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

**March 2017 and Year to Date 2017.**

**Summary Highlights.**

* The total number of stopovers visiting Aruba decreased by 18.1% in March, from 109,998 in March 2016 to 90,133 in March 2017. It should be noted that the Easter weekend was March 25 – 28 in 2016 and that Easter in 2017 fell in April.
* In the first three months of 2017 the number of stopover visitors decreased by 15.0% from 310,255 in 2016 to 263,565 in 2017.
* Traffic from the USA was up by 6.8%, from 60,840 stopovers in March 2016 to 64,947 stopovers in March 2017. Traffic was up by 29.6% from Massachusetts, up by 4.3% from New York State, but down 19.0% from New Jersey. Arrivals from Florida showed a 30.2% increase linked to the new daily JetBlue service from Fort Lauderdale which was introduced in January 2017.
* In the first three months of 2017 the number of stopover visitors from the USA increased by 7.7% from 164,568 in 2016 to 177,179 in 2017.
* Traffic from Venezuela was down by 85.3% in March from 28,041 stopovers in March 2016 to 4,117 in March 2017.
* In the first three months of 2017 the number of stopover visitors from Venezuela fell by 76.4%, from 77,886 in 2016 to 18,406 in 2017.
* Tourism receipts fell by 1.2% in calendar year 2016 compared to calendar year 2015. Stopover arrivals fell by 10% in calendar year 2016.
* The total number of visitor nights declined by 11.4% in March, from 724,458 in March 2016 to 642,152 in March 2017. The overall average length of stay grew by 8.2% from 6.59 nights in March 2016 to 7.12 nights in March 2017.
* The total number of visitor nights declined by 7.3% in the first three months of 2017, from 2,199,687 in 2016 to 2,039,562 in 2017. The overall average length of stay grew by 9.1% from 7.09 nights in 2016 to 7.74 nights in 2017.
* The Dominican Republic saw a 4.6% increase in stopover traffic in the first two months of 2017 whilst the U.S. Virgin Islands saw a 4.6% increase in stopovers and Jamaica saw a 2.1% increase in the same period.
* Outbound travel by US citizens grew by 8.0% in the first eleven months of 2016 compared to the same period for 2015 but was up by just 2.0% to the Caribbean.
* The number of cruise passengers visiting Aruba in March grew by 3.1%, from 96,736 in March 2016 to 99,769 in March 2017. In the first three months of 2017 the number of cruise visitors grew by 0.4% from 279,844 in 2016 to 280,923 in 2017.
* As reported by Immigration card data the number of stopover visitors staying in hotels in March 2017 grew by 1.4%, and staying in timeshare resorts fell by 2.6%. The number staying in “other accommodation” fell by 51.6%. This latter category comprised 20.8% of all visitors in March 2017, down from 35.2% in March 2016.
* In the first three months of 2017 the number of visitors staying in hotels grew by 3.1% compared with the same three months of 2016, the number staying in timeshare resorts fell by 0.8% and the number staying in other accommodation fell by 45.8%.
* In March 2017 hotels saw a 1.0% growth in the overall number of visitor nights compared with March 2016. The USA generated 6.2% more hotel nights in March 2017 than in March 2016.
* The number of nights spent by visitors staying in apartments or guesthouses fell by 25.4% in March, from 34,298 in March 2016 to 25,597 in March 2017. The number of nights spent by visitors staying in private homes fell by 36.4% from 210,159 in March 2016 to 133,597 in March 2017.
* The number of Venezuelan stopovers using “other accommodation” fell by 88.6% in March 2017 and comprised 64.6% of all Venezuelan visitors in March 2017 down from 83.2% in March 2016. The number of Venezuelans staying in hotel accommodation in March 2017 fell by 66.3% compared with March 2016.
* Numbers provided to AHATA show that for a sample of 14 hotels average room occupancy grew by 6.8 percentage points from 77.7% in March 2016 to 84.5% in March 2017. The average daily room rate fell by 4.8% to $290.33 and the average RevPar grew by 3.5% to $245.26.
* In the first three months of 2017 average room occupancy grew by 5.6 percentage points to 87.0%. The average daily room rate fell by 0.3% to $302.48 and the average RevPar grew by 6.7% to $259.15.
* Performance of the hotels by category for March 2017 shows that the brand name beach front hotels saw their average room occupancies grow by 5.9 percentage points to 87.0%, with their RevPar also growing by 2.3% to $375.81. The all-inclusive resorts saw their average room occupancies increase by 11.3 percentage points to 86.8% and their RevPar grow by 7.3% to $159.93. The smaller independent beach front hotels saw their average room occupancy grow by 1.7 percentage points to 93.6% and their RevPar grow by 11.1% to $403.49. The non-beach front hotels saw their average room occupancies improve by 0.6 percentage points to 73.7% and saw their RevPar grow by 1.3% to $146.89.
* In the first three months of 2017 Smith Travel Research (STR) reported that hotels in six of nine Caribbean destinations saw higher average room occupancies and three saw lower average room occupancies. Five of the nine saw a higher average RevPar.
* JetBlue was the number one carrier in March 2017 and brought in 19,463 non-resident visitors, up by 47% compared with March 2016. This was partially due to their new daily service between Fort Lauderdale and Aruba which began in January 2017. United Airlines was the number two carrier (14,348 non-residents) and American Airlines brought in 14,030 non-residents.
* Of the 4,117 Venezuelans who visited Aruba in March 2017 7.7% (319) arrived in Aruba on a US scheduled carrier. In total 398 Venezuelans (9.7% 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.
* 1.1% of non-residents carried to Aruba by American Airlines in March 2017 were residents of Venezuela. 0.2% of non-residents carried to Aruba by Delta Air Lines in March were residents of Venezuela. For most other non-Venezuelan, non-Aruban carriers it was generally less than 3%.
* There was a decline in most age categories in March 2017 with the worst declines being in the 0 - 11 and 12 - 19 years categories (down by 48.8% and 38.7% respectively). There was a 21.8% increase in the number of visitors 70 years old or older.
* In March 2017 45.4% of our visitors reported they were visiting for the first time and 41.4% reported they had visited before. 13.2% 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 March 2017 show that Aruba received a total of 7,167 reviews and achieved an average rating of 4.30 out of 5. The Cayman Islands achieved an average rating of 4.50 with Puerto Rico and the USVI both receiving a 4.40 rating.
* 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%.
* It is currently forecasted by AHATA that there will be little change in the number of available hotel 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 May and June of 2017 which will involve the closure of some rooms.
* AHATA is currently projecting a two percentage point increase in overall average hotel room occupancy in 2017 but with little change in the overall ADR. RevPar is projected to grow by 3.0%.
* The Central Bank of Aruba is forecasting that tourism receipts, as registered in the balance of payments, will grow nominally by 1.3 percent in 2017 and that tourism will decrease slightly in real terms as the number of stay‐over visitors and visitor nights are expected to decline by 1.9 percent and 1.7 percent, respectively.
* The Aruba Airport Authority is forecasting there will be 9.8% more seats from the USA to Aruba during the summer of 2017, a 24.1% increase from Canada and a 16.7% increase from Europe. However the overall number of inbound seats is forecasted to decline by 9.8% however due largely to a lower number of seats from Venezuela and from points within the Caribbean (especially from Curacao).
* Projections for cruise traffic for 2017 suggest that, based on existing schedules, the number of cruise passengers will increase by about 5% compared with 2016.

**Visitor Arrivals – March 2017**

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| **Aruba: Total Visitors March 2017** |
|  |  |  |  |  |  |
|  | 2017 | % | 2016 | % | % change |
| USA |  64,947  | 72.1% |  60,840  | 55.3% | 6.8% |
| Canada |  5,961  | 6.6% |  5,211  | 4.7% | 14.4% |
| Venezuela |  4,117  | 4.6% |  28,041  | 25.5% | -85.3% |
| Brazil |  536  | 0.6% |  536  | 0.5% | 0.0% |
| Colombia |  1,909  | 2.1% |  2,210  | 2.0% | -13.6% |
| Argentina |  2,672  | 3.0% |  1,240  | 1.1% | 115.5% |
| Chile |  669  | 0.7% |  591  | 0.5% | 13.2% |
| Netherlands |  2,985  | 3.3% |  2,746  | 2.5% | 8.7% |
| Germany |  444  | 0.5% |  447  | 0.4% | -0.7% |
| Italy |  244  | 0.3% |  188  | 0.2% | 29.8% |
| UK |  264  | 0.3% |  358  | 0.3% | -26.3% |
| Sweden |  499  | 0.6% |  542  | 0.5% | -7.9% |
| Other |  4,886  | 5.4% |  7,048  | 6.4% | -30.7% |
| Total |  90,133  | 100.0% |  109,998  | 100.0% | -18.1% |
| Source: ATA |  |  |  |  |  |

Total stopover arrivals (persons staying 24 hours or more) for March 2017 showed an 18.1% decrease compared with March 2016.

Traffic from the USA was up by 6.8%, was up by 14.4% from Canada, down 85.3% from Venezuela, down 13.6% from Colombia, up 115.5% from Argentina and was unchanged from Brazil. Arrivals were up 8.7% from The Netherlands.

