

MONTHLY UPDATE - ARUBA'S TOURISM INDUSTRY
January 2017

Summary Highlights.

- The total number of stopovers visiting Aruba decreased by 14.2% in January 2017, from 104,072 in January 2016 to 89,269 in January 2017.
- Traffic from the USA was up by 8.4%, from 51,096 stopovers in January 2016 to 55,383 stopovers in January 2017. Traffic was up by 2.6% from New York State, up by 16.3% from Massachusetts and up 2.5% from New Jersey.
- Traffic from Venezuela was down by 6.2% in January 2017 from 27,925 stopovers in January 2016 to 8,869 in January 2017.
- 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 2016. In the third quarter tourism receipts grew by 0.5% despite a 14.1% decline in stopover arrivals.
- The total number of visitor nights declined by 6.6% in January, from 785,884 in January 2016 to 734,378 in January 2017. The overall average length of stay grew by 8.9% from 7.55 nights in January 2016 to 8.23 nights in January 2017.
- The Dominican Republic saw a 6.2% increase in stopover traffic in CY 2016 whilst Jamaica saw a 2.8% increase in stopovers in 2016. Traffic to Cuba grew by 11.7% in the first eight months of 2016 compared to the same period of 2015.
- Outbound travel by US citizens grew by 8.0% in the first eleven months of 2016 compared to the same period for 2015 and was up by 2.0% to the Caribbean.
- The number of cruise passengers visiting Aruba in January fell by 11.6%, from 101,534 in January 2016 to 89,734 in January 2017.
- As reported by Immigration card data the number of stopover visitors staying in hotels in January 2017 grew by 4.8%, and staying in timeshare resorts fell by 2.2%. The number staying in "other accommodation" fell by 43.3%. This latter category comprised 24.1% of all visitors in January 2017, down from 36.5% in January 2016.
- In January 2017 hotels saw a 1.8% increase in the overall number of visitor nights compared with January 2016. The USA generated 7.6% more hotel nights in January 2017 than in January 2016.
- The number of Venezuelan stopovers using "other accommodation" fell by 77.8% in January 2017 and comprised 58.8% of all Venezuelan visitors in January 2017 down from 83.9% in January 2016. The number of Venezuelans staying in hotel accommodation fell by 15.7% compared with January 2016.

Monthly Update - Aruba's Tourism Industry: January 2017.

- Numbers provided to AHATA show that for a sample of 14 hotels average room occupancy grew by 5.7 percentage points from 79.2% in January 2016 to 84.9% in January 2017. The average daily room rate grew by 1.8% to \$302.22 and the average RevPar grew by 9.0% to \$256.48.
- Performance of the hotels by category for January shows that the brand name beach front hotels saw their average room occupancies grow by 6.1 percentage points to 82.9%, with their RevPar also growing by 8.1% to \$381.36. The all-inclusive resorts saw their average room occupancies grow by 1.0 percentage points to 89.1% and their RevPar grew by 6.0% to \$171.32. The smaller independent beach front hotels saw their average room occupancies grow by 3.2 percentage points to 94.1% and their RevPar grow by 10.9% to \$418.38. The non-beach front hotels saw their average room occupancies improve by 15.0 percentage points to 78.0% and saw their RevPar also grow by 31.7% to \$165.51.
- STR reported that hotels in January 2017 saw four of nine Caribbean destinations having higher average room occupancies with five seeing lower average room occupancies. Four of the nine also saw a lower average RevPar.
- Jet Blue was the number one carrier in January 2017 and brought in 17,395 non-resident visitors. American Airlines was the number two carrier (13,158 non-residents) and United Airlines brought in 12,837 non-residents.
- Of the 8,869 Venezuelans who visited Aruba in January 2017 38.6% (3,419) arrived in Aruba on a US scheduled carrier. In total 3,951 Venezuelans (44.5% 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.
- 14.5% of non-residents carried to Aruba by American Airlines in January 2017 were residents of Venezuela. 3.0% of non-residents carried to Aruba by Delta Air Lines in January were residents of Venezuela. For most other non-Venezuelan, non-Aruban carriers it was generally less than 6%.
- There was a decline in almost all age categories in January 2017 with the worst declines being in the 30 - 39 years category (down 30.0%) and in the 20 - 29 years category (down 26.2%).
- In January 2017 39.7% of our visitors reported they were visiting for the first time and 46.2% reported they had visited before. 14.1% 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 46.2% first time and 53.8% repeat.
- Trip Advisor ratings for January 2017 show that Aruba received a total of 6,336 reviews and achieved an average rating of 4.30 out of 5. The Cayman Islands achieved an average rating of 4.50.
- The Aruba Tourism Authority has set a forecast of 1.0% more stopover visitors for 2017 compared to 2016. As well they have targeted a 1% increase in tourism receipts and an increase of cruise visitors of 5%.

Monthly Update - Aruba's Tourism Industry: January 2017.

