

ANGUILLA

Visitor Summary

Total visitor arrivals to Anguilla were 120.8 thousand in 2004 compared to 109.3 thousand in 2003, an increase of 10.5 percent. The main source of this increase was the tourist arrivals, which expanded by 15.1 percent.

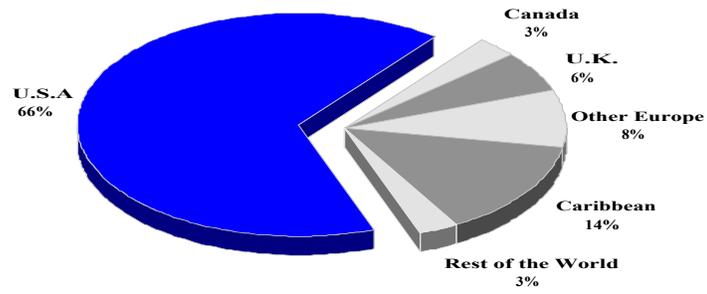
- ◆ Same-day visitors (excursionists) accounted for 55.3 percent of total visitors in 2005 and grew by 7.1 to reach 66.8 thousand.
- ◆ Another robust performance was registered by tourist arrivals to Anguilla in 2005. A total of 53.9 thousand tourists, the largest number ever, were entertained in this destination. The United States, the most significant market for this destination recorded a 1 percent increase in market share to account for 66 percent of total arrivals and grew by 16.7 percent. The other major sources of tourists also increased in 2004. The Caribbean, which is responsible for 14 percent of arrivals, rose by 3.0 percent; arrivals for m Europe (14.2 percent of the total) jumped by 21.5 percent owing mainly to an outstanding performance in the Other Europe market, which excluded the United Kingdom. Some 20.2 percent more tourists originating in Canada came to destination in 2004 when compared to 2003.

TOURISM HIGHLIGHTS FOR 2004

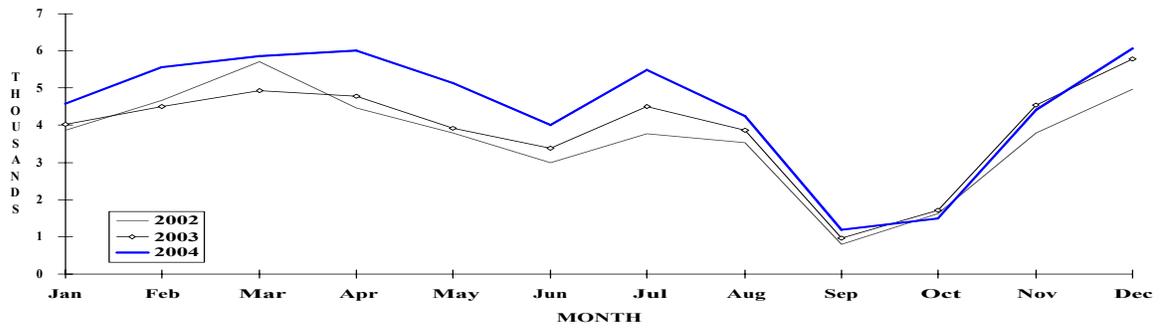
VISITOR ARRIVALS			
Tourist Arrivals ✈	53,987	Same Day Visitors	66,801
➔ <i>Winter</i>	40.7%		
➔ <i>Summer</i>	59.3%		
VISITOR PROFILE			
Average Length of Stay (<i>nights</i>)	7.6	Tourist Arrivals by Purpose of Visit	
		➔ <i>Holiday</i>	93.3%
		➔ <i>Business</i>	6.7%
TOURISM AND OTHER RELATED ECONOMIC STATISTICS			
Average Daily Expenditure (US\$) ^{IV}		Visitor Expenditure (US\$ millions)	\$69.4
➔ <i>Winter</i>	\$213.81	GDP at Factor Cost (US\$ millions)	\$108.9
➔ <i>Summer</i>	\$154.49	Consumer Price Index (% ch. 2004/'03)	5.1%
Tourism Budgets (US\$ thousands) ^{IV}	\$819	Hotel and Restaurant contribution to GDP	28.5%
ACCOMMODATION STATISTICS		SOCIO-ECONOMIC STATISTICS	
Rooms	756	Land Area (<i>square Kilometres</i>)	91
Occupancy rate ^I	41.9%	Population (<i>thousand, mid year 2004</i>)	12.5

ANGUILLA

TOURIST ARRIVALS BY MAIN MARKETS 2004



MONTHLY TOURIST ARRIVALS



						ANGUILLA
VISITOR ARRIVALS BY CATEGORY						
						%Share
Category	2000	2001	2002	2003	2004	2004
Tourists	43789	47965	43969	46915	53987	44.7
Same-day visitors	68680	57009	67149	62367	66801	55.3
TOTAL	112469	104974	111118	109282	120788	100.0
By Sea	83894	72904	81464	80951	96835	80.2
By Air	28575	32070	29654	28331	23953	19.8
TOURIST ARRIVALS BY COUNTRY OF RESIDENCE						
						%Share
Country of Residence	2000	2001	2002	2003	2004	2004
U.S.A.	24799	30099	28755	30644	35751	66.2
Canada	1512	1258	1301	1289	1549	2.9
United Kingdom	2786	2789	2529	2962	3198	5.9
Other Europe	6636	5238	2854	3346	4469	8.3
Caribbean	6816	7369	7455	7362	7580	14.0
Other	1240	1212	1075	1312	1440	2.7
TOTAL	43789	47965	43969	46915	53987	100.0

						ANGUILLA
MONTHLY TOURIST ARRIVALS*						
						% Change
Months	2000	2001	2002	2003	2004	2004\03
January	3611	4504	3868	4018	4580	14.0
February	4435	5552	4677	4501	5563	23.6
March	4787	5594	5702	4930	5846	18.6
April	4821	6054	4472	4787	6005	25.4
May	3694	3965	3783	3915	5130	31.0
June	3390	3498	2997	3373	4001	18.6
July	3836	4295	3771	4542	5485	20.8
August	3498	4016	3536	3856	4246	10.1
September	1031	907	787	967	1178	21.8
October	1650	1596	1619	1712	1494	-12.7
November	3536	3291	3786	4541	4410	-2.9
December	5500	4693	4971	5773	6049	4.8
TOTAL	43789	47965	43969	46915	53987	15.1
<i>*Excluding visiting Anguillan nationals who reside abroad</i>						
TOURIST ACCOMMODATION (Rooms)						
						% Share
Type of Accommodation	2000	2001	2002	2003	2004	2004
Hotels ¹	617	611	536	362	346	45.8
Guest Houses	30	99	101	88	88	11.6
Apartments/Villas	420	359	400	309	322	42.6
TOTAL	1067	1069	1037	759	756	100.0
¹ Sonesta Hotel closed in September 2002						
Source: Department of Tourism, Anguilla						

ANTIGUA AND BARBUDA

Visitor Summary

For the third consecutive year, tourist arrivals to Antigua and Barbuda has grown. In 2004, this growth was recorded at 9.7 percent when arrivals totaled 245.8 thousand as compared to 224.0 thousand in 2003. The winter season was particularly strong as tourist arrivals increased by 23.6 percent. The summer period which accounted for the bulk of arrivals, 61 percent of the total, had a modest increase of 2.2 percent when compared to the same period in 2003.

