

TOURIST PROFILE SECOND QUARTER 2005



Volume II - Second Quarter 2005

October 2005



*Photographs by:
Louissette J.
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Yarzearay*

CENTRAL BUREAU OF STATISTICS - ARUBA

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PREFACE

In this present report you will find the preliminary results of the “Tourist Survey – Second 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 1997 until 2005. The Tourist Profiles include results of the ATourist Survey@ for every quarter from 1997 until 2005. The reaction of the partners was very positive and demonstrated the existing necessity for such data.

The realization of the Tourist Survey for the second quarter 2005 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 II – Second 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 Mary Geerman and Louissette Christiaans-Yarzagaray, M.Sc.

Special thanks go to all other Central Bureau of Statistics staff, especially 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 II – Second 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 *Total 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.

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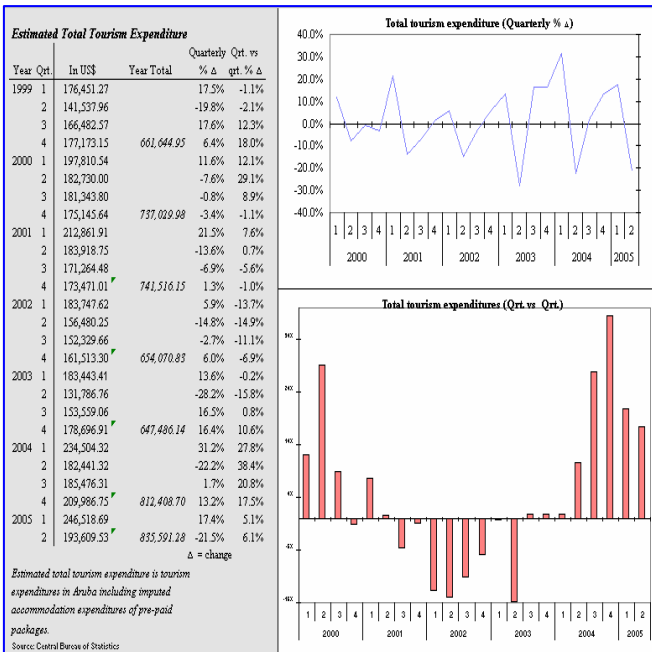
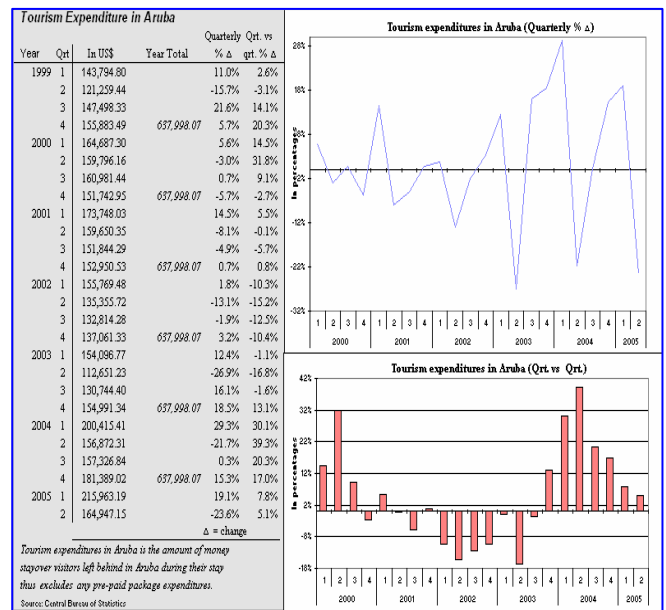
1. Highlights

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 second quarter of the year 2005 compared to the years 1997 to 2005.

