**MONTHLY UPDATE - ARUBA’S TOURISM INDUSTRY**

**August 2016 and Year to Date 2016**

**Summary Highlights.**

* The total number of stopovers visiting Aruba decreased by 13.6% in August, from 111,471 in August 2015 to 96,319 in August 2016.
* In the first eight months of 2016 the number of stopover visitors decreased by 2.2% from 789,875 in 2015 to 772,476 in 2016.
* Traffic from the USA was down by 6.2%, from 53,538 stopovers in August 2015 to 50,193 stopovers in August 2016 with declines out of 12 of the 13 largest markets. Traffic was down 4.5% from New York State and down 2.9% from New Jersey.
* In the first eight months of 2016 the number of stopover visitors from the USA increased by 1.2% from 434,403 in 2015 to 439,628 in 2016.
* Traffic from Venezuela was down by 39.9% in August from 36,728 stopovers in August 2015 to 22,056 in August 2016. In the first eight months of 2016 the number of stopover visitors from Venezuela fell by 17.4%, from 191,798 in 2015 to 158,359 in 2016.
* Tourism receipts fell by 1.4% in the first quarter of 2016 compared to the same quarter of 2015 despite a 5.4% growth in stopover arrivals. In the second quarter visitor arrivals declined by 3.0% whilst tourism receipts fell by 0.4% both compared to second quarter 2015.
* The total number of visitor nights declined by 3.4% in August, from 752,859 in August 2015 to 727,390 in August 2016. The overall average length of stay grew by 11.8% from 6.75 nights in August 2015 to 7.55 nights in August 2016.
* The total number of visitor nights declined by 0.1% in the first eight months of 2016, from 5,510,558 in 2015 to 5,503,612 in 2016. The overall average length of stay grew by 2.1% from 6.98 nights in 2015 to 7.12 nights in 2016.
* The Dominican Republic saw a 7.0% increase in stopover traffic in the first eight months of 2016 whilst the U.S. Virgin Islands saw a 2.2% increase in stopovers in the same period.
* Outbound travel by US citizens grew by 9.8% in the first four months of 2016 compared to the same period for 2015 and was up by 5.1% to the Caribbean.
* The number of cruise passengers visiting Aruba in August fell by 3.1%, from 23,282 in August 2015 to 22,557 in August 2016. In the first eight months of 2016 the number of cruise visitors increased by 16.0% from 360,234 in 2015 to 417,815 in 2016.
* As reported by Immigration card data the number of stopover visitors staying in hotels in August 2016 grew by 2.5%, and staying in timeshare resorts fell by 6.3%. For the fifth time in as many months the number staying in “other accommodation” fell, this time by 42.0%. This latter category comprised 21.0% of all visitors in August 2016, down from 31.3% in August 2015.
* The number of Venezuelan stopovers using “other accommodation” fell by 63.6% in August 2016 and comprised 40.7% of all Venezuelan visitors in August 2016 down from 67.2% in August 2015. The number of Venezuelans staying in hotel accommodation grew by 13.4% compared with August 2015.
* Numbers provided to AHATA show that for a sample of 15 hotels average room occupancy grew by 4.9 percentage points from 78.9% in August 2015 to 83.8% in August 2016. The average daily room rate fell by 5.5% to $192.12 and the average RevPar grew by 0.5% to $161.04.
* In the first eight months of 2016 average room occupancy grew by 0.6 percentage points to 80.3%. The average daily room rate fell by 5.4% to $236.73 and the average RevPar fell by 4.7% to $190.05.
* Performance of the hotels by category for August shows that the brand name beach front hotels saw their average room occupancies fall by 0.8 percentage points to 79.4%, with their RevPar also declining by 7.6% to $203.26. The all-inclusive resorts saw their average room occupancies increase by 6.4 percentage points to 89.6% and their RevPar grew by 14.3% to $132.48. The smaller independent beach front hotels saw a 3.5 percentage point increase in room occupancy to 93.9% but their RevPar fell by 2.2% to $234.18. The non-beach front hotels saw their average room occupancies improve by 15.6 percentage points to 79.9% and saw their RevPar grow by 13.8% to $107.95.
* In the first eight months of 2016 STR reported that hotels in three of the nine Caribbean destinations saw higher average room occupancies, one saw no change, and a further five saw lower average room occupancies. Six of the nine saw lower average RevPar.
* Laser Airlines was the number one carrier in August 2016 and brought in 13,278 non-resident visitors. JetBlue was the number two carrier (13,055 non-residents) and American brought in 12,884 non-residents.
* Of the 22,056 Venezuelans who visited Aruba in August 2016 4.2% (924) arrived in Aruba on a US scheduled carrier. In total 1,178 Venezuelans (5.3% of all Venezuelans) arrived in Aruba on a carrier other than one based in Venezuela or in Aruba. These are thought to be persons visiting Aruba in transit to another country and returning to Venezuela via Aruba.
* 4.5% of non-residents carried to Aruba by American Airlines in August 2016 were residents of Venezuela. 0.4% of non-residents carried to Aruba by Delta Air Lines in August were residents of Venezuela. For most other non-Venezuelan, non-Aruban carriers it was generally less than 6%.
* There was a 0.3% increase in the number of visitors 70 years old or older in August and a 25.0% decline in the number between 30 and 39 years old.
* In August 2016 43.7% of our visitors reported they were visiting for the first time and 40.9% reported they had visited before. 15.4% of our visitors did not report how many times they visited. Assigning the number who did not report on a *pro rata* basis results in an overall percentage of 52% first time and 48% repeat.
* Trip Advisor ratings for June 2016 show that Aruba received a total of 3,942 reviews and achieved an average rating of 4.44 out of 5. The Cayman Islands achieved an average rating of 4.52 with the USVI achieving an average rating of 4.49.
* The Aruba Tourism Authority has set a revised target of 5.5% more stopover visitors for 2016 compared to 2015. As well they have targeted a 6% increase in tourism receipts, to increase cruise visitor arrival numbers by a minimum of 3% above the 2013 total and to achieve a 9% per annum increase in the tourism sector’s RevPar.
* AHATA projects there will be about 3% more available hotel room nights in 2016 compared with 2015 and projects that average room occupancies for the hotel sector for 2016 will be similar to those for 2015, at 78%. It is further projected that the overall average daily room rate will decline by 3.0% in 2016, with RevPar projected to decline by between 2 - 3%.
* The Aruba Airport Authority reports there will be 1.7% more available air seats in the summer of 2016 (April 1 – October 31 2016) compared to the same seven months of 2015. The AAA is projecting 13.4% fewer inbound air seats in the winter 2015/2016 compared to the same five months of 2015/2016.
* Projections for cruise traffic for 2016 suggest that, based on existing schedules, the number of cruise passengers will increase by between 10% and 13% compared with 2015.

**Visitor Arrivals – August 2016**

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| **Aruba: Total Visitors August 2016** |
|  |  |  |  |  |  |
|  | 2016 | % | 2015 | % | % change |
| USA |  50,193  | 52.1% |  53,538  | 48.0% | -6.2% |
| Canada |  2,313  | 2.4% |  2,773  | 2.5% | -16.6% |
| Venezuela |  22,056  | 22.9% |  36,728  | 32.9% | -39.9% |
| Brazil |  859  | 0.9% |  1,173  | 1.1% | -26.8% |
| Colombia |  2,491  | 2.6% |  1,519  | 1.4% | 64.0% |
| Argentina |  1,571  | 1.6% |  1,524  | 1.4% | 3.1% |
| Chile |  794  | 0.8% |  871  | 0.8% | -8.8% |
| Netherlands |  3,088  | 3.2% |  2,816  | 2.5% | 9.7% |
| Germany |  460  | 0.5% |  610  | 0.5% | -24.6% |
| Italy |  1,995  | 2.1% |  2,158  | 1.9% | -7.6% |
| UK |  3,075  | 3.2% |  1,638  | 1.5% | 87.7% |
| Sweden |  105  | 0.1% |  61  | 0.1% | 72.1% |
| Other |  7,319  | 7.6% |  6,062  | 5.4% | 20.7% |
| Total |  96,319  | 100.0% |  111,471  | 100.0% | -13.6% |
| Source: ATA |  |  |  |  |  |

Total stopover arrivals (persons staying 24 hours or more) for August 2016 showed a 13.6% decrease compared with August 2015.

Traffic from the USA was down by 6.2%, was down by 16.6% from Canada, down 39.9% from Venezuela, up 64.0% from Colombia, down 26.8% from Brazil and up 3.1% from Argentina. Arrivals were up 9.7% from The Netherlands.