- The Aruba Airport Authority is projecting 13.4% fewer inbound air seats in the winter 2016/2017 compared to the same five months of 2015/2016.

Visitor Arrivals – January 2017

Aruba: Total Visitors January 2017

	2017	%	2016	%	% change
USA	55,383	62.0%	51,096	49.1%	8.4%
Canada	6,246	7.0%	5,492	5.3%	13.7%
Venezuela	8,869	9.9%	27,925	26.8%	-68.2%
Brazil	1,188	1.3%	1,779	1.7%	-33.2%
Colombia	2,694	3.0%	2,100	2.0%	28.3%
Argentina	3,420	3.8%	2,596	2.5%	31.7%
Chile	774	0.9%	821	0.8%	-5.7%
Netherlands	3,227	3.6%	2,909	2.8%	10.9%
Germany	566	0.6%	327	0.3%	73.1%
Italy	580	0.6%	576	0.6%	0.7%
UK	279	0.3%	316	0.3%	-11.7%
Sweden	896	1.0%	1,241	1.2%	-27.8%
Other	5,147	5.8%	6,894	6.6%	-25.3%
Total	89,269	100.0%	104,072	100.0%	-14.2%

Source: ATA

Total stopover arrivals (persons staying 24 hours or more) for January 2017 showed a 14.2% decrease compared with January 2016.

Traffic from the USA was up by 8.4%, was up by 13.7% from Canada, down 68.2% from Venezuela, up 28.3% from Colombia, down 33.2% from Brazil and up 31.7% from Argentina. Arrivals were up 10.9% from The Netherlands.

Expenditures

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
2016	864.4	672.0	685.3	718.7	2,940.4
2017	852.3	669.0	689.0		

Source: Central Bank of Aruba

Tourism Receipts

(Millions of AFL)

Quarter	2017	2016	change
1st	852.3	864.4	-1.4%
2nd	669.0	672.0	-0.4%
3rd	689.0	685.3	0.5%
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.

In the third quarter visitor arrivals declined by 14.1% but tourism receipts grew by 0.5% compared to third quarter 2015.

Through the first nine months of 2016 tourism receipts fell by 0.5% compared with the same nine months of 2016.

Monthly Update - Aruba's Tourism Industry: January 2017.

Top Producing US States.

Aruba: Total Visitors: US States: January 2017

	2017	%	2016	%	% change
New York	12,232	22.1%	11,924	23.3%	2.6%
Massachusetts	7,645	13.8%	6,576	12.9%	16.3%
New Jersey	5,809	10.5%	5,668	11.1%	2.5%
Pennsylvania	3,713	6.7%	3,209	6.3%	15.7%
Illinois	2,037	3.7%	2,134	4.2%	-4.5%
Florida	2,658	4.8%	2,059	4.0%	29.1%
Connecticut	1,810	3.3%	1,908	3.7%	-5.1%
Maryland	1,533	2.8%	1,757	3.4%	-12.7%
Ohio	1,660	3.0%	1,504	2.9%	10.4%
Michigan	1,421	2.6%	1,323	2.6%	7.4%
Virginia	1,271	2.3%	1,306	2.6%	-2.7%
Texas	982	1.8%	1,058	2.1%	-7.2%
California	978	1.8%	668	1.3%	46.4%
Other	11,634	21.0%	10,002	19.6%	16.3%
Total	55,383	100.0%	51,096	100.0%	8.4%

Source: ATA

Stopover Visitors by Number of Nights Stayed.

Aruba: Total Nights January 2017

	2017	%	2016	%	% change
USA	447,039	60.9%	430,590	54.8%	3.8%
Canada	63,724	8.7%	55,499	7.1%	14.8%
Venezuela	41,569	5.7%	112,008	14.3%	-62.9%
Brazil	7,762	1.1%	11,863	1.5%	-34.6%
Colombia	21,640	2.9%	22,051	2.8%	-1.9%
Argentina	32,790	4.5%	24,697	3.1%	32.8%
Chile	6,337	0.9%	6,875	0.9%	-7.8%
Netherlands	46,368	6.3%	41,409	5.3%	12.0%
Germany	4,283	0.6%	2,703	0.3%	58.5%
Italy	5,391	0.7%	4,448	0.6%	21.2%
UK	2,695	0.4%	2,430	0.3%	10.9%
Sweden	11,205	1.5%	15,376	2.0%	-27.1%
Other	43,575	5.9%	55,935	7.1%	-22.1%
Total	734,378	100.0%	785,884	100.0%	-6.6%

Source: ATA

Aruba: Average Length of Stay in Nights: January 2017

	2017	2016	% change
USA	8.07	8.43	-4.2%
Canada	10.20	10.11	1.0%
Venezuela	4.69	4.01	16.9%
Brazil	6.53	6.67	-2.0%
Colombia	8.03	10.50	-23.5%
Argentina	9.59	9.51	0.8%
Chile	8.19	8.37	-2.2%
Netherlands	14.37	14.23	0.9%
Germany	7.57	8.27	-8.5%
Italy	9.29	7.72	20.4%
UK	9.66	7.69	25.6%
Sweden	12.51	12.39	0.9%
Other	8.47	8.11	4.3%
Total	8.23	7.55	8.9%

Source: ATA

Competing Destination performance.