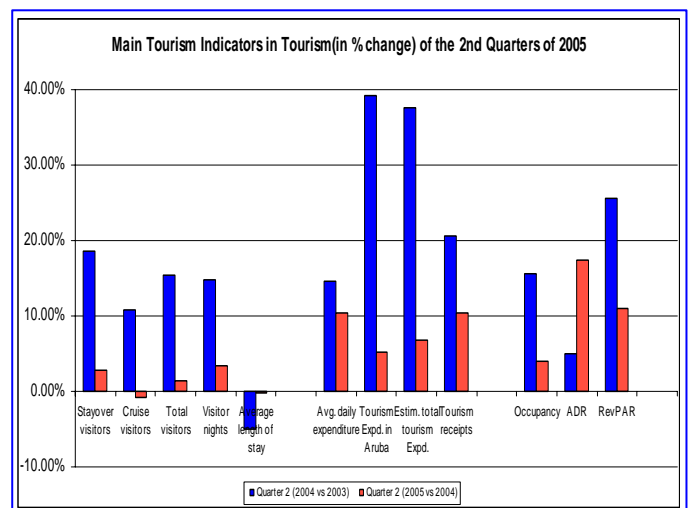
An important indicator is the estimated total tourism expenditure which indicates all travel related expenditures made by stay-over visitors, before, during, and immediately after a trip (refer to methodology for further explanations).



The first combination of table and graphs present the estimated total tourism expenditure in every quarter starting from the years 2000 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 2000 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. The graph below exhibits the same indicators in percentage growth of the second quarter of 2005 compared to 2004 and 2004 compared to 2003.

Main Economic Indicators:	Quarter 2	Quarter 2	Quarter 2	Quarter 2	Quarter 2
	2001	2002	2003	2004	2005
Total stayover visitors	179,632	153,569	150,287	178,144	183,048
Total cruise visitors	92,493	125,872	102,188	113,236	112,234
Total number of visitors	272,125	279,441	252,475	291,380	295,282
Total number of visitor nights(Unit *1000)	1,269	1,095	1,135	1,302	1,346
Average length of stay	7.5	7.5	8.1	7.7	7.7
Average daily expenditure in Aruba (In US\$)	118.66	117.52	92.54	106.06	117.18
Tourism expenditure in Aruba (In US\$)	159,650,350	135,355,720	112,651	156,872,310	164,947,152
Estimated total tourism expenditure (In US\$)	183,904,650	156,480,250	131,758	181,244,660	193,609,527
Tourism receipts (In US\$)	226,369	196,370	343,500	237,486	260,667
Occupancy	75.0%	68.3%	66.9%	77.3%	80.4%
Average Daily Rate (In US\$)	124.22	120.45	121.62	127.74	150.09
Revenue per Available Room (In US\$)	69.40	58.07	55.69	69.91	77.64



2. TOURISM IN ARUBA

2.1 NUMBER OF STAYOVER VISITORS BY MARKET

Country	Qrt. 2 2001	Qrt. 2 2002	Qrt. 2 2003	Qrt. 2 2004	Qrt. 2 2005
Total Visitors	179,632	153,569	150,287	178,144	183,048
United States	126,474	109,964	111,923	135,623	140,990
Venezuela	23,240	14,284	11,525	12,063	10,644
Netherlands	6,497	6,805	8,331	8,570	9,581
Neth. Antilles	5,071	4,565	5,134	5,541	5,025
Colombia	5,927	5,719	2,393	2,831	2,386
Brazil	656	610	353	745	1,142
Canada	2,539	3,312	2,665	3,646	4,094
Argentina	1,038	340	302	425	511
Germany	694	716	699	759	854
Rest of Europe	1,348	1,532	1,555	1,897	2,122
Italy	237	218	214	226	255
Peru	841	875	177	224	150
Rest of the World	762	726	659	574	519
So - Cent. America	715	888	715	974	1,008
Caribbean General	423	336	322	239	168
United Kingdom	1,360	1,328	1,727	2,161	1,862
Surinam	293	204	322	448	363
Switzerland	253	192	171	255	324
Dominican Republic	450	296	220	282	460
Trinidad / Tobago	455	346	583	329	230
Chile	194	145	84	117	158
Ecuador	127	123	176	140	168
Japan	38	45	37	75	34

Source: Aruba Tourism Authority (ATA)

2.2 CRUISE PASSENGERS

Cruise	Qrt. 2 2001	Qrt. 2 2002	Qrt. 2 2003	Qrt. 2 2004	Qrt. 2 2005
Number of passengers	92,493	125,872	102,188	113,236	112,234
Number of calls	50	64	53	53	64
Crew members	37,340	49,407	41,878	45,402	45,644
Number of passengers per ship	1,850	1,967	1,928	2,137	5,069

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

2.3 TOTAL NUMBER OF VISITORS

	Qrt. 2 2001	Qrt. 2 2002	Qrt. 2 2003	Qrt. 2 2004	Qrt. 2 2005
Total stayover visitors	179,632	153,569	150,287	178,144	183,048
Total cruise visitors	92,493	125,872	102,188	113,236	112,234
Total number of visitors	272,125	279,441	252,475	291,380	295,282

