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

**April 2017 and Year to Date 2017.**

**Summary Highlights.**

* It is important to note that noted that Easter Sunday for 2017 fell on April 17th, some three weeks later than in 2016, when it fell on March 27th.
* The total number of stopovers visiting Aruba decreased by 1.9% in April, from 98,823 in April 2016 to 96,915 in April 2017.
* In the first four months of 2017 the number of stopover visitors decreased by 11.9% from 409,078 in 2016 to 360,480 in 2017.
* Traffic from the USA was up by 13.1%, from 58,458 stopovers in April 2016 to 66,110 stopovers in April 2017. Traffic was up by 31.2% from New Jersey, up by 11.6% from New York State, and up 4.1% from Massachusetts. Arrivals from Florida showed a 22.4% increase linked to the new daily JetBlue service from Fort Lauderdale which was introduced in January 2017.
* In the first four months of 2017 the number of stopover visitors from the USA increased by 9.1% from 223,026in 2016 to 243,289 in 2017.
* Traffic from Venezuela was down by 63.9% in April from 21,648 stopovers in April 2016 to 7,820 in April 2017.
* In the first four months of 2017 the number of stopover visitors from Venezuela fell by 73.7%, from 99,534 in 2016 to 26,226 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 grew by 6.0% in April, from 645,280 in April 2016 to 683,998 in April 2017. The overall average length of stay grew by 8.1% from 6.53 nights in April 2016 to 7.06 nights in April 2017.
* The total number of visitor nights declined by 4.3% in the first four months of 2017, from 2,844,967 in 2016 to 2,723,560 in 2017. The overall average length of stay grew by 8.6% from 6.95 nights in 2016 to 7.56 nights in 2017.
* In the first three months of 2017 The Dominican Republic saw a 4.8% increase in stopover traffic, while the U.S. Virgin Islands saw a 2.4% increase and Jamaica was up by 0.1%.
* 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 April grew by 25.0%, from 50,579 in April 2016 to 63,221 in April 2017.
* In the first four months of 2017 the number of cruise visitors grew by 4.2% from 330,423 in 2016 to 344,144 in 2017.
* As reported by Immigration card data the number of stopover visitors staying in hotels in April 2017 grew by 14.2%, and staying in timeshare resorts grew by 11.7%. The number staying in “other accommodation” fell by 38.6%. This latter category comprised 18.4% of all visitors in April 2017, down from 29.5% in April 2016.
* In the first four months of 2017 the number of visitors staying in hotels grew by 5.9% compared with the same four months of 2016, the number staying in timeshare resorts grew by 2.5% and the number staying in other accommodation fell by 44.3%.
* In April 2017 hotels saw a 17.4% growth in the overall number of visitor nights compared with April 2016. The USA generated 11.6% more hotel nights in April 2017 than in April 2016.
* The number of nights spent by visitors staying in apartments or guesthouses grew by 7.2% in April, from 25,412 in April 2016 to 27,244in April 2017. The number of nights spent by visitors staying in private homes fell by 17.3% from 159,914 in April 2016 to 132,316 in April 2017.
* The number of Venezuelan stopovers using “other accommodation” fell by 77.9% in April 2017 and comprised 51.0% of all Venezuelan visitors in April 2017 down from 83.5% in April 2016. The number of Venezuelans staying in hotel accommodation in April 2017 fell by 6.4% compared with April 2016.
* Numbers provided to AHATA show that for a sample of 14 hotels average room occupancy grew by 6.8 percentage points from 79.3% in April 2016 to 86.1% in April 2017. The average daily room rate grew by 16.9% to $251.94 and the average RevPar grew by 26.9% to $217.02. Remember Easter Sunday for 2017 fell on April 17th, some three weeks later than in 2016, when it fell on March 27th.
* In the first four months of 2017 average room occupancy grew by 5.9 percentage points to 85.8%. The average daily room rate grew by 2.9% to $289.65 and the average RevPar grew by 10.5% to $248.55.
* Performance of the hotels by category for April 2017 shows that the brand name beach front hotels saw their average room occupancies grow by 2.6 percentage points to 86.9%, with their RevPar also growing by 30.1% to $328.40. The all-inclusive resorts saw their average room occupancies increase by 11.5 percentage points to 91.2% and their RevPar grow by 29.3% to $150.29. The smaller independent beach front hotels saw their average room occupancy fall by 3.9 percentage points to 89.1% and their RevPar grow by 25.0% to $370.30. The non-beach front hotels saw their average room occupancies improve by 8.0 percentage points to 74.4% and saw their RevPar grow by 15.4% to $129.15.
* In the first four months of 2017 Smith Travel Research (STR) reported that hotels in seven of nine Caribbean destinations saw higher average room occupancies. Seven of the nine also saw a higher average RevPar.
* JetBlue was the number one carrier in April 2017 and brought in 19,428 non-resident visitors up 45.4% compared with April 2016. This was partially due to their new daily service between Fort Lauderdale and Aruba which began in January 2017. American Airlines was the number two carrier (15,169 non-residents) and United Airlines brought in 15,141 non-residents.
* Of the 7,820 Venezuelans who visited Aruba in April 2017 5.8% (451) arrived in Aruba on a US scheduled carrier. In total 608 Venezuelans (7.8% 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.
* 1.7% of non-residents carried to Aruba by American Airlines in April 2017 were residents of Venezuela. 0.3% of non-residents carried to Aruba by Delta Air Lines in April were residents of Venezuela. For most other non-Venezuelan, non-Aruban carriers it was generally less than 2%.
* There was a 58.2% increase in the number of visitors 12 – 19 years old in April with the number 70 years old or older growing by 11.2%.
* The number of visitors from the USA in April between 0 – 11 years and 12 - 19 years old category grew substantially (up by 41.9% and 68.9% respectively) possibly due to Easter falling in mid-April 2017.
* In April 2017 46.4% of our visitors reported they were visiting for the first time and 41.0% reported they had visited before. 12.6% 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 53% first time and 47% repeat.
* Trip Advisor ratings for April 2017 show that Aruba received a total of 6,032 reviews and achieved an average rating of 4.4 out of 5. The Cayman Islands and USVI both achieved an average rating of 4.50 with Puerto Rico also 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 the course 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 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 – April 2017**

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| **Aruba: Total Visitors April 2017** |
|  |  |  |  |  |  |
|  | 2017 | % | 2016 | % | % change |
| USA |  66,110  | 68.2% |  58,458  | 59.2% | 13.1% |
| Canada |  3,929  | 4.1% |  3,059  | 3.1% | 28.4% |
| Venezuela |  7,820  | 8.1% |  21,648  | 21.9% | -63.9% |
| Brazil |  840  | 0.9% |  844  | 0.9% | -0.5% |
| Colombia |  3,104  | 3.2% |  1,593  | 1.6% | 94.9% |
| Argentina |  2,317  | 2.4% |  1,424  | 1.4% | 62.7% |
| Chile |  806  | 0.8% |  845  | 0.9% | -4.6% |
| Netherlands |  3,517  | 3.6% |  3,213  | 3.3% | 9.5% |
| Germany |  585  | 0.6% |  329  | 0.3% | 77.8% |
| Italy |  181  | 0.2% |  206  | 0.2% | -12.1% |
| UK |  1,450  | 1.5% |  553  | 0.6% | 162.2% |
| Sweden |  152  | 0.2% |  206  | 0.2% | -26.2% |
| Other |  6,104  | 6.3% |  6,445  | 6.5% | -5.3% |
| Total |  96,915  | 100.0% |  98,823  | 100.0% | -1.9% |
| Source: ATA |  |  |  |  |  |

Total stopover arrivals (persons staying 24 hours or more) for April 2017 showed a 1.9% decrease compared with April 2016.

Traffic from the USA was up by 13.1%, was up by 28.4% from Canada, down 63.9% from Venezuela, up 94.9% from Colombia, up 62.7% from Argentina and was down 0.5% from Brazil. Arrivals were up 9.5% from The Netherlands.