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| **Aruba: Total Visitors August 2016 YTD** |
|  |  |  |  |  |  |
|  | 2016 | % | 2015 | % | % change |
| USA |  439,628  | 56.9% |  434,403  | 55.0% | 1.2% |
| Canada |  28,326  | 3.7% |  30,399  | 3.8% | -6.8% |
| Venezuela |  158,359  | 20.5% |  191,798  | 24.3% | -17.4% |
| Brazil |  8,074  | 1.0% |  14,028  | 1.8% | -42.4% |
| Colombia |  18,213  | 2.4% |  13,113  | 1.7% | 38.9% |
| Argentina |  12,891  | 1.7% |  9,462  | 1.2% | 36.2% |
| Chile |  7,707  | 1.0% |  6,980  | 0.9% | 10.4% |
| Netherlands |  23,542  | 3.0% |  23,560  | 3.0% | -0.1% |
| Germany |  2,703  | 0.3% |  3,147  | 0.4% | -14.1% |
| Italy |  4,790  | 0.6% |  4,879  | 0.6% | -1.8% |
| UK |  12,496  | 1.6% |  7,661  | 1.0% | 63.1% |
| Sweden |  3,285  | 0.4% |  3,048  | 0.4% | 7.8% |
| Other |  52,462  | 6.8% |  47,397  | 6.0% | 10.7% |
| Total |  772,476  | 100.0% |  789,875  | 100.0% | -2.2% |
| Source: ATA |  |  |  |  |  |

**Total Stopover Arrivals by Month 2016**

|  |  |  |  |
| --- | --- | --- | --- |
|  | 2016 | 2015 | % change |
| Jan |  104,072  |  100,914  | 3.1% |
| Feb |  96,185  |  89,991  | 6.9% |
| Mar |  109,998  |  103,506  | 6.3% |
| Apr |  98,823  |  99,604  | -0.8% |
| May |  80,964  |  87,691  | -7.7% |
| Jun |  86,697  |  87,447  | -0.9% |
| Jul |  99,418  |  109,251  | -9.0% |
| Aug |  96,319  |  111,471  | -13.6% |
| YTD |  772,476  |  789,875  | -2.2% |
| Source: ATA |  |  |

**Expenditures**

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| Tourism Receipts |
| (In Millions of AFL) |
| **YEAR** | **1st** | **2nd** | **3rd** | **4th** | **TOTAL** |
| **2010** | 644.5 | 519.8 | 502.5 | 566.2 | 2,233.0 |
| **2011** | 690.4 | 582.1 | 555.4 | 583.4 | 2,411.3 |
| **2012** | 728.7 | 581.2 | 576.5 | 615.1 | 2,501.5 |
| **2013** | 774.9 | 621.4 | 600.6 | 680.4 | 2,666.0 |
| **2014** | 806.6 | 652.3 | 678.8 | 723.4 | 2,861.1 |
| **2015** | 864.4 | 672.0 | 685.4 | 718.7 | 2,940.5 |
| **2016** | 852.3 | 669.0 |   |   |   |
| Source: Central Bank of Aruba |  |  |  |

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| --- | --- |
|  | Tourism Receipts |
|  | (Millions of AFL) |
| Quarter | 2016 | 2015 |  change |
| 1st | 852.3 | 864.4 | -1.4% |
| 2nd | 669.0 | 672.0 | -0.4% |
| 3rd |  | 685.4 |  |
| 4th |  | 718.7 |  |
| YTD |   | 2,940.5 |   |
| Source: Central Bank of Aruba |  |

Whilst stopover visitor arrivals were up 5.4% in the first three months of 2016 tourism receipts fell by 1.4% in that quarter compared to first quarter 2015.

In the second quarter visitor arrivals declined by 3.0% whilst tourism receipts fell by 0.4% both compared to second quarter 2015.

**Top Producing US States.**

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| **Aruba: Total Visitors: US States: August 2016** |
|  |  |  |  |  |  |
|  | 2016 | % | 2015 | % | % change |
| New York |  14,212  | 23.2% |  14,886  | 24.7% | -4.5% |
| Massachusetts |  4,211  | 6.9% |  4,410  | 7.3% | -4.5% |
| New Jersey |  8,847  | 14.4% |  9,112  | 15.1% | -2.9% |
| Pennsylvania |  2,560  | 4.2% |  2,973  | 4.9% | -13.9% |
| Illinois |  1,149  | 1.9% |  1,519  | 2.5% | -24.4% |
| Florida |  2,845  | 4.6% |  3,012  | 5.0% | -5.5% |
| Connecticut |  1,534  | 2.5% |  1,682  | 2.8% | -8.8% |
| Maryland |  1,767  | 2.9% |  2,071  | 3.4% | -14.7% |
| Ohio |  917  | 1.5% |  947  | 1.6% | -3.2% |
| Michigan |  650  | 1.1% |  676  | 1.1% | -3.8% |
| Virginia |  1,283  | 2.1% |  1,582  | 2.6% | -18.9% |
| Texas |  2,199  | 3.6% |  2,123  | 3.5% | 3.6% |
| California |  1,451  | 2.4% |  1,613  | 2.7% | -10.0% |
| Other |  6,568  | 10.7% |  6,932  | 11.5% | -5.3% |
| Total |  50,193  | 81.8% |  53,538  | 88.7% | -6.2% |
| Source: ATA |  |  |  |  |  |

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| **Aruba: Total Visitors: US States: August 2016 YTD** |
|  |  |  |  |  |  |
|  | 2016 | % | 2015 | % | % change |
| New York |  92,070  | 20.9% |  87,770  | 20.2% | 4.9% |
| Massachusetts |  48,890  | 11.1% |  48,266  | 11.1% | 1.3% |
| New Jersey |  56,530  | 12.9% |  54,042  | 12.4% | 4.6% |
| Pennsylvania |  25,963  | 5.9% |  25,437  | 5.9% | 2.1% |
| Illinois |  13,981  | 3.2% |  16,126  | 3.7% | -13.3% |
| Florida |  22,692  | 5.2% |  22,378  | 5.2% | 1.4% |
| Connecticut |  16,275  | 3.7% |  16,113  | 3.7% | 1.0% |
| Maryland |  16,382  | 3.7% |  16,045  | 3.7% | 2.1% |
| Ohio |  12,585  | 2.9% |  12,347  | 2.8% | 1.9% |
| Michigan |  9,741  | 2.2% |  9,708  | 2.2% | 0.3% |
| Virginia |  11,618  | 2.6% |  11,694  | 2.7% | -0.6% |
| Texas |  16,335  | 3.7% |  16,740  | 3.9% | -2.4% |
| California |  10,272  | 2.3% |  10,736  | 2.5% | -4.3% |
| Other |  86,294  | 19.6% |  87,001  | 20.0% | -0.8% |
| Total |  439,628  | 100.0% |  434,403  | 100.0% | 1.2% |
| Source: ATA |  |  |  |  |  |

**Stopover Visitors by Number of Nights Stayed.**

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| **Aruba: Total Nights August 2016** |
|  |  |  |  |  |  |
|  | 2016 | % | 2015 | % | % change |
| USA |  332,968  | 45.8% |  359,897  | 47.8% | -7.5% |
| Canada |  18,953  | 2.6% |  22,560  | 3.0% | -16.0% |
| Venezuela |  175,056  | 24.1% |  213,387  | 28.3% | -18.0% |
| Brazil |  5,896  | 0.8% |  7,434  | 1.0% | -20.7% |
| Colombia |  21,412  | 2.9% |  11,171  | 1.5% | 91.7% |
| Argentina |  13,516  | 1.9% |  12,777  | 1.7% | 5.8% |
| Chile |  5,922  | 0.8% |  6,510  | 0.9% | -9.0% |
| Netherlands |  36,578  | 5.0% |  32,601  | 4.3% | 12.2% |
| Germany |  4,226  | 0.6% |  5,929  | 0.8% | -28.7% |
| Italy |  14,874  | 2.0% |  16,953  | 2.3% | -12.3% |
| UK |  37,689  | 5.2% |  19,453  | 2.6% | 93.7% |
| Sweden |  978  | 0.1% |  610  | 0.1% | 60.3% |
| Other |  59,322  | 8.2% |  43,577  | 5.8% | 36.1% |
| Total |  727,390  | 100.0% |  752,859  | 100.0% | -3.4% |
| Source: ATA |  |  |  |  |  |

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| **Aruba: Average Length of Stay in Nights: August 2016** |
|  |  |  |  |  |  |
|  | 2016 |  | 2015 |  | % change |
| USA |  6.63  |  |  6.72  |  | -1.3% |
| Canada |  8.19  |  |  8.14  |  | 0.7% |
| Venezuela |  7.94  |  |  5.81  |  | 36.6% |
| Brazil |  6.86  |  |  6.34  |  | 8.3% |
| Colombia |  8.60  |  |  7.35  |  | 16.9% |
| Argentina |  8.60  |  |  8.38  |  | 2.6% |
| Chile |  7.46  |  |  7.47  |  | -0.2% |
| Netherlands |  11.85  |  |  11.58  |  | 2.3% |
| Germany |  9.19  |  |  9.72  |  | -5.5% |
| Italy |  7.46  |  |  7.86  |  | -5.1% |
| UK |  12.26  |  |  11.88  |  | 3.2% |
| Sweden |  9.31  |  |  10.00  |  | -6.9% |
| Other |  8.11  |  |  7.19  |  | 12.8% |
| Total |  7.55  |   |  6.75  |   | 11.8% |
| Source: ATA |  |  |  |  |  |