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. 2 2001	Qrt. 2 2002	Qrt. 2 2003	Qrt. 2 2004	Qrt. 2 2005
U.S.A.	7.4	7.1	7.4	6.9	7.1
Venezuela	5.3	5.6	7.6	7.4	6.6
Netherlands	9.9	11.9	11.5	11.4	14.2
Brazil	7.8	3.5	5.1	3.0	6.1
Netherlands Antilles	4.8	4.6	7.5	7.2	6.2
Canada	7.6	8.1	7.5	7.1	7.8
Colombia	10.7	15.2	13.3	10.3	12.1
Other	11.3	9.9	12.3	12.1	11.7
General	7.5	7.5	8.1	7.7	7.7

Source: Tourist Survey - Central Bureau of Statistics - Aruba

2.5 NUMBER OF VISITOR NIGHTS BY MARKET (* 1.000)

Country	Qrt. 2 2001	Qrt. 2 2002	Qrt. 2 2003	Qrt. 2 2004	Qrt. 2 2005
Total Visitor Nights	1,269.2	1,092.2	1,135.0	1,301.94	1,345.90
United States	880.48	760.32	781.92	932.74	968.83
Venezuela	121.40	68.55	80.10	79.14	62.83
Netherlands	83.99	86.33	98.19	97.97	116.40
Neth. Antilles	24.61	21.56	26.44	27.31	26.94
Colombia	51.69	54.88	31.59	36.90	36.63
Brazil	5.25	3.95	2.42	4.05	7.48
Canada	20.41	23.65	21.30	29.35	32.83
Argentina	7.98	2.99	2.78	3.55	4.21
Germany	7.26	7.20	8.14	8.45	9.47
Rest of Europe	10.83	12.93	16.00	16.76	19.54
Italy	1.81	2.08	1.75	1.90	1.80
Peru	4.73	4.85	2.45	2.69	1.98
Rest of the World	9.95	8.53	10.11	4.90	4.87
So - Cent. America	4.45	7.24	6.93	10.59	10.11
Caribbean General	3.83	2.65	3.34	2.09	1.52
United Kingdom	12.83	11.65	19.00	25.03	21.68
Surinam	3.07	2.20	3.22	4.47	3.65
Switzerland	2.35	2.10	1.83	2.67	3.20
Dominican Republic	3.84	3.51	3.72	4.95	6.52
Trinidad / Tobago	5.94	3.11	12.04	3.99	2.47
Chile	1.25	0.92	0.61	0.81	1.21
Ecuador	1.11	0.82	1.02	1.33	1.58
Japan	0.15	0.19	0.15	0.31	0.18

Source: Aruba Tourism Authority (ATA)

2.6 AIRPORT TRAFFIC / NUMBER OF PASSENGERS TRAVELING BY AIR

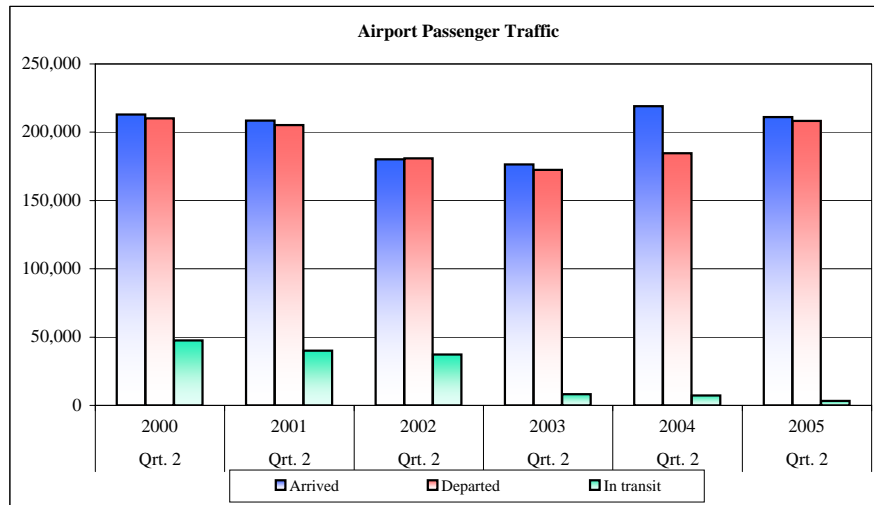
Traffic	Qrt. 2 2001	Qrt. 2 2002	Qrt. 2 2003	Qrt. 2 2004	Qrt. 2 2005
Arrived	208,621	180,141	176,493	219,107	211,104
Departed	205,362	180,903	172,480	184,703	208,340
In transit	39,997	37,198	8,281	7,259	3,302
Total Traffic	453,980	398,242	357,254	411,069	422,746