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| **Aruba: Total Visitors April 2017 YTD** |
|  |  |  |  |  |  |
|  | 2017 | % | 2016 | % | % change |
| USA |  243,289  | 67.5% |  223,026  | 54.5% | 9.1% |
| Canada |  21,967  | 6.1% |  19,724  | 4.8% | 11.4% |
| Venezuela |  26,226  | 7.3% |  99,534  | 24.3% | -73.7% |
| Brazil |  3,387  | 0.9% |  4,140  | 1.0% | -18.2% |
| Colombia |  9,241  | 2.6% |  7,298  | 1.8% | 26.6% |
| Argentina |  10,981  | 3.0% |  6,931  | 1.7% | 58.4% |
| Chile |  3,445  | 1.0% |  3,601  | 0.9% | -4.3% |
| Netherlands |  12,648  | 3.5% |  11,612  | 2.8% | 8.9% |
| Germany |  1,928  | 0.5% |  1,364  | 0.3% | 41.3% |
| Italy |  1,252  | 0.3% |  1,261  | 0.3% | -0.7% |
| UK |  2,230  | 0.6% |  1,489  | 0.4% | 49.8% |
| Sweden |  2,480  | 0.7% |  2,796  | 0.7% | -11.3% |
| Other |  21,406  | 5.9% |  26,302  | 6.4% | -18.6% |
| Total |  360,480  | 100.0% |  409,078  | 100.0% | -11.9% |
| 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% |
| Apr |  96,915  |  98,823  | -1.9% |
| YTD |  360,480  |  409,078  | -11.9% |

**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: April 2017** |
|  |  |  |  |  |  |
|  | 2017 | % | 2016 | % | % change |
| New York |  13,342  | 20.2% |  11,958  | 20.5% | 11.6% |
| Massachusetts |  9,195  | 13.9% |  8,830  | 15.1% | 4.1% |
| New Jersey |  8,946  | 13.5% |  6,819  | 11.7% | 31.2% |
| Pennsylvania |  3,254  | 4.9% |  2,828  | 4.8% | 15.1% |
| Illinois |  1,650  | 2.5% |  1,571  | 2.7% | 5.0% |
| Florida |  3,497  | 5.3% |  2,857  | 4.9% | 22.4% |
| Connecticut |  2,863  | 4.3% |  3,449  | 5.9% | -17.0% |
| Maryland |  2,365  | 3.6% |  1,371  | 2.3% | 72.5% |
| Ohio |  1,460  | 2.2% |  1,376  | 2.4% | 6.1% |
| Michigan |  1,726  | 2.6% |  1,564  | 2.7% | 10.4% |
| Virginia |  1,915  | 2.9% |  1,197  | 2.0% | 60.0% |
| Texas |  1,344  | 2.0% |  1,369  | 2.3% | -1.8% |
| California |  1,306  | 2.0% |  1,432  | 2.4% | -8.8% |
| Other |  13,247  | 20.0% |  11,837  | 20.2% | 11.9% |
| Total |  66,110  | 100.0% |  58,458  | 100.0% | 13.1% |
| Source: ATA |  |  |  |  |  |
| **Aruba: Total Visitors: US States: April 2017 YTD** |
|  |  |  |  |  |  |
|  | 2017 | % | 2016 | % | % change |
| New York |  50,774  | 20.9% |  47,820  | 21.4% | 6.2% |
| Massachusetts |  34,634  | 14.2% |  30,121  | 13.5% | 15.0% |
| New Jersey |  26,868  | 11.0% |  26,245  | 11.8% | 2.4% |
| Pennsylvania |  14,001  | 5.8% |  12,663  | 5.7% | 10.6% |
| Illinois |  8,817  | 3.6% |  8,226  | 3.7% | 7.2% |
| Florida |  12,177  | 5.0% |  9,474  | 4.2% | 28.5% |
| Connecticut |  9,154  | 3.8% |  9,479  | 4.3% | -3.4% |
| Maryland |  7,113  | 2.9% |  6,956  | 3.1% | 2.3% |
| Ohio |  7,418  | 3.0% |  6,468  | 2.9% | 14.7% |
| Michigan |  7,071  | 2.9% |  6,708  | 3.0% | 5.4% |
| Virginia |  5,565  | 2.3% |  5,337  | 2.4% | 4.3% |
| Texas |  4,850  | 2.0% |  4,824  | 2.2% | 0.5% |
| California |  3,735  | 1.5% |  3,607  | 1.6% | 3.5% |
| Other |  51,112  | 21.0% |  45,098  | 20.2% | 13.3% |
| Total |  243,289  | 100.0% |  223,026  | 100.0% | 9.1% |
| Source: ATA |  |  |  |  |  |

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

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| **Aruba: Total Nights April 2017** |
|  |  |  |  |  |  |
|  | 2017 | % | 2016 | % | % change |
| USA |  437,585  | 64.0% |  393,137  | 60.9% | 11.3% |
| Canada |  30,813  | 4.5% |  24,046  | 3.7% | 28.1% |
| Venezuela |  52,227  | 7.6% |  93,180  | 14.4% | -44.0% |
| Brazil |  5,760  | 0.8% |  5,123  | 0.8% | 12.4% |
| Colombia |  20,765  | 3.0% |  15,025  | 2.3% | 38.2% |
| Argentina |  20,424  | 3.0% |  11,751  | 1.8% | 73.8% |
| Chile |  5,919  | 0.9% |  6,279  | 1.0% | -5.7% |
| Netherlands |  40,984  | 6.0% |  37,687  | 5.8% | 8.7% |
| Germany |  5,969  | 0.9% |  2,940  | 0.5% | 103.0% |
| Italy |  1,410  | 0.2% |  1,667  | 0.3% | -15.4% |
| UK |  16,397  | 2.4% |  5,382  | 0.8% | 204.7% |
| Sweden |  1,323  | 0.2% |  3,233  | 0.5% | -59.1% |
| Other |  44,422  | 6.5% |  45,830  | 7.1% | -3.1% |
| Total |  683,998  | 100.0% |  645,280  | 100.0% | 6.0% |
| Source: ATA |  |  |  |  |  |

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| **Aruba: Average Length of Stay in Nights: April 2017** |
|  |  |  |  |  |  |
|  | 2017 |  | 2016 |  | % change |
| USA |  6.62  |  |  6.73  |  | -1.6% |
| Canada |  7.84  |  |  7.86  |  | -0.2% |
| Venezuela |  6.68  |  |  4.30  |  | 55.2% |
| Brazil |  6.86  |  |  6.07  |  | 13.0% |
| Colombia |  6.69  |  |  9.43  |  | -29.1% |
| Argentina |  8.81  |  |  8.25  |  | 6.8% |
| Chile |  7.34  |  |  7.43  |  | -1.2% |
| Netherlands |  11.65  |  |  11.73  |  | -0.7% |
| Germany |  10.20  |  |  8.94  |  | 14.2% |
| Italy |  7.79  |  |  8.09  |  | -3.7% |
| UK |  11.31  |  |  9.73  |  | 16.2% |
| Sweden |  8.70  |  |  15.69  |  | -44.5% |
| Other |  7.28  |  |  7.11  |  | 2.3% |
| Total |  7.06  |  |  6.53  |  | 8.1% |
| Source: ATA |  |  |  |  |  |

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| **Aruba: Total Nights April 2017 YTD** |
|  |  |  |  |  |  |
|  | 2017 | % | 2016 | % | % change |
| USA |  1,748,480  | 64.2% |  1,638,631  | 57.6% | 6.7% |
| Canada |  197,044  | 7.2% |  176,277  | 6.2% | 11.8% |
| Venezuela |  154,668  | 5.7% |  421,299  | 14.8% | -63.3% |
| Brazil |  22,236  | 0.8% |  25,901  | 0.9% | -14.2% |
| Colombia |  69,522  | 2.6% |  73,501  | 2.6% | -5.4% |
| Argentina |  101,578  | 3.7% |  62,369  | 2.2% | 62.9% |
| Chile |  27,656  | 1.0% |  28,398  | 1.0% | -2.6% |
| Netherlands |  159,904  | 5.9% |  146,965  | 5.2% | 8.8% |
| Germany |  17,180  | 0.6% |  12,722  | 0.4% | 35.0% |
| Italy |  10,938  | 0.4% |  10,412  | 0.4% | 5.1% |
| UK |  23,468  | 0.9% |  13,413  | 0.5% | 75.0% |
| Sweden |  30,023  | 1.1% |  35,041  | 1.2% | -14.3% |
| Other |  160,863  | 5.9% |  200,038  | 7.0% | -19.6% |
| Total |  2,723,560  | 100.0% |  2,844,967  | 100.0% | -4.3% |
| Source: ATA |  |  |  |  |  |