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| **Aruba: Total Visitors March 2017 YTD** |
|  |  |  |  |  |  |
|  | 2017 | % | 2016 | % | % change |
| USA |  177,179  | 67.2% |  164,568  | 53.0% | 7.7% |
| Canada |  18,038  | 6.8% |  16,665  | 5.4% | 8.2% |
| Venezuela |  18,406  | 7.0% |  77,886  | 25.1% | -76.4% |
| Brazil |  2,547  | 1.0% |  3,296  | 1.1% | -22.7% |
| Colombia |  6,137  | 2.3% |  5,705  | 1.8% | 7.6% |
| Argentina |  8,664  | 3.3% |  5,507  | 1.8% | 57.3% |
| Chile |  2,639  | 1.0% |  2,756  | 0.9% | -4.2% |
| Netherlands |  9,131  | 3.5% |  8,399  | 2.7% | 8.7% |
| Germany |  1,343  | 0.5% |  1,035  | 0.3% | 29.8% |
| Italy |  1,071  | 0.4% |  1,055  | 0.3% | 1.5% |
| UK |  780  | 0.3% |  936  | 0.3% | -16.7% |
| Sweden |  2,328  | 0.9% |  2,590  | 0.8% | -10.1% |
| Other |  15,302  | 5.8% |  19,857  | 6.4% | -22.9% |
| Total |  263,565  | 100.0% |  310,255  | 100.0% | -15.0% |
| Source: ATA |  |  |  |  |  |

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|  | 2017 | 2016 | % change |
| Jan |  89,269  |  104,072  | -14.2% |
| Feb |  84,163  |  96,185  | -12.5% |
| Mar |  90,133  |  109,998  | -18.1% |
| YTD |  263,565  |  310,255  | -15.0% |
| Source: ATA |  |  |

**Expenditures**

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| --- | --- |
| Tourism Receipts |  |
| (In Millions of AFL) |  |
| **YEAR** | **1st** | **2nd** | **3rd** | **4th** | **TOTAL** | **% change** |
| **2010** | 644.5 | 519.8 | 502.5 | 566.2 |  2,233.0  |  |
| **2011** | 690.4 | 582.1 | 555.4 | 583.4 |  2,411.3  | 8.0% |
| **2012** | 728.7 | 581.2 | 576.5 | 615.1 |  2,501.5  | 3.7% |
| **2013** | 774.9 | 621.4 | 600.6 | 680.4 |  2,660.0  | 6.3% |
| **2014** | 806.7 | 652.3 | 678.8 | 723.5 |  2,861.3  | 7.6% |
| **2015** | 864.4 | 672.0 | 681.4 | 718.8 |  2,936.6  | 2.6% |
| **2016** | 852.5 | 670.8 | 689.0 | 689.8 |  2,902.1  | -1.2% |
| Source: Central Bank of Aruba |  |  |  |  |

In 2016 the volume of visitor arrivals declined by 10% whilst the volume of tourism receipts fell by 1.2%.

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|  | Tourism Receipts |
|  | (Millions of AFL) |
| Quarter | 2016 | 2015 |  change |
| 1st | 852.5 | 864.4 | -1.4% |
| 2nd | 670.8 | 672.0 | -0.2% |
| 3rd | 689.0 | 681.4 | 1.1% |
| 4th | 689.8 | 718.8 | -4.0% |
| YTD | 2,902.1 | 2,936.6 | -1.2% |
| Source: Central Bank of Aruba |  |

**Top Producing US States.**

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| **Aruba: Total Visitors: US States: March 2017** |
|  |  |  |  |  |  |
|  | 2017 | % | 2016 | % | % change |
| New York |  11,402  | 17.6% |  10,937  | 18.0% | 4.3% |
| Massachusetts |  9,315  | 14.3% |  7,186  | 11.8% | 29.6% |
| New Jersey |  6,359  | 9.8% |  7,852  | 12.9% | -19.0% |
| Pennsylvania |  3,802  | 5.9% |  3,444  | 5.7% | 10.4% |
| Illinois |  3,074  | 4.7% |  2,678  | 4.4% | 14.8% |
| Florida |  3,577  | 5.5% |  2,747  | 4.5% | 30.2% |
| Connecticut |  2,473  | 3.8% |  2,081  | 3.4% | 18.8% |
| Maryland |  1,754  | 2.7% |  2,498  | 4.1% | -29.8% |
| Ohio |  2,690  | 4.1% |  2,136  | 3.5% | 25.9% |
| Michigan |  2,144  | 3.3% |  1,954  | 3.2% | 9.7% |
| Virginia |  1,268  | 2.0% |  1,880  | 3.1% | -32.6% |
| Texas |  1,674  | 2.6% |  1,619  | 2.7% | 3.4% |
| California |  782  | 1.2% |  884  | 1.5% | -11.5% |
| Other |  14,633  | 22.5% |  12,944  | 21.3% | 13.0% |
| Total |  64,947  | 100.0% |  60,840  | 100.0% | 6.8% |
| Source: ATA |  |  |  |  |  |

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| **Aruba: Total Visitors: US States: March 2017 YTD** |
|  |  |  |  |  |  |
|  | 2017 | % | 2016 | % | % change |
| New York |  37,432  | 21.1% |  35,862  | 21.8% | 4.4% |
| Massachusetts |  25,439  | 14.4% |  21,291  | 12.9% | 19.5% |
| New Jersey |  17,922  | 10.1% |  19,426  | 11.8% | -7.7% |
| Pennsylvania |  10,747  | 6.1% |  9,835  | 6.0% | 9.3% |
| Illinois |  7,167  | 4.0% |  6,655  | 4.0% | 7.7% |
| Florida |  8,680  | 4.9% |  6,617  | 4.0% | 31.2% |
| Connecticut |  6,291  | 3.6% |  6,030  | 3.7% | 4.3% |
| Maryland |  4,748  | 2.7% |  5,585  | 3.4% | -15.0% |
| Ohio |  5,958  | 3.4% |  5,092  | 3.1% | 17.0% |
| Michigan |  5,345  | 3.0% |  5,144  | 3.1% | 3.9% |
| Virginia |  3,650  | 2.1% |  4,140  | 2.5% | -11.8% |
| Texas |  3,506  | 2.0% |  3,455  | 2.1% | 1.5% |
| California |  2,429  | 1.4% |  2,175  | 1.3% | 11.7% |
| Other |  37,865  | 21.4% |  33,261  | 20.2% | 13.8% |
| Total |  177,179  | 100.0% |  164,568  | 100.0% | 7.7% |
| Source: ATA |  |  |  |  |  |

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

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| **Aruba: Total Nights March 2017** |
|  |  |  |  |  |  |
|  | 2017 | % | 2016 | % | % change |
| USA |  438,086  | 68.2% |  414,918  | 57.3% | 5.6% |
| Canada |  48,931  | 7.6% |  43,444  | 6.0% | 12.6% |
| Venezuela |  26,017  | 4.1% |  124,532  | 17.2% | -79.1% |
| Brazil |  3,418  | 0.5% |  2,986  | 0.4% | 14.5% |
| Colombia |  13,093  | 2.0% |  20,269  | 2.8% | -35.4% |
| Argentina |  24,760  | 3.9% |  10,457  | 1.4% | 136.8% |
| Chile |  5,186  | 0.8% |  4,206  | 0.6% | 23.3% |
| Netherlands |  35,283  | 5.5% |  34,151  | 4.7% | 3.3% |
| Germany |  3,984  | 0.6% |  4,170  | 0.6% | -4.5% |
| Italy |  2,160  | 0.3% |  1,500  | 0.2% | 44.0% |
| UK |  2,185  | 0.3% |  3,543  | 0.5% | -38.3% |
| Sweden |  5,905  | 0.9% |  6,421  | 0.9% | -8.0% |
| Other |  33,144  | 5.2% |  53,861  | 7.4% | -38.5% |
| Total |  642,152  | 100.0% |  724,458  | 100.0% | -11.4% |
| Source: ATA |  |  |  |  |  |

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| **Aruba: Average Length of Stay in Nights: March 2017** |
|  |  |  |  |  |  |
|  | 2017 |  | 2016 |  | % change |
| USA |  6.75  |  |  6.82  |  | -1.1% |
| Canada |  8.21  |  |  8.34  |  | -1.5% |
| Venezuela |  6.32  |  |  4.44  |  | 42.3% |
| Brazil |  6.38  |  |  5.57  |  | 14.5% |
| Colombia |  6.86  |  |  9.17  |  | -25.2% |
| Argentina |  9.27  |  |  8.43  |  | 9.9% |
| Chile |  7.75  |  |  7.12  |  | 8.9% |
| Netherlands |  11.82  |  |  12.44  |  | -5.0% |
| Germany |  8.97  |  |  9.33  |  | -3.8% |
| Italy |  8.85  |  |  7.98  |  | 11.0% |
| UK |  8.28  |  |  9.90  |  | -16.4% |
| Sweden |  11.83  |  |  11.85  |  | -0.1% |
| Other |  6.78  |  |  7.64  |  | -11.2% |
| Total |  7.12  |   |  6.59  |   | 8.2% |
| Source: ATA |  |  |  |  |  |