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

2.7 AIRCRAFT LANDINGS

Landings	Qrt. 2 2001	Qrt. 2 2002	Qrt. 2 2003	Qrt. 2 2004	Qrt. 2 2005
Commercial landings	3,017	3,285	2,721	3,420	3,203
Non-commercial landings	599	658	859	639	547
Total	3,616	3,943	3,580	4,059	3,750

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. 2	Qrt. 2	Qrt. 2	Qrt. 2	Qrt. 2
	2001	2002	2003	2004	2005
Under 20 years	0.4	1.0	0.8	0.6	0.3
20 - 29 years	14.3	16.0	13.6	15.6	13.0
30 - 39 years	23.8	22.4	21.3	22.0	20.7
40 - 49 years	28.7	26.9	29.1	24.1	24.0
50 - 64 years	25.9	28.4	28.0	25.1	31.0
Over 64 years	6.9	5.1	7.0	12.5	11.0
Unknown	0.0	0.3	0.3	0.0	0.0
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. 2	Qrt. 2	Qrt. 2	Qrt. 2	Qrt. 2
	2001	2002	2003	2004	2005
Less than US\$20,000	9.4	7.2	7.6	5.8	6.6
US\$20,001 - US\$30,000	12.3	8.9	8.4	4.6	4.2
US\$30,001 - US\$50,000	19.0	20.6	14.4	14.2	13.2
US\$50,001 - US\$75,000	18.5	23.7	30.7	24.8	25.6
US\$75,001 - US\$100,000	13.8	15.7	17.3	16.3	20.2
US\$100,001 and over	13.2	10.0	12.3	18.5	19.1
Unknown	13.8	14.0	9.2	15.7	11.0
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. 2	Qrt. 2	Qrt. 2	Qrt. 2	Qrt. 2
	2001	2002	2003	2004	2005
Legislators, senior officials and managers	12.2	13.2	15.2	14.0	14.0
Professionals	25.0	22.8	19.7	21.7	19.8
Technicians and associate professionals	14.7	18.1	16.2	18.0	17.3
Clerks	9.1	7.5	9.4	7.6	8.8
Service workers, shop & market sales workers	4.4	4.4	6.0	4.5	5.9
Skilled agricultural and fishery workers	0.4	0.2	0.2	0.2	0.1
Craft and related trades workers	2.5	2.2	3.3	2.6	2.5
Plant and machine operators and assemblers	0.9	1.3	1.0	1.3	1.2
Elementary occupations	1.1	0.4	0.6	0.5	1.1
Armed forces	0.2	0.7	0.1	0.4	0.2
Not economically active (Retired)	29.0	29.2	28.2	29.2	29.3
Unemployed	0.3	0.0	0.0	0.0	0.0
Unknown	0.1	0.0	0.1	0.0	0.1
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. 2	Qrt. 2
	2004	2005
On-Line (internet)	28.2	33.7
Travel Agent	47.2	41.9
Tour Operator	0.9	0.4
Charter Operator	0.3	0.3
Other	23.4	23.7
Total	100%	100%

Source: Tourist Survey - Central Bureau of Statistics - Aruba

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

	Qrt. 2	Qrt. 2
	2004	2005

<i>To Aruba (by cruise)</i>	Yes	7.7	8.4
	No	92.3	91.5
<i>To the Caribbean</i>	Yes	65.8	65.8
	No	34.2	33.5

