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

**June 2017 and Year to Date 2017.**

**Summary Highlights.**

* The total number of stopovers visiting Aruba declined by 1.2% in June 2017 compared with June 2016. The number of stopover visitors was 85,288 in June 2017 and 86,697 in June 2016.
* In the first six months of 2017 the number of stopover visitors decreased by 8.7% from 576,739 in 2016 to 526,743 in 2017.
* Traffic from the USA was up by 6.2%, from 54,520 stopovers in June 2016 to 57,903 stopovers in June 2017. Traffic was up by 7.5% from Pennsylvania, up by 5.6% from Massachusetts, up 0.9% from New Jersey but down 1.4% from New York State. Arrivals from Florida showed a 28.6% increase linked to the new daily JetBlue service from Fort Lauderdale which was introduced in January 2017.
* In the first six months of 2017 the number of stopover visitors from the USA increased by 8.7% from 328,050 in 2016 to 356,779 in 2017.
* Traffic from Venezuela was down by 44.9% in June from 12,052 stopovers in June 2016 to 6,635 in June 2017.
* In the first six months of 2017 the number of stopover visitors from Venezuela fell by 69.2%, from 122,347 in 2016 to 37,624 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 fell by 0.8% in June, from 612,519 in June 2016 to 607,906 in June 2017. The overall average length of stay grew by 0.9% from 7.07 nights in June 2016 to 7.13 nights in June 2017.
* The total number of visitor nights declined by 3.0% in the first six months of 2017, from 4,023,249 in 2016 to 3,903,849 in 2017. The overall average length of stay grew by 6.2% from 6.98 nights in 2016 to 7.41 nights in 2017.
* In the first five months of 2017 The Dominican Republic saw a 7.9% increase in stopover traffic, while the U.S. Virgin Islands saw a 3.8% increase in air arrivals in the same period. Jamaica saw a 2.3% increase in stopovers in the first four months of 2017.
* 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 May grew by 153%, from 20,462 in June 2016 to 51,756 in June 2017. At the time of writing the June numbers are not yet available.
* In the first five months of 2017 the number of cruise visitors grew by 12.8% from 350,885 in 2016 to 395,900 in 2017.
* As reported by Immigration card data the number of stopover visitors staying in hotels in June 2017 fell by 1.4%, and staying in timeshare resorts grew by 3.2%. The number staying in “other accommodation” fell by 9.0%. This latter category comprised 17.9% of all visitors in June 2017, down from 19.3% in June 2016.
* In the first six months of 2017 the number of visitors staying in hotels grew by 4.8% compared with the same six months of 2016, the number staying in timeshare resorts grew by 2.3% and the number staying in other accommodation fell by 38.1%.
* In June 2017 hotels saw a 0.7% growth in the overall number of visitor nights compared with June 2016. The USA generated 5.6% more hotel nights in June 2017 than in June 2016. In the first six months of 2017 the USA has generated an 8.5% increase in the number of hotel nights.
* The number of nights spent by visitors staying in apartments or guesthouses grew by 6.2% in June, from 20,253 nights in June 2016 to 21,499 nights in June 2017. The number of nights spent by visitors staying in private homes fell by 9.5% from 132,442 in June 2016 to 119,808 in June 2017.
* In the first six months of 2017 the number of nights spent by visitors staying in apartments or guesthouses grew by 8.6% from 151,321 nights in 2016 to 164,380 nights in 2017. The number of nights spent in private homes fell by 21.9% in the first six months, from 1,057,054 in 2016 to 825,807 nights in 2017.
* The number of Venezuelan stopovers using “other accommodation” fell by 39.1% in June 2017 and comprised 57.8% of all Venezuelan visitors in June 2017 up from 52.3% in June 2016. The number of Venezuelans staying in hotel accommodation in June 2017 fell by 52.3% compared with June 2016.
* Numbers provided to AHATA show that for a sample of 14 hotels average room occupancy grew by 2.2 percentage points in June from 76.5% in June 2016 to 78.7% in June 2017. The average daily room rate grew by 5.5% to $196.06 and the average RevPar grew by 8.5% to $154.36.
* In the first six months of 2017 average room occupancy grew by 5.6 percentage points to 84.2%. The average daily room rate grew by 3.3% to $259.01 and the average RevPar grew by 10.7% to $218.14.
* Performance of the hotels by category for June 2017 shows that the brand name beach front hotels saw their average room occupancies grow by 4.2 percentage points to 76.5%, with their RevPar also growing by 15.3% to $216.53 The all-inclusive resorts saw their average room occupancies increase by 1.7 percentage points to 88.3% and their RevPar grow by 8.2% to $127.73 The smaller independent beach front hotels saw their average room occupancy fall by 16.8 percentage points to 66.9% and their RevPar fall by 28.3% to $170.96 consequent upon one hotel in this category closing rooms for renovation. The non-beach front hotels saw their average room occupancies improve by 4.1 percentage points to 66.7% and saw their RevPar grow by 7.1% to $94.71.
* In the first five 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.
* American Airlines was the number one carrier in June 2017 and brought in 14,652 non-resident visitors up 4.2% compared with June 2016. JetBlue was the number two carrier (13,904 non-residents) and United Airlines brought in 11,165 non-residents.
* In the first six months of 2017 JetBlue brought in 47.5% more non-resident passengers than in the same period of 2016, growing from 70,080 visitors to 103,399. The additional 33,319 passengers accounted for 94% of the overall increase in non-resident passengers carried by the six main US airlines in the first six months of 2017.
* Of the 6,635 Venezuelans who visited Aruba in June 2017 4.9% (325) arrived in Aruba on a US scheduled carrier. In total 450 Venezuelans (6.8% 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.
* 1.3% of non-residents carried to Aruba by American Airlines in June 2017 were residents of Venezuela. 0.2% of non-residents carried to Aruba by Delta Air Lines in June were residents of Venezuela. For most other non-Venezuelan, non-Aruban carriers it was generally less than 2%.
* There was a 14.4% increase in June of the number of visitors 70 years old or older but a decline in all age categories 0 – 59 years old.
* The number of visitors from the USA 70 years old and older (up 19.9%) and between 0 – 11 years old (up 14.9%) grew substantially in June.
* In May 2017 47.8% of our visitors reported they were visiting for the first time and 38.8% reported they had visited before. At the time of writing the June numbers are not yet available. 13.4% of our visitors did not report how many times they visited. Assigning the number who did not report on a *pro rata* basis results in an overall percentage of 55% first time and 45% repeat. In the first five months of 2017 the *pro rata* numbers are 51% first time and 49% repeat.
* Trip Advisor ratings for June 2017 show that Aruba received a total of 4,909 reviews and achieved an average rating of 4.50 out of 5. The Cayman Islands achieved an average rating of 4.60 with the USVI achieving a 4.50 rating and Puerto Rico 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 2.8 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 3.6%.
* 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 – June 2017**

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| **Aruba: Total Visitors June 2017** |
|  |  |  |  |  |  |
|  | 2017 | % | 2016 | % | % change |
| USA |  57,903  | 67.9% |  54,520  | 62.9% | 6.2% |
| Canada |  1,724  | 2.0% |  1,570  | 1.8% | 9.8% |
| Venezuela |  6,635  | 7.8% |  12,052  | 13.9% | -44.9% |
| Brazil |  1,080  | 1.3% |  933  | 1.1% | 15.8% |
| Colombia |  4,030  | 4.7% |  3,663  | 4.2% | 10.0% |
| Argentina |  1,776  | 2.1% |  1,362  | 1.6% | 30.4% |
| Chile |  909  | 1.1% |  1,077  | 1.2% | -15.6% |
| Netherlands |  2,331  | 2.7% |  2,550  | 2.9% | -8.6% |
| Germany |  405  | 0.5% |  286  | 0.3% | 41.6% |
| Italy |  488  | 0.6% |  563  | 0.6% | -13.3% |
| UK |  2,472  | 2.9% |  2,423  | 2.8% | 2.0% |
| Sweden |  157  | 0.2% |  126  | 0.1% | 24.6% |
| Other |  5,378  | 6.3% |  5,572  | 6.4% | -3.5% |
| Total |  85,288  | 100.0% |  86,697  | 100.0% | -1.6% |
| Source: ATA |  |  |  |  |  |

Total stopover arrivals (persons staying 24 hours or more) for June 2017 showed a 1.6% decline compared with June 2016.

Traffic from the USA was up by 6.2%, was up by 9.8% from Canada, down 44.9% from Venezuela, up 10.0% from Colombia, up 30.4% from Argentina and was up 15.8% from Brazil. Arrivals were down 8.6% from The Netherlands.