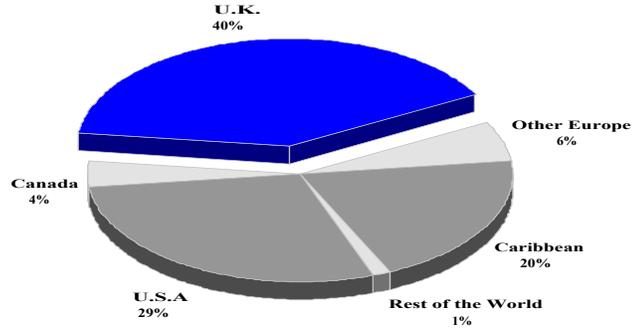
- ◆ Arrivals from the United Kingdom (39.9 percent of total arrivals) and the USA (28.7 percent of total arrivals) formed the two largest markets for this destination. Stay-over arrivals from the UK rose by 17.6 percent partly due to the international cricket match (WI vs England), while those from the USA numbered 70.5 thousand, an increase of 9.6 percent over 2003. The less significant sources of arrivals, Caribbean, Canada and Other Europe matched the performances of these markets recording growth of 2.8 percent, 9.6 percent and 1.3 percent respectively. The ROW, which accounted for the smallest share (1.2 percent) of total arrivals declined by 30.2 percent.
- ◆ At the end of 2004, cruise passenger arrivals had risen by 35.5 percent to reach 522.8 thousand. An associated 26.3 percent rise in cruise ship calls was recorded.

TOURISM HIGHLIGHTS FOR 2004

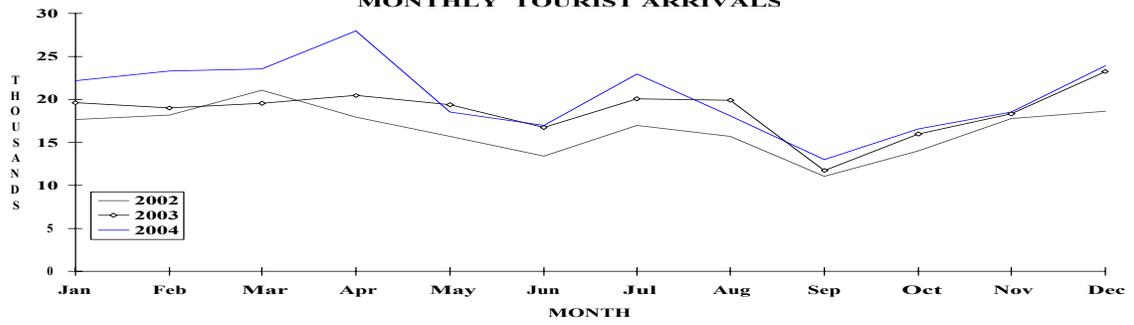
VISITOR ARRIVALS			
Tourist Air Arrivals (Non-nationals) ➔ ➔ <i>Summer</i>	245,797	Cruise Passenger Arrivals ➔ <i>Winter</i>	522,753
Tourist Air Arrivals (Nationals)	39.5%	➔ <i>Summer</i>	52.0%
	60.5%	Cruise Ship Calls	48.0%
	n.a		375
VISITOR PROFILE			
Tourist Arrivals by Purpose of Visit		Age Distribution of Visitors ^{IV}	
➔ <i>Holiday</i>	88.6%	➔ 15 and Under	8.2%
➔ <i>Business</i>	4.9%	➔ 15-44	56.6%
➔ <i>Other</i>	6.5%	➔ 45-59	26.9%
		➔ 60+	8.3%
TOURISM AND OTHER RELATED ECONOMIC STATISTICS			
Total Expenditure (US\$ million)	\$337.3	Hotel and Restaurant contribution to GDP	10.1%
GDP at Factor Cost (US \$million)	\$681.7	Consumer Price Index (% ch. 2004/'03)	1.7%
ACCOMMODATION STATISTICS		SOCIO-ECONOMIC STATISTICS	
Rooms	3,276	Land Area (square Kilometers)	440
		Population (thousand mid year 2004)	80.1

ANTIGUA & BARBUDA

**TOURIST ARRIVALS BY MAIN MARKETS
2004**



MONTHLY TOURIST ARRIVALS



ANTIGUA AND BARBUDA

TOURIST ARRIVALS BY COUNTRY OF RESIDENCE*

						% Share
Country of Residence	2000	2001	2002	2003	2004	2004
U.S.A.	59012	60176	60680	64363	70534	28.7
Canada	14007	12839	10184	8603	9452	3.8
United Kingdom	74957	67785	72401	83447	98101	39.9
Other Europe	15092	10330	9406	15218	15416	6.3
Caribbean	38920	34260	38721	47588	48933	19.9
Rest of World	4883	7786	6693	4813	3361	1.4
TOTAL	206871	193176	198085	224032	245797	100.0

* Non-national Air Arrivals only

The statistics above exclude yacht and other tourist arrivals by sea, as well as visits by nationals of Antigua and Barbuda who permanently reside abroad. Further details are provided below

OTHER VISITORS	2000	2001	2002	2003	2004
Yacht	17356	n.a	n.a	n.a	n.a
Other Sea Arrivals	23143	n.a	n.a	n.a	n.a
Nationals Resident Abroad	6655	7233	6579	n.a	n.a

MONTHLY TOURIST ARRIVALS*

						%Change
Months	2000	2001	2002	2003	2004	2004/03
January	17382	19212	17664	19609	22222	13.3
February	20521	18805	18163	18988	23322	22.8
March	21371	20601	21064	19516	23596	20.9
April	22582	21197	17972	20485	27970	36.5
May	16031	14206	15665	19378	18557	-4.2
June	15465	14404	13411	16711	16970	1.6
July	17689	15163	16997	20106	22971	14.2
August	16144	16001	15696	19932	18124	-9.1
September	10411	9718	11063	11746	13023	10.9
October	13834	12364	13999	15954	16568	3.8
November	16686	15061	17771	18357	18551	1.1
December	18755	16444	18620	23250	23923	2.9
TOTAL	206871	193176	198085	224032	245797	9.7

<i>* Non-national Air Arrivals only</i>						
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ANTIGUA AND BARBUDA						
CRUISE PASSENGER ARRIVALS*						
						% Change
Months	2000	2001	2002	2003	2004	2004/03
January	53471	61190	57953	56195	71669	27.5
February	58047	46818	43799	42841	62424	45.7
March	53297	56676	53406	44298	68789	55.3
April	43568	54518	35496	45217	68776	52.1
May	20118	21512	9981	8259	13787	66.9
June	15700	17131	6628	9175	14542	58.5
July	15940	20442	7507	9802	16648	69.8
August	20450	18981	6764	9533	18680	96.0
September	14581	11655	6229	10210	22872	124.0
October	23443	11885	10202	25515	21855	-14.3
November	52787	38212	25431	55116	63078	14.4
December	58004	49792	46255	69525	79633	14.5
TOTAL	429406	408812	309651	385686	522753	35.5
Cruise Ship Calls**	331	271	217	297	375	
<i>*Excludes Windjammer Cruises which brought 11,756 passengers in 1999, 7,891 in 2000.</i>						
<i>** At the Deep Water Harbour , Nelson Dockyard and Heritage Quay.</i>						
TOURIST ACCOMMODATION (Rooms)						
Type of Accommodation	2000	2001	2002	2003	2004	
Hotels	n.a	n.a	n.a	n.a	2855	
Apartments/Villa	n.a	n.a	n.a	n.a	388	
Guest Houses	n.a	n.a	n.a	n.a	33	
TOTAL	3185	n.a	n.a	n.a	3276	

Source: Antigua Department of Tourism

ARUBA

Visitor Arrivals Summary

In 2004, the number of stay-over tourist arrivals surged by 13.4 percent when compared to the previous year, to reach a total of 728.2 thousand. Each month recorded an increase ranging from 4.4 percent in March to 26.6 percent in May.