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. 2 2001	Qrt. 2 2002	Qrt. 2 2003	Qrt. 2 2004	Qrt. 2 2005
Vacation	82.3	83.0	87.5	85.6	85.0
Honeymoon	6.9	7.2	5.5	4.9	5.0
Visit friends / relatives	4.1	4.0	2.8	3.0	4.4
Business / leisure	3.1	3.4	1.6	2.1	1.5
Other ¹⁾	2.0	1.4	1.7	2.3	2.1
Business only / Convention	1.5	0.9	1.0	1.4	1.7
Wedding	n.a.	n.a.	n.a.	0.5	0.3
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. 2 2001	Qrt. 2 2002	Qrt. 2 2003	Qrt. 2 2004	Qrt. 2 2005
First time	50.2	52.2	43.1	52.8	50.0
2 to 5 times	28.7	28.3	33.4	26.9	26.3
6 times or more	21.1	19.5	23.5	20.3	23.7
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. 2 2001	Qrt. 2 2002	Qrt. 2 2003	Qrt. 2 2004	Qrt. 2 2005
Hotel	59.8	61.6	52.9	61.1	56.9
Timeshare	24.9	23.4	32.7	28.0	31.4
Guest house/Apartment	3.0	4.4	4.4	2.5	2.1
Friends / Relatives	11.0	9.4	8.9	8.0	8.3
Other	1.3	1.2	1.2	0.4	1.2
Total	100%	100%	100%	100%	100%

Source: Tourist Survey - Central Bureau of Statistics - Aruba

3.2.4. TRAVEL ARRANGEMENT OF THE VISITORS (In Percentages)

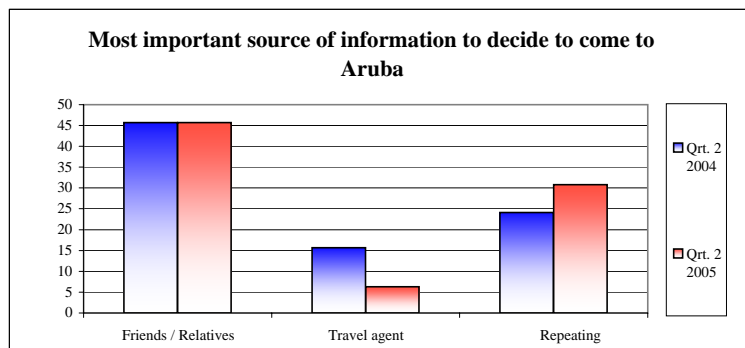
Type of arrangement	Qrt. 2 2001	Qrt. 2 2002	Qrt. 2 2003	Qrt. 2 2004	Qrt. 2 2005
Pre-paid package	45.3	47.8	44.3	43.7	38.7
Own arrangement	54.7	52.2	55.7	56.3	61.3
Total	100%	100%	100%	100%	100%