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| **Aruba: Total Visitors June 2017 YTD** |
|  |  |  |  |  |  |
|  | 2017 | % | 2016 | % | % change |
| USA |  356,579  | 67.7% |  328,050  | 56.9% | 8.7% |
| Canada |  26,281  | 5.0% |  23,733  | 4.1% | 10.7% |
| Venezuela |  37,624  | 7.1% |  122,347  | 21.2% | -69.2% |
| Brazil |  5,406  | 1.0% |  5,863  | 1.0% | -7.8% |
| Colombia |  15,433  | 2.9% |  13,038  | 2.3% | 18.4% |
| Argentina |  15,097  | 2.9% |  9,539  | 1.7% | 58.3% |
| Chile |  5,277  | 1.0% |  5,779  | 1.0% | -8.7% |
| Netherlands |  17,883  | 3.4% |  16,912  | 2.9% | 5.7% |
| Germany |  2,707  | 0.5% |  1,957  | 0.3% | 38.3% |
| Italy |  1,953  | 0.4% |  2,075  | 0.4% | -5.9% |
| UK |  7,596  | 1.4% |  7,001  | 1.2% | 8.5% |
| Sweden |  2,754  | 0.5% |  2,995  | 0.5% | -8.0% |
| Other |  32,153  | 6.1% |  37,450  | 6.5% | -14.1% |
| Total |  526,743  | 100.0% |  576,739  | 100.0% | -8.7% |
| 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% |
| May |  80,975  |  80,964  | 0.0% |
| Jun |  85,288  |  86,697  | -1.6% |
| YTD |  526,743  |  576,739  | -8.7% |
| 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: June 2017** |
|  |  |  |  |  |  |
|  | 2017 | % | 2016 | % | % change |
| New York |  8,158  | 14.1% |  8,272  | 15.2% | -1.4% |
| Massachusetts |  4,727  | 8.2% |  4,478  | 8.2% | 5.6% |
| New Jersey |  6,635  | 11.5% |  6,575  | 12.1% | 0.9% |
| Pennsylvania |  4,036  | 7.0% |  3,755  | 6.9% | 7.5% |
| Illinois |  1,825  | 3.2% |  1,626  | 3.0% | 12.2% |
| Florida |  4,927  | 8.5% |  3,832  | 7.0% | 28.6% |
| Connecticut |  1,720  | 3.0% |  1,593  | 2.9% | 8.0% |
| Maryland |  2,521  | 4.4% |  2,377  | 4.4% | 6.1% |
| Ohio |  2,189  | 3.8% |  1,881  | 3.5% | 16.4% |
| Michigan |  735  | 1.3% |  681  | 1.2% | 7.9% |
| Virginia |  1,566  | 2.7% |  1,588  | 2.9% | -1.4% |
| Texas |  3,469  | 6.0% |  3,628  | 6.7% | -4.4% |
| California |  2,036  | 3.5% |  1,710  | 3.1% | 19.1% |
| Other |  13,359  | 23.1% |  12,524  | 23.0% | 6.7% |
| Total |  57,903  | 100.0% |  54,520  | 100.0% | 6.2% |
| Source: ATA |  |  |  |  |  |

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| **Aruba: Total Visitors: US States: June 2017 YTD** |
|  |  |  |  |  |  |
|  | 2017 | % | 2016 | % | % change |
| New York |  68,115  | 19.1% |  64,843  | 19.8% | 5.0% |
| Massachusetts |  46,620  | 13.1% |  40,164  | 12.2% | 16.1% |
| New Jersey |  39,608  | 11.1% |  38,627  | 11.8% | 2.5% |
| Pennsylvania |  21,235  | 6.0% |  19,199  | 5.9% | 10.6% |
| Illinois |  12,128  | 3.4% |  11,303  | 3.4% | 7.3% |
| Florida |  21,252  | 6.0% |  16,459  | 5.0% | 29.1% |
| Connecticut |  12,627  | 3.5% |  12,784  | 3.9% | -1.2% |
| Maryland |  12,174  | 3.4% |  11,650  | 3.6% | 4.5% |
| Ohio |  11,031  | 3.1% |  9,862  | 3.0% | 11.9% |
| Michigan |  8,923  | 2.5% |  8,465  | 2.6% | 5.4% |
| Virginia |  8,787  | 2.5% |  8,484  | 2.6% | 3.6% |
| Texas |  10,197  | 2.9% |  10,466  | 3.2% | -2.6% |
| California |  7,414  | 2.1% |  6,839  | 2.1% | 8.4% |
| Other |  76,468  | 21.4% |  68,905  | 21.0% | 11.0% |
| Total |  356,579  | 100.0% |  328,050  | 100.0% | 8.7% |
| Source: ATA |  |  |  |  |  |

**USA Stopover Arrivals by Month 2017**

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| USA | 2017 | 2016 | % change |
| Jan |  55,383  |  51,096  | 8.4% |
| Feb |  56,849  |  52,632  | 8.0% |
| Mar |  64,947  |  60,840  | 6.8% |
| Apr |  66,110  |  58,458  | 13.1% |
| May |  55,387  |  50,504  | 9.7% |
| Jun |  57,903  |  54,520  | 6.2% |
| YTD |  356,579  |  328,050  | 8.7% |
| Source: ATA |  |  |

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

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| **Aruba: Total Nights June 2017** |
|  |  |  |  |  |  |
|  | 2017 | % | 2016 | % | % change |
| USA |  384,964  | 63.3% |  362,671  | 59.2% | 6.1% |
| Canada |  13,274  | 2.2% |  11,878  | 1.9% | 11.8% |
| Venezuela |  42,369  | 7.0% |  68,186  | 11.1% | -37.9% |
| Brazil |  7,231  | 1.2% |  5,740  | 0.9% | 26.0% |
| Colombia |  30,153  | 5.0% |  34,386  | 5.6% | -12.3% |
| Argentina |  15,822  | 2.6% |  11,514  | 1.9% | 37.4% |
| Chile |  6,730  | 1.1% |  8,002  | 1.3% | -15.9% |
| Netherlands |  30,802  | 5.1% |  31,541  | 5.1% | -2.3% |
| Germany |  3,643  | 0.6% |  3,069  | 0.5% | 18.7% |
| Italy |  3,804  | 0.6% |  3,996  | 0.7% | -4.8% |
| UK |  28,822  | 4.7% |  29,285  | 4.8% | -1.6% |
| Sweden |  1,745  | 0.3% |  1,498  | 0.2% | 16.5% |
| Other |  38,547  | 6.3% |  40,753  | 6.7% | -5.4% |
| Total |  607,906  | 100.0% |  612,519  | 100.0% | -0.8% |
| Source: ATA |  |  |  |  |  |

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| **Aruba: Average Length of Stay in Nights: June 2017** |
|  |  |  |  |  |  |
|  | 2017 |  | 2016 |  | % change |
| USA |  6.65  |  |  6.65  |  | -0.1% |
| Canada |  7.70  |  |  7.57  |  | 1.8% |
| Venezuela |  6.39  |  |  5.66  |  | 12.9% |
| Brazil |  6.70  |  |  6.15  |  | 8.8% |
| Colombia |  7.48  |  |  9.39  |  | -20.3% |
| Argentina |  8.91  |  |  8.45  |  | 5.4% |
| Chile |  7.40  |  |  7.43  |  | -0.4% |
| Netherlands |  13.21  |  |  12.37  |  | 6.8% |
| Germany |  9.00  |  |  10.73  |  | -16.2% |
| Italy |  7.80  |  |  7.10  |  | 9.8% |
| UK |  11.66  |  |  12.09  |  | -3.5% |
| Sweden |  11.11  |  |  11.89  |  | -6.5% |
| Other |  7.17  |  |  7.31  |  | -2.0% |
| Total |  7.13  |  |  7.07  |  | 0.9% |
| Source: ATA |  |  |  |  |  |

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| **Aruba: Total Nights June 2017 YTD** |
|  |  |  |  |  |  |
|  | 2017 | % | 2016 | % | % change |
| USA |  2,490,474  | 63.8% |  2,330,724  | 57.9% | 6.9% |
| Canada |  230,885  | 5.9% |  207,196  | 5.1% | 11.4% |
| Venezuela |  230,076  | 5.9% |  547,779  | 13.6% | -58.0% |
| Brazil |  35,495  | 0.9% |  36,682  | 0.9% | -3.2% |
| Colombia |  116,439  | 3.0% |  128,285  | 3.2% | -9.2% |
| Argentina |  138,284  | 3.5% |  84,474  | 2.1% | 63.7% |
| Chile |  41,471  | 1.1% |  44,546  | 1.1% | -6.9% |
| Netherlands |  225,169  | 5.8% |  210,927  | 5.2% | 6.8% |
| Germany |  24,196  | 0.6% |  18,979  | 0.5% | 27.5% |
| Italy |  16,472  | 0.4% |  16,342  | 0.4% | 0.8% |
| UK |  85,968  | 2.2% |  80,273  | 2.0% | 7.1% |
| Sweden |  32,786  | 0.8% |  37,271  | 0.9% | -12.0% |
| Other |  236,134  | 6.0% |  279,771  | 7.0% | -15.6% |
| Total |  3,903,849  | 100.0% |  4,023,249  | 100.0% | -3.0% |
| Source: ATA |  |  |  |  |  |