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| **Aruba: Total Nights March 2017 YTD** |
|  |  |  |  |  |  |
|  | 2017 | % | 2016 | % | % change |
| USA |  1,310,895  | 64.3% |  1,245,494  | 56.6% | 5.3% |
| Canada |  166,231  | 8.2% |  152,231  | 6.9% | 9.2% |
| Venezuela |  102,441  | 5.0% |  328,119  | 14.9% | -68.8% |
| Brazil |  16,476  | 0.8% |  20,778  | 0.9% | -20.7% |
| Colombia |  48,757  | 2.4% |  58,476  | 2.7% | -16.6% |
| Argentina |  81,154  | 4.0% |  50,618  | 2.3% | 60.3% |
| Chile |  21,737  | 1.1% |  22,119  | 1.0% | -1.7% |
| Netherlands |  118,920  | 5.8% |  109,278  | 5.0% | 8.8% |
| Germany |  11,211  | 0.5% |  9,782  | 0.4% | 14.6% |
| Italy |  9,528  | 0.5% |  8,745  | 0.4% | 9.0% |
| UK |  7,071  | 0.3% |  8,031  | 0.4% | -12.0% |
| Sweden |  28,700  | 1.4% |  31,808  | 1.4% | -9.8% |
| Other |  116,441  | 5.7% |  154,208  | 7.0% | -24.5% |
| Total |  2,039,562  | 100.0% |  2,199,687  | 100.0% | -7.3% |
| Source: ATA |  |  |  |  |  |

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| **Aruba: Average Length of Stay in Nights: March 2017 YTD** |
|  |  |  |  |  |  |
|  | 2017 |  | 2016 |  | % change |
| USA |  7.40  |  |  7.57  |  | -2.2% |
| Canada |  9.22  |  |  9.13  |  | 0.9% |
| Venezuela |  5.57  |  |  4.21  |  | 32.1% |
| Brazil |  6.47  |  |  6.30  |  | 2.6% |
| Colombia |  7.94  |  |  10.25  |  | -22.5% |
| Argentina |  9.37  |  |  9.19  |  | 1.9% |
| Chile |  8.24  |  |  8.03  |  | 2.6% |
| Netherlands |  13.02  |  |  13.01  |  | 0.1% |
| Germany |  8.35  |  |  9.45  |  | -11.7% |
| Italy |  8.90  |  |  8.29  |  | 7.3% |
| UK |  9.07  |  |  8.58  |  | 5.7% |
| Sweden |  12.33  |  |  12.28  |  | 0.4% |
| Other |  7.61  |  |  7.77  |  | -2.0% |
| Total |  7.74  |   |  7.09  |   | 9.1% |
| Source: ATA |  |  |  |  |  |

**Competing Destination performance.**

The Caribbean Tourism Organization collects data from across the region. Their most recently published figures are from April 2017 which show a limited set of data for 2017.

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|  | **Total Stopover Visitors** |
|  | 2017 | 2016 | % change | Period |
| Antigua |  52,030  |  54,254  | -4.1% | Jan-Feb |
| Aruba |  263,565  |  310,255  | -15.0% | Jan-Mar |
| Bahamas |  NA  |  NA  | NA | NA |
| Barbados |  62,218  |  62,343  | -0.2% | Jan |
| Belize |  122,227  |  119,014  | 2.7% | Jan-Mar |
| British Virgin Islands |  79,595  |  83,346  | -4.5% | Jan-Feb |
| Cayman Islands |  67,181  |  67,587  | -0.6% | Jan-Feb |
| Cuba |  NA  |  NA  | NA | NA |
| Curacao |  38,744  |  41,705  | -7.1% | Jan |
| Dominican Republic |  971,200  |  928,353  | 4.6% | Jan-Feb |
| Jamaica |  372,543  |  364,881  | 2.1% | Jan-Feb |
| Puerto Rico\* |  NA  |  NA  | NA | NA |
| Saint Lucia |  65,051  |  62,309  | 4.4% | Jan |
| Turks & Caicos Islands |  NA  |  NA  | NA | NA |
| US Virgin Islands |  152,262  |  145,705  | 4.5% | Jan-Feb |
| \* Hotel Non Resident Registrations |  |  |  |
| Source CTO |  |  |  |  |

The same CTO report also shows data for stopover visitor arrivals for 2017 from the USA to certain destinations.

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|  | **Total US Stopover Visitors** |
|  | 2017 | 2016 | % change | Period |
| Antigua |  19,235  |  20,550  | -6.4% | Jan-Feb |
| Aruba |  177,179  |  164,568  | 7.7% | Jan-Mar |
| Bahamas |  NA  |  NA  | NA | NA |
| Barbados |  14,901  |  12,924  | 15.3% | Jan |
| Belize |  79,035  |  79,352  | -0.4% | Jan-Mar |
| British Virgin Islands |  NA  |  NA  | NA | NA |
| Cayman Islands |  52,875  |  52,300  | 1.1% | Jan-Feb |
| Cuba |  NA  |  NA  | NA | NA |
| Curacao |  5,136  |  5,157  | -0.4% | Jan |
| Dominican Republic |  530,725  |  528,085  | 0.5% | Jan-Mar |
| Jamaica |  210,990  |  209,523  | 0.7% | Jan-Feb |
| Puerto Rico\* |  NA  |  NA  | NA | NA |
| Saint Lucia |  26,589  |  26,196  | 1.5% | Jan-Feb |
| Turks & Caicos Islands |  NA  |  NA  | NA | NA |
| US Virgin Islands |  NA  |  NA  | NA | NA |
| \* Hotel Non Resident Registrations |  |  |  |
| Source CTO |  |  |  |  |

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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% |
| 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 |

|  |
| --- |
| 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% |
| Feb | 38 |  91,420  | 38 |  81,574  | 0.0% | 12.1% |
| Mar | 41 |  99,769  | 48 |  96,736  | -14.6% | 3.1% |
| YTD | 123 |  280,923  | 138 |  279,844  | -10.9% | 0.4% |
| Source: Aruba Port Authority. |  |  |  |  |

In March 2017 Aruba saw a 3.1% increase in the number of cruise passengers compared with March 2016. Year to date the volume of cruise traffic has grown by 0.4% compared with the same period for 2016.

The CTO numbers for 2017 for cruise visitor traffic show:-

|  |  |
| --- | --- |
|  | Total Cruise Visitors |
|  | 2017 | 2016 | % change | Period |
| Antigua |  128,782  |  128,834  | 0.0% | Jan |
| Aruba |  280,923  |  279,844  | 0.4% | Jan-Mar |
| Bahamas |  NA  |  NA  | NA | NA |
| Barbados |  119,148  |  114,225  | 4.3% | Jan |
| Belize |  365,635  |  336,243  | 8.7% | Jan-Mar |
| British Virgin Islands |  193,418  |  203,877  | -5.1% | Jan-Feb |
| Cayman Islands |  370,794  |  372,747  | -0.5% | Jan-Feb |
| Cozumel |  1,291,503  |  1,130,575  | 14.2% | Jan-Mar |
| Curacao |  78,070  |  64,768  | 20.5% | Jan |
| Dominican Republic |  468,243  |  352,216  | 32.9% | Jan-Mar |
| Jamaica |  398,476  |  384,205  | 3.7% | Jan-Feb |
| Puerto Rico |  178,564  |  172,491  | 3.5% | Jan |
| Saint Lucia |  214,919  |  177,287  | 21.2% | Jan-Feb |
| St. Maarten |  775,389  |  671,288  | 15.5% | Jan-Mar |
| Turks & Caicos Islands |  NA  |  NA  | NA | NA |
| US Virgin Islands |  557,883  |  648,528  | -14.0% | Jan-Mar |
| sub total |  5,421,747  |  5,037,128  | 7.6% |  |
| 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 |
|  | March 2017 | March 2016 |  |
|  | Visitors | % | Visitors | % | % change |
| Hotels | 49,392 | 54.8% | 48,715 | 44.3% | 1.4% |
| Timeshare | 22,003 | 24.4% | 22,593 | 20.5% | -2.6% |
| Apts/Priv Homes | 18,738 | 20.8% | 38,690 | 35.2% | -51.6% |
| Total | 90,133 | 100.0% | 109,998 | 100.0% | -18.1% |
| Source: ATA |  |  |  |  |  |

The hotels category includes High Rise hotels, Low Rise hotels and the Tropicana. As shown above in March 2017 the number of visitors staying in hotel accommodation increased by 1.4%, those staying in a timeshare resort fell by 2.6% and those staying in apartments, guest houses or private homes declined by 51.6%.