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| **Aruba: Total Nights August 2016 YTD** |
|  |  |  |  |  |  |
|  | 2016 | % | 2015 | % | % change |
| USA |  3,085,269  | 56.1% |  3,073,004  | 55.8% | 0.4% |
| Canada |  245,965  | 4.5% |  259,786  | 4.7% | -5.3% |
| Venezuela |  818,786  | 14.9% |  1,027,694  | 18.6% | -20.3% |
| Brazil |  62,450  | 1.1% |  84,215  | 1.5% | -25.8% |
| Colombia |  165,435  | 3.0% |  109,157  | 2.0% | 51.6% |
| Argentina |  114,576  | 2.1% |  85,841  | 1.6% | 33.5% |
| Chile |  59,537  | 1.1% |  52,906  | 1.0% | 12.5% |
| Netherlands |  297,964  | 5.4% |  302,796  | 5.5% | -1.6% |
| Germany |  26,279  | 0.5% |  29,510  | 0.5% | -10.9% |
| Italy |  36,411  | 0.7% |  38,295  | 0.7% | -4.9% |
| UK |  147,317  | 2.7% |  89,308  | 1.6% | 65.0% |
| Sweden |  40,182  | 0.7% |  36,155  | 0.7% | 11.1% |
| Other |  403,441  | 7.3% |  321,891  | 5.8% | 25.3% |
| Total |  5,503,612  | 100.0% |  5,510,558  | 100.0% | -0.1% |
| Source: ATA |  |  |  |  |  |

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| **Aruba: Average Length of Stay in Nights: August 2016 YTD** |
|  |  |  |  |  |  |
|  | 2016 |  | 2015 |  | % change |
| USA |  7.02  |  |  7.07  |  | -0.8% |
| Canada |  8.68  |  |  8.55  |  | 1.6% |
| Venezuela |  5.17  |  |  5.36  |  | -3.5% |
| Brazil |  7.44  |  |  6.71  |  | 10.9% |
| Colombia |  9.25  |  |  7.48  |  | 23.5% |
| Argentina |  8.89  |  |  9.07  |  | -2.0% |
| Chile |  7.73  |  |  7.58  |  | 1.9% |
| Netherlands |  12.66  |  |  12.85  |  | -1.5% |
| Germany |  9.72  |  |  9.38  |  | 3.7% |
| Italy |  7.60  |  |  7.85  |  | -3.2% |
| UK |  11.79  |  |  11.66  |  | 1.1% |
| Sweden |  12.23  |  |  11.86  |  | 3.1% |
| Other |  7.69  |  |  6.79  |  | 13.2% |
| Total |  7.12  |   |  6.98  |   | 2.1% |
| Source: ATA |  |  |  |  |  |

**Competing Destination performance.**

The Caribbean Tourism Organization collects data from across the region. Their most recently published figures are from September 2016 which show a limited set of data for 2016. The following shows the percentage change in stopover visitor arrivals for 2016 compared to the same period in 2015.

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|  | **Total Stopover Visitors** |
|  | 2016 | 2015 | % change | Period |
| Antigua |  187,364  |  171,422  | 9.3% | Jan-Aug |
| Aruba |  772,476  |  789,875  | -2.2% | Jan-Aug |
| Bahamas |  400,591  |  391,202  | 2.4% | Jan-Mar |
| Barbados |  320,656  |  303,652  | 5.6% | Jan-Jul |
| Belize |  275,507  |  238,122  | 15.7% | Jan-Aug |
| British Virgin islands |  239,648  |  231,768  | 3.4% | Jan-Jul |
| Cayman Islands |  253,214  |  251,204  | 0.8% | Jan-Jul |
| Cuba |  1,290,867  |  1,137,328  | 13.5% | Jan-Mar |
| Curacao |  261,352  |  257,744  | 1.4% | Jan-Jul |
| Dominican Republic |  4,165,198  |  3,892,708  | 7.0% | Jan-Aug |
| Jamaica |  1,363,249  |  1,327,409  | 2.7% | Jan-Jul |
| Puerto Rico |  963,463  |  958,670  | 0.5% | Jan-Jun |
| Saint Lucia |  216,520  |  217,827  | -0.6% | Jan-Jul |
| Turks & Caicos Islands |  137,461  |  116,001  | 18.5% | Jan-Mar |
| US Virgin Islands |  573,192  |  560,853  | 2.2% | Jan-Aug |

The same CTO report also shows data for stopover visitor arrivals for 2016 from the USA to certain destinations.

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| --- | --- |
|  | **Total US Stopover Visitors** |
|  | 2016 | 2015 | % change | Period |
| Antigua |  80,289  |  67,754  | 18.5% | Jan-Aug |
| Aruba |  439,628  |  434,403  | 1.2% | Jan-Aug |
| Bahamas |  301,534  |  282,600  | 6.7% | Jan-Mar |
| Barbados |  83,454  |  73,788  | 13.1% | Jan-Jun |
| Belize |  187,685  |  151,115  | 24.2% | Jan-Aug |
| British Virgin islands |  NA  |  NA  | NA | NA |
| Cayman Islands |  202,071  |  195,238  | 3.5% | Jan-Jul |
| Cuba |  NA  |  NA  | NA | NA |
| Curacao |  36,587  |  36,441  | 0.4% | Jan-Jul |
| Dominican Republic |  1,563,924  |  1,478,189  | 5.8% | Jan-Aug |
| Jamaica |  896,215  |  849,493  | 5.5% | Jan-Jul |
| Puerto Rico |  726,553  |  736,869  | -1.4% | Jan-May |
| Saint Lucia |  101,834  |  98,868  | 3.0% | Jan-Jul |
| Turks & Caicos Islands |  109,006  |  93,327  | 16.8% | Jan-Mar |
| US Virgin Islands |  NA  |  NA  | NA | NA |

**US Citizens Outbound Travel 2016.**

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| U.S. Citizens Outbound Travel - Caribbean |
|  | 2016 | 2015 | % change |
| Jan |  588,925  |  560,268  | 5.1% |
| Feb |  643,467  |  610,837  | 5.3% |
| Mar |  809,877  |  755,526  | 7.2% |
| Apr |  687,500  |  671,777  | 2.3% |
| YTD |  2,729,769  |  2,598,408  | 5.1% |
| Source: ITA: National Travel & Tourism Office |
|  |  |  |  |
| U.S. Citizens Outbound Travel - Total |
|  | 2016 | 2015 | % change |
| Jan |  5,329,529  |  4,861,589  | 9.6% |
| Feb |  5,201,686  |  4,696,331  | 10.8% |
| Mar |  6,508,516  |  5,797,906  | 12.3% |
| Apr |  5,834,736  |  5,473,174  | 6.6% |
| YTD |  22,874,467  |  20,829,000  | 9.8% |
| Source: ITA: National Travel & Tourism Office |
|  |  |  |  |
| U.S. Citizens Outbound Travel - Caribbean Share |
|  | 2016 | 2015 | % pt change |
| Jan | 11.1% | 11.5% | -0.5% |
| Feb | 12.4% | 13.0% | -0.6% |
| Mar | 12.4% | 13.0% | -0.6% |
| Apr | 11.8% | 12.3% | -0.5% |
| YTD | 11.9% | 12.5% | -0.5% |
| Source: ITA: National Travel & Tourism Office |

|  |
| --- |
| U.S. Citizens Outbound Travel - Total - April YTD |
|  | 2016 | % share | 2015 | % share | % change |
| Europe |  3,050,363  | 13.3% |  2,853,245  | 13.7% | 6.9% |
| Caribbean |  2,729,769  | 11.9% |  2,598,408  | 12.5% | 5.1% |
| Asia |  1,705,303  | 7.5% |  1,560,527  | 7.5% | 9.3% |
| South America |  642,551  | 2.8% |  545,030  | 2.6% | 17.9% |
| Central America |  1,061,739  | 4.6% |  946,653  | 4.5% | 12.2% |
| Oceania |  247,321  | 1.1% |  225,437  | 1.1% | 9.7% |
| Middle East |  663,697  | 2.9% |  611,471  | 2.9% | 8.5% |
| Africa |  107,802  | 0.5% |  98,179  | 0.5% | 9.8% |
| Mexico (Air) |  3,123,002  | 13.7% |  2,721,939  | 13.1% | 14.7% |
| Mexico (Other) |  6,846,243  | 29.9% |  6,390,198  | 30.7% | 7.1% |
| Canada |  2,696,527  | 11.8% |  2,281,885  | 11.0% | 18.2% |
| Total |  22,874,317  | 100.0% |  20,832,972  | 100.0% | 9.8% |
| Source: ITA: National Travel & Tourism Office |  |  |  |

**Cruise Traffic.**

|  |
| --- |
| **Cruise Visitors: Aruba 2016** |
|  | 2016 | 2015 | Per cent change |
|  | Calls | Passengers | Calls | Passengers | Calls | Passengers |
| Jan | 52 |  101,534  | 42 |  77,819  | 23.8% | 30.5% |
| Feb | 38 |  81,574  | 38 |  76,067  | 0.0% | 7.2% |
| Mar | 48 |  96,736  | 34 |  61,105  | 41.2% | 58.3% |
| Apr | 26 |  50,579  | 24 |  49,644  | 8.3% | 1.9% |
| May | 8 |  20,462  | 13 |  26,447  | -38.5% | -22.6% |
| Jun | 7 |  25,452  | 9 |  22,243  | -22.2% | 14.4% |
| Jul | 8 |  18,921  | 10 |  23,627  | -20.0% | -19.9% |
| Aug | 11 |  22,557  | 10 |  23,282  | 10.0% | -3.1% |
| YTD | 198 |  417,815  | 180 |  360,234  | 10.0% | 16.0% |
| Source: Aruba Port Authority. |  |  |  |  |

In August 2016 Aruba saw a 3.1% decrease in the number of cruise passengers compared with August 2015. Year to date the volume of cruise traffic has grown by 16.0%.