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| **Aruba: Average Length of Stay in Nights: June 2017 YTD** |
|  |  |  |  |  |  |
|  | 2017 |  | 2016 |  | % change |
| USA |  6.98  |  |  7.10  |  | -1.7% |
| Canada |  8.79  |  |  8.73  |  | 0.6% |
| Venezuela |  6.12  |  |  4.48  |  | 36.6% |
| Brazil |  6.57  |  |  6.26  |  | 4.9% |
| Colombia |  7.54  |  |  9.84  |  | -23.3% |
| Argentina |  9.16  |  |  8.86  |  | 3.4% |
| Chile |  7.86  |  |  7.71  |  | 2.0% |
| Netherlands |  12.59  |  |  12.47  |  | 1.0% |
| Germany |  8.94  |  |  9.70  |  | -7.8% |
| Italy |  8.43  |  |  7.88  |  | 7.1% |
| UK |  11.32  |  |  11.47  |  | -1.3% |
| Sweden |  11.90  |  |  12.44  |  | -4.3% |
| Other |  7.34  |  |  7.47  |  | -1.7% |
| Total |  7.41  |  |  6.98  |  | 6.2% |
| 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 |  121,025  |  127,324  | -4.9% | Jan-May |
| Aruba |  526,743  |  576,739  | -8.7% | Jan-Jun |
| Bahamas | NA | NA | NA | NA |
| Barbados |  301,727  |  278,365  | 8.4% | Jan-May |
| Belize |  230,151  |  213,498  | 7.8% | Jan-Jun |
| British Virgin Islands |  171,148  |  171,148  | 0.0% | Jan-Apr |
| Cayman Islands |  150,164  |  147,342  | 1.9% | Jan-Apr |
| Cuba |  2,688,446  |  2,147,919  | 25.2% | Jan-Jun |
| Curacao |  173,469  |  196,005  | -11.5% | Jan-May |
| Dominican Republic |  2,401,634  |  2,225,700  | 7.9% | Jan-May |
| Jamaica |  790,965  |  773,182  | 2.3% | Jan-Apr |
| Puerto Rico\* |  291,848  |  338,964  | -13.9% | Jan-Feb |
| Saint Lucia |  134,800  |  127,531  | 5.7% | Jan-Apr |
| Turks & Caicos Islands |  136,839  |  137,527  | -0.5% | Jan-Mar |
| US Virgin Islands |  382,102  |  368,205  | 3.8% | Jan-May |
| \* 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.

|  |  |
| --- | --- |
|  | **Total US Stopover Visitors** |
|  | 2017 | 2016 | % change | Period |
| Antigua |  49,048  |  53,446  | -8.2% | Jan-May |
| Aruba |  356,579  |  328,050  | 8.7% | Jan-Jun |
| Bahamas | NA | NA | NA | NA |
| Barbados |  82,357  |  69,165  | 19.1% | Jan-May |
| Belize |  125,915  |  120,840  | 4.2% | Jan-May |
| British Virgin Islands | NA | NA | NA | NA |
| Cayman Islands |  121,786  |  116,755  | 4.3% | Jan-Apr |
| Cuba | NA | NA | NA | NA |
| Curacao |  26,332  |  26,698  | -1.4% | Jan-May |
| Dominican Republic |  904,601  |  881,706  | 2.6% | Jan-May |
| Jamaica |  475,472  |  471,571  | 0.8% | Jan-Apr |
| Puerto Rico\* | NA | NA | NA | NA |
| Saint Lucia |  58,365  |  56,775  | 2.8% | Jan-Apr |
| Turks & Caicos Islands |  109,145  |  109,036  | 0.1% | Jan-Mar |
| US Virgin Islands | NA | NA | NA | NA |
| \* Hotel Non-Resident Registrations |  |  |  |
| Source CTO |  |  |  |  |

|  |
| --- |
| 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% |
| June |  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% |
| June |  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% |
| June | 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% |
| May | 19 |  51,756  | 8 |  20,462  | 137.5% | 152.9% |
| YTD | 170 |  395,900  | 172 |  350,885  | -1.2% | 12.8% |
| Source: Aruba Port Authority. |  |  |  |  |

In May 2017 Aruba saw a 153% increase in the number of cruise passengers compared with May 2016. Year to date (through May) the volume of cruise traffic has grown by 12.8% compared with the same period for 2016.

At the time of writing the figures for June cruise visitor arrivals and the number of cruise ship calls are not yet available

In May 2016 Aruba received:

* 4 Pullmantur calls
* 1 Carnival call
* 1 Royal Caribbean International call
* 1 Princess call
* 1 other call

In May 2017 Aruba received:

* 6 Carnival calls
* 4 Royal Caribbean International calls
* 3 Pullmantur calls
* 2 Celebrity calls
* 1 Princess call
* 1 Holland America call

Thus, the difference between May 2016 and May 2017 was five more Carnival calls, three more RCI ships plus new calls by Celebrity and Holland America.

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

|  |  |
| --- | --- |
|  | **Total Cruise Visitors** |
|  | 2017 | 2016 | % change | Period |
| Antigua |  404,397  |  367,714  | 10.0% | Jan-Apr |
| Aruba |  395,900  |  350,855  | 12.8% | Jan-May |
| Bahamas | NA | NA | NA | NA |
| Barbados |  398,851  |  320,455  | 24.5% | Jan-May |
| Belize |  524,209  |  488,877  | 7.2% | Jan-May |
| British Virgin Islands |  327,920  |  349,067  | -6.1% | Jan-Apr |
| Cayman Islands |  695,922  |  754,891  | -7.8% | Jan-Apr |
| Cozumel |  1,861,289  |  1,677,508  | 11.0% | Jan-May |
| Curacao |  281,769  |  247,154  | 14.0% | Jan-May |
| Dominican Republic |  584,347  |  430,112  | 35.9% | Jan-May |
| Jamaica |  774,519  |  745,214  | 3.9% | Jan-Apr |
| Puerto Rico |  681,915  |  620,913  | 9.8% | Jan-May |
| Saint Lucia |  376,060  |  281,371  | 33.7% | Jan-Apr |
| St. Maarten |  775,389  |  671,288  | 15.5% | Jan-Mar |
| Turks & Caicos Islands |  409,493  |  374,051  | 9.5% | Jan-May |
| US Virgin Islands |  801,168  |  947,521  | -15.4% | Jan-May |
| sub total |  9,293,148  |  8,626,991  | 7.7% |  |
| Source CTO |  |  |  |  |

**Place of Stay**

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

|  |  |
| --- | --- |
|  | Place of Stay: Visitors 2017 |
|  | June 2017 | June 2016 |  |
|  | Visitors | % | Visitors | % | % change |
| Hotels | 46,079 | 54.0% | 46,720 | 53.9% | -1.4% |
| Timeshare | 23,964 | 28.1% | 23,232 | 26.8% | 3.2% |
| Apts/Priv Homes | 15,245 | 17.9% | 16,745 | 19.3% | -9.0% |
| Total | 85,288 | 100.0% | 86,697 | 100.0% | -1.6% |
| Source: ATA |  |  |  |  |  |

The hotels category includes High Rise hotels, Low Rise hotels and the Tropicana. As shown above in June 2017 the number of visitors staying in hotel accommodation decreased by 1.4%, those staying in a timeshare resort increased by 3.2% and those staying in apartments, guest houses or private homes declined by 9.0%.