The Caribbean Tourism Organization collects data from across the region. Their most recently published figures are from February 2017 which show a limited set of data for 2017. The following shows the percentage change in stopover visitor arrivals for 2016 compared to the same period in 2015.

	Total Stopover Visitors			Period
	2016	2015	% change	
Antigua	265,187	250,450	5.9%	Jan-Dec
Aruba	1,101,954	1,224,935	-10.0%	Jan-Dec
Bahamas	1,204,271	1,175,233	2.5%	Jan-Sep
Barbados	632,133	592,302	6.7%	Jan-Dec
Belize	385,583	341,161	13.0%	Jan-Dec
British Virgin Islands	406,027	393,018	3.3%	Jan-Dec
Cayman Islands	385,451	385,378	0.0%	Jan-Dec
Cuba	2,715,478	2,430,238	11.7%	Jan-Aug
Curacao	441,331	467,538	-5.6%	Jan-Dec
Dominican Republic	5,134,110	4,832,956	6.2%	Jan-Dec
Jamaica	2,181,684	2,123,042	2.8%	Jan-Dec
Puerto Rico*	1,488,998	1,490,876	-0.1%	Jan-Oct
Saint Lucia	347,872	344,908	0.9%	Jan-Dec
Turks & Caicos Islands	453,612	385,531	17.7%	Jan-Dec
US Virgin Islands	796,889	764,035	4.3%	Jan-Dec

* Hotel Non Resident Registrations

Source CTO

Monthly Update - Aruba's Tourism Industry: January 2017.

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

Total US Stopover Visitors				
	2016	2015	% change	Period
Antigua	108,652	94,617	14.8%	Jan-Dec
Aruba	628,765	621,386	1.2%	Jan-Dec
Bahamas	953,867	916,291	4.1%	Jan-Sep
Barbados	169,221	148,165	14.2%	Jan-Dec
Belize	254,543	215,167	18.3%	Jan-Dec
British Virgin Islands	NA	NA	NA	NA
Cayman Islands	300,571	291,759	3.0%	Jan-Dec
Cuba	171,445	100,305	70.9%	Jan-Aug
Curacao	59,714	63,188	-5.5%	Jan-Dec
Dominican Republic	2,085,186	2,001,909	4.2%	Jan-Dec
Jamaica	1,406,058	1,344,149	4.6%	Jan-Dec
Puerto Rico*	1,237,749	1,240,229	-0.2%	Jan-Sep
Saint Lucia	157,576	152,690	3.2%	Jan-Dec
Turks & Caicos Islands	365,854	315,517	16.0%	Jan-Dec
US Virgin Islands	NA	NA	NA	NA

* Hotel Non Resident Registrations

Source CTO

US Citizens Outbound Travel 2016.

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%
May	641,598	647,866	-1.0%
Jun	803,919	783,320	2.6%
Jul	890,781	852,692	4.5%
Aug	640,065	656,606	-2.5%
Sep	416,980	403,601	3.3%
Oct	451,579	477,299	-5.4%
Nov	502,982	523,274	-3.9%
YTD	7,082,673	6,943,066	2.0%

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%
May	6,757,900	6,369,370	6.1%
Jun	8,227,499	7,751,682	6.1%
Jul	9,072,024	8,235,479	10.2%
Aug	7,438,193	7,066,754	5.3%
Sep	6,291,971	5,781,623	8.8%
Oct	6,063,359	5,499,394	10.3%
Nov	5,599,045	5,405,054	3.6%
YTD	72,559,988	67,188,967	8.0%

Source: ITA: National Travel & Tourism Office

Monthly Update - Aruba's Tourism Industry: January 2017.

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%
May	9.5%	10.2%	-0.7%
Jun	9.8%	10.1%	-0.3%
Jul	9.8%	10.4%	-0.5%
Aug	8.6%	9.3%	-0.7%
Sep	6.6%	7.0%	-0.4%
Oct	7.4%	8.7%	-1.2%
Nov	9.0%	9.7%	-0.7%
YTD	9.8%	10.3%	-0.6%

Source: ITA: National Travel & Tourism Office

U.S. Citizens Outbound Travel - January - November 2016 YTD					
	2016	% share	2015	% share	% change
Europe	12,582,821	17.3%	11,774,204	17.5%	6.9%
Caribbean	7,082,673	9.8%	6,943,066	10.3%	2.0%
Asia	4,823,912	6.6%	4,404,734	6.6%	9.5%
South America	1,781,067	2.5%	1,635,186	2.4%	8.9%
Central America	2,655,456	3.7%	2,469,846	3.7%	7.5%
Oceania	634,541	0.9%	569,251	0.8%	11.5%
Middle East	1,935,216	2.7%	1,828,788	2.7%	5.8%
Africa	328,752	0.5%	316,757	0.5%	3.8%
Mexico (Air)	7,940,334	10.9%	7,145,001	10.6%	11.1%
Mexico (Other)	19,861,014	27.4%	18,459,627	27.5%	7.6%
Canada	12,934,202	17.8%	11,642,507	17.3%	11.1%
Total	72,559,988	100.0%	67,188,967	100.0%	8.0%