|  |  |
| --- | --- |
|  | Place of Stay: Visitor Nights 2017 |
|  | March 2017 | March 2016 |  |
|  | Nights | % | Nights | % | % change |
| Hotels | 295,394 | 46.0% | 292,488 | 40.4% | 1.0% |
| Timeshare | 187,549 | 29.2% | 186,117 | 25.7% | 0.8% |
| Apts/Priv Homes | 159,209 | 24.8% | 245,853 | 33.9% | -35.2% |
| Total | 642,152 | 100.0% | 724,458 | 100.0% | -11.4% |
| Source: ATA |  |  |  |  |  |
|  |  |  |  |  |  |
|  | Average Length of Stay in Nights 2017 |
|  | March 2017 | March 2016 |  |
|  | Nights |  | Nights |  | % change |
| Hotels | 5.98 |  | 6.00 |  | -0.4% |
| Timeshare | 8.52 |  | 8.24 |  | 3.5% |
| Apts/Priv Homes | 8.50 |  | 6.35 |  | 33.7% |
| Total | 7.12 |   | 6.59 |   | 8.2% |
| Source: ATA |  |  |  |  |  |

|  |  |
| --- | --- |
|  | Visitors 2017 |
|  | March 2017 YTD | March 2016 YTD |  |
|  | Visitors | % | Visitors | % | % change |
| Hotels | 140,217 | 53.2% | 135,989 | 43.8% | 3.1% |
| Timeshare | 63,627 | 24.1% | 64,142 | 20.7% | -0.8% |
| Apts/Priv Homes | 59,721 | 22.7% | 110,124 | 35.5% | -45.8% |
| Total | 263,565 | 100.0% | 310,255 | 100.0% | -15.0% |
| Source: ATA |  |  |  |  |  |
|  |  |  |  |  |  |
|  | Visitor Nights Full Year 2017 |
|  | March 2017 YTD | March 2016 YTD |  |
|  | Nights | % | Nights | % | % change |
| Hotels | 891,449 | 43.7% | 875,140 | 39.8% | 1.9% |
| Timeshare | 593,470 | 29.1% | 596,427 | 27.1% | -0.5% |
| Apts/Priv Homes | 554,643 | 27.2% | 728,120 | 33.1% | -23.8% |
| Total | 2,039,562 | 100.0% | 2,199,687 | 100.0% | -7.3% |
| Source: ATA |  |  |  |  |  |
|  |  |  |  |  |  |
|  | Average Length of Stay in Nights 2017 |
|  | March 2017 YTD | March 2016 YTD |  |
|  | Nights |  | Nights |  | % change |
| Hotels | 6.36 |  | 6.44 |  | -1.2% |
| Timeshare | 9.33 |  | 9.30 |  | 0.3% |
| Apts/Priv Homes | 9.29 |  | 6.61 |  | 40.5% |
| Total | 7.74 |   | 7.09 |   | 9.1% |
| 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.

The USA has shown good growth in hotel nights so far this year and accounted for 75.1% of all hotel nights in March 2017 and 70.1% for the first quarter up from 71.5% and 66.6% respectively.

|  |
| --- |
| **Aruba: Total Hotel Nights March 2017** |
|  |  |  |  |  |  |
|  | 2017 | % | 2016 | % | % change |
| USA |  221,958  | 75.1% |  209,039  | 71.5% | 6.2% |
| Canada |  24,955  | 8.4% |  22,042  | 7.5% | 13.2% |
| Venezuela |  4,640  | 1.6% |  18,043  | 6.2% | -74.3% |
| Brazil |  2,389  | 0.8% |  2,030  | 0.7% | 17.7% |
| Colombia |  4,131  | 1.4% |  5,087  | 1.7% | -18.8% |
| Argentina |  13,548  | 4.6% |  7,822  | 2.7% | 73.2% |
| Netherlands |  4,818  | 1.6% |  4,769  | 1.6% | 1.0% |
| Germany |  1,439  | 0.5% |  1,355  | 0.5% | 6.2% |
| Italy |  911  | 0.3% |  644  | 0.2% | 41.5% |
| UK |  855  | 0.3% |  1,334  | 0.5% | -35.9% |
| Other |  15,750  | 5.3% |  20,323  | 6.9% | -22.5% |
| Total |  295,394  | 100.0% |  292,488  | 100.0% | 1.0% |
| Source: ATA |  |  |  |  |  |

|  |
| --- |
| **Aruba: Total Hotel Nights March YTD 2017** |
|  |  |  |  |  |  |
|  | 2017 | % | 2016 | % | % change |
| USA |  624,604  | 70.1% |  582,764  | 66.6% | 7.2% |
| Canada |  79,512  | 8.9% |  80,104  | 9.2% | -0.7% |
| Venezuela |  21,688  | 2.4% |  41,373  | 4.7% | -47.6% |
| Brazil |  11,861  | 1.3% |  14,626  | 1.7% | -18.9% |
| Colombia |  12,559  | 1.4% |  11,957  | 1.4% | 5.0% |
| Argentina |  52,504  | 5.9% |  37,207  | 4.3% | 41.1% |
| Netherlands |  16,380  | 1.8% |  16,902  | 1.9% | -3.1% |
| Germany |  3,849  | 0.4% |  3,649  | 0.4% | 5.5% |
| Italy |  3,143  | 0.4% |  3,130  | 0.4% | 0.4% |
| UK |  2,629  | 0.3% |  3,243  | 0.4% | -18.9% |
| Other |  62,720  | 7.0% |  80,185  | 9.2% | -21.8% |
| Total |  891,449  | 100.0% |  875,140  | 100.0% | 1.9% |
| Source: ATA |  |  |  |  |  |

**Visitor Nights in Apartments/Guest Houses and Private Homes.**

**March 2017**

|  |  |  |  |
| --- | --- | --- | --- |
| **March 2017** | 2017 | 2016 | Per Cent Change |
| Nights | Apt/ |   | Private |   | Apt/ |   | Private |   | Apt/ | Private |
|  | Gst Hse | % share | Home | % share | Gst Hse | % share | Home | % share | Gst Hse | Home |
| USA |  6,795  | 26.5% |  41,180  | 30.8% |  5,748  | 16.8% |  39,369  | 18.7% | 18.2% | 4.6% |
| Canada |  1,238  | 4.8% |  10,368  | 7.8% |  836  | 2.4% |  9,208  | 4.4% | 48.1% | 12.6% |
| Venezuela |  1,335  | 5.2% |  18,731  | 14.0% |  5,401  | 15.7% |  92,763  | 44.1% | -75.3% | -79.8% |
| Brazil |  173  | 0.7% |  711  | 0.5% |  205  | 0.6% |  682  | 0.3% | -15.6% | 4.3% |
| Colombia |  390  | 1.5% |  8,315  | 6.2% |  345  | 1.0% |  13,795  | 6.6% | 13.0% | -39.7% |
| Argentina |  1,854  | 7.2% |  8,384  | 6.3% |  380  | 1.1% |  1,653  | 0.8% | 387.9% | 407.2% |
| Netherlands |  5,819  | 22.7% |  23,814  | 17.8% |  3,616  | 10.5% |  25,020  | 11.9% | 60.9% | -4.8% |
| Germany |  641  | 2.5% |  1,818  | 1.4% |  427  | 1.2% |  1,993  | 0.9% | 50.1% | -8.8% |
| U.K |  245  | 1.0% |  736  | 0.6% |  236  | 0.7% |  1,414  | 0.7% | 3.8% | -47.9% |
| Italy |  79  | 0.3% |  958  | 0.7% |  74  | 0.2% |  702  | 0.3% | 6.8% | 36.5% |
| Other |  7,028  | 27.5% |  18,582  | 13.9% |  17,030  | 49.7% |  23,560  | 11.2% | -58.7% | -21.1% |
| Total |  25,597  | 100.0% |  133,597  | 100.0% |  34,298  | 100.0% |  210,159  | 100.0% | -25.4% | -36.4% |
| Source: ATA |  |  |  |  |  |  |  |  |  |  |

**Year to Date.**

|  |  |  |  |
| --- | --- | --- | --- |
| **March 2017 YTD** | 2017 | 2016 | Per Cent Change |
| Nights | Apt/ |  | Private |  | Apt/ |  | Private |  | Apt/ | Private |
|  | Gst Hse | % share | Home | % share | Gst Hse | % share | Home | % share | Gst Hse | Home |
| USA | 24,708 | 26.8% | 133,063 | 28.8% | 17,795 | 20.8% | 127,534 | 20.0% | 38.8% | 4.3% |
| Canada | 6,080 | 6.6% | 46,501 | 10.1% | 3,154 | 3.7% | 37,439 | 5.9% | 92.8% | 24.2% |
| Venezuela | 5,039 | 5.5% | 70,515 | 15.3% | 15,814 | 18.5% | 253,986 | 39.8% | -68.1% | -72.2% |
| Brazil | 785 | 0.9% | 3,104 | 0.7% | 1,162 | 1.4% | 4,389 | 0.7% | -32.4% | -29.3% |
| Colombia | 2,013 | 2.2% | 32,204 | 7.0% | 900 | 1.1% | 43,276 | 6.8% | 123.7% | -25.6% |
| Argentina | 4,526 | 4.9% | 18,713 | 4.0% | 1,245 | 1.5% | 8,328 | 1.3% | 263.5% | 124.7% |
| Netherlands | 19,771 | 21.4% | 79,979 | 17.3% | 10,829 | 12.7% | 78,797 | 12.3% | 82.6% | 1.5% |
| Germany | 1,487 | 1.6% | 5,789 | 1.3% | 729 | 0.9% | 5,009 | 0.8% | 104.0% | 15.6% |
| U.K | 805 | 0.9% | 2,957 | 0.6% | 584 | 0.7% | 3,263 | 0.5% | 37.8% | -9.4% |
| Italy | 708 | 0.8% | 4,545 | 1.0% | 498 | 0.6% | 4,370 | 0.7% | 42.2% | 4.0% |
| Other | 26,277 | 28.5% | 64,941 | 14.0% | 32,760 | 38.3% | 71,833 | 11.3% | -19.8% | -9.6% |
| Total | 92,199 | 100.0% | 462,311 | 100.0% | 85,470 | 100.0% | 638,224 | 100.0% | 7.9% | -27.6% |
| Source: ATA |  |  |  |  |  |  |  |  |  |  |