|  |  |
| --- | --- |
|  | Place of Stay: Visitor Nights 2017 |
|  | June 2017 | June 2016 |  |
|  | Nights | % | Nights | % | % change |
| Hotels | 283,895 | 46.7% | 281,909 | 46.0% | 0.7% |
| Timeshare | 182,704 | 30.1% | 177,711 | 29.0% | 2.8% |
| Apts/Priv Homes | 141,307 | 23.2% | 152,899 | 25.0% | -7.6% |
| Total | 607,906 | 100.0% | 612,519 | 100.0% | -0.8% |
| Source: ATA |  |  |  |  |  |
|  |  |  |  |  |  |
|  | Average Length of Stay in Nights 2017 |
|  | June 2017 | June 2016 |  |
|  | Nights |  | Nights |  | % change |
| Hotels | 6.16 |  | 6.03 |  | 2.1% |
| Timeshare | 7.62 |  | 7.65 |  | -0.3% |
| Apts/Priv Homes | 9.27 |  | 9.13 |  | 1.5% |
| Total | 7.13 |  | 7.07 |  | 0.9% |
| Source: ATA |  |  |  |  |  |

|  |  |
| --- | --- |
|  | Visitors 2017 |
|  | June 2017 YTD | June 2016 YTD |  |
|  | Visitors | % | Visitors | % | % change |
| Hotels | 284,650 | 54.0% | 271,556 | 47.1% | 4.8% |
| Timeshare | 134,547 | 25.6% | 131,520 | 22.8% | 2.3% |
| Apts/Priv Homes | 107,546 | 20.4% | 173,663 | 30.1% | -38.1% |
| Total | 526,743 | 100.0% | 576,739 | 100.0% | -8.7% |
| Source: ATA |  |  |  |  |  |
|  |  |  |  |  |  |
|  | Visitor Nights 2017 |
|  | June 2017 YTD | June 2016 YTD |  |
|  | Nights | % | Nights | % | % change |
| Hotels | 1,775,467 | 45.5% | 1,692,616 | 42.1% | 4.9% |
| Timeshare | 1,137,952 | 29.1% | 1,116,737 | 27.8% | 1.9% |
| Apts/Priv Homes | 990,430 | 25.4% | 1,213,896 | 30.2% | -18.4% |
| Total | 3,903,849 | 100.0% | 4,023,249 | 100.0% | -3.0% |
| Source: ATA |  |  |  |  |  |
|  |  |  |  |  |  |
|  | Average Length of Stay in Nights 2017 |
|  | June 2017 YTD | June 2016 YTD |  |
|  | Nights |  | Nights |  | % change |
| Hotels | 6.24 |  | 6.23 |  | 0.1% |
| Timeshare | 8.46 |  | 8.49 |  | -0.4% |
| Apts/Priv Homes | 9.21 |  | 6.99 |  | 31.8% |
| Total | 7.41 |  | 6.98 |  | 6.2% |
| Source: ATA |  |  |  |  |  |

**Hotel Nights by Market.**

The following numbers are from the ATA data base and are 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 (up 8.5%) and accounted for 65.7% of all hotel nights in June 2017 and 68.4% for the first six months of 2017.

|  |
| --- |
| **Aruba: Total Hotel Nights June 2017** |
|  |  |  |  |  |  |
|  | 2017 | % | 2016 | % | % change |
| USA |  186,497  | 65.7% |  176,540  | 62.6% | 5.6% |
| Canada |  7,981  | 2.8% |  8,333  | 3.0% | -4.2% |
| Venezuela |  9,190  | 3.2% |  17,610  | 6.2% | -47.8% |
| Brazil |  5,390  | 1.9% |  4,113  | 1.5% | 31.0% |
| Colombia |  9,090  | 3.2% |  8,380  | 3.0% | 8.5% |
| Argentina |  12,349  | 4.3% |  9,623  | 3.4% | 28.3% |
| Netherlands |  5,721  | 2.0% |  7,333  | 2.6% | -22.0% |
| Germany |  1,765  | 0.6% |  1,344  | 0.5% | 31.3% |
| Italy |  2,401  | 0.8% |  3,064  | 1.1% | -21.6% |
| UK |  23,477  | 8.3% |  25,129  | 8.9% | -6.6% |
| Other |  20,034  | 7.1% |  20,440  | 7.3% | -2.0% |
| Total |  283,895  | 100.0% |  281,909  | 100.0% | 0.7% |
| Source: ATA |  |  |  |  |  |

|  |
| --- |
| **Aruba: Total Hotel Nights June YTD 2017** |
|  |  |  |  |  |  |
|  | 2017 | % | 2016 | % | % change |
| USA |  1,215,027  | 68.4% |  1,120,053  | 66.2% | 8.5% |
| Canada |  115,024  | 6.5% |  112,989  | 6.7% | 1.8% |
| Venezuela |  50,776  | 2.9% |  79,808  | 4.7% | -36.4% |
| Brazil |  25,813  | 1.5% |  26,813  | 1.6% | -3.7% |
| Colombia |  34,211  | 1.9% |  27,690  | 1.6% | 23.6% |
| Argentina |  93,651  | 5.3% |  64,510  | 3.8% | 45.2% |
| Netherlands |  37,598  | 2.1% |  39,731  | 2.3% | -5.4% |
| Germany |  9,245  | 0.5% |  8,328  | 0.5% | 11.0% |
| Italy |  7,264  | 0.4% |  8,059  | 0.5% | -9.9% |
| UK |  64,656  | 3.6% |  65,116  | 3.8% | -0.7% |
| Other |  122,202  | 6.9% |  139,519  | 8.2% | -12.4% |
| Total |  1,775,467  | 100.0% |  1,692,616  | 100.0% | 4.9% |
| Source: ATA |  |  |  |  |  |

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

**June 2017**

|  |  |  |  |
| --- | --- | --- | --- |
| **June 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 |  4,809  | 22.4% |  33,704  | 28.1% |  3,780  | 18.7% |  29,004  | 21.9% | 27.2% | 16.2% |
| Canada |  426  | 2.0% |  2,866  | 2.4% |  201  | 1.0% |  1,967  | 1.5% | 111.9% | 45.7% |
| Venezuela |  2,375  | 11.0% |  26,787  | 22.4% |  2,357  | 11.6% |  42,081  | 31.8% | 0.8% | -36.3% |
| Brazil |  176  | 0.8% |  706  | 0.6% |  217  | 1.1% |  646  | 0.5% | -18.9% | 9.3% |
| Colombia |  685  | 3.2% |  13,466  | 11.2% |  467  | 2.3% |  17,586  | 13.3% | 46.7% | -23.4% |
| Argentina |  283  | 1.3% |  1,368  | 1.1% |  199  | 1.0% |  556  | 0.4% | 42.2% | 146.0% |
| Netherlands |  4,619  | 21.5% |  19,379  | 16.2% |  2,630  | 13.0% |  20,289  | 15.3% | 75.6% | -4.5% |
| Germany |  344  | 1.6% |  1,355  | 1.1% |  219  | 1.1% |  1,260  | 1.0% | 57.1% | 7.5% |
| U.K. |  312  | 1.5% |  916  | 0.8% |  66  | 0.3% |  553  | 0.4% | 372.7% | 65.6% |
| Italy |  1,913  | 8.9% |  1,234  | 1.0% |  799  | 3.9% |  1,867  | 1.4% | 139.4% | -33.9% |
| Other |  5,557  | 25.8% |  18,027  | 15.0% |  9,318  | 46.0% |  16,633  | 12.6% | -40.4% | 8.4% |
| Total |  21,499  | 100.0% |  119,808  | 100.0% |  20,253  | 100.0% |  132,442  | 100.0% | 6.2% | -9.5% |
| Source: ATA |  |  |  |  |  |  |  |  |  |  |

**Year to Date.**

|  |  |  |  |
| --- | --- | --- | --- |
| **June 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 |  40,101  | 24.4% |  227,721  | 24.4% |  28,407  | 18.8% |  204,459  | 19.3% | 41.2% | 11.4% |
| Canada |  7,845  | 4.8% |  61,367  | 4.8% |  4,042  | 2.7% |  48,257  | 4.6% | 94.1% | 27.2% |
| Venezuela |  11,998  | 7.3% |  148,264  | 7.3% |  24,458  | 16.2% |  412,028  | 39.0% | -50.9% | -64.0% |
| Brazil |  1,482  | 0.9% |  5,622  | 0.9% |  1,653  | 1.1% |  6,238  | 0.6% | -10.3% | -9.9% |
| Colombia |  3,474  | 2.1% |  66,772  | 2.1% |  2,084  | 1.4% |  86,212  | 8.2% | 66.7% | -22.5% |
| Argentina |  6,685  | 4.1% |  26,444  | 4.1% |  1,807  | 1.2% |  10,781  | 1.0% | 270.0% | 145.3% |
| Netherlands |  35,418  | 21.5% |  145,285  | 21.5% |  20,384  | 13.5% |  143,210  | 13.5% | 73.8% | 1.4% |
| Germany |  3,546  | 2.2% |  10,300  | 2.2% |  1,314  | 0.9% |  8,256  | 0.8% | 169.9% | 24.8% |
| U.K. |  4,422  | 2.7% |  7,555  | 2.7% |  1,422  | 0.9% |  5,995  | 0.6% | 211.0% | 26.0% |
| Italy |  2,815  | 1.7% |  6,741  | 1.7% |  1,455  | 1.0% |  7,496  | 0.7% | 93.5% | -10.1% |
| Other |  46,594  | 28.3% |  119,736  | 28.3% |  64,295  | 42.5% |  124,122  | 11.7% | -27.5% | -3.5% |
| Total |  164,380  | 100.0% |  825,807  | 100.0% |  151,321  | 100.0% |  1,057,054  | 100.0% | 8.6% | -21.9% |
| Source: ATA |  |  |  |  |  |  |  |  |  |  |