Source: ITA: National Travel & Tourism Office

Travel to the Caribbean by US citizens in the first 11 months of 2016 has shown the slowest rate of growth of all destinations, with a 2% increase, compared with an overall increase of 8.0%. Consequently the Caribbean's share of such travel has fallen from 10.3% in 2015 to 9.8% in 2016.

Cruise Traffic.

Cruise Visitors: Aruba 2017

	2017		2016		Per cent change	
	Calls	Passengers	Calls	Passengers	Calls	Passengers
Jan	44	89,734	52	101,534	-15.4%	-11.6%

In January 2017 Aruba saw an 11.6% decline in the number of cruise passengers compared with January 2016.

The CTO numbers for 2016 for cruise visitor traffic show

	Total Cruise Visitors			Period
	2016	2015	% change	
Antigua	608,503	644,314	-5.6%	Jan-Dec
Aruba	656,043	607,019	8.1%	Jan-Dec
Bahamas	3,769,559	3,630,471	3.8%	Jan-Oct
Barbados	594,985	586,615	1.4%	Jan-Dec
Belize	1,005,394	957,975	4.9%	Jan-Dec
British Virgin Islands	699,105	516,436	35.4%	Jan-Dec
Cayman Islands	1,711,849	1,716,812	-0.3%	Jan-Dec
Cozumel	3,637,321	3,396,072	7.1%	Jan-Dec
Curacao	471,327	531,395	-11.3%	Jan-Dec
Dominican Republic	663,871	416,521	59.4%	Jan-Nov
Jamaica	1,655,565	1,568,702	5.5%	Jan-Dec
Puerto Rico	1,086,956	1,152,332	-5.7%	Jan-Oct
Saint Lucia	587,749	677,394	-13.2%	Jan-Dec
St. Maarten	1,029,027	1,249,699	-17.7%	Jan-Jul
Turks & Caicos Islands	846,963	929,737	-8.9%	Jan-Dec
US Virgin Islands	1,776,685	1,878,847	-5.4%	Jan-Dec
sub total	20,800,902	20,460,341	1.7%	

Source CTO

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 2017				
	January 2017		January 2016		% change
	Visitors	%	Visitors	%	
Hotels	46,226	51.8%	44,119	42.4%	4.8%
Timeshare	21,501	24.1%	21,982	21.1%	-2.2%
Apts/Priv Homes	21,542	24.1%	37,971	36.5%	-43.3%
Total	89,269	100.0%	104,072	100.0%	-14.2%

Source: ATA

The hotels category includes High Rise hotels, Low Rise hotels and the Tropicana. As shown above in January 2017 the number of visitors staying in hotel accommodation increased by 4.8%, those staying in a timeshare resort fell by 2.2% and those staying in apartments, guest houses or private homes declined by 43.3%.

	Place of Stay: Visitor Nights 2017				
	January 2017		January 2016		% change
	Nights	%	Nights	%	
Hotels	304,379	41.4%	299,023	38.0%	1.8%
Timeshare	217,028	29.6%	227,287	28.9%	-4.5%
Apts/Priv Homes	212,971	29.0%	259,574	33.0%	-18.0%
Total	734,378	100.0%	785,884	100.0%	-6.6%

Source: ATA

	Average Length of Stay in Nights 2017				% change
	January 2017		January 2016		
	Nights		Nights		
Hotels	6.58	nts	6.78	nts	-2.8%
Timeshare	10.09	nts	10.34	nts	-2.4%
Apts/Priv Homes	9.89	nts	6.84	nts	44.6%
Total	8.23	nts	7.55	nts	8.9%

Source: ATA

Hotel Nights by Market.

The following numbers are from the ATA data base and derived from the information entered on the immigration card by all visitors as to the length of their intended stay.

Aruba: Total Hotel Nights January 2017

	2017	%	2016	%	% change
USA	198,218	65.1%	184,136	61.6%	7.6%
Canada	28,211	9.3%	27,890	9.3%	1.2%
Venezuela	10,473	3.4%	14,217	4.8%	-26.3%
Brazil	5,769	1.9%	8,162	2.7%	-29.3%
Colombia	6,101	2.0%	4,894	1.6%	24.7%
Argentina	22,872	7.5%	17,989	6.0%	27.1%
Netherlands	6,194	2.0%	5,971	2.0%	3.7%
Germany	1,318	0.4%	1,182	0.4%	11.5%
Italy	1,485	0.5%	1,474	0.5%	0.7%
UK	1,150	0.4%	970	0.3%	18.6%
Other	22,588	7.4%	32,138	10.7%	-29.7%
Total	304,379	100.0%	299,023	100.0%	1.8%

Source: ATA

Use of Accommodation by visitors from Venezuela.