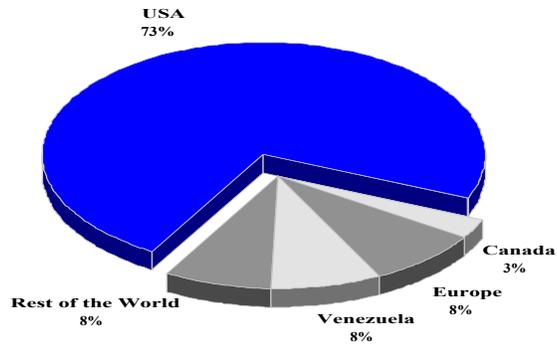
- ◆ The USA gained an additional 1.7 percentage points of the total market share in 2004, so at the end of the year this market accounted for 73.0 percent or some 531.3 thousand tourists. This figure was an increase of 15.4 percent over 2003 performance. Venezuela, which is the second most significant market with a share of 8.1 percent, rose by 8.5 percent. European tourists to this destination accounted for 8.3 percent of total arrivals and increased by 10.4 percent owing mainly to the performance of Holland, which made 63.1 percent of European visitors. Canada and the Other South America markets rebounded after last year's disappointing performances. In the case of Canada, the 20.6 thousands tourists who came in 2004 was the highest number since 2000.
- ◆ In 2004, 576.3 thousand cruise passengers visited this destination in 318 cruise ship calls. Comparing this performance to 2003, arrivals increased by 6.3 percent with an associated 1.0 percent rise in calls. Robust growth during the summer months of 17.6 percent nullified the decline of 6.2 percent, which was recorded during the winter period.

TOURISM HIGHLIGHTS FOR 2004

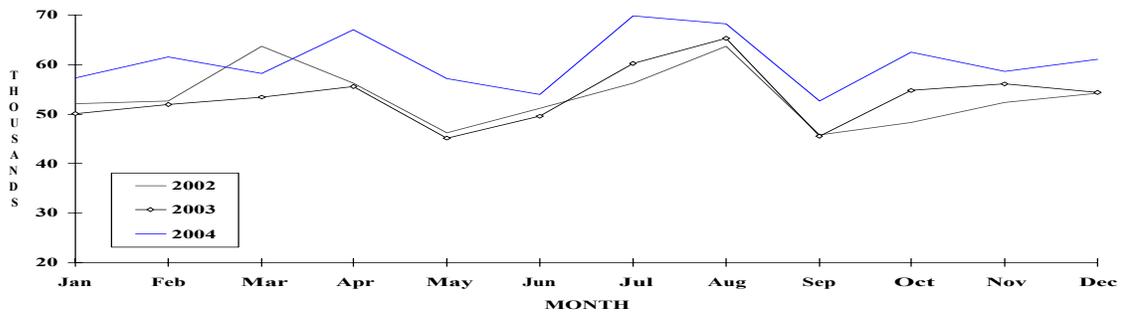
VISITOR ARRIVALS			
Tourist Arrivals ✈	728,157	Cruise Passenger Arrivals	576,320
➔ Winter	33.5%	➔ Winter	42.0%
➔ Summer	66.5%	➔ Summer	58.0%
		Cruise Ship Calls	318
VISITOR PROFILE			
Average Length of Stay (nights)	7.8	Tourist Arrivals by Place of Stay	
Tourist Arrivals by Purpose of Visit		➔ Hotels	87.9%
➔ Holiday	86.0%	➔ Guest Houses/Apartments	1.0%
➔ Business	3.8%	➔ Private	11.1%
➔ Other	10.2%		
TOURISM AND OTHER RELATED ECONOMIC STATISTICS			
Total Expenditure (US\$ millions)	\$812.4	Tourism Budget (US\$ thousands)	\$23,595
Receipts per visitor night (US\$) ¹¹	\$186.59	Consumer Price Index (% ch. 2004/'03)	2.5%
ACCOMMODATION STATISTICS		SOCIO-ECONOMIC STATISTICS	
Rooms	6,886	Land Area (square Kilometers)	180
Room Occupancy Rate	80.7%	Population (thousand mid year 2004)	97.5

ARUBA

TOURIST ARRIVALS BY MAIN MARKETS 2004



MONTHLY TOURIST ARRIVALS



						ARUBA
TOURIST ARRIVALS BY COUNTRY OF RESIDENCE						
Country of Residence	2000	2001	2002	2003	2004	% Share
						2004
U.S.A.	452211	443262	432906	460241	531287	73.0
Canada	20594	18926	17601	17218	20560	2.8
Holland	30575	28457	27992	36415	38122	5.2
Other Europe	16488	16504	15978	18296	22306	3.1
Venezuela	112018	109337	81665	54554	59218	8.1
Brazil	3309	3028	2314	2785	4762	0.7
Other South America	45848	36128	31419	17456	18391	2.5
Neth. Antilles	23709	19679	19602	20962	21472	2.9
Other Caribbean	12552	11573	8784	10526	9799	1.3
Rest of World	3920	4526	4366	3453	2240	0.3
TOTAL	721224	691420	642627	641906	728157	100.0
MONTHLY TOURIST ARRIVALS						
						% Change
Months	2000	2001	2002	2003	2004	2004/03
January	56414	60171	52101	50017	57266	14.5
February	57819	59531	52643	51940	61560	18.5
March	64959	63870	63683	53389	58272	9.1
April	69693	70090	56252	55609	67035	20.5
May	50630	53480	46178	45199	57201	26.6
June	55618	56062	51139	49479	53908	9.0
July	69718	63671	56246	60208	69930	16.1
August	69684	67578	63665	65270	68262	4.6
September	57418	45046	45828	45480	52611	15.7
October	56946	48179	48285	54826	62487	14.0
November	52779	47905	52335	56089	58570	4.4
December	59546	55837	54272	54400	61055	12.2
TOTAL	721224	691420	642627	641906	728157	13.4

						ARUBA
CRUISE PASSENGER ARRIVALS						
						% Change
Months	2000	2001	2002	2003	2004	2004/03
January	69955	67677	77102	69298	66504	-4.0
February	64503	59304	67877	61276	54086	-11.7
March	74314	68732	70602	70826	64571	-8.8
April	58732	62834	73027	56758	56940	0.3
May	14213	13363	30695	25615	28250	10.3
June	12590	16287	22150	19815	28046	41.5
July	10026	13040	25234	23379	28809	23.2
August	10415	16285	25737	23259	28220	21.3
September	15171	11076	16654	23240	24181	4.0
October	32812	36576	36473	46172	56482	22.3
November	56137	52163	66988	50411	62634	24.2
December	71317	69959	69656	72278	77597	7.4
TOTAL	490185	487296	582195	542327	576320	6.3
Cruise Ship Calls	230	331	298	337	315	
TOURIST ACCOMMODATION (Rooms)						
Type of Accommodation	2000	2001	2002	2003	2004	
Hotels, Apartments	n.a	n.a	n.a	n.a	n.a	
Condo	n.a	n.a	n.a	n.a	n.a	
Other	n.a	n.a	n.a	n.a	n.a	
TOTAL	7212	7320	7500	7500	6886	
<i>* Based on data from the Aruba Hotel and Tourism Association (AHATA)</i>						
Source: Aruba Tourism Authority						

THE BAHAMAS

Visitor Arrival Summary

By the end of 2004, 1,561.3 thousand tourists had stay in the Bahamas. Arrivals had grown by 3.4 percent when compared to 2003. The year commenced with increase levels of tourist up to July, with the YTD performance showing arrivals up by 13.3 percent. In the following months, arrivals plummeted especially on the island of Grand Bahama due to the impact by two significant hurricanes, Francis and Jeanne.