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

The number of visitors from Venezuela using hotel accommodation in June fell by 52.3%. The number of visitors using private homes/apartments and condominiums fell by 39.1% and comprised 57.8% of all Venezuelan visitors in June 2017, up from 52.3% in June 2016.

|  |  |
| --- | --- |
|  | Visitors from Venezuela 2017 |
|  | June 2017 | June 2016 |  |
|  | Visitors | % | Visitors | % | % change |
| Hotels | 2,225 | 33.5% | 4,668 | 38.7% | -52.3% |
| Timeshare | 577 | 8.7% | 1,085 | 9.0% | -46.8% |
| Apts/Priv Homes | 3,833 | 57.8% | 6,299 | 52.3% | -39.1% |
| Total | 6,635 | 100.0% | 12,052 | 100.0% | -44.9% |
| Source: ATA |  |  |  |  |  |
|  |  |  |  |  |  |
|  | Visitor Nights from Venezuela 2017 |
|  | June 2017 | June 2016 |  |
|  | Nights | % | Nights | % | % change |
| Hotels | 9,190 | 21.7% | 17,610 | 25.8% | -47.8% |
| Timeshare | 4,017 | 9.5% | 5,970 | 8.8% | -32.7% |
| Apts/Priv Homes | 29,162 | 68.8% | 44,606 | 65.4% | -34.6% |
| Total | 42,369 | 100.0% | 68,186 | 100.0% | -37.9% |
| Source: ATA |  |  |  |  |  |
|  |  |  |  |  |  |
|  | Average Length of Stay Venezuela 2017 |
|  | June 2017 | June 2016 |  |
|  | Nights |  | Nights |  | % change |
| Hotels | 4.13 | nts | 3.77 | nts | 9.5% |
| Timeshare | 6.96 | nts | 5.50 | nts | 26.5% |
| Apts/Priv Homes | 7.61 | nts | 7.08 | nts | 7.4% |
| Total | 6.39 | nts | 5.66 | nts | 12.9% |
| Source: ATA |  |  |  |  |  |

**Year to Date.**

|  |  |
| --- | --- |
|  | Visitors from Venezuela 2017 |
|  | June 2017 YTD | June 2016 YTD |  |
|  | Visitors | % | Visitors | % | % change |
| Hotels | 12,247 | 32.6% | 19,518 | 16.0% | -37.3% |
| Timeshare | 3,170 | 8.4% | 4,609 | 3.8% | -31.2% |
| Apts/Priv Homes | 22,207 | 59.0% | 98,220 | 80.2% | -77.4% |
| Total | 37,624 | 100.0% | 122,347 | 100.0% | -69.2% |
| Source: ATA |  |  |  |  |  |
|  |  |  |  |  |  |
|  | Visitor Nights from Venezuela 2017 |
|  | June 2017 YTD | June 2016 YTD |  |
|  | Nights | % | Nights | % | % change |
| Hotels | 50,776 | 22.1% | 79,808 | 14.6% | -36.4% |
| Timeshare | 18,860 | 8.2% | 26,358 | 4.8% | -28.4% |
| Apts/Priv Homes | 160,440 | 69.7% | 441,613 | 80.6% | -63.7% |
| Total | 230,076 | 100.0% | 547,779 | 100.0% | -58.0% |
| Source: ATA |  |  |  |  |  |
|  |  |  |  |  |  |
|  | Average Length of Stay Venezuela 2017 |
|  | June 2017 YTD | June 2016 YTD |  |
|  | Nights |  | Nights |  | % change |
| Hotels | 4.15 | nts | 4.09 | nts | 1.4% |
| Timeshare | 5.95 | nts | 5.72 | nts | 4.0% |
| Apts/Priv Homes | 7.22 | nts | 4.50 | nts | 60.7% |
| Total | 6.12 | nts | 4.48 | nts | 36.6% |
| Source: ATA |  |  |  |  |  |

**Hotel Performance Aruba 2017**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  | 2017/2016 |  |
| **June 2017** | 2017 | 2016 | % change |  |
| Rooms |  4,673  |  4,600  | 1.6% |  |
| ARN |  140,190  |  138,014  | 1.6% |  |
| ORN |  110,371  |  105,630  | 4.5% |  |
| % occupancy | 78.7% | 76.5% | 2.2% | points |
| ADR | $196.06 | $185.90 | 5.5% |  |
| Rev Par | $154.36 | $142.28 | 8.5% |  |
| ***Based on data from 14 properties.*** |  |  |  |

Total transient hotel room inventory for Aruba in June 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 June 2017, the hotel sector saw a 2.2 percentage point increase in average room occupancy, from 76.5% to 78.7%, and a 5.5% increase in the average daily room rate (ADR) from $185.90 to $196.06. With a higher average room occupancy and higher ADR revenue per available room (RevPar) grew by 8.5% compared with June 2016.

**Year to Date**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  | 2017/2016 |  |
| **June 2017 YTD** | 2017 | 2016 | % change |  |
| Rooms |  4,660  |  4,579  | 1.8% |  |
| ARN |  837,571  |  828,987  | 1.0% |  |
| ORN |  705,414  |  651,897  | 8.2% |  |
| % occupancy | 84.2% | 78.6% | 5.6% | points |
| ADR | $259.01 | $250.67 | 3.3% |  |
| Rev Par | $218.14 | $197.12 | 10.7% |  |
| ***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% |
| Apr | 86.1% | 79.3% | 6.8% | $251.94  | $215.46  | 16.9% | $217.02  | $170.96  | 26.9% |
| May | 83.5% | 75.8% | 7.7% | $195.95  | $188.54  | 3.9% | $163.68  | $142.98  | 14.5% |
| Jun | 78.7% | 76.5% | 2.2% | $196.06  | $185.90  | 5.5% | $154.36  | $142.28  | 8.5% |
| YTD | 84.2% | 78.6% | 5.6% | $259.01  | $250.67  | 3.3% | $218.14  | $197.12  | 10.7% |

**Performance by Category – June 2017.**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  | 2017 |  |  |  |
|  | Rooms | ARN | ORN | %opy | Revenue | $ADR | $RevPar |
| Brand Name Beach Front |  1,678  |  50,340  |  38,491  | 76.5% | $10,900,264.00 | $283.19 | $216.53 |
| All Inclusives |  1,844  |  55,320  |  48,848  | 88.3% | $7,066,165.00 | $144.66 | $127.73 |
| Small Independent Beach Front |  176  |  5,280  |  3,530  | 66.9% | $902,661.00 | $255.71 | $170.96 |
| Non-Beach Front |  975  |  29,250  |  19,502  | 66.7% | $2,770,316.00 | $142.05 | $94.71 |
| Total |  4,673  |  140,190  |  110,371  | 78.7% | $21,639,406.00 | $196.06 | $154.36 |
|  |  |  |  |  |  |  |  |
|  |  |  |  | 2016 |  |  |  |
|  | Rooms | ARN | ORN | %opy | Revenue | $ADR | $RevPar |
| Brand Name Beach Front |  1,678  |  50,340  |  36,385  | 72.3% | $9,456,346.00 | $259.90 | $187.85 |
| All Inclusives |  1,841  |  55,230  |  47,828  | 86.6% | $6,520,492.00 | $136.33 | $118.06 |
| Small Independent Beach Front |  176  |  5,280  |  4,417  | 83.7% | $1,258,115.00 | $284.83 | $238.28 |
| Non-Beach Front |  905  |  27,164  |  17,000  | 62.6% | $2,402,155.00 | $141.30 | $88.43 |
| Total |  4,600  |  138,014  |  105,630  | 76.5% | $19,637,108.00 | $185.90 | $142.28 |
|  |  |  |  |  |  |  |  |
|  |  |  |  | Percentage Change |  |  |
|  | Rooms | ARN | ORN | % pt change | Revenue | $ADR | $RevPar |
| Brand Name Beach Front | 0.0% | 0.0% | 5.8% | 4.2% | 15.3% | 9.0% | 15.3% |
| All Inclusives | 0.2% | 0.2% | 2.1% | 1.7% | 8.4% | 6.1% | 8.2% |
| Small Independent Beach Front | 0.0% | 0.0% | -20.1% | -16.8% | -28.3% | -10.2% | -28.3% |
| Non-Beach Front | 7.7% | 7.7% | 14.7% | 4.1% | 15.3% | 0.5% | 7.1% |
| Total | 1.6% | 1.6% | 4.5% | 2.2% | 10.2% | 5.5% | 8.5% |