The number of visitors from Venezuela using hotel accommodation in January fell by 15.7%.

The number of visitors using private homes/apartments and condominiums fell by 77.8% and comprised 58.8% of all Venezuelan visitors in January 2017, down from 83.9% in January 2016.

Visitors from Venezuela 2017					
	January 2017		January 2016		
	Visitors	%	Visitors	%	% change
Hotels	3,075	34.7%	3,646	13.1%	-15.7%
Timeshare	583	6.6%	841	3.0%	-30.7%
Apts/Priv Homes	5,211	58.8%	23,438	83.9%	-77.8%
Total	8,869	100.0%	27,925	100.0%	-68.2%

Source: ATA

Visitor Nights from Venezuela 2017					
	January 2017		January 2016		
	Nights	%	Nights	%	% change
Hotels	10,473	25.2%	14,217	12.7%	-26.3%
Timeshare	2,648	6.4%	4,626	4.1%	-42.8%
Apts/Priv Homes	28,448	68.4%	93,165	83.2%	-69.5%
Total	41,569	100.0%	112,008	100.0%	-62.9%

Source: ATA

Average Length of Stay Venezuela 2017					
	January 2017		January 2016		
	Visitors		Visitors		% change
Hotels	3.41	nts	3.90	nts	-12.7%
Timeshare	4.54	nts	5.50	nts	-17.4%
Apts/Priv Homes	5.46	nts	3.97	nts	37.3%
Total	4.69	nts	4.01	nts	16.9%

Source: ATA

Hotel Performance Aruba 2017

January 2017	2017	2016	2017/2016 % change	
Rooms	4,589	4,479	2.5%	
ARN	142,242	138,849	2.4%	
ORN	120,713	110,029	9.7%	
% occupancy	84.9%	79.2%	5.7%	points
ADR	\$302.22	\$296.93	1.8%	
Rev Par	\$256.48	\$235.30	9.0%	

Based on data from 14 properties.

Total transient hotel room inventory for Aruba in January 2017 stood at 5,275 rooms. In addition to the transient hotel room inventory there were an estimated total of 3,440 timeshare units.

The above numbers reflect a sample of hotels. The sample includes all major hotels except the Hilton Aruba.

In January 2017 the hotel sector saw a 5.7 percentage point increase in average room occupancy, from 79.2% to 84.9%, and a 1.8% increase in the average daily room rate (ADR) from \$296.93 to \$302.22. With a higher average room occupancy and higher ADR revenue per available room (RevPar) grew by 9.0% compared with January 2016.

Performance by Category – January 2017.

	2017						
	Rooms	ARN	ORN	%opy	Revenue	\$ADR	\$RevPar
Brand Name Beach Front	1,678	52,018	43,139	82.9%	\$19,837,533.00	\$459.85	\$381.36
All Inclusives	1,841	57,068	50,848	89.1%	\$9,776,802.00	\$192.28	\$171.32
Small Independent Beach Front	176	5,456	5,133	94.1%	\$2,282,667.00	\$444.70	\$418.38
Non Beach Front	894	27,700	21,593	78.0%	\$4,584,587.00	\$212.32	\$165.51
Total	4,589	142,242	120,713	84.9%	\$36,481,589.00	\$302.22	\$256.48

	2016						
	Rooms	ARN	ORN	%opy	Revenue	\$ADR	\$RevPar
Brand Name Beach Front	1,685	52,235	40,119	76.8%	\$18,432,231.00	\$459.44	\$352.87
All Inclusives	1,781	55,211	48,617	88.1%	\$8,920,328.00	\$183.48	\$161.57
Small Independent Beach Front	176	5,456	4,957	90.9%	\$2,058,659.00	\$415.30	\$377.32
Non Beach Front	837	25,947	16,336	63.0%	\$3,260,037.00	\$199.56	\$125.64
Total	4,479	138,849	110,029	79.2%	\$32,671,255.00	\$296.93	\$235.30

	Percentage Change						
	Rooms	ARN	ORN	% pt change	Revenue	\$ADR	\$RevPar
Brand Name Beach Front	-0.4%	-0.4%	7.5%	6.1%	7.6%	0.1%	8.1%
All Inclusives	3.4%	3.4%	4.6%	1.0%	9.6%	4.8%	6.0%
Small Independent Beach Front	0.0%	0.0%	3.6%	3.2%	10.9%	7.1%	10.9%
Non Beach Front	6.8%	6.8%	32.2%	15.0%	40.6%	6.4%	31.7%
Total	2.5%	2.4%	9.7%	5.6%	11.7%	1.8%	9.0%

Brand Name Beachfront Hotels

The Aruba Marriott, the Holiday Inn, the Hyatt Regency Aruba, and the Ritz Carlton Aruba.