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| **Aruba: Average Length of Stay in Nights: April 2017 YTD** |
|  |  |  |  |  |  |
|  | 2017 |  | 2016 |  | % change |
| USA |  7.19  |  |  7.35  |  | -2.2% |
| Canada |  8.97  |  |  8.94  |  | 0.4% |
| Venezuela |  5.90  |  |  4.23  |  | 39.3% |
| Brazil |  6.57  |  |  6.26  |  | 4.9% |
| Colombia |  7.52  |  |  10.07  |  | -25.3% |
| Argentina |  9.25  |  |  9.00  |  | 2.8% |
| Chile |  8.03  |  |  7.89  |  | 1.8% |
| Netherlands |  12.64  |  |  12.66  |  | -0.1% |
| Germany |  8.91  |  |  9.33  |  | -4.5% |
| Italy |  8.74  |  |  8.26  |  | 5.8% |
| UK |  10.52  |  |  9.01  |  | 16.8% |
| Sweden |  12.11  |  |  12.53  |  | -3.4% |
| Other |  7.51  |  |  7.61  |  | -1.2% |
| Total |  7.56  |  |  6.95  |  | 8.6% |
| Source: ATA |  |  |  |  |  |

**Competing Destination performance.**

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

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|  | **Total Stopover Visitors** |
|  | 2017 | 2016 | % change | Period |
| Antigua |  78,982  |  84,563  | -6.6% | Jan-Mar |
| Aruba |  360,480  |  409,078  | -11.9% | Jan-Apr |
| Bahamas | NA | NA | NA | NA |
| Barbados |  125,303  |  123,330  | 1.6% | Jan-Feb |
| Belize |  160,317  |  149,549  | 7.2% | Jan-Apr |
| British Virgin Islands |  79,595  |  83,346  | -4.5% | Jan-Feb |
| Cayman Islands |  111,237  |  112,816  | -1.4% | Jan-Mar |
| Cuba | NA | NA | NA | NA |
| Curacao |  109,198  |  127,568  | -14.4% | Jan-Mar |
| Dominican Republic |  1,495,249  |  1,427,088  | 4.8% | Jan-Mar |
| Jamaica |  585,143  |  584,558  | 0.1% | Jan-Mar |
| Puerto Rico\* | NA | NA | NA | NA |
| Saint Lucia |  100,478  |  97,362  | 3.2% | Jan-Mar |
| Turks & Caicos Islands | NA | NA | NA | NA |
| US Virgin Islands |  238,975  |  233,374  | 2.4% | Jan-Mar |
| \* 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 |  30,472  |  34,627  | -12.0% | Jan-Mar |
| Aruba |  243,289  |  223,026  | 9.1% | Jan-Apr |
| Bahamas | NA | NA | NA | NA |
| Barbados |  31,232  |  27,229  | 14.7% | Jan-Feb |
| Belize |  103,439  |  100,329  | 3.1% | Jan-Apr |
| British Virgin Islands | NA | NA | NA | NA |
| Cayman Islands |  89,821  |  89,374  | 0.5% | Jan-Mar |
| Cuba | NA | NA | NA | NA |
| Curacao |  16,581  |  17,435  | -4.9% | Jan-Mar |
| Dominican Republic |  725,666  |  706,588  | 2.7% | Jan-Apr |
| Jamaica |  342,834  |  349,831  | -2.0% | Jan-Mar |
| Puerto Rico\* | NA | NA | NA | NA |
| Saint Lucia |  42,511  |  41,800  | 1.7% | Jan-Mar |
| 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% |
| Apr | 28 |  63,221  | 26 |  50,579  | 7.7% | 25.0% |
| YTD | 151 |  344,144  | 164 |  330,423  | -7.9% | 4.2% |
| Source: Aruba Port Authority. |  |  |  |  |

In April 2017 Aruba saw a 25.0% increase in the number of cruise passengers compared with April 2016. Year to date the volume of cruise traffic has grown by 4.2% 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 |  347,383  |  330,846  | 5.0% | Jan-Mar |
| Aruba |  344,144  |  330,423  | 4.2% | Jan-Apr |
| Bahamas | NA | NA | NA | NA |
| Barbados |  119,148  |  114,225  | 4.3% | Jan |
| Belize |  463,057  |  426,900  | 8.5% | Jan-Apr |
| British Virgin Islands |  193,418  |  203,877  | -5.1% | Jan-Feb |
| Cayman Islands |  570,638  |  610,086  | -6.5% | Jan-Mar |
| Cozumel |  1,631,587  |  1,443,327  | 13.0% | Jan-Apr |
| Curacao |  219,348  |  194,091  | 13.0% | Jan-Mar |
| Dominican Republic |  537,852  |  391,453  | 37.4% | Jan-Apr |
| Jamaica |  632,727  |  613,316  | 3.2% | Jan-Mar |
| Puerto Rico |  178,564  |  172,491  | 3.5% | Jan |
| Saint Lucia |  313,552  |  245,760  | 21.2% | Jan-Mar |
| 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 |  6,884,690  |  6,396,611  | 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.

|  |  |  |  |
| --- | --- | --- | --- |
|  | April 2017 | April 2016 |  |
|  | Visitors | % | Visitors | % | % change |
| Hotels | 53,080 | 54.8% | 46,471 | 47.0% | 14.2% |
| Timeshare | 25,962 | 26.8% | 23,245 | 23.5% | 11.7% |
| Apts/Priv Homes | 17,873 | 18.4% | 29,107 | 29.5% | -38.6% |
| Total | 96,915 | 100.0% | 98,823 | 100.0% | -1.9% |
| Source: ATA |  |  |  |  |  |

The hotels category includes High Rise hotels, Low Rise hotels and the Tropicana. As shown above in April 2017 the number of visitors staying in hotel accommodation increased by 14.2%, those staying in a timeshare resort increased by 11.7% and those staying in apartments, guest houses or private homes declined by 38.6%.

|  |  |
| --- | --- |
|  | Place of Stay: Visitor Nights 2017 |
|  | April 2017 | April 2016 |  |
|  | Nights | % | Nights | % | % change |
| Hotels | 323,639 | 47.3% | 275,708 | 42.7% | 17.4% |
| Timeshare | 200,736 | 29.3% | 183,563 | 28.4% | 9.4% |
| Apts/Priv Homes | 159,623 | 23.3% | 186,009 | 28.8% | -14.2% |
| Total | 683,998 | 100.0% | 645,280 | 100.0% | 6.0% |
| Source: ATA |  |  |  |  |  |
|  |  |  |  |  |  |
|  | Average Length of Stay in Nights 2017 |
|  | April 2017 | April 2016 |  |
|  | Nights |  | Nights |  | % change |
| Hotels | 6.10 |  | 5.93 |  | 2.8% |
| Timeshare | 7.73 |  | 7.90 |  | -2.1% |
| Apts/Priv Homes | 8.93 |  | 6.39 |  | 39.8% |
| Total | 7.06 |  | 6.53 |  | 8.1% |
| Source: ATA |  |  |  |  |  |

|  |  |
| --- | --- |
|  | Visitors 2017 |
|  | April 2017 YTD | April 2016 YTD |  |
|  | Visitors | % | Visitors | % | % change |
| Hotels | 193,297 | 53.6% | 182,460 | 44.6% | 5.9% |
| Timeshare | 89,589 | 24.9% | 87,387 | 21.4% | 2.5% |
| Apts/Priv Homes | 77,594 | 21.5% | 139,231 | 34.0% | -44.3% |
| Total | 360,480 | 100.0% | 409,078 | 100.0% | -11.9% |
| Source: ATA |  |  |  |  |  |
|  |  |  |  |  |  |
|  | Visitor Nights Full Year 2017 |
|  | April 2017 YTD | April 2016 YTD |  |
|  | Nights | % | Nights | % | % change |
| Hotels | 1,215,088 | 44.6% | 1,150,848 | 40.5% | 5.6% |
| Timeshare | 794,206 | 29.2% | 779,990 | 27.4% | 1.8% |
| Apts/Priv Homes | 714,266 | 26.2% | 914,129 | 32.1% | -21.9% |
| Total | 2,723,560 | 100.0% | 2,844,967 | 100.0% | -4.3% |
| Source: ATA |  |  |  |  |  |
|  |  |  |  |  |  |
|  | Average Length of Stay in Nights 2017 |
|  | April 2017 YTD | April 2016 YTD |  |
|  | Nights |  | Nights |  | % change |
| Hotels | 6.29 |  | 6.31 |  | -0.3% |
| Timeshare | 8.86 |  | 8.93 |  | -0.7% |
| Apts/Priv Homes | 9.21 |  | 6.57 |  | 40.2% |
| Total | 7.56 |  | 6.95 |  | 8.6% |
| 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 69.0% of all hotel nights in April 2017 and 69.8% for the first four months of 2017.