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

The number of visitors from Venezuela using hotel accommodation in March fell by 66.3%. The number of visitors using private homes/apartments and condominiums fell by 88.6% and comprised 64.6% of all Venezuelan visitors in March 2017, down from 83.2% in March 2016.

|  |  |
| --- | --- |
|  | Visitors from Venezuela 2017 |
|  | March 2017 | March 2016 |  |
|  | Visitors | % | Visitors | % | % change |
| Hotels | 1,220 | 29.6% | 3,622 | 12.9% | -66.3% |
| Timeshare | 236 | 5.7% | 1,081 | 3.9% | -78.2% |
| Apts/Priv Homes | 2,661 | 64.6% | 23,338 | 83.2% | -88.6% |
| Total | 4,117 | 100.0% | 28,041 | 100.0% | -85.3% |
| Source: ATA |  |  |  |  |  |
|  |  |  |  |  |  |
|  | Visitor Nights from Venezuela 2017 |
|  | March 2017 | March 2016 |  |
|  | Nights | % | Nights | % | % change |
| Hotels | 4,640 | 17.8% | 18,043 | 14.5% | -74.3% |
| Timeshare | 1,305 | 5.0% | 7,032 | 5.6% | -81.4% |
| Apts/Priv Homes | 20,072 | 77.1% | 99,457 | 79.9% | -79.8% |
| Total | 26,017 | 100.0% | 124,532 | 100.0% | -79.1% |
| Source: ATA |  |  |  |  |  |
|  |  |  |  |  |  |
|  | Average Length of Stay Venezuela 2017 |
|  | March 2017 | March 2016 |  |
|  | Nights |  | Nights |  | % change |
| Hotels | 3.80 | nts | 4.98 | nts | -23.7% |
| Timeshare | 5.53 | nts | 6.51 | nts | -15.0% |
| Apts/Priv Homes | 7.54 | nts | 4.26 | nts | 77.0% |
| Total | 6.32 | nts | 4.44 | nts | 42.3% |
| Source: ATA |  |  |  |  |  |

**Year to Date.**

|  |  |
| --- | --- |
|  | Visitors from Venezuela 2017 |
|  | March 2017 YTD | March 2016 YTD |  |
|  | Visitors | % | Visitors | % | % change |
| Hotels | 5,963 | 32.4% | 9,585 | 12.3% | -37.8% |
| Timeshare | 1,040 | 5.7% | 2,218 | 2.8% | -53.1% |
| Apts/Priv Homes | 11,403 | 62.0% | 66,083 | 84.8% | -82.7% |
| Total | 18,406 | 100.0% | 77,886 | 100.0% | -76.4% |
| Source: ATA |  |  |  |  |  |
|  |  |  |  |  |  |
|  | Visitor Nights from Venezuela 2017 |
|  | March 2017 YTD | March 2016 YTD |  |
|  | Nights | % | Nights | % | % change |
| Hotels | 21,688 | 21.2% | 41,373 | 12.6% | -47.6% |
| Timeshare | 5,083 | 5.0% | 12,850 | 3.9% | -60.4% |
| Apts/Priv Homes | 75,670 | 73.9% | 273,896 | 83.5% | -72.4% |
| Total | 102,441 | 100.0% | 328,119 | 100.0% | -68.8% |
| Source: ATA |  |  |  |  |  |
|  |  |  |  |  |  |
|  | Average Length of Stay Venezuela 2017 |
|  | March 2017 YTD | March 2016 YTD |  |
|  | Nights |  | Nights |  | % change |
| Hotels | 3.64 | nts | 4.32 | nts | -15.7% |
| Timeshare | 4.89 | nts | 5.79 | nts | -15.6% |
| Apts/Priv Homes | 6.64 | nts | 4.14 | nts | 60.1% |
| Total | 5.57 | nts | 4.21 | nts | 32.1% |
| Source: ATA |  |  |  |  |  |

**Hotel Performance Aruba 2017**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  | 2017/2016 |  |
| **March 2017** | 2017 | 2016 | % change |  |
| Rooms |  4,603  |  4,559  | 1.0% |  |
| ARN |  142,697  |  141,329  | 1.0% |  |
| ORN |  120,545  |  109,767  | 9.8% |  |
| % occupancy | 84.5% | 77.7% | 6.8% | points |
| ADR | $290.33 | $305.03 | -4.8% |  |
| Rev Par | $245.26 | $236.91 | 3.5% |  |
| ***Based on data from 14 properties.*** |  |  |  |

Total transient hotel room inventory for Aruba in March 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 14 hotels. The sample includes all major hotels except the Hilton Aruba.

In March 2017 the hotel sector saw a 6.8 percentage point increase in average room occupancy, from 77.7% to 84.5%, but a 4.8% decline in the average daily room rate (ADR) from $305.03 to $290.33. With a higher average room occupancy but lower ADR revenue per available room (RevPar) grew by 3.5% compared with March 2016.

**Year to Date**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  | 2017/2016 |  |
| **March 2017 YTD** | 2017 | 2016 | % change |  |
| Rooms |  4,603  |  4,559  | 1.0% |  |
| ARN |  413,515  |  411,654  | 0.5% |  |
| ORN |  354,287  |  329,624  | 7.5% |  |
| % occupancy | 85.7% | 80.1% | 5.6% | points |
| ADR | $302.48 | $303.36 | -0.3% |  |
| Rev Par | $259.15 | $242.91 | 6.7% |  |
| ***Based on data from 14 properties.*** |  |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **2017** | Avg Occupancy | ADR | RevPar |
|  | 2017 | 2016 | % pt chng | 2017 | 2016 | % chng | 2017 | 2016 | % chng |
| Jan | 84.9% | 79.2% | 5.7% | $302.22  | $296.93  | 1.8% | $256.48  | $235.30  | 9.0% |
| Feb | 87.9% | 83.5% | 4.4% | $315.71  | $308.11  | 2.5% | $277.53  | $257.38  | 7.8% |
| Mar | 84.5% | 77.7% | 6.8% | $290.33  | $305.03  | -4.8% | $245.26  | $236.91  | 3.5% |
| YTD | 85.7% | 80.1% | 5.6% | $302.48  | $303.36  | -0.3% | $259.15  | $242.91  | 6.7% |

**Performance by Category – March 2017.**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  |   |   |   | 2017 |   |   |   |
|  | Rooms | ARN | ORN | %opy | Revenue | $ADR | $RevPar |
| Brand Name Beach Front |  1,678  |  52,018  |  45,247  | 87.0% | $19,548,918.00 | $432.05 | $375.81 |
| All Inclusives |  1,844  |  57,164  |  49,608  | 86.8% | $9,141,988.00 | $184.28 | $159.93 |
| Small Independent Beach Front |  176  |  5,456  |  5,108  | 93.6% | $2,201,461.00 | $430.98 | $403.49 |
| Non Beach Front |  905  |  28,059  |  20,688  | 73.7% | $4,121,625.00 | $199.23 | $146.89 |
| Total |  4,603  |  142,697  |  120,651  | 84.6% | $35,013,992.00 | $290.21 | $245.37 |
|  |  |  |  |  |  |  |  |
|  |   |   |   | 2016 |   |   |   |
|  | Rooms | ARN | ORN | %opy | Revenue | $ADR | $RevPar |
| Brand Name Beach Front |  1,678  |  52,018  |  42,156  | 81.0% | $19,113,381.00 | $453.40 | $367.44 |
| All Inclusives |  1,841  |  57,071  |  43,052  | 75.4% | $8,509,142.00 | $197.65 | $149.10 |
| Small Independent Beach Front |  176  |  5,456  |  5,015  | 91.9% | $1,981,382.00 | $395.09 | $363.16 |
| Non Beach Front |  864  |  26,784  |  19,593  | 73.2% | $3,884,350.00 | $198.25 | $145.03 |
| Total |  4,559  |  141,329  |  109,816  | 77.7% | $33,488,255.00 | $304.95 | $236.95 |
|  |  |  |  |  |  |  |  |
|  |   |   |   | Percentage Change |   |   |
|  | Rooms | ARN | ORN | % pt change | Revenue | $ADR | $RevPar |
| Brand Name Beach Front | 0.0% | 0.0% | 7.3% | 5.9% | 2.3% | -4.7% | 2.3% |
| All Inclusives | 0.2% | 0.2% | 15.2% | 11.3% | 7.4% | -6.8% | 7.3% |
| Small Independent Beach Front | 0.0% | 0.0% | 1.9% | 1.7% | 11.1% | 9.1% | 11.1% |
| Non Beach Front | 4.7% | 4.8% | 5.6% | 0.6% | 6.1% | 0.5% | 1.3% |
| Total | 1.0% | 1.0% | 9.9% | 6.8% | 4.6% | -4.8% | 3.6% |