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. 2 2001	Qrt. 2 2002	Qrt. 2 2003	Qrt. 2 2004	Qrt. 2 2005
Friends / Relatives	35.9	38.3	42.9	45.7	45.6
Travel agent	25.0	21.8	19.2	15.7	6.3
Newspaper / magazine	2.6	1.2	1.5	1.2	4.2
Television ad / Radio ad	0.8	0.4	0.4	0.5	0.4
Tourist board	1.3	0.6	0.6	0.8	0.3
Other	5.1	4.5	4.8	3.6	2.7
Repeating	19.4	20.4	21.0	24.1	30.8
Cruise	0.6	0.6	0.9	0.4	0.4
Internet	4.3	7.7	6.2	3.8	6.0
Business	5.0	4.4	2.3	3.6	3.4
Unknown			0.2	0.4	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. 2 2001	Qrt. 2 2002	Qrt. 2 2003	Qrt. 2 2004	Qrt. 2 2005
<u>ACCOMMODATION</u>					
Good	91.9	92.9	92.9	89.1	89.1
Average	6.8	6.2	6.1	9.7	10.1
Poor	0.6	0.5	0.8	0.9	0.9
Unknown / n.a.	0.6	0.4	0.2	0.4	0.0
Total	100%	100%	100%	100%	100%
<u>MEALS & DRINKS</u>					
Good	88.3	90.0	91.1	89.2	90.7
Average	11.0	9.8	8.1	9.8	8.6
Poor	0.3	0.2	0.5	0.5	0.7
Unknown / n.a.	0.4	0.0	0.3	0.4	0.0
Total	100%	100%	100%	100%	100%
<u>LOCAL TRANSPORTATION</u>					
Good	84.8	81.8	85.6	79.9	78.8
Average	5.8	4.5	5.0	6.4	4.9
Poor	0.4	0.4	0.3	0.4	0.6
Unknown / n.a.	9.1	13.3	9.1	13.4	15.7
Total	100%	100%	100%	100%	100%
<u>SHOPPING</u>					
Good	77.5	79.6	81.6	78.6	73.0
Average	12.4	9.5	8.7	8.9	10.5
Poor	0.5	0.3	0.6	0.9	0.4
Unknown / n.a.	9.5	10.6	9.1	11.6	16.0
Total	100%	100%	100%	100%	100%
<u>ENTERTAINMENT / RECREATION</u>					
Good	80.0	79.5	81.0	71.4	63.4
Average	7.3	6.6	7.3	9.2	9.0
Poor	0.3	0.5	0.3	0.7	0.4
Unknown / n.a.	12.4	13.3	11.4	18.6	27.1
Total	100%	100%	100%	100%	100%
<u>QUALITY OF SERVICE</u>					
Good	92.8	94.7	94.2	92.2	92.3
Average	5.5	4.6	5.0	6.7	6.6
Poor	1.2	0.4	0.6	0.9	1.0
Unknown / n.a.	0.5	0.3	0.2	0.3	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. 2 2001	Qrt. 2 2002	Qrt. 2 2003	Qrt. 2 2004	Qrt. 2 2005
<u>ACCOMMODATION</u>					
Good	76.5	75.6	78.1	75.6	76.9
Average	13.3	11.7	10.4	14.3	13.6
Poor	2.3	3.6	2.9	2.5	1.9
Unknown / n.a.	7.9	9.2	8.6	7.6	7.7
Total	100%	100%	100%	100%	100%
<u>MEALS & DRINKS</u>					
Good	67.7	66.2	70.0	69.1	74.4
Average	24.7	23.0	22.6	20.7	18.8
Poor	5.8	7.6	5.9	7.5	4.1
Unknown / n.a.	1.9	3.3	1.4	2.8	2.8
Total	100%	100%	100%	100%	100%
<u>LOCAL TRANSPORTATION</u>					
Good	77.1	73.8	77.6	70.6	71.9
Average	10.5	9.9	10.5	12.9	9.4
Poor	2.8	2.5	2.5	2.6	2.1
Unknown / n.a.	9.7	13.9	9.4	13.9	16.5
Total	100%	100%	100%	100%	100%
<u>SHOPPING</u>					
Good	66.1	66.4	69.7	66.2	65.2
Average	21.1	19.2	18.8	18.4	16.8
Poor	3.2	3.7	2.7	3.2	2.0
Unknown / n.a.	9.6	10.7	8.9	12.2	15.9
Total	100%	100%	100%	100%	100%
<u>ENTERTAINMENT / RECREATION</u>					
Good	64.2	62.1	63.6	53.5	49.4
Average	13.7	16.6	16.6	14.7	15.0
Poor	1.9	2.1	2.3	2.0	1.9
Unknown / n.a.	20.2	19.1	17.5	29.7	33.7
Total	100%	100%	100%	100%	100%
<u>QUALITY OF SERVICE</u>					
Good	87.7	88.8	88.5	85.9	86.0
Average	9.1	7.2	9.3	10.3	9.4
Poor	2.3	2.3	1.7	2.8	1.9
Unknown / n.a.	0.9	1.7	0.5	1.1	2.7
Total	100%	100%	100%	100%	100%

Source: Tourist Survey - Central Bureau of Statistics - Aruba

4. MONEY ASPECTS OF VISITORS

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

Categories of expenditures	Qrt. 2 2001	Qrt. 2 2002	Qrt. 2 2003	Qrt. 2 2004	Qrt. 2 2005
Accommodation ²⁾	25.35	26.99	21.35	29.61	31.48
Food & beverage	24.87	27.14	22.53	25.78	30.16
Groceries / sundries	3.29	3.42	3.03	2.60	3.05
Entertainment / recreation	9.74	9.34	6.84	8.04	8.84
Taxis	2.58	3.49	2.50	2.84	3.20
Car rental	4.67	4.61	4.00	3.77	4.17
Public transportation	0.38	0.32	0.24	0.21	0.29
Tax free shopping	7.38	5.89	3.47	3.27	3.82
Shopping	19.83	18.90	13.39	12.50	13.73
Casinos	17.47	13.82	13.57	13.18	10.43
Internet/Telephone n.a.		n.a.	0.71	0.71	0.81
Departure tax	1.44	1.56	n.a.	n.a.	n.a.
Other ³⁾	1.68	2.04	0.92	1.02	0.46
Total (In US\$)	118.66	117.52	92.54	106.06	117.18