|  |
| --- |
| **Aruba: Total Hotel Nights April 2017** |
|  |  |  |  |  |  |
|  | 2017 | % | 2016 | % | % change |
| USA |  223,229  | 69.0% |  200,004  | 72.5% | 11.6% |
| Canada |  16,262  | 5.0% |  13,173  | 4.8% | 23.4% |
| Venezuela |  13,868  | 4.3% |  11,393  | 4.1% | 21.7% |
| Brazil |  3,764  | 1.2% |  4,148  | 1.5% | -9.3% |
| Colombia |  8,092  | 2.5% |  3,333  | 1.2% | 142.8% |
| Argentina |  14,475  | 4.5% |  9,243  | 3.4% | 56.6% |
| Netherlands |  9,267  | 2.9% |  8,211  | 3.0% | 12.9% |
| Germany |  1,992  | 0.6% |  1,578  | 0.6% | 26.2% |
| Italy |  708  | 0.2% |  686  | 0.2% | 3.2% |
| UK |  11,014  | 3.4% |  3,768  | 1.4% | 192.3% |
| Other |  20,968  | 6.5% |  20,171  | 7.3% | 4.0% |
| Total |  323,639  | 100.0% |  275,708  | 100.0% | 17.4% |
| Source: ATA |  |  |  |  |  |
| **Aruba: Total Hotel Nights April YTD 2017** |
|  |  |  |  |  |  |
|  | 2017 | % | 2016 | % | % change |
| USA |  847,833  | 69.8% |  782,768  | 68.0% | 8.3% |
| Canada |  95,774  | 7.9% |  93,277  | 8.1% | 2.7% |
| Venezuela |  35,556  | 2.9% |  52,766  | 4.6% | -32.6% |
| Brazil |  15,625  | 1.3% |  18,774  | 1.6% | -16.8% |
| Colombia |  20,651  | 1.7% |  15,290  | 1.3% | 35.1% |
| Argentina |  66,979  | 5.5% |  46,450  | 4.0% | 44.2% |
| Netherlands |  25,647  | 2.1% |  25,113  | 2.2% | 2.1% |
| Germany |  5,841  | 0.5% |  5,227  | 0.5% | 11.7% |
| Italy |  3,851  | 0.3% |  3,816  | 0.3% | 0.9% |
| UK |  13,643  | 1.1% |  7,011  | 0.6% | 94.6% |
| Other |  83,688  | 6.9% |  100,356  | 8.7% | -16.6% |
| Total |  1,215,088  | 100.0% |  1,150,848  | 100.0% | 5.6% |
| Source: ATA |  |  |  |  |  |

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

**April 2017**

|  |  |  |  |
| --- | --- | --- | --- |
| **April 2017** | 2017 | 2016 | Per Cent Change |
| Nights | Aprtmnt/ |  | Private |  | Aprtmnt/ |  | Private |  | Aprtmnt/ | Private |
|  | Gst Hse | % share | Home | % share | Gst Hse | % share | Home | % share | Gst Hse | Home |
| USA |  5,992  | 22.0% |  33,370  | 25.2% |  3,434  | 13.5% |  24,419  | 15.3% | 74.5% | 36.7% |
| Canada |  987  | 3.6% |  6,823  | 5.2% |  376  | 1.5% |  4,900  | 3.1% | 162.5% | 39.2% |
| Venezuela |  2,855  | 10.5% |  28,036  | 21.2% |  4,078  | 16.0% |  73,047  | 45.7% | -30.0% | -61.6% |
| Brazil |  196  | 0.7% |  1,277  | 1.0% |  215  | 0.8% |  529  | 0.3% | -8.8% | 141.4% |
| Colombia |  387  | 1.4% |  10,396  | 7.9% |  167  | 0.7% |  10,641  | 6.7% | 131.7% | -2.3% |
| Argentina |  797  | 2.9% |  3,615  | 2.7% |  243  | 1.0% |  1,255  | 0.8% | 228.0% | 188.0% |
| Netherlands |  5,751  | 21.1% |  24,370  | 18.4% |  3,590  | 14.1% |  23,569  | 14.7% | 60.2% | 3.4% |
| Germany |  1,299  | 4.8% |  2,059  | 1.6% |  194  | 0.8% |  907  | 0.6% | 569.6% | 127.0% |
| U.K. |  1,430  | 5.2% |  1,760  | 1.3% |  233  | 0.9% |  777  | 0.5% | 513.7% | 126.5% |
| Italy |  119  | 0.4% |  424  | 0.3% |  124  | 0.5% |  751  | 0.5% | -4.0% | -43.5% |
| Other |  7,431  | 27.3% |  20,186  | 15.3% |  12,758  | 50.2% |  19,119  | 12.0% | -41.8% | 5.6% |
| Total |  27,244  | 100.0% |  132,316  | 100.0% |  25,412  | 100.0% |  159,914  | 100.0% | 7.2% | -17.3% |
| Source: ATA |  |  |  |  |  |  |  |  |  |  |

**Year to Date.**

|  |  |  |  |
| --- | --- | --- | --- |
| **April 2017 YTD** | 2017 | 2016 | Per Cent Change |
| Nights | Aprtmnt/ |  | Private |  | Aprtmnt/ |  | Private |  | Aprtmnt/ | Private |
|  | Gst Hse | % share | Home | % share | Gst Hse | % share | Home | % share | Gst Hse | Home |
| USA |  30,700  | 25.7% |  166,433  | 28.0% |  21,229  | 19.1% |  151,953  | 19.0% | 44.6% | 9.5% |
| Canada |  7,067  | 5.9% |  53,324  | 9.0% |  3,530  | 3.2% |  42,339  | 5.3% | 100.2% | 25.9% |
| Venezuela |  7,894  | 6.6% |  98,551  | 16.6% |  19,892  | 17.9% |  327,033  | 41.0% | -60.3% | -69.9% |
| Brazil |  981  | 0.8% |  4,381  | 0.7% |  1,377  | 1.2% |  4,918  | 0.6% | -28.8% | -10.9% |
| Colombia |  2,400  | 2.0% |  42,600  | 7.2% |  1,067  | 1.0% |  53,917  | 6.8% | 124.9% | -21.0% |
| Argentina |  5,323  | 4.5% |  22,328  | 3.8% |  1,488  | 1.3% |  9,583  | 1.2% | 257.7% | 133.0% |
| Netherlands |  25,522  | 21.4% |  104,349  | 17.5% |  14,419  | 13.0% |  102,366  | 12.8% | 77.0% | 1.9% |
| Germany |  2,786  | 2.3% |  7,848  | 1.3% |  923  | 0.8% |  5,916  | 0.7% | 201.8% | 32.7% |
| U.K |  2,235  | 1.9% |  4,717  | 0.8% |  817  | 0.7% |  4,040  | 0.5% | 173.6% | 16.8% |
| Italy |  827  | 0.7% |  4,969  | 0.8% |  622  | 0.6% |  5,121  | 0.6% | 33.0% | -3.0% |
| Other |  33,708  | 28.2% |  85,127  | 14.3% |  45,518  | 41.1% |  90,952  | 11.4% | -25.9% | -6.4% |
| Total |  119,443  | 100.0% |  594,627  | 100.0% |  110,882  | 100.0% |  798,138  | 100.0% | 7.7% | -25.5% |
| Source: ATA |  |  |  |  |  |  |  |  |  |  |

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

The number of visitors from Venezuela using hotel accommodation in April fell by 28.0%. The number of visitors using private homes/apartments and condominiums fell by 81.7% and comprised 65.1% of all Venezuelan visitors in April 2017, down from 88.1% in April 2016.