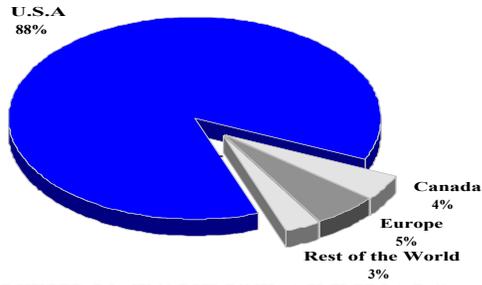
- ◆ Air Arrivals from the both the United States and Canada markets grew and had marginal increases in market share during 2004. In the USA market, arrivals accounted for 87.2 percent of the total and grew by 4.3 percent where as the Canadian market expanded by 8.4 percent while representing 4.4 percent of the total arrivals. Last year's best performing market, Europe, although it is small was this year worst. Arrivals dropped by 10.3 percent. The ROW has a relatively flat performance.
- ◆ While tourist arrivals have been declining, cruise passenger arrivals have been performing well. For the fifth consecutive year, cruise passengers increased, 13.1 percent or some 390.0 thousand cruise passengers arrived at this destination in 2004 than in 2003. The total for the year was 3,360.0 thousand arriving in 2,068 cruise ship calls.

TOURISM HIGHLIGHTS FOR 2004

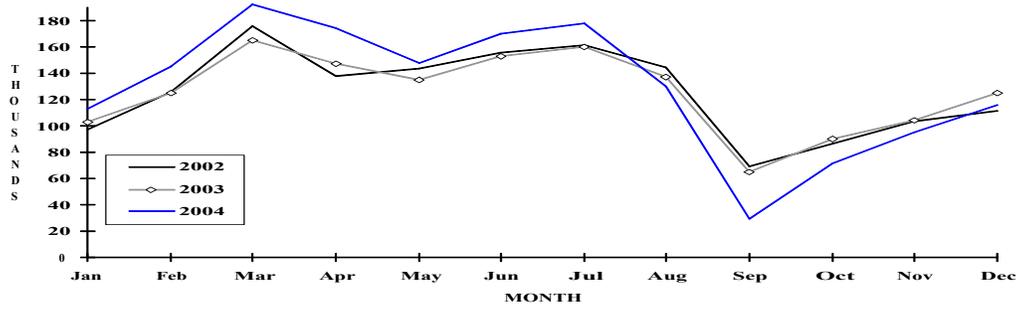
VISITOR ARRIVALS			
Tourist Arrivals ➔	1,561,312	Cruise Passenger Arrivals	3,360,012
➔ <i>Winter</i>	40.0%	➔ <i>Winter</i>	38.6%
➔ <i>Summer</i>	60.0%	➔ <i>Summer</i>	61.4%
Same Day Visitors	86,291	Cruise Ship Calls	2,068
VISITOR PROFILE			
Average Length of Stay (<i>nights</i>)	6.3	Tourist Arrivals by Place of Stay	
Tourist Arrivals by Purpose of Visit		➔ <i>Hotels</i>	73.8%
➔ <i>Holiday</i>	89.1%	➔ <i>Guest Houses/Apartments</i>	11.3%
➔ <i>Business</i>	9.5%	➔ <i>Private</i>	4.6%
➔ <i>Other</i>	1.4%	➔ <i>Other</i>	10.3%
TOURISM AND OTHER RELATED ECONOMIC STATISTICS			
Total Expenditure (<i>US\$ millions</i>)	\$1,884.5	GDP at Market Prices (<i>US\$ million</i>) ¹	\$5,260.0
Cruise Expenditure (<i>US\$ millions</i>)	\$185.8	Consumer Price Index (<i>%ch. 2004/'03</i>)	1.7%
Tourism Budget (<i>US\$ thousands</i>)	\$67,150		
ACCOMMODATION STATISTICS		SOCIO-ECONOMIC STATISTICS	
Rooms	15,508	Land Area (<i>square Kilometers</i>)	13,864
Room Occupancy Rates	65.1%	Population (<i>thousand mid year 2004</i>)	320.7

THE BAHAMAS

TOURIST ARRIVALS BY MAIN MARKETS 2004



MONTHLY TOURIST ARRIVALS



BAHAMAS						
VISITOR ARRIVALS BY CATEGORY						
Category	2000	2001	2002	2003	2004	
Tourists	1543959	1537780	1513151	1510169	1561312	
Cruise Passenger	2512626	2551673	2802112	2970174	3360012	
Day Visitors	n.a	n.a	n.a	83921	86291	
TOTAL	n.a	n.a	n.a	4564264	5007615	
TOURIST ARRIVALS BY COUNTRY OF RESIDENCE						
Country of Residence	2000	2001	2002	2003	2004	% Share 2004
United States	1294295	1308163	1310140	1305335	1360912	87.2
Canada	82840	79715	68592	63148	68462	4.4
Europe	104611	94047	79564	93170	83590	5.4
Rest of the World	62213	55855	54855	48516	48348	3.1
TOTAL	1543959	1537780	1513151	1510169	1561312	100.0
MONTHLY TOURIST ARRIVALS						
Months	2000	2001	2002	2003	2004	% Change 2004/03
January	105024	113178	97425	102975	112604	9.4
February	126832	136503	125600	125034	144852	15.9
March	171887	178906	175662	165072	192455	16.6
April	151245	165381	138170	147212	174192	18.3
May	147653	147296	143818	135289	147997	9.4
June	157884	167865	155851	152797	170018	11.3
July	164725	169936	161545	160088	177872	11.1
August	123760	151620	144006	137445	129714	-5.6
September	82378	56549	69559	64981	28933	-55.5
October	85823	69335	86289	89782	71710	-20.1
November	108391	86640	103521	104574	95060	-9.1
December	118357	94571	111705	124920	115905	-7.2
TOTAL	1543959	1537780	1513151	1510169	1561312	3.4

BAHAMAS						
TOURIST ARRIVALS BY AREA*						
Area	2000	2001	2002		2004	
Grand Bahama	367724	400441	401582	376425	374433	
Nassau\New Providence	900585	901911	882792	895612	921932	
Family Islands	275650	235428	228777	238132	264947	
TOTAL	1577066	1537780	1513151		1561312	
<i>* Intended address in The Bahamas</i>						
CRUISE PASSENGER ARRIVALS						
Months	2000	2001	2002	2003	2004	% Change 2004/03
January	209278	232867	252011	268920	281142	4.5
February	219205	230949	250999	253670	280530	10.6
March	237707	270178	290523	282087	369690	31.1
April	239094	240345	243401	255661	363928	42.3
May	180251	188095	205102	234543	274785	17.2
June	198080	204079	220339	230630	262860	14.0
July	215608	207722	228980	228600	309423	35.4
August	174057	196355	223663	250431	296654	18.5
September	153663	132021	189425	183581	116977	-36.3
October	186613	184303	197791	216568	246867	14.0
November	224815	206498	243646	278966	276422	-0.9
December	274255	258261	256232	286517	280734	-2.0
TOTAL	2512626	2551673	2802112	2970174	3360012	13.1
Grand Bahama	248164	210709	196923	203312	327933	61.3
New Providence	1667903	1746540	1645904	1687851	1981883	17.4
Family Islands	596559	594424	959285	1079011	1050196	-2.7
TOURIST ACCOMMODATION (Rooms)*						
Type of Accommodation	2000	2001	2002	2003	2004	
Total Rooms	14701	15195	15145	15393	15508	
<i>*Licensed Properties</i>						
<i>Source: Bahamas Ministry of Tourism</i>						

BARBADOS

Visitor Arrival Summary

The recovery of tourism activity commenced in 2003 and continued in 2004 with tourist arrivals to Barbados growing by 3.8 percent. The 551.5 thousand tourists who visited were even more than those in 2000. During the winter season, tourist arrivals increased by 8.4 percent. Although fewer tourists came in four of the month in the summer season, the performance in the other months were such that arrivals rose by 1.5 percent by the end and represented 64.5 percent of total arrivals.