The CTO numbers for 2016 for cruise visitor traffic show

|  |  |
| --- | --- |
|  | Total Cruise Visitors |
|  | 2016 | 2015 | % change | Period |
| Antigua |  389,336  |  400,253  | -2.7% | Jan-Jun |
| Aruba |  417,815  |  360,234  | 16.0% | Jan-Aug |
| Bahamas |  2,451,944  |  2,410,060  | 1.7% | Jan-Aug |
| Barbados |  340,043  |  327,626  | 3.8% | Jan-Jun |
| Belize |  647,049  |  647,014  | 0.0% | Jan-Aug |
| British Virgin Islands |  411,211  |  277,017  | 48.4% | Jan-Jun |
| Cayman Islands |  1,081,752  |  1,024,073  | 5.6% | Jan-Jul |
| Cozumel |  2,365,746  |  2,303,459  | 2.7% | Jan-Aug |
| Curacao |  298,989  |  342,225  | -12.6% | Jan-Jul |
| Dominican Republic |  462,391  |  291,877  | 58.4% | Jan-Jun |
| Jamaica |  1,037,898  |  931,583  | 11.4% | Jan-Jul |
| Puerto Rico |  717,772  |  836,287  | -14.2% | Jan-Jun |
| Saint Lucia |  353,415  |  424,983  | -16.8% | Jan-Jul |
| St. Maarten |  1,029,027  |  1,249,699  | -17.7% | Jan-Jul |
| Turks & Caicos Islands |  319,674  |  331,018  | -3.4% | Jan-Apr |
| US Virgin Islands |  1,226,144  |  1,219,847  | 0.5% | Jan-Aug |
| sub total |  13,550,206  |  13,377,255  | 1.3% |  |

**Place of Stay**

The following numbers are from the ATA data base and derived from the information entered on the immigration card by all visitors.

|  |  |
| --- | --- |
|  | Place of Stay: Visitors 2016 |
|  | Aug 2016 | Aug 2015 |  |
|  | Visitors | % | Visitors | % | % change |
| Hotels | 50,327 | 52.3% | 49,107 | 44.1% | 2.5% |
| Timeshare | 25,784 | 26.8% | 27,518 | 24.7% | -6.3% |
| Apts/Priv Homes | 20,208 | 21.0% | 34,846 | 31.3% | -42.0% |
| Total | 96,319 | 100.0% | 111,471 | 100.0% | -13.6% |
| Source: ATA |  |  |  |  |  |

The hotels category includes High Rise hotels, Low Rise hotels and the Tropicana. As shown above in August 2016 the number of visitors staying in hotel accommodation increased by 2.5%, those staying in a timeshare resort decreased by 6.3% and those staying in apartments, guest houses or private homes declined by 42.0%.

|  |  |
| --- | --- |
|  | Place of Stay: Visitor Nights 2016 |
|  | Aug 2016 | Aug 2015 |  |
|  | Nights | % | Nights | % | % change |
| Hotels | 323,940 | 44.5% | 311,484 | 41.4% | 4.0% |
| Timeshare | 204,221 | 28.1% | 219,922 | 29.2% | -7.1% |
| Apts/Priv Homes | 199,229 | 27.4% | 221,453 | 29.4% | -10.0% |
| Total | 727,390 | 100.0% | 752,859 | 100.0% | -3.4% |
| Source: ATA |  |  |  |  |  |
|  |  |  |  |  |  |
|  | Average Length of Stay in Nights 2016 |
|  | Aug 2016 | Aug 2015 |  |
|  | Nights |  | Nights |  | % change |
| Hotels | 6.44 |  | 6.34 |  | 1.5% |
| Timeshare | 7.92 |  | 7.99 |  | -0.9% |
| Apts/Priv Homes | 9.86 |  | 6.36 |  | 55.1% |
| Total | 7.55 |   | 6.75 |   | 11.8% |
| Source: ATA |  |  |  |  |  |

|  |  |
| --- | --- |
|  | Visitors 2016 |
|  | Aug 2016 YTD | Aug 2015 YTD |  |
|  | Visitors | % | Visitors | % | % change |
| Hotels | 373,110 | 48.3% | 372,076 | 47.1% | 0.3% |
| Timeshare | 184,307 | 23.9% | 190,064 | 24.1% | -3.0% |
| Apts/Priv Homes | 215,059 | 27.8% | 227,735 | 28.8% | -5.6% |
| Total | 772,476 | 100.0% | 789,875 | 100.0% | -2.2% |
| Source: ATA |  |  |  |  |  |
|  |  |  |  |  |  |
|  | Visitor Nights Full Year 2016 |
|  | Aug 2016 YTD | Aug 2015 YTD |  |
|  | Nights | % | Nights | % | % change |
| Hotels | 2,342,444 | 42.6% | 2,315,219 | 42.0% | 1.2% |
| Timeshare | 1,538,063 | 27.9% | 1,568,275 | 28.5% | -1.9% |
| Apts/Priv Homes | 1,623,105 | 29.5% | 1,627,064 | 29.5% | -0.2% |
| Total | 5,503,612 | 100.0% | 5,510,558 | 100.0% | -0.1% |
| Source: ATA |  |  |  |  |  |
|  |  |  |  |  |  |
|  | Average Length of Stay in Nights 2016 |
|  | Aug 2016 YTD | Aug 2015 YTD |  |
|  | Nights |  | Nights |  | % change |
| Hotels | 6.28 |  | 6.22 |  | 0.9% |
| Timeshare | 8.35 |  | 8.25 |  | 1.1% |
| Apts/Priv Homes | 7.55 |  | 7.14 |  | 5.6% |
| Total | 7.12 |   | 6.98 |   | 2.1% |
| Source: ATA |  |  |  |  |  |

**Use of Accommodation by visitors from Venezuela.**

During 2015 there was a sharp change in the use of accommodation by Venezuelan visitors, a trend which has continued during 2016.

The number of visitors from Venezuela using hotel accommodation in August increased by 13.4%. Interestingly the number using private homes/apartments and condominiums fell by 63.6% and comprised 40.7% of all Venezuelan visitors in August 2016, down from 67.2% in August 2015.

|  |  |
| --- | --- |
|  | Visitors from Venezuela 2016 |
|  | Aug 2016 | Aug 2015 |  |
|  | Visitors | % | Visitors | % | % change |
| Hotels | 6,758 | 30.6% | 5,959 | 16.2% | 13.4% |
| Timeshare | 6,327 | 28.7% | 6,101 | 16.6% | 3.7% |
| Apts/Priv Homes | 8,971 | 40.7% | 24,668 | 67.2% | -63.6% |
| Total | 22,056 | 100.0% | 36,728 | 100.0% | -39.9% |
| Source: ATA |  |  |  |  |  |
|  |  |  |  |  |  |
|  | Visitor Nights from Venezuela 2016 |
|  | Aug 2016 | Aug 2015 |  |
|  | Nights | % | Nights | % | % change |
| Hotels | 37,121 | 21.2% | 31,807 | 14.9% | 16.7% |
| Timeshare | 57,074 | 32.6% | 56,037 | 26.3% | 1.9% |
| Apts/Priv Homes | 80,861 | 46.2% | 125,543 | 58.8% | -35.6% |
| Total | 175,056 | 100.0% | 213,387 | 100.0% | -18.0% |
| Source: ATA |  |  |  |  |  |
|  |  |  |  |  |  |
|  | Average Length of Stay Venezuela 2016 |
|  | Aug 2016 | Aug 2015 |  |
|  | Nights |  | Nights |  | % change |
| Hotels | 5.49 | nts | 5.34 | nts | 2.9% |
| Timeshare | 9.02 | nts | 9.18 | nts | -1.8% |
| Apts/Priv Homes | 9.01 | nts | 5.09 | nts | 77.1% |
| Total | 7.94 | nts | 5.81 | nts | 36.6% |
| Source: ATA |  |  |  |  |  |

|  |  |
| --- | --- |
|  | Visitors from Venezuela 2016 |
|  | Aug 2016 YTD | Aug 2015 YTD |  |
|  | Visitors | % | Visitors | % | % change |
| Hotels | 30,961 | 19.6% | 37,877 | 19.7% | -18.3% |
| Timeshare | 12,683 | 8.0% | 13,870 | 7.2% | -8.6% |
| Apts/Priv Homes | 114,715 | 72.4% | 140,051 | 73.0% | -18.1% |
| Total | 158,359 | 100.0% | 191,798 | 100.0% | -17.4% |
| Source: ATA |  |  |  |  |  |
|  |  |  |  |  |  |
|  | Visitor Nights from Venezuela 2016 |
|  | Aug 2016 YTD | Aug 2015 YTD |  |
|  | Nights | % | Nights | % | % change |
| Hotels | 136,963 | 16.7% | 158,894 | 15.5% | -13.8% |
| Timeshare | 96,408 | 11.8% | 99,940 | 9.7% | -3.5% |
| Apts/Priv Homes | 585,415 | 71.5% | 768,860 | 74.8% | -23.9% |
| Total | 818,786 | 100.0% | 1,027,694 | 100.0% | -20.3% |
| Source: ATA |  |  |  |  |  |
|  |  |  |  |  |  |
|  | Average Length of Stay Venezuela 2016 |
|  | Aug 2016 YTD | Aug 2015 YTD |  |
|  | Nights |  | Nights |  | % change |
| Hotels | 4.42 | nts | 4.19 | nts | 5.5% |
| Timeshare | 7.60 | nts | 7.21 | nts | 5.5% |
| Apts/Priv Homes | 5.10 | nts | 5.49 | nts | -7.0% |
| Total | 5.17 | nts | 5.36 | nts | -3.5% |
| Source: ATA |  |  |  |  |  |