|  |  |
| --- | --- |
|  | Visitors from Venezuela 2017 |
|  | April 2017 | April 2016 |  |
|  | Visitors | % | Visitors | % | % change |
| Hotels | 2,692 | 34.4% | 2,877 | 13.3% | -6.4% |
| Timeshare | 1,140 | 14.6% | 688 | 3.2% | 65.7% |
| Apts/Priv Homes | 3,988 | 51.0% | 18,083 | 83.5% | -77.9% |
| Total | 7,820 | 100.0% | 21,648 | 100.0% | -63.9% |
| Source: ATA |  |  |  |  |  |
|  |  |  |  |  |  |
|  | Visitor Nights from Venezuela 2017 |
|  | April 2017 | April 2016 |  |
|  | Nights | % | Nights | % | % change |
| Hotels | 13,868 | 26.6% | 11,393 | 12.2% | 21.7% |
| Timeshare | 7,442 | 14.2% | 3,987 | 4.3% | 86.7% |
| Apts/Priv Homes | 30,917 | 59.2% | 77,800 | 83.5% | -60.3% |
| Total | 52,227 | 100.0% | 93,180 | 100.0% | -44.0% |
| Source: ATA |  |  |  |  |  |
|  |  |  |  |  |  |
|  | Average Length of Stay Venezuela 2017 |
|  | April 2017 | April 2016 |  |
|  | Nights |  | Nights |  | % change |
| Hotels | 5.15 | nts | 3.96 | nts | 30.1% |
| Timeshare | 6.53 | nts | 5.80 | nts | 12.6% |
| Apts/Priv Homes | 7.75 | nts | 4.30 | nts | 80.2% |
| Total | 6.68 | nts | 4.30 | nts | 55.2% |
| Source: ATA |  |  |  |  |  |

**Year to Date.**

|  |  |
| --- | --- |
|  | Visitors from Venezuela 2017 |
|  | April 2017 YTD | April 2016 YTD |  |
|  | Visitors | % | Visitors | % | % change |
| Hotels | 8,655 | 33.0% | 12,462 | 12.5% | -30.5% |
| Timeshare | 2,180 | 8.3% | 2,906 | 2.9% | -25.0% |
| Apts/Priv Homes | 15,391 | 58.7% | 84,166 | 84.6% | -81.7% |
| Total | 26,226 | 100.0% | 99,534 | 100.0% | -73.7% |
| Source: ATA |  |  |  |  |  |
|  |  |  |  |  |  |
|  | Visitor Nights from Venezuela 2017 |
|  | April 2017 YTD | April 2016 YTD |  |
|  | Nights | % | Nights | % | % change |
| Hotels | 35,556 | 23.0% | 52,766 | 12.5% | -32.6% |
| Timeshare | 12,525 | 8.1% | 16,837 | 4.0% | -25.6% |
| Apts/Priv Homes | 106,587 | 68.9% | 351,696 | 83.5% | -69.7% |
| Total | 154,668 | 100.0% | 421,299 | 100.0% | -63.3% |
| Source: ATA |  |  |  |  |  |
|  |  |  |  |  |  |
|  | Average Length of Stay Venezuela 2017 |
|  | April 2017 YTD | April 2016 YTD |  |
|  | Nights |  | Nights |  | % change |
| Hotels | 4.11 | nts | 4.23 | nts | -3.0% |
| Timeshare | 5.75 | nts | 5.79 | nts | -0.8% |
| Apts/Priv Homes | 6.93 | nts | 4.18 | nts | 65.7% |
| Total | 5.90 | nts | 4.23 | nts | 39.3% |
| Source: ATA |  |  |  |  |  |

**Hotel Performance Aruba 2017**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  | 2017/2016 |  |
| **April 2017** | 2017 | 2016 | % change |  |
| Rooms |  4,651  |  4,579  | 1.6% |  |
| ARN |  139,530  |  137,370  | 1.6% |  |
| ORN |  120,187  |  108,995  | 10.3% |  |
| % occupancy | 86.1% | 79.3% | 6.8% | points |
| ADR | $251.94 | $215.46 | 16.9% |  |
| Rev Par | $217.02 | $170.96 | 26.9% |  |
| ***Based on data from 14 properties.*** |  |  |  |

Total transient hotel room inventory for Aruba in April 2017 stood at 5,275 rooms. In addition to the transient hotel room inventory there was 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 April 2017, the hotel sector saw a 6.8 percentage point increase in average room occupancy, from 79.3% to 86.1%, and a 16.9% increase in the average daily room rate (ADR) from $215.46 to $251.94. With a higher average room occupancy and higher ADR revenue per available room (RevPar) grew by 26.9% compared with April 2016.

It should be noted that Easter Sunday for 2017 fell on April 17th some three weeks later than in 2016 when it fell on March 27th. Consequently, higher rated business was maintained through the middle of April 2017 resulting in substantially higher ADR’s than in April 2016.

**Year to Date**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  | 2017/2016 |  |
| **April 2017 YTD** | 2017 | 2016 | % change |  |
| Rooms |  4,651  |  4,579  | 1.6% |  |
| ARN |  553,045  |  549,024  | 0.7% |  |
| ORN |  474,580  |  438,668  | 8.2% |  |
| % occupancy | 85.8% | 79.9% | 5.9% | points |
| ADR | $289.65 | $281.50 | 2.9% |  |
| Rev Par | $248.55 | $224.91 | 10.5% |  |
| ***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 | 84.6% | 77.7% | 6.9% | $290.21  | $304.95  | -4.8% | $245.37  | $236.95  | 3.6% |
| Apr | 86.1% | 79.3% | 6.8% | $251.94  | $215.46  | 16.9% | $217.02  | $170.96  | 26.9% |
| YTD | 85.8% | 79.9% | 5.9% | $289.65  | $281.50  | 2.9% | $248.55  | $224.91  | 10.5% |

**Performance by Category – April 2017.**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| April |  |  |  | April 2017 |  |  |  |
|  | Rooms | ARN | ORN | %opy | Revenue | $ADR | $RevPar |
| Brand Name Beach Front |  1,678  |  50,340  |  43,730  | 86.9% | $16,531,588.00 | $378.04 | $328.40 |
| All Inclusives |  1,844  |  55,320  |  50,479  | 91.2% | $8,314,122.00 | $164.70 | $150.29 |
| Small Independent Beach Front |  176  |  5,280  |  4,705  | 89.1% | $1,742,266.00 | $370.30 | $329.97 |
| Non-Beach Front |  953  |  28,590  |  21,273  | 74.4% | $3,692,338.00 | $173.57 | $129.15 |
| Total |  4,651  |  139,530  |  120,187  | 86.1% | $30,280,314.00 | $251.94 | $217.02 |
|  |  |  |  |  |  |  |  |
|  |  |  |  | April 2016 |  |  |  |
|  | Rooms | ARN | ORN | %opy | Revenue | $ADR | $RevPar |
| Brand Name Beach Front |  1,678  |  50,340  |  42,415  | 84.3% | $12,704,062.00 | $299.52 | $252.37 |
| All Inclusives |  1,841  |  55,230  |  44,051  | 79.8% | $6,418,806.00 | $145.71 | $116.22 |
| Small Independent Beach Front |  176  |  5,280  |  4,910  | 93.0% | $1,394,089.00 | $283.93 | $264.03 |
| Non-Beach Front |  884  |  26,520  |  17,619  | 66.4% | $2,967,287.00 | $168.41 | $111.89 |
| Total |  4,579  |  137,370  |  108,995  | 79.3% | $23,484,244.00 | $215.46 | $170.96 |
|  |  |  |  |  |  |  |  |
|  |  |  |  | Percentage Change |  |  |
|  | Rooms | ARN | ORN | % pt change | Revenue | $ADR | $RevPar |
| Brand Name Beach Front | 0.0% | 0.0% | 3.1% | 2.6% | 30.1% | 26.2% | 30.1% |
| All Inclusives | 0.2% | 0.2% | 14.6% | 11.5% | 29.5% | 13.0% | 29.3% |
| Small Independent Beach Front | 0.0% | 0.0% | -4.2% | -3.9% | 25.0% | 30.4% | 25.0% |
| Non-Beach Front | 7.8% | 7.8% | 20.7% | 8.0% | 24.4% | 3.1% | 15.4% |
| Total | 1.6% | 1.6% | 10.3% | 6.8% | 28.9% | 16.9% | 26.9% |