**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.

**Year to Date.**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **March YTD** |   |   |   | 2017 |   |   |   |
|  | Rooms | ARN | ORN | %opy | Revenue | $ADR | $RevPar |
| Brand Name Beach Front |  1,678  |  151,020  |  130,834  | 86.6% | $59,606,761.00 | $455.59 | $394.69 |
| All Inclusives |  1,844  |  165,584  |  147,313  | 89.0% | $28,092,904.00 | $190.70 | $169.66 |
| Small Independent Beach Front |  176  |  15,840  |  14,952  | 94.4% | $6,572,475.00 | $439.57 | $414.93 |
| Non Beach Front |  904  |  81,071  |  61,294  | 75.6% | $12,907,669.00 | $210.59 | $159.21 |
| Total |  4,602  |  413,515  |  354,393  | 85.7% | $107,179,809.00 | $302.48 | $259.15 |
|  |  |  |  |  |  |  |  |
|  |   |   |   | 2016 |   |   |   |
|  | Rooms | ARN | ORN | %opy | Revenue | $ADR | $RevPar |
| Brand Name Beach Front |  1,679  |  152,947  |  122,922  | 80.4% | $56,841,082.00 | $462.42 | $371.64 |
| All Inclusives |  1,841  |  165,281  |  138,979  | 84.1% | $26,340,414.00 | $189.53 | $159.37 |
| Small Independent Beach Front |  176  |  16,016  |  14,739  | 92.0% | $6,047,342.00 | $410.30 | $377.58 |
| Non Beach Front |  851  |  77,410  |  53,033  | 68.5% | $10,769,918.00 | $203.08 | $139.13 |
| Total |  4,547  |  411,654  |  329,673  | 80.1% | $99,998,756.00 | $303.36 | $242.91 |
|  |  |  |  |  |  |  |  |
|  |   |   |   | Percentage Change |   |   |
|  | Rooms | ARN | ORN | % pt change | Revenue | $ADR | $RevPar |
| Brand Name Beach Front | -0.1% | -1.3% | 6.4% | 6.3% | 4.9% | -1.5% | 6.2% |
| All Inclusives | 0.2% | 0.2% | 6.0% | 4.9% | 6.7% | 0.6% | 6.5% |
| Small Independent Beach Front | 0.0% | -1.1% | 1.4% | 2.4% | 8.7% | 7.1% | 9.9% |
| Non Beach Front | 6.2% | 4.7% | 15.6% | 7.1% | 19.8% | 3.7% | 14.4% |
| Total | 1.2% | 0.5% | 7.5% | 5.6% | 7.2% | -0.3% | 6.7% |

**Competing Destination performance.**

Smith Travel Research (STR) 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 March 2017 compared with March 2016.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **March 2017** | Average Room Occupancy | Average Daily Rate | RevPar | #Hotels in |
|  | 2017 | 2016 | % pt change | 2017 | 2016 | % change | 2017 | 2016 | % change | Sample |
| Aruba | 84.5% | 77.7% | 6.8% | $290.33 | $305.03 | -4.8% | $245.26 | $236.91 | 3.5% | 14 |
| Barbados | 76.2% | 76.3% | -0.1% | $342.41 | $362.75 | -5.6% | $260.93 | $276.86 | -5.8% | 38 |
| Cancun | 79.2% | 79.2% | 0.0% | $237.13 | $249.09 | -4.8% | $187.70 | $197.16 | -4.8% | 65 |
| Cayman Islands | 79.4% | 84.5% | -5.1% | $497.69 | $523.97 | -5.0% | $395.22 | $442.77 | -10.7% | 9 |
| Curacao | 76.9% | 73.2% | 3.7% | $167.28 | $165.34 | 1.2% | $128.64 | $120.99 | 6.3% | 12 |
| Dominican Republic | 81.4% | 74.8% | 6.6% | $157.20 | $167.84 | -6.3% | $128.02 | $125.56 | 2.0% | 32 |
| Jamaica | 83.5% | 79.2% | 4.3% | $291.24 | $302.49 | -3.7% | $243.27 | $239.65 | 1.5% | 10 |
| Puerto Rico | 77.2% | 78.1% | -0.9% | $216.22 | $227.35 | -4.9% | $167.00 | $177.67 | -6.0% | 46 |
| USVI | 88.2% | 86.9% | 1.3% | $488.73 | $469.78 | 4.0% | $431.26 | $408.21 | 5.6% | 6 |
| Caribbean | 76.7% | 75.5% | 1.2% | $250.29 | $262.52 | -4.7% | $191.94 | $198.21 | -3.2% | 273 |
| Source: STR. |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |
| **March YTD 2017** | Average Room Occupancy | Average Daily Rate | RevPar | #Hotels in |
|  | 2017 | 2016 | % pt change | 2017 | 2016 | % change | 2017 | 2016 | % change | Sample |
| Aruba | 85.7% | 80.1% | 5.6% | $302.48 | $303.36 | -0.3% | $259.15 | $242.91 | 6.7% | 14 |
| Barbados | 76.9% | 81.0% | -4.1% | $373.71 | $376.57 | -0.8% | $287.51 | $304.92 | -5.7% | 38 |
| Cancun | 78.5% | 75.1% | 3.4% | $235.68 | $239.03 | -1.4% | $184.89 | $179.40 | 3.1% | 65 |
| Cayman Islands | 71.4% | 77.1% | -5.7% | $473.83 | $483.23 | -1.9% | $338.13 | $372.52 | -9.2% | 9 |
| Curacao | 78.2% | 77.1% | 1.1% | $171.81 | $166.02 | 3.5% | $134.40 | $128.05 | 5.0% | 12 |
| Dominican Republic | 80.2% | 78.3% | 1.9% | $157.19 | $161.10 | -2.4% | $126.07 | $126.12 | 0.0% | 32 |
| Jamaica | 80.5% | 73.9% | 6.6% | $283.82 | $296.23 | -4.2% | $228.47 | $218.86 | 4.4% | 10 |
| Puerto Rico | 71.7% | 76.6% | -4.9% | $211.13 | $230.08 | -8.2% | $151.38 | $176.16 | -14.1% | 46 |
| USVI | 84.2% | 83.5% | 0.7% | $477.42 | $460.59 | 3.7% | $402.18 | $384.58 | 4.6% | 6 |
| Caribbean | 73.8% | 74.3% | -0.5% | $244.88 | $251.72 | -2.7% | $180.65 | $187.09 | -3.4% | 273 |
| Source: STR. |  |  |  |  |  |  |  |  |  |  |

**Visitors by Carrier.**

The table below shows the number of non-resident visitors brought in by various airline carriers during March 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: March 2017** |
|  | (Non-resident stopover Arrivals) |  |  |  |  |
|  |  | 2017 | % share | 2016 | % share | % change |
| 1 | jetBlue |  19,463  | 21.6% |  13,231  | 12.0% | 47.1% |
| 2 | American Airlines |  14,030  | 15.6% |  15,095  | 13.7% | -7.1% |
| 3 | United Airlines |  14,348  | 15.9% |  15,677  | 14.3% | -8.5% |
| 4 | Delta Air Lines |  10,720  | 11.9% |  9,212  | 8.4% | 16.4% |
| 5 | Southwest |  6,670  | 7.4% |  7,770  | 7.1% | -14.2% |
| 6 | Copa |  2,378  | 2.6% |  1,861  | 1.7% | 27.8% |
| 7 | Insel Air |  2,706  | 3.0% |  4,638  | 4.2% | -41.7% |
| 8 | KLM |  2,450  | 2.7% |  2,086  | 1.9% | 17.4% |
| 9 | Avianca |  468  | 0.5% |  2,094  | 1.9% | -77.7% |
| 10 | Sunwing |  2,446  | 2.7% |  1,900  | 1.7% | 28.7% |
| 11 | Laser |  655  | 0.7% |  15,844  | 14.4% | -95.9% |
| 12 | Aruba Airlines |  1,643  | 1.8% |  3,151  | 2.9% | -47.9% |
| 13 | WestJet |  1,137  | 1.3% |  1,228  | 1.1% | -7.4% |
| 14 | Air Canada |  1,590  | 1.8% |  1,105  | 1.0% | 43.9% |
| 15 | ArkeFly |  1,118  | 1.2% |  1,357  | 1.2% | -17.6% |
| 16 | Aserca |  920  | 1.0% |  2,835  | 2.6% | -67.5% |
| 17 | Surinam Airways |  465  | 0.5% |  732  | 0.7% | -36.5% |
| 18 | Thomas Cook |  321  | 0.4% |  325  | 0.3% | -1.2% |
| 19 | Spirit Airlines |  326  | 0.4% |  431  | 0.4% | -24.4% |
| 20 | Pawa |  422  | 0.5% |  126  | 0.1% | 234.9% |
| 21 | Avior |  141  | 0.2% |  3,521  | 3.2% | -96.0% |
| 22 | Venezolana |  -  | 0.0% |  843  | 0.8% | -100.0% |
| 23 | GOL |  -  | 0.0% |  -  | 0.0% | 0.0% |
| 24 | Private |  831  | 0.9% |  1,210  | 1.1% | -31.3% |
|  | Charter |  1,767  | 2.0% |  1,828  | 1.7% | -3.3% |
|  | Other |  3,118  | 3.5% |  1,898  | 1.7% | 64.3% |
|  | TOTAL |  90,133  | 100.0% |  109,998  | 100.0% | -18.1% |
|  | Source: ATA |  |  |  |  |  |