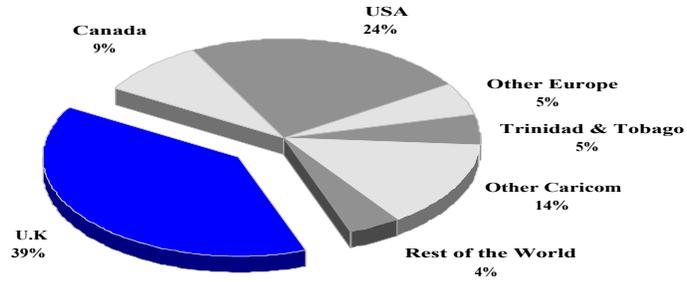
- ◆ The United Kingdom continued to be the largest source market for tourists to Barbados, accounting for some 38.8 percent of total arrivals in 2004. This market grew by 5.6 percent when compared to 2003. Stay-Over tourists from the United States, the second largest market, grew marginally and contributed 23.5 percent of the total. Arrivals from Canada, Other European Countries and Other Caricom countries rose by 0.8 percent, 9.7 percent and 13.0 percent respectively. On-the-other-hand, those from Trinidad and Tobago while accounting for 4.8 percent of the total, declined by 3.8 percent. Fewer tourists also come from the ROW combined.
- ◆ Cruise passenger arrivals to Barbados went up by 29.0 percent to 721.2 thousand in 2004. This position was achieved by the home porting of several cruise lines during the year. Consequently, cruise ship calls rose from 442 in 2003 to 530 in 2004, or by 19.9 percent.

TOURISM HIGHLIGHTS FOR 2004

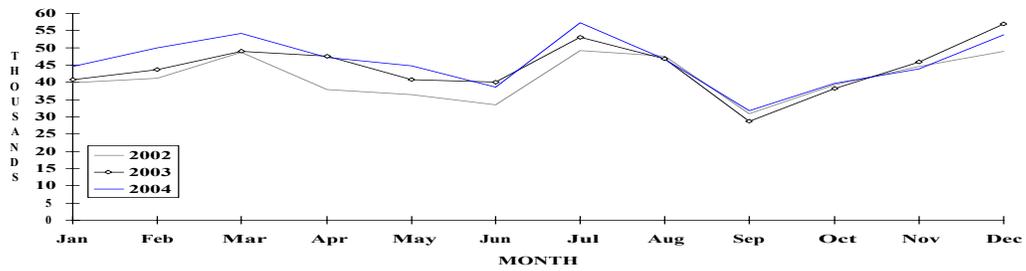
VISITOR ARRIVALS			
Tourist Arrivals ➔	551,502	Cruise Passenger Arrivals	721,270
➔ <i>Winter</i>	35.5%	➔ <i>Winter</i>	48.6%
➔ <i>Summer</i>	64.5%	➔ <i>Summer</i>	51.4%
		Cruise Ship Calls	530
VISITOR PROFILE			
Average Intended Length of Stay (<i>nights</i>) ^I	10.0	Tourist Arrivals by Place of Stay^I	
Tourist Arrivals by Purpose of Visit^I		➔ <i>Hotels</i>	26.9%
➔ <i>Holiday</i>	86.1%	➔ <i>Guest House/Apartment</i>	34.6%
➔ <i>Business</i>	9.9%	➔ <i>Private</i>	23.2%
➔ <i>Other</i>	4.0%	➔ <i>Other</i>	15.3%
TOURISM AND OTHER RELATED ECONOMIC STATISTICS			
Total Expenditure (<i>US\$ millions</i>)	\$763.2	Hotel and Restaurant contribution to GDP	12.4%
Average Daily Expenditure (<i>US\$</i>)	\$127.48	GDP at Factor Cost (<i>US\$ million</i>)	\$2,307.7
Tourism Budget (<i>US\$ thousands</i>) ^{IV}	\$22,137	Consumer Price Index (% <i>ch. 2004/'03</i>)	1.4%
ACCOMMODATION STATISTICS		SOCIO-ECONOMIC STATISTICS	
Rooms	5,945	Land Area (<i>square Kilometers</i>)	432.0
Room Occupancy Rates	49.7%	Population (thousand mid year 2004)	272.4

BARBADOS

TOURIST ARRIVALS BY MAIN MARKETS 2004



MONTHLY TOURIST ARRIVALS



						BARBADOS
TOURIST ARRIVALS BY COUNTRY OF RESIDENCE						
						% Share
Country of Residence	2000	2001	2002	2003	2004	2004
United States	112153	106629	123429	129326	129675	23.5
Canada	59957	52381	46754	49641	50025	9.1
United Kingdom	226787	216821	192606	202564	213945	38.8
Other Europe	33988	30359	25328	29526	30030	5.4
Trinidad & Tobago	23215	21010	25559	27530	26492	4.8
Other Caricom	64209	59075	64118	69278	78262	14.2
Rest of World	24387	20803	20105	23346	23073	4.2
TOTAL	544696	507078	497899	531211	551502	100.0
MONTHLY TOURIST ARRIVALS						
						% Change
Months	2000	2001	2002	2003	2004	2004/03
January	43302	45499	39915	40743	44719	9.8
February	47033	47010	41205	43643	49870	14.3
March	49287	49256	48583	49016	54190	10.6
April	49731	48786	37804	47504	47255	-0.5
May	44176	39988	36373	40750	44865	10.1
June	39348	34980	33426	39994	38536	-3.6
July	54730	48416	49239	52982	57285	8.1
August	47415	44685	47503	46745	45625	-2.4
September	32168	28715	30977	28737	31837	10.8
October	42085	34870	39273	38210	39717	3.9
November	45515	38858	44667	45924	43870	-4.5
December	49906	46015	48934	56963	53733	-5.7
TOTAL	544696	507078	497899	531211	551502	3.8

						BARBADOS
CRUISE PASSENGER ARRIVALS						
						% Change
Months	2000	2001	2002	2003	2004	2004/03
January	60931	80976	80516	83577	101119	21.0
February	58975	67529	64641	66304	83975	26.7
March	61994	77912	64057	63071	94446	49.7
April	55034	64139	42559	59365	71119	19.8
May	22121	15127	28759	20791	26826	29.0
June	21656	19042	23574	19360	32201	66.3
July	19861	16780	24580	22863	27871	21.9
August	24399	18214	23961	19344	27165	40.4
September	20176	11737	11099	17716	28525	61.0
October	35482	26577	29306	37657	40889	8.6
November	65424	56266	50200	57797	82353	42.5
December	87225	73298	80001	91274	104781	14.8
TOTAL	533278	527597	523253	559119	721270	29.0
Cruise Ship Calls	484	453	423	442	530	
TOURIST ACCOMMODATION (Rooms)						
Type of Accommodation	2000	2001	2002	2003	2004	
Hotels	1942	2115	} 4984	2663	n.a	
Apartment Hotels	2309	2395		2326	n.a	
Apartments & Cottages	2019	2024	1589	1071	n.a	
Guest Houses	186	247	169	150	n.a	
TOTAL	6456	6781	6742	6210	5945	
Source: Barbados Statistical Service						

BELIZE

Visitor Arrival Summary

Tourist arrivals to Belize continued to expand in 2004 following up the robust in 2003. Arrivals in 2004 grew by 4.8 percent to 230.8 thousand. The year began with a particularly strong performance, which saw the winter season posting an increase of 10.4 percent over the same period of 2003. Summer season started slowly but gained momentum in the second half of the season so that an increase of 1.1 percent was recorded during the season.