**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.**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **April YTD** |  |  |  | 2017 |  |  |  |
|  | Rooms | ARN | ORN | %opy | Revenue | $ADR | $RevPar |
| Brand Name Beach Front |  1,678  |  201,360  |  174,564  | 86.7% | $76,138,349.00 | $436.16 | $378.12 |
| All Inclusives |  1,844  |  220,904  |  197,792  | 89.5% | $36,407,026.00 | $184.07 | $164.81 |
| Small Independent Beach Front |  176  |  21,120  |  19,657  | 93.1% | $8,314,741.00 | $422.99 | $393.69 |
| Non-Beach Front |  904  |  109,661  |  82,567  | 75.3% | $16,600,007.00 | $201.05 | $151.38 |
| Total |  4,602  |  553,045  |  474,580  | 85.8% | $137,460,123.00 | $289.65 | $248.55 |
|  |  |  |  |  |  |  |  |
|  |  |  |  | 2016 |  |  |  |
|  | Rooms | ARN | ORN | %opy | Revenue | $ADR | $RevPar |
| Brand Name Beach Front |  1,679  |  203,287  |  165,337  | 81.3% | $69,545,144.00 | $420.63 | $342.10 |
| All Inclusives |  1,841  |  220,511  |  183,030  | 83.0% | $32,759,220.00 | $178.98 | $148.56 |
| Small Independent Beach Front |  176  |  21,296  |  19,649  | 92.3% | $7,441,431.00 | $378.72 | $349.43 |
| Non-Beach Front |  851  |  103,930  |  70,652  | 68.0% | $13,737,205.00 | $194.43 | $132.18 |
| Total |  4,547  |  549,024  |  438,668  | 79.9% | $123,483,000.00 | $281.50 | $224.91 |
|  |  |  |  |  |  |  |  |
|  |  |  |  | Percentage Change |  |  |
|  | Rooms | ARN | ORN | % pt change | Revenue | $ADR | $RevPar |
| Brand Name Beach Front | -0.1% | -0.9% | 5.6% | 5.4% | 9.5% | 3.7% | 10.5% |
| All Inclusives | 0.2% | 0.2% | 8.1% | 6.5% | 11.1% | 2.8% | 10.9% |
| Small Independent Beach Front | 0.0% | -0.8% | 0.0% | 0.8% | 11.7% | 11.7% | 12.7% |
| Non-Beach Front | 6.2% | 5.5% | 16.9% | 7.3% | 20.8% | 3.4% | 14.5% |
| Total | 1.2% | 0.7% | 8.2% | 5.9% | 11.3% | 2.9% | 10.5% |

**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 April 2017 compared with April 2016.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **April 2017** | Average Room Occupancy | Average Daily Rate | RevPar | #Hotels in |
|  | 2017 | 2016 | % pt change | 2017 | 2016 | % change | 2017 | 2016 | % change | Sample |
| Aruba | 86.1% | 79.3% | 6.8% | $251.94 | $215.46 | 16.9% | $217.02 | $170.96 | 26.9% | 14 |
| Barbados | 68.5% | 65.0% | 3.5% | $304.13 | $277.50 | 9.6% | $208.44 | $180.31 | 15.6% | 38 |
| Cancun | 78.2% | 74.2% | 4.0% | $226.99 | $213.65 | 6.2% | $177.41 | $158.44 | 12.0% | 64 |
| Cayman Islands | 71.9% | 80.0% | -8.1% | $408.09 | $374.22 | 9.1% | $293.59 | $299.51 | -2.0% | 9 |
| Curacao | 67.7% | 69.0% | -1.3% | $142.00 | $135.36 | 4.9% | $96.09 | $93.41 | 2.9% | 13 |
| Dominican Republic | 79.1% | 76.4% | 2.7% | $144.99 | $134.68 | 7.7% | $114.74 | $102.86 | 11.5% | 31 |
| Jamaica | 75.6% | 72.1% | 3.5% | $254.62 | $228.71 | 11.3% | $192.41 | $164.92 | 16.7% | 10 |
| Puerto Rico | 72.7% | 76.2% | -3.5% | $194.40 | $191.06 | 1.7% | $141.42 | $145.50 | -2.8% | 46 |
| USVI | 81.9% | 83.5% | -1.6% | $397.38 | $338.24 | 17.5% | $325.50 | $282.59 | 15.2% | 6 |
| Caribbean | 73.0% | 72.7% | 0.3% | $227.53 | $204.13 | 11.5% | $166.03 | $148.39 | 11.9% | 275 |
| Source: STR. |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |
| **April YTD 2017** | Average Room Occupancy | Average Daily Rate | RevPar | #Hotels in |
|  | 2017 | 2016 | % pt change | 2017 | 2016 | % change | 2017 | 2016 | % change | Sample |
| Aruba | 85.8% | 79.9% | 5.9% | $289.65 | $281.50 | 2.9% | $248.55 | $224.91 | 10.5% | 14 |
| Barbados | 75.0% | 74.4% | 0.6% | $361.48 | $362.52 | -0.3% | $271.26 | $269.57 | 0.6% | 38 |
| Cancun | 78.4% | 74.8% | 3.6% | $233.18 | $232.74 | 0.2% | $182.76 | $174.19 | 4.9% | 64 |
| Cayman Islands | 71.5% | 77.8% | -6.3% | $456.69 | $455.20 | 0.3% | $326.57 | $354.27 | -7.8% | 9 |
| Curacao | 75.4% | 73.3% | 2.1% | $164.23 | $156.27 | 5.1% | $123.77 | $114.60 | 8.0% | 13 |
| Dominican Republic | 79.9% | 77.8% | 2.1% | $154.21 | $154.62 | -0.3% | $123.17 | $120.30 | 2.4% | 31 |
| Jamaica | 79.2% | 73.4% | 5.8% | $276.78 | $279.66 | -1.0% | $219.34 | $205.37 | 6.8% | 10 |
| Puerto Rico | 71.9% | 76.4% | -4.5% | $206.80 | $220.41 | -6.2% | $148.77 | $168.49 | -11.7% | 46 |
| USVI | 83.7% | 83.5% | 0.2% | $457.88 | $430.07 | 6.5% | $383.06 | $359.15 | 6.7% | 6 |
| Caribbean | 73.4% | 73.7% | -0.3% | $240.85 | $239.92 | 0.4% | $176.75 | $176.86 | -0.1% | 275 |
| Source: STR. |  |  |  |  |  |  |  |  |  |  |

**Visitors by Carrier.**

The table below shows the number of non-resident visitors brought in by various airline carriers during April 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: April 2017** |
|  | (Non-resident stopover Arrivals) |  |  |  |  |
|  |  | 2017 | % share | 2016 | % share | % change |
| 1 | JetBlue |  19,428  | 20.0% |  13,361  | 13.5% | 45.4% |
| 2 | American Airlines |  15,169  | 15.7% |  15,827  | 16.0% | -4.2% |
| 3 | United Airlines |  15,141  | 15.6% |  11,835  | 12.0% | 27.9% |
| 4 | Delta Air Lines |  9,537  | 9.8% |  9,661  | 9.8% | -1.3% |
| 5 | Southwest |  7,187  | 7.4% |  7,439  | 7.5% | -3.4% |
| 6 | Copa |  3,018  | 3.1% |  2,153  | 2.2% | 40.2% |
| 7 | Insel Air |  2,372  | 2.4% |  3,992  | 4.0% | -40.6% |
| 8 | KLM |  2,694  | 2.8% |  2,130  | 2.2% | 26.5% |
| 9 | Avianca |  2,939  | 3.0% |  2,423  | 2.5% | 21.3% |
| 10 | Sunwing |  1,087  | 1.1% |  1,092  | 1.1% | -0.5% |
| 11 | Laser |  2,565  | 2.6% |  14,347  | 14.5% | -82.1% |
| 12 | Aruba Airlines |  2,072  | 2.1% |  1,941  | 2.0% | 6.7% |
| 13 | WestJet |  1,096  | 1.1% |  1,020  | 1.0% | 7.5% |
| 14 | Air Canada |  1,570  | 1.6% |  594  | 0.6% | 164.3% |
| 15 | ArkeFly |  1,325  | 1.4% |  1,382  | 1.4% | -4.1% |
| 16 | Aserca |  1,122  | 1.2% |  1,596  | 1.6% | -29.7% |
| 17 | Surinam Airways |  713  | 0.7% |  590  | 0.6% | 20.8% |
| 18 | Thomas Cook |  -  | 0.0% |  -  | 0.0% | #DIV/0! |
| 19 | Spirit Airlines |  485  | 0.5% |  514  | 0.5% | -5.6% |
| 20 | Pawa |  362  | 0.4% |  69  | 0.1% | 424.6% |
| 21 | Avior |  562  | 0.6% |  2,232  | 2.3% | -74.8% |
| 22 | Venezolana |  -  | 0.0% |  393  | 0.4% | -100.0% |
| 23 | GOL |  -  | 0.0% |  -  | 0.0% | 0.0% |
| 24 | Private |  2,019  | 2.1% |  873  | 0.9% | 131.3% |
|  | Charter |  1,812  | 1.9% |  1,472  | 1.5% | 23.1% |
|  | Other |  2,640  | 2.7% |  1,887  | 1.9% | 39.9% |
|  | TOTAL |  96,915  | 100.0% |  98,823  | 100.0% | -1.9% |
|  | Source: ATA |  |  |  |  |  |