**Hotel Performance Aruba 2016**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  | 2016/2015 |  |
| **August 2016** | 2016 | 2015 | % change |  |
| Rooms |  4,919  |  4,858  | 1.3% |  |
| ARN |  152,503  |  150,598  | 1.3% |  |
| ORN |  127,827  |  118,756  | 7.6% |  |
| % occupancy | 83.8% | 78.9% | 4.9% | points |
| ADR | $192.12 | $203.30 | -5.5% |  |
| Rev Par | $161.04 | $160.31 | 0.5% |  |
| ***Based on data from 15 properties.*** |  |  |  |

Total transient hotel room inventory for Aruba in August 2016 stood at 5,378 rooms. In addition to the transient hotel room inventory there were an estimated total of 3,430 timeshare units. It should be noted that the Divi All Inclusive added 60 rooms in February 2016.

In August 2016 the hotel sector saw a 4.9 percentage point increase in average room occupancy, from 78.9% to 83.8%, and a 5.5% decrease in the average daily room rate (ADR). With a higher average room occupancy but lower ADR revenue per available room (rev par) increased by 0.5% compared with August 2015.

**Year to Date.**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  | 2016/2015 |  |
| **August 2016 YTD** | 2016 | 2015 | % change |  |
| Rooms |  4,908  |  4,848  | 1.2% |  |
| ARN |  1,196,606  |  1,135,419  | 5.4% |  |
| ORN |  960,628  |  904,435  | 6.2% |  |
| % occupancy | 80.3% | 79.7% | 0.6% | points |
| ADR | $236.73 | $250.36 | -5.4% |  |
| Rev Par | $190.05 | $199.43 | -4.7% |  |
| ***Based on data from 15 properties.*** |  |  |  |

**By Month**

|  |  |  |  |
| --- | --- | --- | --- |
| **2016** | Avg Occupancy | ADR | RevPar |
|  | 2016 | 2015 | % pt chng | 2016 | 2015 | % chng | 2016 | 2015 | % chng |
| Jan | 78.2% | 84.9% | -6.7% | $299.55  | $305.87  | -2.1% | $234.15  | $259.78  | -9.9% |
| Feb | 84.1% | 87.0% | -2.9% | $307.59  | $308.25  | -0.2% | $258.72  | $268.04  | -3.5% |
| Mar | 78.1% | 77.1% | 1.0% | $304.10  | $293.17  | 3.7% | $237.45  | $225.98  | 5.1% |
| Apr | 79.9% | 82.1% | -2.2% | $215.84  | $253.63  | -14.9% | $172.41  | $208.34  | -17.2% |
| May | 76.3% | 74.2% | 2.1% | $187.89  | $200.87  | -6.5% | $143.32  | $148.98  | -3.8% |
| Jun | 77.9% | 70.5% | 7.4% | $185.52  | $199.46  | -7.0% | $144.51  | $140.56  | 2.8% |
| Jul | 84.1% | 81.9% | 2.2% | $204.80  | $216.78  | -5.5% | $172.28  | $177.51  | -2.9% |
| Aug | 83.8% | 78.9% | 4.9% | $192.12  | $203.30  | -5.5% | $161.04  | $160.32  | 0.5% |
| YTD | 80.3% | 79.7% | 0.6% | $236.73  | $250.36  | -5.4% | $190.05  | $199.43  | -4.7% |

**Performance by Category – August 2016.**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  |   |   |   | August 2016 |   |   |   |
|  | Rooms | ARN | ORN | %opy | Revenue | $ADR | $RevPar |
| Brand Name Beach Front |  2,033  |  63,023  |  50,042  | 79.4% | $12,810,257.00 | $255.99 | $203.26 |
| All Inclusives |  1,841  |  57,071  |  51,135  | 89.6% | $7,560,998.00 | $147.86 | $132.48 |
| Small Independent Beach Front |  176  |  5,456  |  5,122  | 93.9% | $1,277,699.00 | $249.45 | $234.18 |
| Non Beach Front |  869  |  26,953  |  21,528  | 79.9% | $2,909,570.00 | $135.15 | $107.95 |
| Total |  4,919  |  152,503  |  127,827  | 83.8% | $24,558,524.00 | $192.12 | $161.04 |
|  |  |  |  |  |  |  |  |
|  |   |   |   | August 2015 |   |   |   |
|  | Rooms | ARN | ORN | %opy | Revenue | $ADR | $RevPar |
| Brand Name Beach Front |  2,040  |  63,240  |  50,731  | 80.2% | $13,910,662.00 | $274.20 | $219.97 |
| All Inclusives |  1,777  |  55,087  |  45,848  | 83.2% | $6,382,447.00 | $139.21 | $115.86 |
| Small Independent Beach Front |  176  |  5,456  |  4,932  | 90.4% | $1,306,291.00 | $264.86 | $239.42 |
| Non Beach Front |  865  |  26,815  |  17,245  | 64.3% | $2,543,847.00 | $147.51 | $94.87 |
| Total |  4,858  |  150,598  |  118,756  | 78.9% | $24,143,247.00 | $203.30 | $160.32 |
|  |  |  |  |  |  |  |  |
|  |   |   |   | Per Cent Change |   |   |
|  | Rooms | ARN | ORN | % pt change | Revenue | $ADR | $RevPar |
| Brand Name Beach Front | -0.3% | -0.3% | -1.4% | -0.8% | -7.9% | -6.6% | -7.6% |
| All Inclusives | 3.6% | 3.6% | 11.5% | 6.4% | 18.5% | 6.2% | 14.3% |
| Small Independent Beach Front | 0.0% | 0.0% | 3.9% | 3.5% | -2.2% | -5.8% | -2.2% |
| Non Beach Front | 0.5% | 0.5% | 24.8% | 15.6% | 14.4% | -8.4% | 13.8% |
| Total | 1.3% | 1.3% | 7.6% | 5.0% | 1.7% | -5.5% | 0.4% |

**Brand Name Beachfront Hotels**

The Aruba Marriott, the Holiday Inn, the Hyatt Regency Aruba, the Ritz Carlton Aruba and the Hilton Aruba Caribbean Resort & Casino.

**All Inclusives Resorts.**

Divi Tamarijn and Divi All Inclusive, the Occidental Grand, the Riu Palace and the Riu Palace Antillas.

**Small Independent Beach Front Hotels.**

Bucuti & Tara Beach Resort, the Manchebo Beach Resort

**Non Beachfront Hotels.**

The Mill Resort, the Talk of the Town, the Renaissance Aruba, the Tropicana Aruba Resort & Casino.

**Performance by Category – Year to Date.**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **August YTD 2016** |   |   |   | 2016 |   |   |   |
|  | Rooms | ARN | ORN | %opy | Revenue | $ADR | $RevPar |
| Brand Name Beach Front |  2,033  |  496,472  |  389,901  | 78.5% | $129,531,031.00 | $332.22 | $260.90 |
| All Inclusives |  1,841  |  446,954  |  382,151  | 85.5% | $61,016,822.00 | $159.67 | $136.52 |
| Small Independent Beach Front |  176  |  42,944  |  38,644  | 90.0% | $12,656,339.00 | $327.51 | $294.72 |
| Non Beach Front |  862  |  210,236  |  149,932  | 71.3% | $24,209,948.00 | $161.47 | $115.16 |
| Total |  4,912  |  1,196,606  |  960,628  | 80.3% | $227,414,140.00 | $236.73 | $190.05 |
|  |  |  |  |  |  |  |  |
| **August YTD 2015** |   |   |   | 2015 |   |   |   |
|  | Rooms | ARN | ORN | %opy | Revenue | $ADR | $RevPar |
| Brand Name Beach Front |  2,040  |  495,720  |  390,090  | 78.7% | $136,866,346.00 | $350.86 | $276.10 |
| All Inclusives |  1,777  |  388,112  |  333,836  | 86.0% | $52,373,134.00 | $156.88 | $134.94 |
| Small Independent Beach Front |  176  |  42,768  |  39,114  | 91.5% | $12,492,631.00 | $319.39 | $292.10 |
| Non Beach Front |  855  |  208,819  |  141,395  | 67.7% | $24,701,591.00 | $174.70 | $118.29 |
| Total |  4,848  |  1,135,419  |  904,435  | 79.7% |  $ 226,433,702.00  | $250.36 | $199.43 |
|  |  |  |  |  |  |  |  |
| **August YTD** |   |   |   | Per Cent Change |   |   |
|  | Rooms | ARN | ORN | % pt change | Revenue | $ADR | $RevPar |
| Brand Name Beach Front | -0.3% | 0.2% | 0.0% | -0.2% | -5.4% | -5.3% | -5.5% |
| All Inclusives | 3.6% | 15.2% | 14.5% | -0.5% | 16.5% | 1.8% | 1.2% |
| Small Independent Beach Front | 0.0% | 0.4% | -1.2% | -1.5% | 1.3% | 2.5% | 0.9% |
| Non Beach Front | 0.8% | 0.7% | 6.0% | 3.6% | -2.0% | -7.6% | -2.7% |
| Total | 1.3% | 5.4% | 6.2% | 0.6% | 0.4% | -5.4% | -4.7% |