- ◆ the United States with a share of 59.5 percent was the largest market for Belize in 2004. Over 10.0 thousand more tourist originated from this source. The biggest performance for arrivals to this destination came from the Canadian market, which represented 5.2 percent of total arrival and grew by 14.2 percent. The European market (the second largest market) did not match last year performance. Arrival fell by 2.3 percent when compared to 2003. Collectively, all other markets registered less tourist arrivals.
- ◆ Cruise passenger arrivals to Belize was continued to exhibit robust growth in 2004. During the period, there were 406 cruise ship calls bringing 851.4 thousand passengers. When compared to 2003, these figures represented an increase of 28.9 percent in cruise calls and growth of 48.0 percent in cruise passengers.

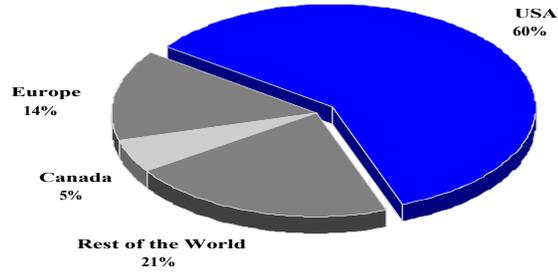
TOURISM HIGHLIGHTS FOR 2004

VISITOR ARRIVALS			
Tourist Arrivals →	230,832	Cruise Passenger Arrivals	851,436
→ <i>Winter</i>	40.3%	→ <i>Winter</i>	40.5%
→ <i>Summer</i>	59.7%	→ <i>Summer</i>	59.5%
VISITOR PROFILE			
Average Length of Stay (<i>nights</i>)	6.8	Tourist Arrivals by Place of Stay¹	
Tourist Arrivals by Purpose of Visit		→ <i>Hotels</i>	64.7%
→ <i>Holiday</i>	94.7%	→ <i>Guest House/Apartment</i>	19.1%
→ <i>Business</i>	5.3%	→ <i>Private</i>	9.1%
		→ <i>Other</i>	7.1%
TOURISM AND OTHER RELATED ECONOMIC STATISTICS			
Total Expenditure (<i>US\$ millions</i>)	\$205.2	GDP at Factor Cost (<i>US\$millions</i>)	\$917.6
Tourism Budget (<i>US\$ thousands</i>) ^{bf}	\$4,838	Consumer Price Index (% ch. 2004/'03)	3.2%
Hotel & Restaurant contribution to GDP	4.4%		
ACCOMMODATION STATISTICS		SOCIO-ECONOMIC STATISTICS	
Rooms	5,151	Land Area (<i>square Kilometers</i>)	22,966
Room Occupancy Rates	40.7%	Population (<i>thousand mid year 2004</i>)	282.6

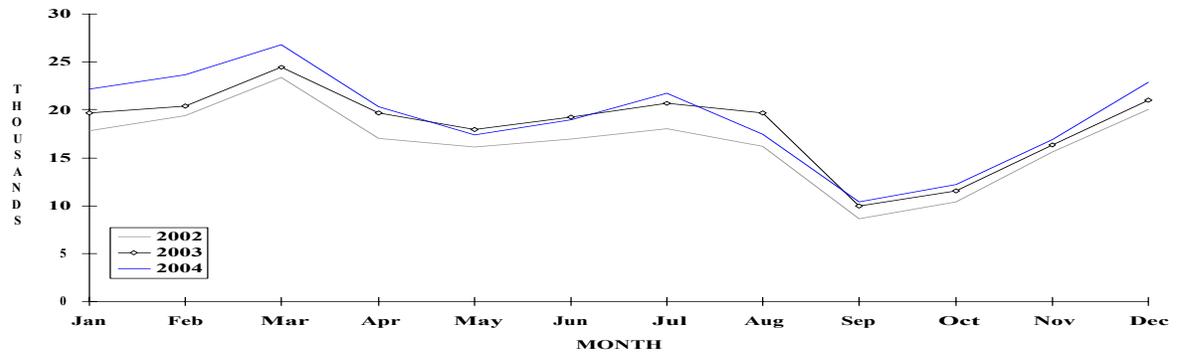
¹ Source: Belize 2000, Visitor Expenditure and Motivation Survey

BELIZE

TOURIST ARRIVALS BY MAIN MARKETS 2004



MONTHLY TOURIST ARRIVALS



						BELIZE
TOURIST ARRIVALS BY COUNTRY OF RESIDENCE						
						% Share
Country of Residence	2000	2001	2002	2003	2004	2004
United States	104717	106292	104603	127288	137367	59.5
Canada	9205	9492	9185	9831	11926	5.2
Europe	27674	29736	29115	33530	32767	14.2
Rest of World	54170	50436	56618	49925	48772	21.1
TOTAL	195766	195956	199521	220574	230832	100.0
MONTHLY TOURIST ARRIVALS						
						% Change
Months	2000	2001	2002	2003	2004	2004/03
January	17033	18896	17820	19648	22166	12.8
February	18767	19767	19377	20412	23645	15.8
March	22921	21526	23388	24460	26817	9.6
April	18699	18398	17027	19660	20320	3.4
May	15704	16335	16106	17967	17386	-3.2
June	16148	17081	16953	19228	18939	-1.5
July	18307	18704	18011	20670	21734	5.1
August	16633	17342	16184	19689	17479	-11.2
September	11019	8659	8634	9975	10432	4.6
October	8580	9069	10397	11524	12167	5.6
November	13632	12822	15603	16313	16873	3.4
December	18323	17357	20021	21028	22874	8.8
TOTAL	195766	195956	199521	220574	230832	4.7
<i>Note: Tourist arrivals for Belize excludes border traffic from Guatemala and Mexico who enter Belize daily to conduct trade, This data broken down by month and market is available from 1998 only</i>						

						BELIZE
CRUISE PASSENGER ARRIVALS						
						% Change
Months	2000	2001	2002	2003	2004	2004/03
January	10485	4653	18448	56689	94861	67.3
February	11665	7584	19056	48172	87532	81.7
March	13271	8648	21822	54151	89807	65.8
April	6695	3517	23989	46401	72260	55.7
May	4750	0	22973	24413	50642	107.4
June	899	0	17473	33623	57160	70.0
July	0	0	20502	30602	56794	85.6
August	0	0	16072	38809	57018	46.9
September	0	0	23095	31430	45132	43.6
October	696	0	33810	47356	58961	24.5
November	3648	8548	46377	70377	77579	10.2
December	6022	15166	56073	93173	103690	11.3
TOTAL	58131	48116	319690	575196	851436	48.0
Cruise Ship Calls	70	48	200	315	406	
VISITOR ACCOMMODATION (Rooms) BY AREA						
Area	2000	2001	2002	2003	2004	
Belize District	785	866	897	943	884	
Ambergris	965	1020	1111	1204	1228	
Cayo District	649	724	716	752	2233	
Caye Caulker	383	356	453	480	515	
Other	1324	1497	1528	1671	291	
TOTAL	4106	4463	4705	5050	5151	
<i>Source: Belize Tourist Bureau, Central Statistical Office</i>						

BERMUDA

Visitor Arrival Summary

Tourist (Air) Arrivals to Bermuda in 2004 were 271.6 thousand, an increase of 15.0 thousand tourists over the total in 2003. Arrivals had declined by 4.4 percent by the end of August owing mainly to a lack of hotel inventory that was damaged by Hurricane Fabian in 2003. The loss during the period was compensated for in the September to December period. Arrivals grew by 44.4 percent when compared to the dip caused by Hurricane Fabian.