**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.**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **June YTD** |  |  |  | 2017 |  |  |  |
|  | Rooms | ARN | ORN | %opy | Revenue | $ADR | $RevPar |
| Brand Name Beach Front |  1,678  |  303,718  |  255,271  | 84.0% | $99,037,875.00 | $387.97 | $326.08 |
| All Inclusives |  1,844  |  333,388  |  299,579  | 89.9% | $50,906,458.00 | $169.93 | $152.69 |
| Small Independent Beach Front |  176  |  31,856  |  26,985  | 84.7% | $10,206,254.00 | $378.22 | $320.39 |
| Non-Beach Front |  904  |  168,609  |  123,685  | 73.4% | $22,574,454.00 | $182.52 | $133.89 |
| Total |  4,602  |  837,571  |  705,414  | 84.2% | $182,725,041.00 | $259.01 | $218.14 |
|  |  |  |  |  |  |  |  |
|  |  |  |  | 2016 |  |  |  |
|  | Rooms | ARN | ORN | %opy | Revenue | $ADR | $RevPar |
| Brand Name Beach Front |  1,679  |  305,645  |  238,452  | 78.0% | $88,974,802.00 | $373.14 | $291.11 |
| All Inclusives |  1,841  |  332,812  |  279,827  | 84.1% | $45,811,216.00 | $163.71 | $137.65 |
| Small Independent Beach Front |  176  |  32,032  |  28,781  | 89.9% | $10,028,692.00 | $348.45 | $313.08 |
| Non-Beach Front |  851  |  158,498  |  104,886  | 66.2% | $18,601,153.00 | $177.35 | $117.36 |
| Total |  4,547  |  828,987  |  651,897  | 78.6% | $163,415,863.00 | $250.67 | $197.12 |
|  |  |  |  |  |  |  |  |
|  |  |  |  | Percentage Change |  |  |
|  | Rooms | ARN | ORN | % pt change | Revenue | $ADR | $RevPar |
| Brand Name Beach Front | -0.1% | -0.6% | 7.1% | 6.0% | 11.3% | 4.0% | 12.0% |
| All Inclusives | 0.2% | 0.2% | 7.1% | 5.8% | 11.1% | 3.8% | 10.9% |
| Small Independent Beach Front | 0.0% | -0.5% | -6.2% | -5.1% | 1.8% | 8.5% | 2.3% |
| Non-Beach Front | 6.2% | 6.4% | 17.9% | 7.2% | 21.4% | 2.9% | 14.1% |
| Total | 1.2% | 1.0% | 8.2% | 5.6% | 11.8% | 3.3% | 10.7% |

**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 May 2017 compared with May 2016.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **May 2017** | Average Room Occupancy | Average Daily Rate | RevPar | #Hotels in |
|  | 2017 | 2016 | % pt change | 2017 | 2016 | % change | 2017 | 2016 | % change | Sample |
| Aruba | 83.5% | 75.8% | 7.7% | $195.95 | $188.54 | 3.9% | $163.68 | $142.98 | 14.5% | 14 |
| Barbados | 69.1% | 67.0% | 2.1% | $200.66 | $202.49 | -0.9% | $138.73 | $135.62 | 2.3% | 36 |
| Cancun | 75.9% | 68.4% | 7.5% | $186.33 | $183.47 | 1.6% | $141.46 | $125.57 | 12.7% | 62 |
| Cayman Islands | 63.3% | 69.1% | -5.8% | $310.69 | $276.38 | 12.4% | $196.57 | $191.06 | 2.9% | 8 |
| Curacao | 59.5% | 55.6% | 3.9% | $132.49 | $126.78 | 4.5% | $78.88 | $70.52 | 11.9% | 14 |
| Dominican Republic | 72.8% | 66.8% | 6.0% | $121.34 | $112.92 | 7.5% | $88.34 | $75.40 | 17.2% | 31 |
| Jamaica | 69.1% | 64.3% | 4.8% | $189.59 | $191.74 | -1.1% | $131.03 | $123.20 | 6.4% | 10 |
| Puerto Rico | 66.4% | 66.6% | -0.2% | $161.63 | $161.85 | -0.1% | $107.37 | $107.77 | -0.4% | 47 |
| USVI | 80.3% | 80.6% | -0.3% | $309.14 | $284.87 | 8.5% | $248.37 | $229.63 | 8.2% | 6 |
| Caribbean | 65.1% | 64.1% | 1.0% | $178.15 | $175.44 | 1.5% | $115.89 | $112.43 | 3.1% | 272 |
|  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |
| **May YTD 2017** | Average Room Occupancy | Average Daily Rate | RevPar | #Hotels in |
|  | 2017 | 2016 | % pt change | 2017 | 2016 | % change | 2017 | 2016 | % change | Sample |
| Aruba | 85.3% | 79.1% | 6.2% | $270.69 | $263.19 | 2.8% | $230.96 | $208.07 | 11.0% | 14 |
| Barbados | 73.9% | 72.9% | 1.0% | $331.10 | $332.69 | -0.5% | $244.66 | $242.41 | 0.9% | 36 |
| Cancun | 77.9% | 73.5% | 4.4% | $223.13 | $223.30 | -0.1% | $173.71 | $164.18 | 5.8% | 62 |
| Cayman Islands | 69.8% | 76.0% | -6.2% | $429.37 | $421.83 | 1.8% | $299.73 | $320.76 | -6.6% | 8 |
| Curacao | 72.9% | 69.7% | 3.2% | $152.19 | $151.44 | 0.5% | $110.93 | $105.55 | 5.1% | 14 |
| Dominican Republic | 78.4% | 75.5% | 2.9% | $147.83 | $147.05 | 0.5% | $115.86 | $111.09 | 4.3% | 31 |
| Jamaica | 77.2% | 71.6% | 5.6% | $260.61 | $263.46 | -1.1% | $201.06 | $188.51 | 6.7% | 10 |
| Puerto Rico | 70.8% | 74.4% | -3.6% | $197.95 | $209.65 | -5.6% | $140.11 | $156.03 | -10.2% | 47 |
| USVI | 83.0% | 82.9% | 0.1% | $428.39 | $401.15 | 6.8% | $355.46 | $332.62 | 6.9% | 6 |
| Caribbean | 71.6% | 71.7% | -0.1% | $227.63 | $228.09 | -0.2% | $163.05 | $163.63 | -0.4% | 272 |
| Source: STR. |  |  |  |  |  |  |  |  |  |  |

**Visitors by Carrier.**

The table below shows the number of non-resident visitors brought in by various airline carriers during June 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: June 2017** |
|  | (Non-resident stopover Arrivals) |  |  |  |  |
|  |  | 2017 | % share | 2016 | % share | % change |
| 1 | JetBlue |  13,904  | 16.3% |  9,657  | 11.1% | 44.0% |
| 2 | American Airlines |  14,652  | 17.2% |  14,068  | 16.2% | 4.2% |
| 3 | United Airlines |  11,165  | 13.1% |  12,150  | 14.0% | -8.1% |
| 4 | Delta Air Lines |  10,326  | 12.1% |  9,903  | 11.4% | 4.3% |
| 5 | Southwest |  7,623  | 8.9% |  8,580  | 9.9% | -11.2% |
| 6 | Copa |  2,899  | 3.4% |  3,247  | 3.7% | -10.7% |
| 7 | Insel Air |  2,513  | 2.9% |  3,745  | 4.3% | -32.9% |
| 8 | KLM |  2,210  | 2.6% |  2,005  | 2.3% | 10.2% |
| 9 | Avianca |  2,415  | 2.8% |  2,812  | 3.2% | -14.1% |
| 10 | Sunwing |  698  | 0.8% |  636  | 0.7% | 9.7% |
| 11 | Laser |  2,287  | 2.7% |  6,700  | 7.7% | -65.9% |
| 12 | Aruba Airlines |  2,795  | 3.3% |  1,619  | 1.9% | 72.6% |
| 13 | WestJet |  332  | 0.4% |  57  | 0.1% | 482.5% |
| 14 | Air Canada |  512  | 0.6% |  355  | 0.4% | 44.2% |
| 15 | ArkeFly |  766  | 0.9% |  1,042  | 1.2% | -26.5% |
| 16 | Aserca |  1,028  | 1.2% |  1,167  | 1.3% | -11.9% |
| 17 | Surinam Airways |  456  | 0.5% |  764  | 0.9% | -40.3% |
| 18 | Thomas Cook |  -  | 0.0% |  -  | 0.0% | 0.0% |
| 19 | Spirit Airlines |  566  | 0.7% |  569  | 0.7% | -0.5% |
| 20 | Pawa |  465  | 0.5% |  104  | 0.1% | 347.1% |
| 21 | Avior |  590  | 0.7% |  1,175  | 1.4% | -49.8% |
| 22 | Venezolana |  -  | 0.0% |  337  | 0.4% | -100.0% |
| 23 | GOL |  -  | 0.0% |  -  | 0.0% | 0.0% |
| 24 | Private |  734  | 0.9% |  863  | 1.0% | -14.9% |
|  | Charter |  2,439  | 2.9% |  839  | 1.0% | 190.7% |
|  | Other |  3,913  | 4.6% |  4,303  | 5.0% | -9.1% |
|  | TOTAL |  85,288  | 100.0% |  86,697  | 100.0% | -1.6% |
|  | Source: ATA |  |  |  |  |  |