**Competing Destination performance.**

Smith Travel Research collects data from hotels across the Caribbean on behalf of the CHTA. The following numbers are based on this STR report and show the performance figures for hotels in various Caribbean countries for August 2016 compared with August 2015 and for August YTD.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **August 2016** | Average Room Occupancy | Average Daily Rate | RevPar | #Hotels in |
|  | 2016 | 2015 | % pt change | 2016 | 2015 | % change | 2016 | 2015 | % change | Sample |
| Aruba | 83.8% | 78.9% | 4.9% | $192.12 | $203.30 | -5.5% | $161.04 | $160.32 | 0.4% | 15 |
| Barbados | 59.2% | 63.6% | -4.4% | $215.35 | $214.93 | 0.2% | $127.54 | $136.65 | -6.7% | 31 |
| Cancun | 75.1% | 73.3% | 1.8% | $174.93 | $176.65 | -1.0% | $131.37 | $129.63 | 1.3% | 44 |
| Cayman Islands | 63.9% | 61.6% | 2.3% | $235.65 | $244.26 | -3.5% | $150.55 | $150.53 | 0.0% | 7 |
| Curacao | 62.6% | 71.8% | -9.2% | $140.21 | $138.72 | 1.1% | $87.77 | $99.60 | -11.9% | 13 |
| Dominican Republic | 73.9% | 67.3% | 6.6% | $122.06 | $123.91 | -1.5% | $90.17 | $83.34 | 8.2% | 29 |
| Jamaica | 70.3% | 69.8% | 0.5% | $190.42 | $202.92 | -6.2% | $133.85 | $141.61 | -5.5% | 9 |
| Puerto Rico | 69.9% | 72.8% | -2.9% | $146.88 | $158.02 | -7.0% | $102.74 | $114.98 | -10.6% | 42 |
| USVI | 74.9% | 68.6% | 6.3% | $238.39 | $240.35 | -0.8% | $178.55 | $164.77 | 8.4% | 7 |
| Caribbean | 66.0% | 67.6% | -1.6% | $169.17 | $189.70 | -10.8% | $111.60 | $128.17 | -12.9% | 240 |
| Source: STR. |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |
| **August YTD 2016** | Average Room Occupancy | Average Daily Rate | RevPar | #Hotels in |
|  | 2016 | 2015 | % pt change | 2016 | 2015 | % change | 2016 | 2015 | % change | Sample |
| Aruba | 80.3% | 79.7% | 0.6% | $236.73 | $250.36 | -5.4% | $190.05 | $199.43 | -4.7% | 15 |
| Barbados | 68.8% | 69.5% | -0.7% | $298.07 | $293.06 | 1.7% | $204.94 | $203.79 | 0.6% | 31 |
| Cancun | 74.9% | 78.4% | -3.5% | $202.50 | $197.84 | 2.4% | $151.77 | $155.19 | -2.2% | 44 |
| Cayman Islands | 73.4% | 73.4% | 0.0% | $366.40 | $376.13 | -2.6% | $268.90 | $276.18 | -2.6% | 7 |
| Curacao | 67.1% | 71.1% | -4.0% | $148.66 | $154.24 | -3.6% | $99.69 | $109.60 | -9.0% | 13 |
| Dominican Republic | 75.7% | 74.4% | 1.3% | $138.73 | $136.48 | 1.6% | $105.09 | $101.47 | 3.6% | 29 |
| Jamaica | 71.4% | 75.6% | -4.2% | $238.80 | $250.47 | -4.7% | $170.42 | $189.39 | -10.0% | 9 |
| Puerto Rico | 74.7% | 78.6% | -3.9% | $189.21 | $194.66 | -2.8% | $141.39 | $153.02 | -7.6% | 42 |
| USVI | 81.8% | 81.3% | 0.5% | $353.82 | $338.24 | 4.6% | $289.31 | $275.14 | 5.2% | 7 |
| Caribbean | 69.7% | 72.2% | -2.5% | $228.03 | $236.15 | -3.4% | $158.88 | $170.61 | -6.9% | 240 |
| Source: STR. |  |  |  |  |  |  |  |  |  |  |

**Visitors by Carrier.**

The table below shows the number of non-resident visitors brought in by various airline carriers during August 2016. It does not show the number of passengers in transit (for example from The Netherlands through to Bonaire) nor does it show the number of returning residents of Aruba which used any one of the carriers. Note that US Airways merged with American Airlines during October 2015.

|  |
| --- |
| **Stopovers: By Airline: August 2016** |
| (Non-resident stopover Arrivals) |  |  |  |  |
|  | 2016 | % share | 2015 | % share | % change |
| Laser |  13,278  | 13.8% |  16,325  | 14.6% | -18.7% |
| American Airlines |  12,884  | 13.4% |  9,484  | 8.5% | 35.8% |
| jetBlue |  13,055  | 13.6% |  14,323  | 12.8% | -8.9% |
| United Airlines |  12,204  | 12.7% |  11,253  | 10.1% | 8.5% |
| Delta Air Lines |  10,270  | 10.7% |  10,514  | 9.4% | -2.3% |
| Southwest/Air Tran |  4,338  | 4.5% |  4,296  | 3.9% | 1.0% |
| Insel Air |  4,595  | 4.8% |  6,033  | 5.4% | -23.8% |
| Avior |  375  | 0.4% |  4,794  | 4.3% | -92.2% |
| Copa |  3,267  | 3.4% |  2,529  | 2.3% | 29.2% |
| Avianca |  2,154  | 2.2% |  2,282  | 2.0% | -5.6% |
| Sunwing |  912  | 0.9% |  927  | 0.8% | -1.6% |
| Aruba Airlines |  2,849  | 3.0% |  4,432  | 4.0% | -35.7% |
| KLM |  1,889  | 2.0% |  1,852  | 1.7% | 2.0% |
| Aserca |  3,931  | 4.1% |  3,504  | 3.1% | 12.2% |
| WestJet |  230  | 0.2% |  532  | 0.5% | -56.8% |
| Venezolana |  446  | 0.5% |  2,517  | 2.3% | -82.3% |
| ArkeFly |  1,159  | 1.2% |  1,365  | 1.2% | -15.1% |
| Thomas Cook |  -  | 0.0% |  -  | 0.0% | 0.0% |
| Air Canada |  506  | 0.5% |  548  | 0.5% | -7.7% |
| GOL |  -  | 0.0% |  737  | 0.7% | -100.0% |
| Surinam Airways |  648  | 0.7% |  342  | 0.3% | 89.5% |
| Spirit Airlines |  483  | 0.5% |  647  | 0.6% | -25.3% |
| US Airways |  -  | 0.0% |  6,709  | 6.0% | -100.0% |
| Tiara Air |  -  | 0.0% |  -  | 0.0% | 0.0% |
| Private |  971  | 1.0% |  1,283  | 1.2% | -24.3% |
| Charter |  1,181  | 1.2% |  938  | 0.8% | 25.9% |
| Other |  4,694  | 4.9% |  3,305  | 3.0% | 42.0% |
| TOTAL |  96,319  | 100.0% |  111,471  | 100.0% | -13.6% |
| Source: ATA |  |  |  |  |  |