|  |  |
| --- | --- |
|  | **Stopovers: By Airline: March 2017 YTD** |
|  | (Non-resident stopover Arrivals) |  |  |  |  |
|  |  | 2017 YTD | % share | 2016 YTD | % share | % change |
| 1 | jetBlue |  54,708  | 20.8% |  37,784  | 12.2% | 44.8% |
| 2 | American Airlines |  38,658  | 14.7% |  41,159  | 13.3% | -6.1% |
| 3 | United Airlines |  39,246  | 14.9% |  37,474  | 12.1% | 4.7% |
| 4 | Delta Air Lines |  31,064  | 11.8% |  26,399  | 8.5% | 17.7% |
| 5 | Southwest |  18,927  | 7.2% |  21,376  | 6.9% | -11.5% |
| 6 | Copa |  8,825  | 3.3% |  7,017  | 2.3% | 25.8% |
| 7 | Insel Air |  8,436  | 3.2% |  12,945  | 4.2% | -34.8% |
| 8 | KLM |  7,634  | 2.9% |  5,517  | 1.8% | 38.4% |
| 9 | Avianca |  5,231  | 2.0% |  6,710  | 2.2% | -22.0% |
| 10 | Sunwing |  7,167  | 2.7% |  6,894  | 2.2% | 4.0% |
| 11 | Laser |  3,550  | 1.3% |  43,020  | 13.9% | -91.7% |
| 12 | Aruba Airlines |  5,467  | 2.1% |  7,897  | 2.5% | -30.8% |
| 13 | WestJet |  2,832  | 1.1% |  3,690  | 1.2% | -23.3% |
| 14 | Air Canada |  4,587  | 1.7% |  2,963  | 1.0% | 54.8% |
| 15 | ArkeFly |  3,116  | 1.2% |  3,358  | 1.1% | -7.2% |
| 16 | Aserca |  2,370  | 0.9% |  6,471  | 2.1% | -63.4% |
| 17 | Surinam Airways |  1,736  | 0.7% |  1,794  | 0.6% | -3.2% |
| 18 | Thomas Cook |  1,544  | 0.6% |  1,877  | 0.6% | -17.7% |
| 19 | Spirit Airlines |  959  | 0.4% |  1,194  | 0.4% | -19.7% |
| 20 | Pawa |  1,002  | 0.4% |  249  | 0.1% | 302.4% |
| 21 | Avior |  393  | 0.1% |  10,330  | 3.3% | -96.2% |
| 22 | Venezolana |  -  | 0.0% |  2,966  | 1.0% | -100.0% |
| 23 | GOL |  -  | 0.0% |  984  | 0.3% | -100.0% |
| 24 | Private |  3,783  | 1.4% |  3,609  | 1.2% | 4.8% |
|  | Charter |  5,550  | 2.1% |  11,988  | 3.9% | -53.7% |
|  | Other |  6,780  | 2.6% |  4,590  | 1.5% | 47.7% |
|  | TOTAL |  263,565  | 100.0% |  310,255  | 100.0% | -15.0% |
|  | Source: ATA |  |  |  |  |  |

**Carriers Used by Venezuelans.**

|  |
| --- |
| **Venezuelan Stopovers: By Airline: March 2017** |
| (Non-resident stopover Arrivals) |  |  |  |  |  |
|  | Mar 2017 | % share | Mar 2016 | % share | % change |
| **US Carriers** |  |  |  |  |  |
| American Airlines |  152  | 3.7% |  246  | 0.9% | -38.2% |
| Delta Air Lines |  24  | 0.6% |  30  | 0.1% | -20.0% |
| United Airlines |  33  | 0.8% |  48  | 0.2% | -31.3% |
| Southwest |  17  | 0.4% |  35  | 0.1% | -51.4% |
| jetBlue |  77  | 1.9% |  33  | 0.1% | 133.3% |
| Spirit Airlines |  16  | 0.4% |  -  | 0.0% | 100.0% |
| Total US Carriers |  319  | 7.7% |  392  | 1.4% | -18.6% |
|  |  |  |  |  |  |
| **Canada** |  |  |  |  |  |
| Air Canada |  19  | 0.5% |  6  | 0.0% | 216.7% |
| WestJet |  10  | 0.2% |  9  | 0.0% | 11.1% |
| Total Canada |  29  | 0.7% |  15  | 0.1% | 93.3% |
|  |  |  |  |  |  |
| **Europe** |  |  |  |  |  |
| KLM |  15  | 0.4% |  13  | 0.0% | 15.4% |
| Arke Fly |  3  | 0.1% |  9  | 0.0% | -66.7% |
| Total Europe |  18  | 0.4% |  22  | 0.1% | -18.2% |
|  |  |  |  |  |  |
| **Other Non-Venezuelan** |  |  |  |  |  |
| Copa |  20  | 0.5% |  38  | 0.1% | -47.4% |
| Surinam Airlines |  12  | 0.3% |  11  | 0.0% | 9.1% |
| Total Other Non Venez |  32  | 0.8% |  49  | 0.2% | -34.7% |
|  |  |  |  |  |  |
| **Total (Non Aruba/Non Venezuelan)** |  398  | 9.7% |  478  | 1.7% | -16.7% |
|  |  |  |  |  |  |
| Other (Aruban/Venezuelan) |  3,719  | 90.3% |  27,563  | 98.3% | -86.5% |
| **Total** |  4,117  | 100.0% |  28,041  | 100.0% | -85.3% |
| Source: ATA |  |  |  |  |  |

A portion of Venezuelan business to Aruba in March 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 319 residents of Venezuela (7.7% 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 down by 18.6% compared to March 2016. In total 398 residents of Venezuela (9.7% of all Venezuelans visiting Aruba) arrived in Aruba by a scheduled carrier other than one based in Venezuela or Aruba.

|  |
| --- |
| **Venezuelan Stopovers: By Airline: March 2017** |
| (Non-resident stopover Arrivals) |  |  |  |
|  | Inbound To Aruba by Carrier Used |
| **Carriers** | Total | Venezuelans | % |
| **US Carriers** |  |  |  |
| American Airlines |  14,030  |  152  | 1.1% |
| Delta Air Lines |  10,720  |  24  | 0.2% |
| United Airlines |  14,348  |  33  | 0.2% |
| Southwest |  6,670  |  17  | 0.3% |
| jetBlue |  19,463  |  77  | 0.4% |
| Spirit Airlines |  326  |  16  | 4.9% |
| Total US Carriers |  65,557  |  319  | 0.5% |
|  |  |  |  |
| **Canada** |  |  |  |
| Air Canada |  1,590  |  19  | 1.2% |
| WestJet |  1,137  |  10  | 0.9% |
| Total Canada |  2,727  |  29  | 1.1% |
|  |  |  |  |
| **Europe** |  |  |  |
| KLM |  2,450  |  15  | 0.6% |
| Arke Fly |  1,118  |  3  | 0.3% |
| Total Europe |  3,568  |  18  | 0.5% |
|  |  |  |  |
| **Other Non-Venezuelan** |  |  |  |
| Copa |  2,378  |  20  | 0.8% |
| Surinam Airlines |  465  |  12  | 2.6% |
| Total Other Non Venez |  2,843  |  32  | 1.1% |
|  |  |  |  |
| **Total (Non Aruba/Non Venezuelan)** |  74,695  |  398  | 0.5% |
|  |  |  |  |
| Other (Aruban/Venezuelan) |  15,438  |  3,719  | 24.1% |
| **Total** |  90,133  |  4,117  | 4.6% |
| 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 1.1% of all non-residents arriving in Aruba on American Airlines in March 2017 were residents of Venezuela and 0.2% of all non-residents arriving in Aruba on Delta Air Lines in March 2017 were residents of Venezuela.

**Venezuelans arriving on American Airlines.**

In March 2017 1.1% of all non-resident passengers arriving in Aruba on an American Airlines flight were residents of Venezuela.

|  |
| --- |
| Percentage of all Non Resident Passengers arriving  |
| in Aruba on American Airlines who were |
| residents of Venezuela |
|  |  |  | 2017 |  |
|  |  | Jan | 14.5% |  |
|  |  | Feb | 1.6% |  |
|  |  | Mar | 1.1% |  |

**Age of Visitors.**

The biggest changes in age demographics in March 2017 came in the 0 – 11 years and 12 – 19 years old categories (down by 48.8% and 38.7% respectively. The number of visitors 60 – 69 years old and 70 years old and older grew by 14.6% and 21.8% respectively.

|  |
| --- |
| **Age of All Stopover Visitors March 2017** |
|  |  |  |  |  |  |
|  | 2017 | % share | 2016 | % share | % change |
| 0 - 11 yrs |  5,574  | 6.2% |  10,897  | 9.9% | -48.8% |
| 12 - 19 yrs |  5,460  | 6.1% |  8,900  | 8.1% | -38.7% |
| 20 - 29 yrs |  11,192  | 12.4% |  14,682  | 13.3% | -23.8% |
| 30 - 39 yrs |  13,034  | 14.5% |  18,423  | 16.7% | -29.3% |
| 40 - 49 yrs |  14,985  | 16.6% |  19,931  | 18.1% | -24.8% |
| 50 - 59 yrs |  19,548  | 21.7% |  19,738  | 17.9% | -1.0% |
| 60 - 69 yrs |  14,180  | 15.7% |  12,369  | 11.2% | 14.6% |
| 70 yrs or more |  6,157  | 6.8% |  5,057  | 4.6% | 21.8% |
| Not Stated |  3  | 0.0% |  1  | 0.0% | 200.0% |
| Total |  90,133  | 100.0% |  109,998  | 100.0% | -18.1% |
| Source: ATA |  |  |  |  |  |