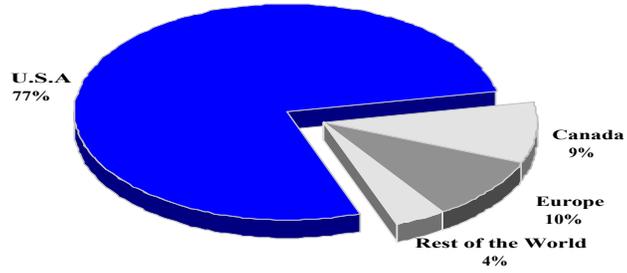
- ◆ Air arrivals from all markets in 2004 were greater than those 2003 expect for those from the United Kingdom, which declined by 1.1 percent. The United States market, the main generating market for Belize , with a market share of 77.0 percent grew by 5.6 percent. Healthy gains were recorded by Canadian (up 8.2 percent) market and tourists from other parts of Europe (up 3.9 percent). The Rest of the World also rose significantly..
- ◆ In 2004, Bermuda welcomed the third highest number of cruise passenger in its history. On this occasion 206.1 thousand passengers visited in 157 ship calls. this was a decline of 8.8 percent when compared to 2003 although a similar number of calls were made.

TOURISM HIGHLIGHTS FOR 2004

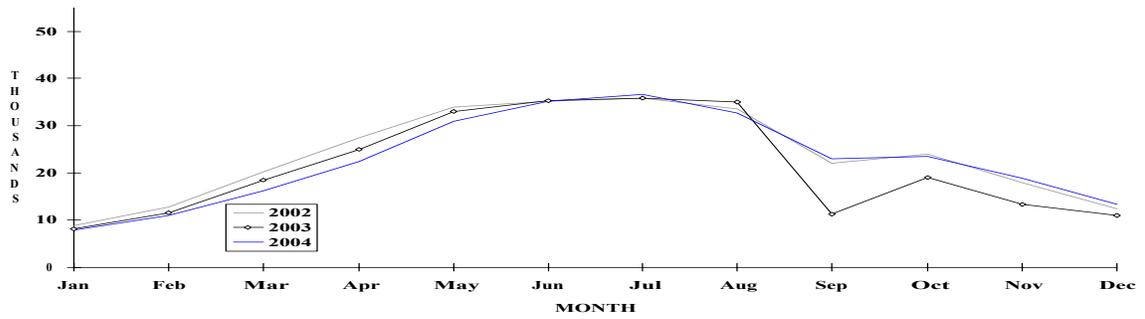
VISITOR ARRIVALS			
Tourist Arrivals ✈	271,617	Cruise Passenger Arrivals	206,133
➔ <i>Winter</i>	21.2%	➔ <i>Winter</i>	6.1%
➔ <i>Summer</i>	78.8%	➔ <i>Summer</i>	93.9%
		Cruise Calls	157
		Yacht visitors	5,057
VISITOR PROFILE			
Average Length of Stay (<i>nights</i>)	6.4	Tourist Arrivals by Place of Stay	
		➔ <i>Hotels</i>	56.4%
Tourist Arrivals by Purpose of Visit		➔ <i>Guest House/Apartment</i>	19.8%
➔ <i>Holiday</i>	79.6%	➔ <i>Private</i>	23.5%
➔ <i>Business</i>	20.5%	➔ <i>Other</i>	0.3%
➔ <i>Other</i>	-		
TOURISM AND OTHER RELATED ECONOMIC STATISTICS			
Total Expenditure (<i>US\$ millions</i>)	\$353.7	Consumer Price Index (<i>% ch. 2004/'03</i>)	3.6%
Tourism Budget (<i>US \$ thousands</i>) ^{1b}	\$35,900	GDP at Factor Cost (<i>US\$ million</i>)	\$4,505.3
ACCOMMODATION STATISTICS		SOCIO-ECONOMIC STATISTICS	
Rooms	2,939	Land Area (<i>square Kilometers</i>)	53
Room Occupancy Rates	62.4%	Population (<i>thousand mid year 2003</i>)	62.0

BERMUDA

TOURIST ARRIVALS BY MAIN MARKETS 2004



MONTHLY TOURIST ARRIVALS



						BERMUDA
TOURIST ARRIVALS BY COUNTRY OF RESIDENCE						
						% Share
Country of Residence	2000	2001	2002	2003	2004	2004
United States	256831	213475	217868	197911	209054	77.0
Canada	30706	27793	25882	24485	26491	9.8
United Kingdom	29218	23792	25595	21665	21431	7.9
Other Europe	6702	4708	5063	4271	4439	1.6
Rest of World	8734	8335	9561	8244	10202	3.8
TOTAL	332191	278103	283969	256576	271617	100.0
MONTHLY TOURIST ARRIVALS *						
						% Change
Months	2000	2001	2002	2003	2004	2004/03
January	10294	8426	8804	8194	7826	-4.5
February	13746	10806	12780	11065	11049	-0.1
March	24189	21399	20196	18432	16193	-12.1
April	33701	28276	27466	25002	22429	-10.3
May	37712	35647	33979	33064	31029	-6.2
June	42409	38813	35202	35333	35216	-0.3
July	39037	37225	35835	35914	36657	2.1
August	36659	35651	33498	35045	32669	-6.8
September	29193	15689	21939	11260	22896	103.3
October	29239	17324	23979	18979	23447	23.5
November	22960	16750	17894	13259	18923	42.7
December	12845	12097	12397	11029	13283	20.4
TOTAL	331984	278103	283969	256576	271617	5.9
<i>* Excluding ship/air visitors. Due to a report conflict the monthly numbers are missing a small number of arrivals.</i>						

						BERMUDA
CRUISE PASSENGER ARRIVALS*						
						% Change
Months	2000	2001	2002	2003	2004	2004/03
January	0	0	0	0	0	-
February	668	411	0	0	0	-
March	0	717	585	136	743	446.3
April	10751	8598	5669	9542	11792	23.6
May	35778	30097	29232	32489	31830	-2.0
June	31431	23374	37085	33660	32744	-2.7
July	35645	34997	36526	43527	33064	-24.0
August	37174	29430	29826	46674	42449	-9.1
September	27569	25918	28543	26620	25782	-3.1
October	28865	25893	29790	28825	23185	-19.6
November	0	525	2809	4073	4023	-1.2
December	0	0	0	551	521	-
TOTAL	207881	179960	200065	226097	206133	-8.8
Cruise Ship Calls	165	156	145	156	157	
<i>* Including ship/air visitors</i>						
TOURIST ACCOMMODATION (Rooms)						
Type of Accommodation	2000	2001	2002	2003	2004	
Hotels	n.a	2402	2859	n.a	n.a	
Cottage Colonies	n.a	479	212	n.a	n.a	
Guest Houses	n.a	101	68	n.a	n.a	
Clubs/Other	n.a	355	112	n.a	n.a	
Total	3339	3337	3251	2073	2939	

Source Bermuda Department of Tourism

BONAIRE

Visitor Arrival Summary

In 2004, Bonaire enjoyed its third consecutive year of growth in stay-over arrivals reaching 63.2 thousand tourists; an increase of 1.6 percent when compared to 2003. Arrivals during the winter season to this destination accounted for 38.2 percent and rose by 11.5 percent, whereas the summer season arrivals represented 61.8 percent decreased by 3.7 percent.