All Inclusives Resorts.

Divi Tamarijn and Divi All Inclusive, the Barcelo Aruba, 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.

Monthly Update - Aruba's Tourism Industry: January 2017.

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 January 2017 compared with January 2016.

January 2017	Average Room Occupancy			Average Daily Rate			RevPar			#Hotels in
	2017	2016	% pt change	2017	2016	% change	2017	2016	% change	Sample
Aruba	84.9%	79.2%	5.7%	\$302.22	\$296.93	1.8%	\$256.48	\$235.30	9.0%	15
Barbados	75.5%	79.0%	-3.5%	\$402.67	\$379.78	6.0%	\$303.91	\$300.13	1.3%	38
Cancun	77.2%	71.0%	6.2%	\$215.28	\$234.78	-8.3%	\$166.11	\$166.57	-0.3%	51
Cayman Islands	61.7%	68.7%	-7.0%	\$446.12	\$455.69	-2.1%	\$275.24	\$312.89	-12.0%	8
Curacao	78.0%	77.0%	1.0%	\$179.15	\$170.29	5.2%	\$139.76	\$131.19	6.5%	13
Dominican Republic	76.3%	77.6%	-1.3%	\$151.56	\$155.17	-2.3%	\$115.71	\$120.40	-3.9%	29
Jamaica	74.7%	69.0%	5.7%	\$272.05	\$286.97	-5.2%	\$203.16	\$198.05	2.6%	10
Puerto Rico	65.2%	73.6%	-8.4%	\$202.29	\$226.85	-10.8%	\$131.85	\$166.95	-21.0%	43
USVI	78.7%	80.3%	-1.6%	\$362.49	\$442.53	-18.1%	\$285.39	\$355.16	-19.6%	6
Caribbean	69.7%	71.2%	-1.5%	\$231.67	\$240.39	-3.6%	\$161.56	\$171.06	-5.6%	261

Source: STR.

Monthly Update - Aruba's Tourism Industry: January 2017.

Visitors by Carrier.

The table below shows the number of non-resident visitors brought in by various airline carriers during January 2017. 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.

Stopovers: By Airline: January 2017						
(Non-resident stopover Arrivals)						
	Jan 2017	% share	Jan 2016	% share	% change	
jetBlue	17,395	19.5%	12,651	12.2%	37.5%	
American Airlines	13,158	14.7%	13,443	12.9%	-2.1%	
United Airlines	12,837	14.4%	10,067	9.7%	27.5%	
Delta Air Lines	10,366	11.6%	8,729	8.4%	18.8%	
Southwest	6,065	6.8%	6,747	6.5%	-10.1%	
Copa	3,256	3.6%	3,063	2.9%	6.3%	
Insel Air	3,207	3.6%	4,400	4.2%	-27.1%	
KLM	2,658	3.0%	1,696	1.6%	56.7%	
Avianca	2,518	2.8%	2,403	2.3%	4.8%	
Sunwing	2,319	2.6%	2,260	2.2%	2.6%	
Laser	1,910	2.1%	16,006	15.4%	-88.1%	
Aruba Airlines	1,588	1.8%	1,970	1.9%	-19.4%	
WestJet	1,536	1.7%	1,280	1.2%	20.0%	
Air Canada	1,528	1.7%	910	0.9%	67.9%	
ArkeFly	994	1.1%	1,087	1.0%	-8.6%	
Aserca	819	0.9%	1,652	1.6%	-50.4%	
Surinam Airways	726	0.8%	506	0.5%	43.5%	
Thomas Cook	608	0.7%	934	0.9%	-34.9%	
Spirit Airlines	319	0.4%	427	0.4%	-25.3%	
Pawa	281	0.3%	96	0.1%	192.7%	
Avior	73	0.1%	3,243	3.1%	-97.7%	
Venezolana	-	0.0%	1,181	1.1%	-100.0%	
GOL	-	0.0%	855	0.8%	-100.0%	
Private	1,566	1.8%	1,390	1.3%	12.7%	
Charter	1,983	2.2%	5,619	5.4%	-64.7%	
Other	1,559	1.7%	1,457	1.4%	7.0%	
TOTAL	89,269	100.0%	104,072	100.0%	-14.2%	

Source: ATA

Monthly Update - Aruba's Tourism Industry: January 2017.

Carriers Used by Venezuelans.