|  |
| --- |
| **Stopovers: By Airline: August 2016 YTD** |
| (Non-resident stopover Arrivals) |  |  |  |  |
|  | 2016 YTD | % share | 2015 YTD | % share | % change |
| Laser |  92,085  | 11.9% |  66,398  | 8.4% | 38.7% |
| American Airlines |  111,747  | 14.5% |  72,014  | 9.1% | 55.2% |
| jetBlue |  96,330  | 12.5% |  90,839  | 11.5% | 6.0% |
| United Airlines |  99,587  | 12.9% |  96,852  | 12.3% | 2.8% |
| Delta Air Lines |  76,367  | 9.9% |  76,486  | 9.7% | -0.2% |
| Southwest/Air Tran |  57,731  | 7.5% |  54,836  | 6.9% | 5.3% |
| Insel Air |  33,973  | 4.4% |  47,800  | 6.1% | -28.9% |
| Avior |  16,049  | 2.1% |  27,889  | 3.5% | -42.5% |
| Copa |  21,134  | 2.7% |  20,131  | 2.5% | 5.0% |
| Avianca |  19,897  | 2.6% |  18,061  | 2.3% | 10.2% |
| Sunwing |  10,916  | 1.4% |  12,445  | 1.6% | -12.3% |
| Aruba Airlines |  17,383  | 2.3% |  18,517  | 2.3% | -6.1% |
| KLM |  15,818  | 2.0% |  16,495  | 2.1% | -4.1% |
| Aserca |  16,694  | 2.2% |  24,290  | 3.1% | -31.3% |
| WestJet |  5,831  | 0.8% |  5,399  | 0.7% | 8.0% |
| Venezolana |  4,477  | 0.6% |  14,418  | 1.8% | -68.9% |
| ArkeFly |  9,219  | 1.2% |  9,740  | 1.2% | -5.3% |
| Thomas Cook |  1,877  | 0.2% |  1,916  | 0.2% | -2.0% |
| Air Canada |  5,661  | 0.7% |  5,134  | 0.6% | 10.3% |
| GOL |  984  | 0.1% |  5,532  | 0.7% | -82.2% |
| Surinam Airways |  5,138  | 0.7% |  3,181  | 0.4% | 61.5% |
| Spirit Airlines |  3,927  | 0.5% |  4,261  | 0.5% | -7.8% |
| US Airways |  -  | 0.0% |  64,326  | 8.1% | -100.0% |
| Tiara Air |  127  | 0.0% |  -  | 0.0% | 100.0% |
| Private |  7,829  | 1.0% |  9,225  | 1.2% | -15.1% |
| Charter |  17,550  | 2.3% |  8,107  | 1.0% | 116.5% |
| Other |  24,145  | 3.1% |  15,583  | 2.0% | 54.9% |
| TOTAL |  772,476  | 100.0% |  789,875  | 100.0% | -2.2% |
| Source: ATA |  |  |  |  |  |

**Carriers Used by Venezuelans.**

|  |
| --- |
| **Venezuelan Stopovers: By Airline: August 2016** |
| (Non-resident stopover Arrivals) |  |  |  |  |  |
|  | Aug 2016 | % share | Aug 2015 | % share | % change |
| **US Carriers** |  |  |  |  |  |
| American Airlines |  574  | 2.6% |  1,081  | 2.9% | -46.9% |
| Delta Air Lines |  45  | 0.2% |  161  | 0.4% | -72.0% |
| United Airlines |  175  | 0.8% |  268  | 0.7% | -34.7% |
| US Airways |  -  | 0.0% |  90  | 0.2% | -100.0% |
| Southwest/Air Tran |  58  | 0.3% |  65  | 0.2% | -10.8% |
| jetBlue |  61  | 0.3% |  85  | 0.2% | -28.2% |
| Spirit Airlines |  11  | 0.0% |  16  | 0.0% | -31.3% |
| Total US Carriers |  924  | 4.2% |  1,766  | 4.8% | -47.7% |
|  |  |  |  |  |  |
| **Canada** |  |  |  |  |  |
| Air Canada |  21  | 0.1% |  12  | 0.0% | 75.0% |
| WestJet |  13  | 0.1% |  19  | 0.1% | -31.6% |
| Total Canada |  34  | 0.2% |  31  | 0.1% | 9.7% |
|  |  |  |  |  |  |
| **Europe** |  |  |  |  |  |
| KLM |  92  | 0.4% |  133  | 0.4% | -30.8% |
| Arke Fly |  16  | 0.1% |  18  | 0.0% | 100.0% |
| Total Europe |  108  | 0.5% |  151  | 0.4% | -28.5% |
|  |  |  |  |  |  |
| **Other Non-Venezuelan** |  |  |  |  |  |
| Copa |  49  | 0.2% |  98  | 0.3% | -50.0% |
| Surinam Airlines |  63  | 0.3% |  42  | 0.1% | 50.0% |
| Total Other Non Venez |  112  | 0.5% |  140  | 0.4% | -20.0% |
|  |  |  |  |  |  |
| **Total (Non-Aruba/Non Venezuelan)** |  1,178  | 5.3% |  2,088  | 5.7% | -43.6% |
|  |  |  |  |  |  |
| Other (Aruban/Venezuelan) |  20,878  | 94.7% |  34,640  | 94.3% | -39.7% |
| **Total** |  22,056  | 100.0% |  36,728  | 100.0% | -39.9% |
| Source: ATA |  |  |  |  |  |

A portion of Venezuelan business to Aruba in August 2016 was thought to be residents of Venezuela travelling via Aruba to other countries, notably the United States and returning through Aruba to Venezuela.

The above table shows the number of residents of Venezuela who arrived in Aruba using a non-Venezuelan (or Aruban) airline. This is a good indicator of the number of Venezuelans who travelled to and from other countries via Aruba.

The table shows that 924 residents of Venezuela (4.2% of all Venezuelans visiting Aruba) arrived in Aruba by a scheduled US carrier (i.e. were returning to Venezuela via Aruba) so were probably visiting the USA. This was down by 47.7% compared to August 2015. In total 1,178 residents of Venezuela (5.3% of all Venezuelans visiting Aruba) arrived in Aruba by a scheduled carrier other than one based in Venezuela or Aruba.

|  |
| --- |
| **Venezuelan Stopovers: By Airline: August 2016** |
| (Non-resident stopover Arrivals) |  |  |  |
|  | Inbound To Aruba by Carrier Used |
| **Carriers** | Total | Venezuelans | % |
| **US Carriers** |  |  |  |
| American Airlines |  12,884  |  574  | 4.5% |
| Delta Air Lines |  10,270  |  45  | 0.4% |
| United Airlines |  12,204  |  175  | 1.4% |
| US Airways |  -  |  -  | 0.0% |
| Southwest/Air Tran |  4,338  |  58  | 1.3% |
| jetBlue |  13,055  |  61  | 0.5% |
| Spirit Airlines |  483  |  11  | 2.3% |
| Total US Carriers |  53,234  |  924  | 1.7% |
|  |  |  |  |
| **Canada** |  |  |  |
| Air Canada |  506  |  21  | 4.2% |
| WestJet |  230  |  13  | 5.7% |
| Total Canada |  736  |  34  | 4.6% |
|  |  |  |  |
| **Europe** |  |  |  |
| KLM |  1,889  |  92  | 4.9% |
| Arke Fly |  1,159  |  16  | 1.4% |
| Total Europe |  3,048  |  108  | 3.5% |
|  |  |  |  |
| **Other Non-Venezuelan** |  |  |  |
| Copa |  3,267  |  49  | 1.5% |
| Surinam Airlines |  648  |  63  | 9.7% |
| Total Other Non Venez |  3,915  |  112  | 2.9% |
|  |  |  |  |
| **Total (Non Aruba/Non Venezuelan)** |  60,933  |  1,178  | 1.9% |
|  |  |  |  |
| Other (Aruban/Venezuelan) |  35,386  |  20,878  | 59.0% |
| **Total** |  96,319  |  22,056  | 22.9% |
| Source ATA |  |  |  |

The above table shows the number of Venezuelan residents who arrived in Aruba as a percentage of the total non-residents carried by an airline.

Thus 4.5% of all non-residents arriving in Aruba on American Airlines in August 2016 were residents of Venezuela and 0.4% of all non-residents arriving in Aruba on Delta Air Lines in August 2016 were residents of Venezuela.

**Venezuelans arriving on American Airlines.**

|  |
| --- |
| Percentage of all Non-Resident Passengers arriving  |
| in Aruba on American Airlines who were |
| residents of Venezuela |
|  |  |  | 2016 |  |
|  |  | Jan | 15.1% |  |
|  |  | Feb | 2.0% |  |
|  |  | Mar | 1.6% |  |
|  |  | Apr | 1.1% |  |
|  |  | May | 1.2% |  |
|  |  | Jun | 1.1% |  |
|  |  | Jul | 1.5% |  |
|  |  | Aug | 4.5% |  |

In August 2016 4.5% of all non-resident passengers arriving in Aruba on an American Airlines flight were residents of Venezuela. This is down substantially from January 2016 when the number was 15.1%.

