,213,148	4,791,335	5,902,498
Quarter 2	4,127,626	3,617,218	3,644,288	4,397,729	
Quarter 3	3,874,968	2,847,719	3,218,436	5,979,035	
Quarter 4	1,924,217	3,192,238	2,919,820	3,854,241	
Total	14,866,213	13,842,818	13,995,692	19,022,339	

Source: Tax collectors office

4.9 CASINO TAX

In US dollars	2001	2002	2003	2004	2005
Quarter 1	2,549,919	3,079,023	3,300,750	4,483,377	3,938,285
Quarter 2	2,323,962	2,281,639	2,030,976	3,616,766	
Quarter 3	1,360,236	1,832,629	1,793,855	3,456,375	
Quarter 4	2,764,469	2,338,188	2,461,460	2,776,169	
Total	8,998,586	9,531,479	9,587,041	14,332,687	

Source: Tax collectors office

4.10 TOURISM RECEIPTS

In million US dollars	2001	2002	2003	2004	2005
Quarter 1	261.62	245.03	436.00	303.184	303.799 *
Quarter 2	226.37	196.37	343.50	237.486	
Quarter 3	209.83	175.25	348.60	232.682	
Quarter 4	197.21	207.99	381.50	273.017	
Total	895.03	824.64	1,509.60	1,046.369	

Source: Central Bank of Aruba

* Provisional

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

Estimated total tourism expenditure	2001	2002	2003	2004	2005
Quarter 1	212,861.91	183,747.62	183,443.41	234,504.32	246,518.69
Quarter 2	183,918.75	156,480.25	131,786.76	182,441.32	
Quarter 3	171,264.48	152,329.66	153,559.06	185,476.31	
Quarter 4	173,471.01	161,513.30	178,696.91	209,986.75	
Total	741,516.16	654,070.85	647,486.14	812,408.69	

Source: Tourist Survey - Central Bureau of Statistics - Aruba

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