Venezuelan Stopovers: By Airline: January 2017

(Non-resident stopover Arrivals)

	Jan 2017	% share	Jan 2016	% share	% change
US Carriers					
American Airlines	1,909	21.5%	2,027	7.3%	-5.8%
Delta Air Lines	315	3.6%	127	0.5%	148.0%
United Airlines	434	4.9%	290	1.0%	49.7%
Southwest	367	4.1%	168	0.6%	118.5%
jetBlue	322	3.6%	42	0.2%	666.7%
Spirit Airlines	72	0.8%	47	0.2%	53.2%
Total US Carriers	3,419	38.6%	2,701	9.7%	26.6%
Canada					
Air Canada	79	0.9%	21	0.1%	276.2%
WestJet	108	1.2%	36	0.1%	200.0%
Total Canada	187	2.1%	57	0.2%	228.1%
Europe					
KLM	81	0.9%	39	0.1%	107.7%
Arke Fly	12	0.1%	21	0.1%	-42.9%
Total Europe	93	1.0%	60	0.2%	55.0%
Other Non-Venezuelan					
Copa	58	0.7%	66	0.2%	-12.1%
Surinam Airlines	194	2.2%	102	0.4%	90.2%
Total Other Non Venez	252	2.8%	168	0.6%	50.0%
Total (Non Aruba/Non Venezuelan)	3,951	44.5%	2,986	10.7%	32.3%
Other (Aruban/Venezuelan)	4,918	55.5%	24,939	89.3%	-80.3%
Total	8,869	100.0%	27,925	100.0%	-68.2%

Source: ATA

Monthly Update - Aruba's Tourism Industry: January 2017.

A portion of Venezuelan business to Aruba in January 2017 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 3,419 residents of Venezuela (38.6% of all Venezuelans visiting Aruba) arrived in Aruba by a scheduled US carrier (i.e. they were returning to Venezuela via Aruba) so were probably visiting the USA. This was up by 26.6% compared to January 2016. In total 3,951 residents of Venezuela (44.5% of all Venezuelans visiting Aruba) arrived in Aruba by a scheduled carrier other than one based in Venezuela or Aruba.

Monthly Update - Aruba's Tourism Industry: January 2017.

Venezuelan Stopovers: By Airline: January 2017

(Non-resident stopover Arrivals)

Carriers	Inbound To Aruba by Carrier Used		
	Total	Venezuelans	%
US Carriers			
American Airlines	13,158	1,909	14.5%
Delta Air Lines	10,366	315	3.0%
United Airlines	12,837	434	3.4%
Southwest	6,065	367	6.1%
jetBlue	17,395	322	1.9%
Spirit Airlines	319	72	22.6%
Total US Carriers	60,140	3,419	5.7%
Canada			
Air Canada	1,528	79	5.2%
WestJet	1,536	36	2.3%
Total Canada	3,064	115	3.8%
Europe			
KLM	2,658	81	3.0%
Arke Fly	994	12	1.2%
Total Europe	3,652	93	2.5%
Other Non-Venezuelan			
Copa	3,256	58	1.8%
Surinam Airlines	726	194	26.7%
Total Other Non Venez	3,982	252	6.3%
Total (Non Aruba/Non Venezuelan)			
	70,838	3,879	5.5%
Other (Aruban/Venezuelan)	18,431	4,990	27.1%
Total	89,269	8,869	9.9%

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 14.5% of all non-residents arriving in Aruba on American Airlines in January 2017 were residents of Venezuela and 3.0% of all non-residents arriving in Aruba on Delta Air Lines in January 2017 were residents of Venezuela.

Venezuelans arriving on American Airlines.

In January 2017 14.5% of all non-resident passengers arriving in Aruba on an American Airlines flight were residents of Venezuela. This is very similar to January 2016 when the number was 15.1%.

Age of Visitors.

The biggest changes in age demographics in January 2017 came in the 30 - 39 years and 20 - 29 years old categories (down 30.0% and 26.2% respectively). The number of young children also fell substantially (down 32.1%). The number of visitors 70 years old and older grew up 6.7%.

Age of All Stopover Visitors January 2017

	2017	% share	2016	% share	% change
0 - 11 yrs	5,943	6.7%	8,757	8.4%	-32.1%
12 - 19 yrs	4,178	4.7%	4,648	4.5%	-10.1%
20 - 29 yrs	10,637	11.9%	14,421	13.9%	-26.2%
30 - 39 yrs	12,233	13.7%	17,473	16.8%	-30.0%
40 - 49 yrs	13,376	15.0%	15,296	14.7%	-12.6%
50 - 59 yrs	18,669	20.9%	19,530	18.8%	-4.4%
60 - 69 yrs	15,994	17.9%	16,228	15.6%	-1.4%
70 yrs or more	8,238	9.2%	7,718	7.4%	6.7%
Not Stated	1	0.0%	1	0.0%	0.0%
Total	89,269	100.0%	104,072	100.0%	-14.2%

Source: ATA

Age of Visitors from the USA.

The biggest changes in age demographics in January 2017 for visitors from the USA came in the 20 - 29 years old categories (up by 11.8%), the 12-19 years category (up 11.3%) and in the 70 years and older category (up 11.1%).