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 RESIDENCE ¹⁾ (In US\$)

Place of residence	Qrt. 2 2001	Qrt. 2 2002	Qrt. 2 2003	Qrt. 2 2004	Qrt. 2 2005
U.S.A.	112.45	117.69	94.49	108.57	125.00
Venezuela	175.12	166.72	119.32	145.40	145.15
Netherlands	63.07	67.19	55.66	52.57	49.78
Brazil	*	*	*	*	99.64
Netherlands Antilles	91.56	128.81	72.57	123.72	82.07
Canada	58.25	67.58	58.69	114.02	75.91
Colombia	138.56	68.75	91.11	72.38	71.15
Other	97.96	82.27	65.02	95.81	86.94
Total visitors (In US dollars)	118.66	117.52	92.54	106.06	117.18

Source: Tourist Survey - Central Bureau of Statistics - Aruba

* = not representative due to a small sample

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

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

Purpose of visit	Qrt. 2 2001	Qrt. 2 2002	Qrt. 2 2003	Qrt. 2 2004	Qrt. 2 2005
Vacation	117.62	119.39	91.35	108.36	116.26
Honeymoon	102.95	93.00	100.02	142.40	146.85
Visit friends / relatives	49.08	37.33	26.43	89.57	54.94
Other ²⁾	95.62	76.45	77.60	130.40	113.17
Business & leisure	205.60	191.87	172.12	250.41	171.26
Business Only / Convention	261.22	210.17	228.88	255.41	181.20
Wedding	n.a.	n.a.	n.a.	n.a.	197.80

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 ARUBA ¹⁾ (In US\$)

Number of visits	Qrt. 2 2001	Qrt. 2 2002	Qrt. 2 2003	Qrt. 2 2004	Qrt. 2 2005
First time	110.11	118.16	90.68	114.58	115.85
Between 2 and 5 times	116.52	104.46	83.38	107.45	117.72
6 Times or more	138.33	134.39	108.90	125.05	119.44

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. 2 2001	Qrt. 2 2002	Qrt. 2 2003	Qrt. 2 2004	Qrt. 2 2005
<i>Hotel :</i>					
Occupancy	76.5%	68.4%	64.7%	80.3%	85.5%
Average Daily Rate	\$126.70	\$121.28	\$124.24	\$128.36	\$152.98
Revenue per available room	\$96.95	\$83.02	\$80.36	\$103.29	\$131.00
<i>Timeshare :</i>					
Occupancy	72.1%	68.1%	70.6%	72.3%	74.6%
Average Daily Rate	\$107.34	\$113.78	\$101.61	\$121.08	\$128.94
Revenue per available room	\$21.12	\$16.16	\$14.40	\$15.29	\$17.08
<i>Total :</i>					
Occupancy	75.0%	68.3%	66.9%	77.3%	80.4%
Average Daily Rate	\$124.22	\$120.45	\$121.62	\$127.74	\$150.09
Rev. per avail. room	\$69.40	\$58.07	\$55.69	\$69.91	\$77.64

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. 2 2001	Qrt. 2 2002	Qrt. 2 2003	Qrt. 2 2004	Qrt. 2 2005
U.S.A.	827.63	833.25	699.23	788.74	885.00
Venezuela	919.38	938.63	906.83	1,166.93	950.73
Netherlands	623.76	796.20	640.09	682.59	708.87
Netherl. Antilles	441.32	587.37	543.55	973.57	508.83
Canada	445.03	544.02	439.00	511.43	592.86
Colombia	1,481.21	1,045.69	1,213.59	684.95	863.76
Other	1,107.93	810.36	796.50	1,623.36	1,018.07
Total visitors	888.76	877.87	749.57	880.59	901.11