**Age of Visitors.**

The biggest changes in age demographics in August 2016 came in the 30-39 years old categories (down 25.0%) and with 0.3% growth in the 70 years old and older categories. There was a 23.7% decline in the number of visitors 20-29 years old and a 16.5% decline in the number 0-11 years old.

|  |
| --- |
| **Age of All Stopover Visitors August 2016** |
|  |  |  |  |  |  |
|  | 2016 | % share | 2015 | % share | % change |
| 0 - 11 yrs |  10,154  | 10.5% |  12,158  | 10.9% | -16.5% |
| 12 - 19 yrs |  9,617  | 10.0% |  9,660  | 8.7% | -0.4% |
| 20 - 29 yrs |  13,937  | 14.5% |  18,275  | 16.4% | -23.7% |
| 30 - 39 yrs |  16,064  | 16.7% |  21,424  | 19.2% | -25.0% |
| 40 - 49 yrs |  17,830  | 18.5% |  19,950  | 17.9% | -10.6% |
| 50 - 59 yrs |  15,821  | 16.4% |  16,580  | 14.9% | -4.6% |
| 60 - 69 yrs |  9,025  | 9.4% |  9,569  | 8.6% | -5.7% |
| 70 yrs or more |  3,868  | 4.0% |  3,855  | 3.5% | 0.3% |
| Not Stated |  3  | 0.0% |  -  | 0.0% | 100.0% |
| Total |  96,319  | 100.0% |  111,471  | 100.0% | -13.6% |
| Source: ATA |  |  |  |  |  |

|  |
| --- |
| **Age of All Stopover Visitors August 2016 YTD** |
|  |  |  |  |  |  |
|  | 2016 | % share | 2015 | % share | % change |
| 0 - 11 yrs |  67,417  | 8.7% |  71,239  | 9.0% | -5.4% |
| 12 - 19 yrs |  55,461  | 7.2% |  53,053  | 6.7% | 4.5% |
| 20 - 29 yrs |  104,720  | 13.6% |  111,945  | 14.2% | -6.5% |
| 30 - 39 yrs |  130,887  | 16.9% |  143,398  | 18.2% | -8.7% |
| 40 - 49 yrs |  136,761  | 17.7% |  137,366  | 17.4% | -0.4% |
| 50 - 59 yrs |  142,295  | 18.4% |  140,749  | 17.8% | 1.1% |
| 60 - 69 yrs |  95,174  | 12.3% |  93,973  | 11.9% | 1.3% |
| 70 yrs or more |  39,740  | 5.1% |  38,107  | 4.8% | 4.3% |
| Not Stated |  21  | 0.0% |  45  | 0.0% | -53.3% |
| Total |  772,476  | 100.0% |  789,875  | 100.0% | -2.2% |
| Source: ATA |  |  |  |  |  |

**First Time/Repeat Visitors.**

|  |
| --- |
| **Number of visits to Aruba: August 2016** |
|  |  |  |  |  |  |
| Number of Times Visited | 2016 | % share | 2015 | % share | % change |
| First Time |  42,103  | 43.7% |  48,139  | 44.1% | -12.5% |
| 2 - 5 times |  22,800  | 23.7% |  27,219  | 24.9% | -16.2% |
| 6 - 9 times |  6,375  | 6.6% |  6,425  | 5.9% | -0.8% |
| 10 or more |  10,222  | 10.6% |  9,970  | 9.1% | 2.5% |
| Not Stated |  14,819  | 15.4% |  19,718  | 18.0% | -24.8% |
| Total |  96,319  | 100.0% |  109,251  | 100.0% | -11.8% |
| Source: ATA: Self-reported by visitors |  |  |  |  |

In August 2016 43.7% of our visitors reported they were visiting for the first time and 40.9% reported they had visited before. 15.4% of our visitors did not report how many times they visited. Assigning the number who did not report on a *pro rata* basis results in an overall percentage of 52% first time and 48% repeat.

|  |
| --- |
| **Number of visits to Aruba: August 2016 YTD** |
|  |  |  |  |  |  |
| Number of Times Visited | 2016 | % share | 2015 | % share | % change |
| First Time |  329,226  | 42.6% |  344,534  | 43.7% | -4.4% |
| 2 - 5 times |  197,443  | 25.6% |  196,949  | 25.0% | 0.3% |
| 6 - 9 times |  50,580  | 6.5% |  50,385  | 6.4% | 0.4% |
| 10 or more |  80,441  | 10.4% |  77,322  | 9.8% | 4.0% |
| Not Stated |  114,786  | 14.9% |  120,685  | 15.3% | -4.9% |
| Total |  772,476  | 100.0% |  787,655  | 100.0% | -1.9% |
| Source: ATA: Self-reported by visitors |  |  |  |  |

Year to date 2016 42.6% of our visitors reported they were visiting for the first time and 42.5% reported they had visited before. 14.9% of our visitors did not report how many times they visited. Assigning the number who did not report on a *pro rata* basis results in an overall percentage of 50% first time and 50% repeat.

**Trip Advisor Ratings.**

Trip Advisor has made data available to us which shows the total number of reviews received for the overall Caribbean and for five of our competitors (that is all reviews of hotels, restaurants, attractions and the destination as a whole) for August 2016. The ratings are out of 5.

|  |
| --- |
| **TripAdvisor Ratings for August 2016** |
|  | Number of Reviews |
| Aruba | 3,942 |  |
| Bahamas | 3,614 |  |
| Cayman | 2,514 |  |
| Curacao | 572 |  |
| Puerto Rico | 7,046 |  |
| USVI | 3,807 |  |
|  |  |  |
|  | Average Rating |  |
| Cayman | 4.52 |  |
| USVI | 4.49 |  |
| Aruba | 4.44 |  |
| Puerto Rico | 4.39 |  |
| Curacao | 4.38 |  |
| Bahamas | 4.17 |  |

**Targets for 2016.**

The Aruba Tourism Authority has set as a target an increase of 5.5% more stopover visitors in 2016 compared to 2015. As well they have targeted a 6% increase in tourism receipts, to increase cruise visitor arrival numbers by a minimum of 3% over the 2013 total and to achieve a 9% per annum increase in the tourism sector’s RevPar. It is likely these numbers are subject to revision.

By market the ATA is targeting a growth in stopover visitors from the USA of 6% in 2016 over the 2015 total, and a growth of 3% from Canada. Latin America has traditionally been very difficult to forecast and the ATA is projecting no growth from the Venezuelan market in 2016 over the 2015 total, 5% growth from the Brazilian market, 30% from Colombia and 4% from Argentina. Chile is projected to show a 15% increase in traffic over the 2015 total. From Europe the Netherlands is projected to show 1% growth over 2015, Germany 2.0%, Italy 2.5% and the UK 70%.

**Change in Currency Exchange Rates.**

|  |  |  |  |
| --- | --- | --- | --- |
|  | August 2016 | August 2015 |  |
| as of | 8/15/2016 | 8/17/2015 | % change |
| Euro | $1.120 | $1.108 | 1.1% |
| UK Pound | $1.287 | $1.560 | -17.5% |
| Canadian Dollar | $0.774 | $0.764 | 1.3% |
| Colombian Peso\* | 2928 | 2989 | 2.1% |
| Brazilian Real\*\* | 3.170 | 3.473 | 9.6% |
| \* Pesos per $1.00 |  |  |  |
| \*\* Reals per $1.00 |  |  |  |

**Inventory.**

It is currently forecasted by AHATA that there will be an increase of 3% - 4% in available room nights during 2016 due to the addition of 60 rooms at the Divi Tamarijn/All Inclusive, the addition of 74 renovated rooms at the Tropicana Aruba and the full year operation of the Riu Palace (which was closed for three months in 2015 for renovation). Please note that the Hilton Aruba currently plans renovations during the course of 2016 which will involve the closure of some rooms.

**Forecast**

Consequently it is forecast by AHATA that overall average room occupancy for 2016 for the hotel sector will remain at about the same level as in 2015, but that ADR will decline by about 3% compared to full year 2015 and that as a result RevPar will decline by between 2% - 3% compared with 2015.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Projected | Actual | 2016/2015 |  |
| **December 2016 YTD** | 2016 | 2015 | % change |  |
| Rooms |  4,908  |  4,848  | 1.2% |  |
| ARN |  1,785,244  |  1,725,914  | 3.4% |  |
| ORN |  1,399,809  |  1,346,974  | 3.9% |  |
| % occupancy | 78.4% | 78.0% | 0.4% | points |
| ADR | $231.01 | $238.19 | -3.0% |  |
| Rev Par | $181.13 | $185.89 | -2.6% |  |
| ***Based on data from 15 properties.*** |  |  |  |

The Aruba Airport Authority reports there will be 1.7% more air seats in the summer of 2016 (April 1 – October 31 2016) compared to the same seven months of 2015. The USA gateways will see 4.4% fewer seats largely due to the loss of the third daily flight out of Miami.

|  |
| --- |
| **SUMMER 2016: TOTAL AIRLIFT (April 1 - October 31 2016)** |
|  | 2016 | 2015 | Change | % change |
|  | Seats | Seats | Seats |  |
| USA |  498,975  |  522,061  |  (23,086) | -4.4% |
| Canada |  15,414  |  15,128  |  286  | 1.9% |
| Europe |  52,065  |  40,608  |  11,457  | 28.2% |
| Latin America |  433,084  |  404,746  |  28,338  | 7.0% |
| Total |  999,538  |  982,543  |  16,995  | 1.7% |
| Source: AAA |  |  |  |  |

|  |
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| **Inbound Air Seats - Winter 2016/2017** |
| November 1 2015 - March 31 2016 |
|   | 2016/2017 | 2015/2016 | Change | % change |
| USA | 384,411 | 360,093 | 24,318 | 6.8% |
| Canada | 28,994 | 23,553 | 5,441 | 23.1% |
| Europe | 36,799 | 28,801 | 7,998 | 27.8% |
| Latin America | 215,881 | 357,703 | (141,822) | -39.6% |
| Caribbean | 75,508 | 86,172 | (10,664) | -12.4% |
| Total | 741,593 | 856,322 | (114,729) | -13.4% |
| Source: Aruba Airport Authority. |  |  |  |

Projections for 2016 for cruise traffic suggest that based on existing schedules the number of cruise passengers will increase by between 10% and 13% compared to 2015. However this growth rate could fall below 10% if certain calls which have been scheduled do not materialize.