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| **Age of All Stopover Visitors March 2017 YTD** |
|  |  |  |  |  |  |
|  | 2017 | % share | 2016 | % share | % change |
| 0 - 11 yrs |  18,040  | 6.8% |  28,016  | 9.0% | -35.6% |
| 12 - 19 yrs |  14,567  | 5.5% |  18,567  | 6.0% | -21.5% |
| 20 - 29 yrs |  29,430  | 11.2% |  39,942  | 12.9% | -26.3% |
| 30 - 39 yrs |  36,734  | 13.9% |  52,261  | 16.8% | -29.7% |
| 40 - 49 yrs |  42,855  | 16.3% |  51,522  | 16.6% | -16.8% |
| 50 - 59 yrs |  56,298  | 21.4% |  58,245  | 18.8% | -3.3% |
| 60 - 69 yrs |  44,430  | 16.9% |  42,812  | 13.8% | 3.8% |
| 70 yrs or more |  21,203  | 8.0% |  18,885  | 6.1% | 12.3% |
| Not Stated |  8  | 0.0% |  5  | 0.0% | 60.0% |
| Total |  263,565  | 100.0% |  310,255  | 100.0% | -15.0% |
| Source: ATA |  |  |  |  |  |

**Age of Visitors from the USA.**

The biggest changes in age demographics in March 2017 for visitors from the USA came in the 12 - 19 years old category (down by 30.7%) and the 0 - 11 years category (down 27.8%) possibly die to Easter falling in March 2016. There was strong growth in the number of visitors from the USA 60 – 69 years old (up 29.9%) and 70 years old and older (up 31.8%).

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| **Age of All US Stopover Visitors March 2017** |
|  |  |  |  |  |  |
|  | 2017 | % share | 2016 | % share | % change |
| 0 - 11 yrs |  3,840  | 5.9% |  5,321  | 8.7% | -27.8% |
| 12 - 19 yrs |  4,300  | 6.6% |  6,202  | 10.2% | -30.7% |
| 20 - 29 yrs |  7,463  | 11.5% |  6,040  | 9.9% | 23.6% |
| 30 - 39 yrs |  7,955  | 12.2% |  6,963  | 11.4% | 14.2% |
| 40 - 49 yrs |  10,480  | 16.1% |  11,237  | 18.5% | -6.7% |
| 50 - 59 yrs |  14,782  | 22.8% |  12,718  | 20.9% | 16.2% |
| 60 - 69 yrs |  11,250  | 17.3% |  8,660  | 14.2% | 29.9% |
| 70 yrs or more |  4,874  | 7.5% |  3,698  | 6.1% | 31.8% |
| Not Stated |  3  | 0.0% |  1  | 0.0% | 200.0% |
| Total |  64,947  | 100.0% |  60,840  | 100.0% | 6.8% |
| Source: ATA |  |  |  |  |  |

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| **Age of All US Stopover Visitors March YTD 2017** |
|  |  |  |  |  |  |
|  | 2017 | % share | 2016 | % share | % change |
| 0 - 11 yrs |  10,953  | 6.2% |  12,189  | 7.4% | -10.1% |
| 12 - 19 yrs |  9,996  | 5.6% |  11,197  | 6.8% | -10.7% |
| 20 - 29 yrs |  17,215  | 9.7% |  14,869  | 9.0% | 15.8% |
| 30 - 39 yrs |  20,741  | 11.7% |  19,256  | 11.7% | 7.7% |
| 40 - 49 yrs |  27,588  | 15.6% |  26,830  | 16.3% | 2.8% |
| 50 - 59 yrs |  40,028  | 22.6% |  36,173  | 22.0% | 10.7% |
| 60 - 69 yrs |  33,963  | 19.2% |  29,913  | 18.2% | 13.5% |
| 70 yrs or more |  16,688  | 9.4% |  14,137  | 8.6% | 18.0% |
| Not Stated |  7  | 0.0% |  4  | 0.0% | 75.0% |
| Total |  177,179  | 100.0% |  164,568  | 100.0% | 7.7% |
| Source: ATA |  |  |  |  |  |

**First Time/Repeat Visitors.**

In March 2017 45.4% of our visitors reported they were visiting for the first time and 41.4% reported they had visited before. 13.2% 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 52.4% first time and 47.6% repeat.

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| **Number of visits to Aruba: March 2017** |
|  |  |  |  |  |  |
| Number of Times Visited | 2017 | % share | 2016 | % share | % change |
| First Time |  40,962  | 45.4% |  44,833  | 40.8% | -8.6% |
| 2 - 5 times |  20,878  | 23.2% |  29,301  | 26.6% | -28.7% |
| 6 - 9 times |  6,008  | 6.7% |  7,022  | 6.4% | -14.4% |
| 10 or more |  10,395  | 11.5% |  10,942  | 9.9% | -5.0% |
| Not Stated |  11,890  | 13.2% |  17,900  | 16.3% | -33.6% |
| Total |  90,133  | 100.0% |  109,998  | 100.0% | -18.1% |
| Source: ATA: Self-reported by visitors |  |  |  |  |
|  |  |  |  |  |  |
| **Number of visits to Aruba: March 2017 YTD** |
|  |  |  |  |  |  |
| Number of Times Visited | 2017 | % share | 2016 | % share | % change |
| First Time |  109,635  | 41.6% |  119,511  | 38.5% | -8.3% |
| 2 - 5 times |  62,936  | 23.9% |  85,185  | 27.5% | -26.1% |
| 6 - 9 times |  19,448  | 7.4% |  21,158  | 6.8% | -8.1% |
| 10 or more |  34,334  | 13.0% |  35,069  | 11.3% | -2.1% |
| Not Stated |  37,212  | 14.1% |  49,332  | 15.9% | -24.6% |
| Total |  263,565  | 100.0% |  310,255  | 100.0% | -15.0% |
| Source: ATA: Self-reported by visitors |  |  |  |  |

Year to date 2017 41.6% of our visitors reported they were visiting for the first time and 44.3% 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 48.4% first time and 51.6% 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 March 2017. The ratings are out of 5.

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| **TripAdvisor Ratings for March 2017** |
|  | Number of Reviews |
| Aruba | 7,167 |  |
| Bahamas | 4,949 |  |
| Cayman Islands | 3,646 |  |
| Curacao | 3,340 |  |
| Puerto Rico | 12,224 |  |
| USVI | 5,612 |  |
|  |  |  |
|  | Average Rating |
| Cayman | 4.50 |  |
| Puerto Rico | 4.40 |  |
| USVI | 4.40 |  |
| Aruba | 4.30 |  |
| Bahamas | 4.20 |  |
| Curacao | 4.10 |  |

**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.**

|  |  |  |  |
| --- | --- | --- | --- |
|  | March 2017 | March 2016 |  |
| as of | 3/15/2017 | 3/15/2016 | % change |
| Euro | $1.063 | $1.111 | -4.3% |
| UK Pound | $1.222 | $1.417 | -13.8% |
| Canadian Dollar | $0.743 | $0.748 | -0.7% |
| Colombian Peso\* | 2971 | 3169 | 6.7% |
| Brazilian Real\*\* | 3.159 | 3.733 | 18.2% |
| \* 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 hotel 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 May and June 2017 which will involve the closure of 41 rooms.

**Hotel Performance Forecast.**

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| **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% |  |

**Tourism Receipts Forecast from Central Bank of Aruba.**

According to the Central Bank of Aruba tourism receipts, as registered in the balance of payments, are forecasted to grow nominally by 1.3 percent in 2017. This is based on a critical assumption that the hotel sector will achieve a higher average daily rate for hotel rooms.

In real terms, tourism will decrease slightly as the number of stay‐over visitors and visitor nights are expected to decline by 1.9 percent and 1.7 percent, respectively. An anticipated increase in airlift from the United States should contribute to a growth in visitors from the U.S. market but this is insufficient to fully eliminate the significant drop in visitors from Venezuela.

**Airline Seats.**

The Aruba Airport Authority is forecasting there will be 9.8% more seats from the USA to Aruba during the coming summer, a 24.1% increase from Canada and a 16.7% increase from Europe.

The overall number of inbound seats is forecasted to decline by 9.8% however due largely to a lower number of seats from Venezuela and from points within the Caribbean (especially from Curacao).

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| **Inbound Air Seats - Summer 2017** |
| April 1 - October 31 2017 |
|   | 2017 | 2016 | Change | % change |
| USA |  547,432  |  498,618  |  48,814  | 9.8% |
| Canada |  19,284  |  15,540  |  3,744  | 24.1% |
| Europe |  63,736  |  54,634  |  9,102  | 16.7% |
| Venezuela |  131,518  |  265,703  |  (134,185) | -50.5% |
| Colombia |  64,478  |  42,408  |  22,070  | 52.0% |
| Panama |  30,106  |  30,211  |  (105) | -0.3% |
| Other Latin America |  13,356  |  31,052  |  (17,696) | -57.0% |
| Caribbean |  71,265  |  105,608  |  (34,343) | -32.5% |
| Total |  941,175  |  1,043,774  |  (102,599) | -9.8% |
| Source: Aruba Airport Authority. |  |  |  |

**Cruise forecast.**

Projections for cruise traffic for 2017 suggest that, based on existing schedules, the number of cruise passengers will increase by about 5% compared with 2016.