Age of All US Stopover Visitors January 2017

	2017	% share	2016	% share	% change
0 - 11 yrs	2,896	5.2%	2,838	5.6%	2.0%
12 - 19 yrs	2,084	3.8%	1,873	3.7%	11.3%
20 - 29 yrs	5,925	10.7%	5,298	10.4%	11.8%
30 - 39 yrs	6,419	11.6%	5,997	11.7%	7.0%
40 - 49 yrs	7,462	13.5%	6,741	13.2%	10.7%
50 - 59 yrs	12,414	22.4%	11,439	22.4%	8.5%
60 - 69 yrs	11,777	21.3%	11,143	21.8%	5.7%
70 yrs or more	6,405	11.6%	5,767	11.3%	11.1%
Not Stated	1	0.0%	-	0.0%	100.0%
Total	55,383	100.0%	51,096	100.0%	8.4%

Source: ATA

First Time/Repeat Visitors.

In January 2017 39.7% of our visitors reported they were visiting for the first time and 46.3% reported they had visited before. 14.0% 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 46.2% first time and 53.8% repeat.

Number of visits to Aruba: January 2017

Number of Times Visited	2017	% share	2016	% share	% change
First Time	35,396	39.7%	38,820	37.3%	-8.8%
2 - 5 times	21,607	24.2%	29,100	28.0%	-25.7%
6 - 9 times	6,875	7.7%	7,243	7.0%	-5.1%
10 or more	12,816	14.4%	13,106	12.6%	-2.2%
Not Stated	12,575	14.0%	15,803	15.2%	-20.4%
Total	89,269	100.0%	104,072	100.0%	-14.2%

Source: ATA: Self-reported by visitors

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 January 2017. The ratings are out of 5.

TripAdvisor Ratings for January 2017

	Number of Reviews
Aruba	6,336
Bahamas	4,451
Cayman Islands	3,477
Curacao	3,047
Puerto Rico	11,842
USVI	5,234

	Average Rating
Cayman	4.50
Aruba	4.30
Puerto Rico	4.30
Curacao	4.20
Bahamas	4.10
USVI	4.00

TripAdvisor Ratings for Full Year 2016

	Number of Reviews
Aruba	75,467
Bahamas	55,629
Cayman Islands	35,916
Curacao	33,474
Puerto Rico	129,118
USVI	53,674

	Average Rating
USVI	4.50
Cayman	4.50
Aruba	4.40
Puerto Rico	4.40
Curacao	4.30
Bahamas	4.20

Overall Destination Targets for 2017.

The ATA has set the following targets for 2017.

1. To increase stopover arrivals by 1.0% compared with 2016.
2. To increase tourism receipts by 1.0% compared with 2016
3. To increase cruise arrivals by 5% compared with 2016.

Targets in Stopover Visitation for 2017.

The Aruba Tourism Authority has set as a target an increase of 1.0% more stopover visitors in 2017 compared to 2016.

By market the ATA is targeting a growth in stopover visitors from the USA of 5% in 2017 over the 2016 total, and a growth of 3% from Canada.

Latin America has traditionally been very difficult to forecast and the ATA has not forecast a total from the Venezuelan market for 2017. However they have forecast 10% growth from the Brazilian market, 25% growth from Colombia and 10% from Argentina. Chile is projected to show a 5% increase in traffic over the 2016 total.

From Europe the Netherlands is projected to show 7% growth over 2016, Germany 36%, Italy 5% and the UK 8%.

Change in Currency Exchange Rates.

	January 2017	January 2016	
as of	1/17/2017	1/15/2016	% change
Euro	\$1.060	\$1.097	-3.4%
UK Pound	\$1.204	\$1.429	-15.7%
Canadian Dollar	\$0.760	\$0.688	10.5%
Colombian Peso*	2945	3287	11.6%
Brazilian Real**	3.228	4.045	25.3%

* Pesos per \$1.00

** Reals per \$1.00

Inventory.

It is currently forecasted by AHATA that there will be little change in the number of available room nights in 2017 due on the one hand the addition of 74 renovated rooms at the Tropicana Aruba but there being one less day in 2017 than in 2016. Please note that the Bucuti and Tara Beach Resort currently plans renovations during the course of 2017 which will involve the closure of some rooms.

Monthly Update - Aruba's Tourism Industry: January 2017.

Forecast.

Hotel Performance Forecast 2017				
	2017	2016	2017/2016	
	Projected	Actual	% change	
% occupancy	81.6%	79.6%	2.0%	points
ADR	\$229.88	\$228.62	0.6%	
Rev Par	\$187.48	\$182.03	3.0%	

Airline Seats

The Aruba Airport Authority reports there will be a decline of 13.4% in the number of air seats in the winter of 2016/2017 (November 1 2016 through March 31 2017) compared to the same five months of 2015/2016. The USA gateways will see 6.8% more seats largely due to the addition of non-stop daily service provided by jetBlue out of Fort Lauderdale which commenced on January 4 2017.

Inbound Air Seats - Winter 2017/2017				
November 1 2016 - March 31 2017				
	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.