|  |  |
| --- | --- |
|  | **Stopovers: By Airline: April 2017 YTD** |
|  | (Non-resident stopover Arrivals) |  |  |  |  |
|  |  | 2017 YTD | % share | 2016 YTD | % share | % change |
| 1 | JetBlue |  74,136  | 20.6% |  51,145  | 12.5% | 45.0% |
| 2 | American Airlines |  53,827  | 14.9% |  56,986  | 13.9% | -5.5% |
| 3 | United Airlines |  54,387  | 15.1% |  49,309  | 12.1% | 10.3% |
| 4 | Delta Air Lines |  40,601  | 11.3% |  36,060  | 8.8% | 12.6% |
| 5 | Southwest |  26,114  | 7.2% |  28,815  | 7.0% | -9.4% |
| 6 | Copa |  11,843  | 3.3% |  9,170  | 2.2% | 29.1% |
| 7 | Insel Air |  10,808  | 3.0% |  16,937  | 4.1% | -36.2% |
| 8 | KLM |  10,328  | 2.9% |  7,647  | 1.9% | 35.1% |
| 9 | Avianca |  8,170  | 2.3% |  9,133  | 2.2% | -10.5% |
| 10 | Sunwing |  8,254  | 2.3% |  7,986  | 2.0% | 3.4% |
| 11 | Laser |  6,115  | 1.7% |  57,367  | 14.0% | -89.3% |
| 12 | Aruba Airlines |  7,539  | 2.1% |  9,838  | 2.4% | -23.4% |
| 13 | WestJet |  3,928  | 1.1% |  4,710  | 1.2% | -16.6% |
| 14 | Air Canada |  6,157  | 1.7% |  3,557  | 0.9% | 73.1% |
| 15 | ArkeFly |  4,441  | 1.2% |  4,740  | 1.2% | -6.3% |
| 16 | Aserca |  3,492  | 1.0% |  8,067  | 2.0% | -56.7% |
| 17 | Surinam Airways |  2,449  | 0.7% |  2,384  | 0.6% | 2.7% |
| 18 | Thomas Cook |  1,544  | 0.4% |  1,877  | 0.5% | -17.7% |
| 19 | Spirit Airlines |  1,444  | 0.4% |  1,708  | 0.4% | -15.5% |
| 20 | Pawa |  1,364  | 0.4% |  318  | 0.1% | 328.9% |
| 21 | Avior |  955  | 0.3% |  12,562  | 3.1% | -92.4% |
| 22 | Venezolana |  -  | 0.0% |  3,359  | 0.8% | -100.0% |
| 23 | GOL |  -  | 0.0% |  984  | 0.2% | -100.0% |
| 24 | Private |  5,802  | 1.6% |  4,482  | 1.1% | 29.5% |
|  | Charter |  7,362  | 2.0% |  13,460  | 3.3% | -45.3% |
|  | Other |  9,420  | 2.6% |  6,477  | 1.6% | 45.4% |
|  | TOTAL |  360,480  | 100.0% |  409,078  | 100.0% | -11.9% |
|  | Source: ATA |  |  |  |  |  |

**Carriers Used by Venezuelans.**

|  |
| --- |
| **Venezuelan Stopovers: By Airline: April 2017** |
| (Non-resident stopover Arrivals) |  |  |  |  |  |
|  | Apr 2017 | % share | Apr 2016 | % share | % change |
| **US Carriers** |  |  |  |  |  |
| American Airlines |  257  | 3.3% |  177  | 0.8% | 45.2% |
| Delta Air Lines |  31  | 0.4% |  13  | 0.1% | 138.5% |
| United Airlines |  64  | 0.8% |  24  | 0.1% | 166.7% |
| Southwest |  19  | 0.2% |  24  | 0.1% | 100.0% |
| JetBlue |  70  | 0.9% |  13  | 0.1% | 438.5% |
| Spirit Airlines |  10  | 0.1% |  1  | 0.0% | 900.0% |
| Total US Carriers |  451  | 5.8% |  252  | 1.2% | 79.0% |
|  |  |  |  |  |  |
| **Canada** |  |  |  |  |  |
| Air Canada |  27  | 0.3% |  2  | 0.0% | 1250.0% |
| WestJet |  16  | 0.2% |  11  | 0.1% | 45.5% |
| Total Canada |  43  | 0.5% |  13  | 0.1% | 230.8% |
|  |  |  |  |  |  |
| **Europe** |  |  |  |  |  |
| KLM |  55  | 0.7% |  13  | 0.1% | 323.1% |
| Arke Fly |  6  | 0.1% |  9  | 0.0% | 100.0% |
| Total Europe |  61  | 0.8% |  22  | 0.1% | 177.3% |
|  |  |  |  |  |  |
| **Other Non-Venezuelan** |  |  |  |  |  |
| Copa |  39  | 0.5% |  28  | 0.1% | 39.3% |
| Surinam Airlines |  14  | 0.2% |  10  | 0.0% | 40.0% |
| Total Other Non Venez |  53  | 0.7% |  38  | 0.2% | 39.5% |
|  |  |  |  |  |  |
| **Total (Non-Aruba/Non-Venezuelan)** |  608  | 7.8% |  325  | 1.5% | 87.1% |
|  |  |  |  |  |  |
| Other (Aruban/Venezuelan) |  7,212  | 92.2% |  21,323  | 98.5% | -66.2% |
| **Total** |  7,820  | 100.0% |  21,648  | 100.0% | -63.9% |
| Source: ATA |  |  |  |  |  |

A portion of Venezuelan business to Aruba in April 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 451 residents of Venezuela (5.8% 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 79.0% compared to April 2016. In total 608 residents of Venezuela (7.8% of all Venezuelans visiting Aruba) arrived in Aruba by a scheduled carrier other than one based in Venezuela or Aruba.

|  |
| --- |
| **Venezuelan Stopovers: By Airline: April 2017** |
| (Non-resident stopover Arrivals) |  |  |  |
|  | Inbound to Aruba by Carrier Used |
| **Carriers** | Total | Venezuelans | % |
| **US Carriers** |  |  |  |
| American Airlines |  15,169  |  257  | 1.7% |
| Delta Air Lines |  9,537  |  31  | 0.3% |
| United Airlines |  15,141  |  64  | 0.4% |
| Southwest |  7,187  |  19  | 0.3% |
| JetBlue |  19,428  |  70  | 0.4% |
| Spirit Airlines |  485  |  10  | 2.1% |
| Total US Carriers |  66,947  |  451  | 0.7% |
|  |  |  |  |
| **Canada** |  |  |  |
| Air Canada |  1,570  |  27  | 1.7% |
| WestJet |  1,096  |  16  | 1.5% |
| Total Canada |  2,666  |  43  | 1.6% |
|  |  |  |  |
| **Europe** |  |  |  |
| KLM |  2,694  |  55  | 2.0% |
| Arke Fly |  1,325  |  6  | 0.5% |
| Total Europe |  4,019  |  61  | 1.5% |
|  |  |  |  |
| **Other Non-Venezuelan** |  |  |  |
| Copa |  3,018  |  39  | 1.3% |
| Surinam Airlines |  713  |  14  | 2.0% |
| Total Other Non Venez |  3,731  |  53  | 1.4% |
|  |  |  |  |
| **Total (Non-Aruba/Non-Venezuelan)** |  77,363  |  608  | 0.8% |
|  |  |  |  |
| Other (Aruban/Venezuelan) |  19,552  |  7,212  | 36.9% |
| **Total** |  96,915  |  7,820  | 8.1% |
| 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 1.7% of all non-residents arriving in Aruba on American Airlines in April 2017 were residents of Venezuela and 0.3% of all non-residents arriving in Aruba on Delta Air Lines in April 2017 were residents of Venezuela.