Source: Tourist Survey - Central Bureau of Statistics - Aruba

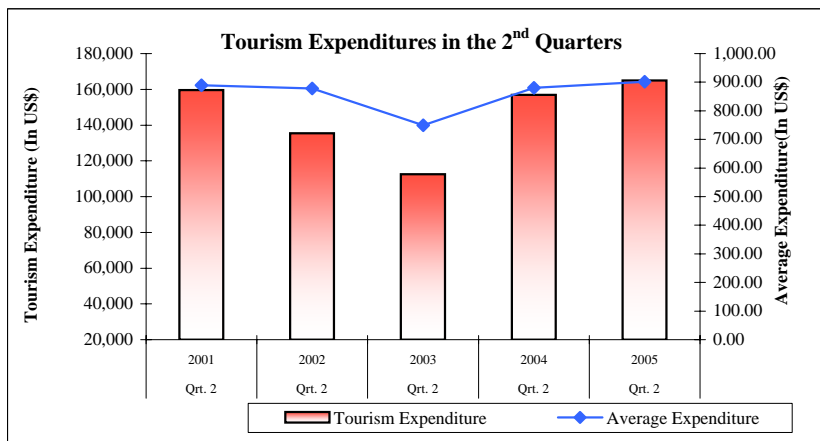
1) The expenditures above mentioned are expenditures that took place while the visitors were IN ARUBA, excluding thus anything spent on pre-paid package.

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

Place of residence	Qrt. 2 2001	Qrt. 2 2002	Qrt. 2 2003	Qrt. 2 2004	Qrt. 2 2005
U.S.A.	104,673.93	91,885.92	78,259.47	106,971.15	124,776.15
Venezuela	21,366.39	13,335.97	10,451.24	14,076.64	10,119.60
Netherlands	4,052.58	5,441.01	5,332.59	5,849.79	6,791.66
Netherl. Antilles	2,237.93	2,704.90	2,790.58	5,394.53	2,556.89
Canada	1,129.93	1,812.99	1,169.94	1,864.66	2,427.16
Colombia	8,779.11	5,976.36	2,904.11	1,939.09	2,060.93
Other	10,223.96	6,768.25	6,342.49	12,926.80	8,106.87
Total visitors	159,650.35	134,814.29	112,651.23	156,872.31	164,947.15

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. (see highlights for further explanation and comments.)



4.8 LODGING TAX (In US\$)

In US dollars	2000	2001	2002	2003	2004	2005
Quarter 1	3,223,065	4,939,402	4,185,643	4,213,148	4,791,335	5,902,498
Quarter 2	3,353,101	4,127,626	3,617,218	3,644,288	4,397,729	5,161,686
Quarter 3	2,543,998	3,874,968	2,847,719	3,218,436	5,979,035	
Quarter 4	3,115,742	1,924,217	3,192,238	2,919,820	3,854,241	
Total	12,235,907	14,866,213	13,842,818	13,995,692	19,022,339	

Source: Tax collectors office

4.9 CASINO TAX (In US\$)

In US dollars	2000	2001	2002	2003	2004	2005
Quarter 1	2,933,212	2,549,919	3,078,023	3,300,750	4,483,377	3,938,285
Quarter 2	1,880,493	2,323,962	2,281,639	2,030,976	3,616,766	2,773,033
Quarter 3	1,769,763	1,360,236	1,832,629	1,793,855	3,456,375	
Quarter 4	1,902,678	2,764,469	2,338,188	2,461,460	2,776,169	
Total	8,486,146	8,998,586	9,530,479	9,587,041	14,332,687	

Source: Tax collectors office

4.10 TOURISM RECEIPTS (In US\$)

In million US dollars	2000	2001	2002	2003	2004	2005
Quarter 1	254.02	261.62	245.03	436.00	303.184	303.799 *
Quarter 2	196.26	226.37	196.37	343.50	237.486	260.67 *
Quarter 3	195.53	209.83	175.25	348.60	232.682	
Quarter 4	200.11	197.21	207.99	381.50	273.017	
Total	845.92	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	2000	2001	2002	2003	2004	2005
Quarter 1	197,810.54	212,861.91	183,747.62	183,443.41	234,504.32	246,518.69 *
Quarter 2	182,730.00	183,918.75	156,479.91	131,786.76	182,441.32	193,609.53 *
Quarter 3	181,343.80	171,264.48	152,329.66	153,559.06	185,476.31	
Quarter 4	175,145.64	173,471.01	161,513.30	178,696.91	209,986.75	
Total	737,029.98	741,516.16	654,070.85	647,486.14	812,408.69	

Source: Tourist Survey - Central Bureau of Statistics - Aruba

* Provisional

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