|  |  |
| --- | --- |
|  | **Stopovers: By Airline: June 2017 YTD** |
|  | (Non-resident stopover Arrivals) |  |  |  |  |
|  |  | 2017 YTD | % share | 2016 YTD | % share | % change |
| 1 | JetBlue |  103,399  | 19.6% |  70,080  | 12.2% | 47.5% |
| 2 | American Airlines |  82,751  | 15.7% |  83,917  | 14.6% | -1.4% |
| 3 | United Airlines |  75,953  | 14.4% |  72,521  | 12.6% | 4.7% |
| 4 | Delta Air Lines |  60,732  | 11.5% |  55,204  | 9.6% | 10.0% |
| 5 | Southwest |  39,553  | 7.5% |  45,038  | 7.8% | -12.2% |
| 6 | Copa |  17,148  | 3.3% |  14,468  | 2.5% | 18.5% |
| 7 | Insel Air |  15,654  | 3.0% |  24,698  | 4.3% | -36.6% |
| 8 | KLM |  14,954  | 2.8% |  11,456  | 2.0% | 30.5% |
| 9 | Avianca |  13,692  | 2.6% |  14,646  | 2.5% | -6.5% |
| 10 | Sunwing |  9,785  | 1.9% |  9,305  | 1.6% | 5.2% |
| 11 | Laser |  9,623  | 1.8% |  70,936  | 12.3% | -86.4% |
| 12 | Aruba Airlines |  11,651  | 2.2% |  12,614  | 2.2% | -7.6% |
| 13 | WestJet |  4,673  | 0.9% |  5,063  | 0.9% | -7.7% |
| 14 | Air Canada |  7,506  | 1.4% |  4,511  | 0.8% | 66.4% |
| 15 | ArkeFly |  6,154  | 1.2% |  6,879  | 1.2% | -10.5% |
| 16 | Aserca |  5,449  | 1.0% |  9,969  | 1.7% | -45.3% |
| 17 | Surinam Airways |  3,587  | 0.7% |  3,836  | 0.7% | -6.5% |
| 18 | Thomas Cook |  1,544  | 0.3% |  1,877  | 0.3% | -17.7% |
| 19 | Spirit Airlines |  2,458  | 0.5% |  2,775  | 0.5% | -11.4% |
| 20 | Pawa |  2,135  | 0.4% |  522  | 0.1% | 309.0% |
| 21 | Avior |  2,003  | 0.4% |  14,982  | 2.6% | -86.6% |
| 22 | Venezolana |  -  | 0.0% |  3,834  | 0.7% | -100.0% |
| 23 | GOL |  -  | 0.0% |  984  | 0.2% | -100.0% |
| 24 | Private |  7,245  | 1.4% |  6,036  | 1.0% | 20.0% |
|  | Charter |  11,671  | 2.2% |  15,167  | 2.6% | -23.1% |
|  | Other |  17,423  | 3.3% |  15,421  | 2.7% | 13.0% |
|  | TOTAL |  526,743  | 100.0% |  576,739  | 100.0% | -8.7% |
|  | Source: ATA |  |  |  |  |  |

**Carriers Used by Venezuelans.**

|  |
| --- |
| **Venezuelan Stopovers: By Airline: June 2017** |
| (Non-resident stopover Arrivals) |  |  |  |  |  |
|  | June 2017 | % share | June 2016 | % share | % change |
| **US Carriers** |  |  |  |  |  |
| American Airlines |  188  | 2.8% |  160  | 1.3% | 17.5% |
| Delta Air Lines |  22  | 0.3% |  23  | 0.2% | -4.3% |
| United Airlines |  42  | 0.6% |  40  | 0.3% | 5.0% |
| Southwest |  26  | 0.4% |  87  | 0.7% | -70.1% |
| JetBlue |  44  | 0.7% |  15  | 0.1% | 193.3% |
| Spirit Airlines |  3  | 0.0% |  7  | 0.1% | -57.1% |
| Total US Carriers |  325  | 4.9% |  332  | 2.8% | -2.1% |
|  |  |  |  |  |  |
| **Canada** |  |  |  |  |  |
| Air Canada |  21  | 0.3% |  4  | 0.0% | 425.0% |
| WestJet |  12  | 0.2% |  1  | 0.0% | 1100.0% |
| Total Canada |  33  | 0.5% |  5  | 0.0% | 560.0% |
|  |  |  |  |  |  |
| **Europe** |  |  |  |  |  |
| KLM |  28  | 0.4% |  47  | 0.4% | -40.4% |
| Arke Fly |  8  | 0.1% |  6  | 0.0% | 100.0% |
| Total Europe |  36  | 0.5% |  53  | 0.4% | -32.1% |
|  |  |  |  |  |  |
| **Other Non-Venezuelan** |  |  |  |  |  |
| Copa |  34  | 0.5% |  24  | 0.2% | 41.7% |
| Surinam Airlines |  22  | 0.3% |  24  | 0.2% | -8.3% |
| Total Other Non Venez |  56  | 0.8% |  48  | 0.4% | 16.7% |
|  |  |  |  |  |  |
| **Total (Non-Aruba/Non-Venezuelan)** |  450  | 6.8% |  438  | 3.6% | 2.7% |
|  |  |  |  |  |  |
| Other (Aruban/Venezuelan) |  6,185  | 93.2% |  11,614  | 96.4% | -46.7% |
| **Total** |  6,635  | 100.0% |  12,052  | 100.0% | -44.9% |
| Source: ATA |  |  |  |  |  |

A portion of Venezuelan business to Aruba in June 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 325 residents of Venezuela (4.9% 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 2.1% compared to June 2016. In total 450 residents of Venezuela (6.8% of all Venezuelans visiting Aruba) arrived in Aruba by a scheduled carrier other than one based in Venezuela or Aruba.

|  |
| --- |
| **Venezuelan Stopovers: By Airline: June 2017** |
| (Non-resident stopover Arrivals) |  |  |  |
|  | Inbound to Aruba by Carrier Used |
| **Carriers** | Total | Venezuelans | % |
| **US Carriers** |  |  |  |
| American Airlines |  14,652  |  188  | 1.3% |
| Delta Air Lines |  10,326  |  22  | 0.2% |
| United Airlines |  11,165  |  42  | 0.4% |
| Southwest |  7,623  |  26  | 0.3% |
| JetBlue |  13,904  |  28  | 0.2% |
| Spirit Airlines |  566  |  3  | 0.5% |
| Total US Carriers |  58,236  |  309  | 0.5% |
|  |  |  |  |
| **Canada** |  |  |  |
| Air Canada |  512  |  21  | 4.1% |
| WestJet |  332  |  12  | 3.6% |
| Total Canada |  844  |  33  | 3.9% |
|  |  |  |  |
| **Europe** |  |  |  |
| KLM |  2,210  |  28  | 1.3% |
| Arke Fly |  766  |  8  | 1.0% |
| Total Europe |  2,976  |  36  | 1.2% |
|  |  |  |  |
| **Other Non-Venezuelan** |  |  |  |
| Copa |  2,899  |  34  | 1.2% |
| Surinam Airlines |  456  |  22  | 4.8% |
| Total Other Non Venez |  3,355  |  56  | 1.7% |
|  |  |  |  |
| **Total (Non-Aruba/Non-Venezuelan)** |  65,411  |  434  | 0.7% |
|  |  |  |  |
| Other (Aruban/Venezuelan) |  19,877  |  6,201  | 31.2% |
| **Total** |  85,288  |  6,635  | 7.8% |
| 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 1.3% of all non-residents arriving in Aruba on American Airlines in June 2017 were residents of Venezuela and 0.2% of all non-residents arriving in Aruba on Delta Air Lines in June 2017 were residents of Venezuela.