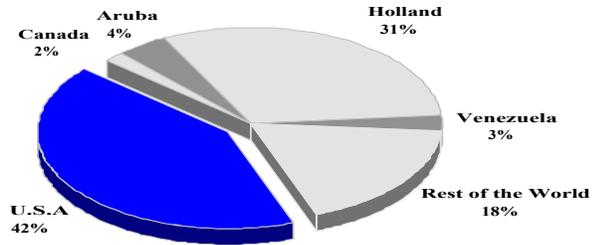
- ◆ Bonaire was able to achieve an increase in business from the United States, its main market (accounted for 41.9 percent of total arrivals in 2004), of 4.9 percent when compared to 2003. Tourists from Holland numbered 19.6 thousand, 1.9 percent less than those of 2003. Fewer tourists also came from Germany and Venezuela, each of which has a market of approximately 3 percent. There was an increase number of tourists from Canada and Aruba, a market which has been growing in share over the last three years.
- ◆ A total of 53.3 thousand cruise passengers Bonaire in 2004, representing an increase of 19.6 percent against the 44.6 thousand of 2003. Increases above 50 percent were recorded in the month of January, May, June, November and December. There was an associated rise in cruise ship calls of 8.3 percent.

TOURISM HIGHLIGHTS FOR 2004

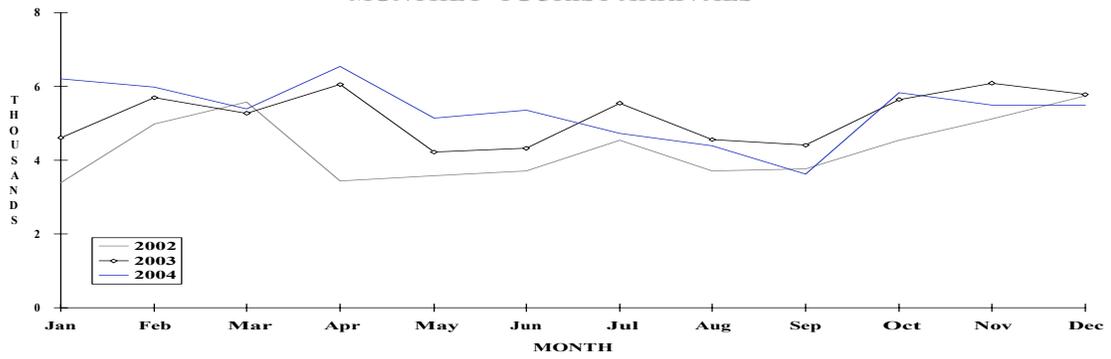
VISITOR ARRIVALS			
Tourist Arrivals →	63,156	Cruise Passenger Arrivals	53,343
→ Winter	38.2%	→ Winter	55.7%
→ Summer	61.8%	→ Summer	44.3%
Same day Visitors	432	Cruise calls	78
VISITOR PROFILE			
Average Length of Stay (nights)	9.2	Tourist Arrivals by Place of Stay ^{III}	
Tourist Arrivals by Purpose of Visit		→ Hotels	55.2%
→ Holiday	97.1%	→ Guest House/Apartment	31.5%
→ Business	2.7%	→ Private/Unregistered	13.0%
→ Other	0.2%	→ Other	0.3%
TOURISM AND OTHER RELATED ECONOMIC STATISTICS			
Total Expenditure (US\$ millions)	\$83.7	Tourism Budget (US\$ thousands)	\$1,676
		Consumer Price Index (% ch 2004/'03)	1.8%
ACCOMMODATION STATISTICS		SOCIO-ECONOMIC STATISTICS	
Rooms	1,175	Land Area (square Kilometers)	288
Occupancy Rate	61.0%	Population (thousand mid year 2004)	10.2

BONAIRE

TOURIST ARRIVALS BY MAIN MARKETS 2004



MONTHLY TOURIST ARRIVALS



						BONAIRE
TOURIST ARRIVALS BY COUNTRY OF RESIDENCE *						
						% Share
Country of Residence	2000	2001	2002	2003	2004	2004
U.S.A.**	25429	26357	26500	25228	26453	41.9
Canada	1099	1098	593	843	1068	1.7
Aruba	1515	1191	2162	2493	2790	4.4
Holland	13322	11860	12814	19987	19612	31.1
Germany	1841	1511	1602	2236	2052	3.2
Venezuela	3504	3462	2150	1725	1722	2.7
Rest World ***	4559	4916	6265	9667	9459	15.0
TOTAL	51269	50395	52086	62179	63156	100.0
* Excluding arrivals from Netherlands Antilles						
** Including Puerto Rico						
*** Including arrivals from other European countries: 2787 in 2000, 2955 in 2001, 3736 in 2002 , 6856 in 2003 and 6539 in 2004.						
MONTHLY TOURIST ARRIVALS						
						% Change
Months	2000	2001	2002	2003	2004	2004/03
January	5047	5595	3385	4612	6201	34.5
February	4658	5094	4976	5693	5982	5.1
March	5553	5645	5568	5277	5391	2.2
April	5168	5243	3446	6045	6539	8.2
May	4231	3710	3571	4216	5130	21.7
June	3553	3729	3720	4317	4352	0.8
July	4143	4093	4540	5544	4736	-14.6
August	4046	4036	3704	4558	4387	-3.8
September	2981	2661	3766	4401	3624	-17.7
October	3963	3756	4541	5648	5836	3.3
November	4529	3730	5118	6081	5492	-9.7
December	3397	3103	5751	5787	5486	-5.2
TOTAL	51269	50395	52086	62179	63156	1.6

							BONAIRE
CRUISE PASSENGERS							
							% Change
Months	2000	2001	2002	2003	2004		2004/03
January	10565	8116	7277	7545	11484		52.2
February	6297	6704	7778	8153	9259		13.6
March	8778	9135	7555	8944	5388		-39.8
April	4226	2998	3915	2903	3603		24.1
May	0	72	0	225	346		53.8
June	0	0	348	597	0		-
July	0	78	485	220	574		160.9
August	624	313	860	650	477		-26.6
September	510	621	775	763	390		-48.9
October	1791	1786	1482	890	774		-13.0
November	3018	4719	4812	5101	7715		51.2
December	7668	5993	6894	8610	13333		54.9
TOTAL	14790	40535	42181	44601	53343		19.6
Cruise calls	71	64	81	72	78		
TOURIST ACCOMMODATION (Rooms)							
Type of Accommodation	2000	2001	2002	2003	2004		
Hotels	n.a	741	n.a	n.a	n.a		
Apartments	n.a	146	n.a	n.a	n.a		
Condominiums	n.a	-	n.a	n.a	n.a		
Other	n.a	114	n.a	n.a	n.a		
TOTAL	1050	1001	1070	1070	1175		

Source: Bonaire Government Tourist Bureau