**Venezuelans arriving on American Airlines.**

In April 2017 1.7% 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% |  |
|  |  | Apr | 1.7% |  |

**Age of Visitors.**

The biggest changes in age demographics in April 2017 came in the 12 – 19 years old category (up 58.2%). The number of visitors 70 years old and older grew by 11.2%.

|  |
| --- |
| **Age of All Stopover Visitors April 2017** |
|  |  |  |  |  |  |
|  | 2017 | % share | 2016 | % share | % change |
| 0 - 11 yrs |  9,204  | 9.5% |  8,550  | 8.7% | 7.6% |
| 12 - 19 yrs |  8,203  | 8.5% |  5,185  | 5.2% | 58.2% |
| 20 - 29 yrs |  9,469  | 9.8% |  11,669  | 11.8% | -18.9% |
| 30 - 39 yrs |  14,393  | 14.9% |  17,986  | 18.2% | -20.0% |
| 40 - 49 yrs |  18,162  | 18.7% |  17,963  | 18.2% | 1.1% |
| 50 - 59 yrs |  18,981  | 19.6% |  19,183  | 19.4% | -1.1% |
| 60 - 69 yrs |  12,952  | 13.4% |  13,290  | 13.4% | -2.5% |
| 70 yrs or more |  5,551  | 5.7% |  4,992  | 5.1% | 11.2% |
| Not Stated |  -  | 0.0% |  5  | 0.0% | -100.0% |
| Total |  96,915  | 100.0% |  98,823  | 100.0% | -1.9% |
| Source: ATA |  |  |  |  |  |

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| --- |
| **Age of All Stopover Visitors April 2017 YTD** |
|  |  |  |  |  |  |
|  | 2017 | % share | 2016 | % share | % change |
| 0 - 11 yrs |  27,244  | 7.6% |  36,566  | 8.9% | -25.5% |
| 12 - 19 yrs |  22,770  | 6.3% |  23,752  | 5.8% | -4.1% |
| 20 - 29 yrs |  38,899  | 10.8% |  51,611  | 12.6% | -24.6% |
| 30 - 39 yrs |  51,127  | 14.2% |  70,247  | 17.2% | -27.2% |
| 40 - 49 yrs |  61,017  | 16.9% |  69,485  | 17.0% | -12.2% |
| 50 - 59 yrs |  75,279  | 20.9% |  77,428  | 18.9% | -2.8% |
| 60 - 69 yrs |  57,382  | 15.9% |  56,102  | 13.7% | 2.3% |
| 70 yrs or more |  26,754  | 7.4% |  23,877  | 5.8% | 12.0% |
| Not Stated |  8  | 0.0% |  10  | 0.0% | -20.0% |
| Total |  360,480  | 100.0% |  409,078  | 100.0% | -11.9% |
| Source: ATA |  |  |  |  |  |

**Age of Visitors from the USA.**

The biggest changes in age demographics in April 2017 for visitors from the USA came in the 0 – 11 years and 12 - 19 years old category (up by 41.9% and 68.9% respectively) possibly due to Easter falling in mid-April 2017. There was growth in the number of visitors from the USA 40 – 49 years old (up 16.0%) and 70 years old and older (up 13.0%).

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| **Age of All US Stopover Visitors April 2017** |
|  |  |  |  |  |  |
|  | 2017 | % share | 2016 | % share | % change |
| 0 - 11 yrs |  6,141  | 9.3% |  4,327  | 7.4% | 41.9% |
| 12 - 19 yrs |  6,089  | 9.2% |  3,606  | 6.2% | 68.9% |
| 20 - 29 yrs |  5,224  | 7.9% |  4,829  | 8.3% | 8.2% |
| 30 - 39 yrs |  8,447  | 12.8% |  8,072  | 13.8% | 4.6% |
| 40 - 49 yrs |  12,657  | 19.1% |  10,910  | 18.7% | 16.0% |
| 50 - 59 yrs |  13,703  | 20.7% |  13,133  | 22.5% | 4.3% |
| 60 - 69 yrs |  9,693  | 14.7% |  9,898  | 16.9% | -2.1% |
| 70 yrs or more |  4,156  | 6.3% |  3,678  | 6.3% | 13.0% |
| Not Stated |  -  | 0.0% |  5  | 0.0% | -100.0% |
| Total |  66,110  | 100.0% |  58,458  | 100.0% | 13.1% |
| Source: ATA |  |  |  |  |  |
|  |  |  |  |  |  |
| **Age of All US Stopover Visitors April YTD 2017** |
|  |  |  |  |  |  |
|  | 2017 | % share | 2016 | % share | % change |
| 0 - 11 yrs |  17,094  | 7.0% |  16,516  | 7.4% | 3.5% |
| 12 - 19 yrs |  16,085  | 6.6% |  14,803  | 6.6% | 8.7% |
| 20 - 29 yrs |  22,439  | 9.2% |  19,698  | 8.8% | 13.9% |
| 30 - 39 yrs |  29,188  | 12.0% |  27,328  | 12.3% | 6.8% |
| 40 - 49 yrs |  40,245  | 16.5% |  37,740  | 16.9% | 6.6% |
| 50 - 59 yrs |  53,731  | 22.1% |  49,306  | 22.1% | 9.0% |
| 60 - 69 yrs |  43,656  | 17.9% |  39,811  | 17.9% | 9.7% |
| 70 yrs or more |  20,844  | 8.6% |  17,815  | 8.0% | 17.0% |
| Not Stated |  7  | 0.0% |  9  | 0.0% | -22.2% |
| Total |  243,289  | 100.0% |  223,026  | 100.0% | 9.1% |
| Source: ATA |  |  |  |  |  |

**First Time/Repeat Visitors.**

In April 2017 46.4% of our visitors reported they were visiting for the first time and 41.0% reported they had visited before. 12.6% 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 53.2% first time and 46.8% repeat.

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| **Number of visits to Aruba: April 2017** |
|  |  |  |  |  |  |
| Number of Times Visited | 2017 | % share | 2016 | % share | % change |
| First Time |  44,981  | 46.4% |  42,504  | 43.0% | 5.8% |
| 2 - 5 times |  22,888  | 23.6% |  26,624  | 26.9% | -14.0% |
| 6 - 9 times |  6,474  | 6.7% |  6,429  | 6.5% | 0.7% |
| 10 or more |  10,328  | 10.7% |  9,619  | 9.7% | 7.4% |
| Not Stated |  12,244  | 12.6% |  13,647  | 13.8% | -10.3% |
| Total |  96,915  | 100.0% |  98,823  | 100.0% | -1.9% |
| Source: ATA: Self-reported by visitors |  |  |  |  |
|  |  |  |  |  |  |
| **Number of visits to Aruba: April 2017 YTD** |
|  |  |  |  |  |  |
| Number of Times Visited | 2017 | % share | 2016 | % share | % change |
| First Time |  154,616  | 42.9% |  162,015  | 39.6% | -4.6% |
| 2 - 5 times |  85,824  | 23.8% |  111,809  | 27.3% | -23.2% |
| 6 - 9 times |  25,922  | 7.2% |  27,587  | 6.7% | -6.0% |
| 10 or more |  44,662  | 12.4% |  44,688  | 10.9% | -0.1% |
| Not Stated |  49,456  | 13.7% |  62,979  | 15.4% | -21.5% |
| Total |  360,480  | 100.0% |  409,078  | 100.0% | -11.9% |
| Source: ATA: Self-reported by visitors |  |  |  |  |

Year to date 2017 42.9% of our visitors reported they were visiting for the first time and 43.4% reported they had visited before. 13.7% 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 49.7% first time and 50.3% 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 April 2017. The ratings are out of 5.

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| **TripAdvisor Ratings for April 2017** |
|  | Number of Reviews |
| Aruba | 6,032 |  |
| Bahamas | 4,598 |  |
| Cayman Islands | 3,188 |  |
| Curacao | 2,703 |  |
| Puerto Rico | 10,479 |  |
| USVI | 4,796 |  |
|  |  |  |
|  | Average Rating |
| Cayman | 4.50 |  |
| USVI | 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.**

|  |  |  |  |
| --- | --- | --- | --- |
|  | April 2017 | April 2016 |  |
| as of | 4/15/2017 | 4/15/2017 | % change |
| Euro | $1.062 | $1.129 | -5.9% |
| UK Pound | $1.253 | $1.421 | -11.8% |
| Canadian Dollar | $0.751 | $0.778 | -3.5% |
| Colombian Peso\* | 2868 | 2998 | 4.5% |
| Brazilian Real\*\* | 3.145 | 3.538 | 12.5% |
| \* 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.