**Venezuelans arriving on American Airlines.**

In June 2017 1.3% 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% |  |
|  |  | May | 1.0% |  |
|  |  | Jun | 1.3% |  |

**Age of Visitors.**

The biggest changes in age demographics in June 2017 came in the 70 years old and older category (up 14.4%). The number of visitors between 0 and 59 years old all showed declines.

|  |
| --- |
| **Age of All Stopover Visitors June 2017** |
|  |  |  |  |  |  |
|  | 2017 | % share | 2016 | % share | % change |
| 0 - 11 yrs |  6,647  | 7.8% |  6,697  | 7.7% | -0.7% |
| 12 - 19 yrs |  7,556  | 8.9% |  7,597  | 8.8% | -0.5% |
| 20 - 29 yrs |  12,310  | 14.4% |  13,240  | 15.3% | -7.0% |
| 30 - 39 yrs |  14,284  | 16.7% |  14,957  | 17.3% | -4.5% |
| 40 - 49 yrs |  15,473  | 18.1% |  15,945  | 18.4% | -3.0% |
| 50 - 59 yrs |  15,244  | 17.9% |  15,466  | 17.8% | -1.4% |
| 60 - 69 yrs |  9,457  | 11.1% |  9,026  | 10.4% | 4.8% |
| 70 yrs or more |  4,307  | 5.0% |  3,766  | 4.3% | 14.4% |
| Not Stated |  10  | 0.0% |  3  | 0.0% | 233.3% |
| Total |  85,288  | 100.0% |  86,697  | 100.0% | -1.6% |
| Source: ATA |  |  |  |  |  |

|  |
| --- |
| **Age of All Stopover Visitors June 2017 YTD** |
|  |  |  |  |  |  |
|  | 2017 | % share | 2016 | % share | % change |
| 0 - 11 yrs |  37,597  | 7.1% |  47,323  | 8.2% | -20.6% |
| 12 - 19 yrs |  32,784  | 6.2% |  33,837  | 5.9% | -3.1% |
| 20 - 29 yrs |  63,048  | 12.0% |  76,787  | 13.3% | -17.9% |
| 30 - 39 yrs |  79,645  | 15.1% |  99,777  | 17.3% | -20.2% |
| 40 - 49 yrs |  90,697  | 17.2% |  100,063  | 17.3% | -9.4% |
| 50 - 59 yrs |  108,056  | 20.5% |  109,850  | 19.0% | -1.6% |
| 60 - 69 yrs |  78,870  | 15.0% |  76,967  | 13.3% | 2.5% |
| 70 yrs or more |  36,015  | 6.8% |  32,121  | 5.6% | 12.1% |
| Not Stated |  31  | 0.0% |  14  | 0.0% | 121.4% |
| Total |  526,743  | 100.0% |  576,739  | 100.0% | -8.7% |
| Source: ATA |  |  |  |  |  |

**Age of Visitors from the USA.**

The biggest changes in age demographics in June 2017 for visitors from the USA came in the 70 years old and older category (up by 19.9%) and in the 0 – 11 years old category (up by 14.9%).

|  |
| --- |
| **Age of All US Stopover Visitors June 2017** |
|  |  |  |  |  |  |
|  | 2017 | % share | 2016 | % share | % change |
| 0 - 11 yrs |  4,612  | 8.0% |  4,013  | 7.4% | 14.9% |
| 12 - 19 yrs |  6,222  | 10.7% |  5,769  | 10.6% | 7.9% |
| 20 - 29 yrs |  7,820  | 13.5% |  7,679  | 14.1% | 1.8% |
| 30 - 39 yrs |  8,324  | 14.4% |  8,044  | 14.8% | 3.5% |
| 40 - 49 yrs |  10,649  | 18.4% |  10,126  | 18.6% | 5.2% |
| 50 - 59 yrs |  10,679  | 18.4% |  10,213  | 18.7% | 4.6% |
| 60 - 69 yrs |  6,648  | 11.5% |  6,219  | 11.4% | 6.9% |
| 70 yrs or more |  2,942  | 5.1% |  2,454  | 4.5% | 19.9% |
| Not Stated |  7  | 0.0% |  3  | 0.0% | 133.3% |
| Total |  57,903  | 100.0% |  54,520  | 100.0% | 6.2% |
| Source: ATA |  |  |  |  |  |
|  |  |  |  |  |  |
| **Age of All US Stopover Visitors June YTD 2017** |
|  |  |  |  |  |  |
|  | 2017 | % share | 2016 | % share | % change |
| 0 - 11 yrs |  23,831  | 6.7% |  22,223  | 6.8% | 7.2% |
| 12 - 19 yrs |  23,942  | 6.7% |  22,024  | 6.7% | 8.7% |
| 20 - 29 yrs |  38,120  | 10.7% |  34,315  | 10.5% | 11.1% |
| 30 - 39 yrs |  46,171  | 12.9% |  43,197  | 13.2% | 6.9% |
| 40 - 49 yrs |  60,573  | 17.0% |  56,826  | 17.3% | 6.6% |
| 50 - 59 yrs |  77,148  | 21.6% |  71,315  | 21.7% | 8.2% |
| 60 - 69 yrs |  59,314  | 16.6% |  54,617  | 16.6% | 8.6% |
| 70 yrs or more |  27,458  | 7.7% |  23,521  | 7.2% | 16.7% |
| Not Stated |  22  | 0.0% |  12  | 0.0% | 83.3% |
| Total |  356,579  | 100.0% |  328,050  | 100.0% | 8.7% |
| Source: ATA |  |  |  |  |  |

**First Time/Repeat Visitors.**

In May 2017 47.8% of our visitors reported they were visiting for the first time and 38.8% reported they had visited before. 13.4% of our visitors did not report how many times they visited. Assigning the number who did not report on a *pro rata* basis results in an overall percentage of 55.2% first time and 44.8% repeat.

|  |
| --- |
| **Number of visits to Aruba: May 2017** |
|  |  |  |  |  |  |
| Number of Times Visited | 2017 | % share | 2016 | % share | % change |
| First Time |  38,681  | 47.8% |  36,839  | 45.5% | 5.0% |
| 2 - 5 times |  18,243  | 22.5% |  19,979  | 24.7% | -8.7% |
| 6 - 9 times |  4,947  | 6.1% |  5,017  | 6.2% | -1.4% |
| 10 or more |  8,222  | 10.2% |  8,023  | 9.9% | 2.5% |
| Not Stated |  10,882  | 13.4% |  11,106  | 13.7% | -2.0% |
| Total |  80,975  | 100.0% |  80,964  | 100.0% | 0.0% |
| Source: ATA: Self-reported by visitors |  |  |  |  |

Year to date 2017 43.8% of our visitors reported they were visiting for the first time and 42.6% 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 50.7% first time and 49.3% repeat.

|  |
| --- |
| **Number of visits to Aruba: May 2017 YTD** |
|  |  |  |  |  |  |
| Number of Times Visited | 2017 | % share | 2016 | % share | % change |
| First Time |  193,297  | 43.8% |  198,854  | 40.6% | -2.8% |
| 2 - 5 times |  104,067  | 23.6% |  131,788  | 26.9% | -21.0% |
| 6 - 9 times |  30,869  | 7.0% |  32,604  | 6.7% | -5.3% |
| 10 or more |  52,884  | 12.0% |  52,711  | 10.8% | 0.3% |
| Not Stated |  60,338  | 13.7% |  74,085  | 15.1% | -18.6% |
| Total |  441,455  | 100.0% |  490,042  | 100.0% | -9.9% |
| Source: ATA: Self-reported by visitors |  |  |  |  |

**Trip Advisor Ratings.**

Trip Advisor has made data available to us which shows the total number of reviews received for the overall Caribbean and for five of our competitors (that is all reviews of hotels, restaurants, attractions and the destination) for June 2017.

The ratings are out of 5.

|  |
| --- |
| **TripAdvisor Ratings for June 2017** |
|  | Number of Reviews |
| Aruba | 4,909 |  |
| Bahamas | 3,704 |  |
| Cayman Islands | 2,699 |  |
| Curacao | 1,924 |  |
| Puerto Rico | 7,722 |  |
| USVI | 3,800 |  |
|  |  |  |
|  | Average Rating |
| Cayman | 4.60 |  |
| USVI | 4.50 |  |
| Aruba | 4.50 |  |
| 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.**

|  |  |  |  |
| --- | --- | --- | --- |
|  | June 2017 | June 2016 |  |
| as of | 6/15/2017 | 6/15/2016 | % change |
| Euro | $1.115 | $1.124 | -0.8% |
| UK Pound | $1.276 | $1.419 | -10.1% |
| Canadian Dollar | $0.753 | $0.740 | 1.8% |
| Colombian Peso\* | 2946 | 2993 | 1.6% |
| Brazilian Real\*\* | 3.275 | 3.471 | 6.0% |
| \* 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 - 2017**

|  |
| --- |
| **Hotel Performance Forecast 2017** |
|  | 2017 | 2016 | 2017/2016 |  |
|  | Projected | Actual | % change |  |
| % occupancy | 82.9% | 80.1% | 2.8% | points |
| ADR | $226.91 | $226.54 | 0.2% |  |
| Rev Par | $188.07 | $181.49 | 3.6% |  |
| ***Revised as of July 3 2017*** |  |  |  |  |

**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 summer of 2017, 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).

|  |
| --- |
| **Inbound Air Seats - Summer 2017** |
| June 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.