**CURRENT STATUS OF TOURISM INDUSTRY – ARUBA**

**December 2014 and YTD**

**Visitor Arrivals – December 2014**

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| **Aruba: Total Visitors December 2014** |
|  |  |  |  |  |  |
|  | 2014 | % | 2013 | % | % change |
| USA |  50,367  | 45.8% |  46,565  | 46.4% | 8.2% |
| Canada |  6,764  | 6.2% |  5,882  | 5.9% | 15.0% |
| Venezuela |  35,273  | 32.1% |  29,821  | 29.7% | 18.3% |
| Brazil |  2,769  | 2.5% |  2,694  | 2.7% | 2.8% |
| Colombia |  2,614  | 2.4% |  3,036  | 3.0% | -13.9% |
| Argentina |  522  | 0.5% |  762  | 0.8% | -31.5% |
| Netherlands |  2,812  | 2.6% |  2,957  | 2.9% | -4.9% |
| Germany |  310  | 0.3% |  314  | 0.3% | -1.3% |
| Italy |  504  | 0.5% |  336  | 0.3% | 50.0% |
| UK |  288  | 0.3% |  304  | 0.3% | -5.3% |
| Sweden |  1,428  | 1.3% |  1,227  | 1.2% | 16.4% |
| Other |  6,203  | 5.6% |  6,392  | 6.4% | -3.0% |
| Total |  109,854  | 100.0% |  100,290  | 100.0% | 9.5% |
| Source: ATA |  |  |  |  |  |

Total stopover arrivals (persons staying 24 hours or more) for December 2014 showed a 9.5% increase compared with December 2013. Traffic from the USA was up by 8.2%, up 15.0% from Canada, up 18.3% from Venezuela, down 13.9% from Colombia, up 2.8% from Brazil and down 31.5% from Argentina. Arrivals were down 4.9% from The Netherlands.

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| --- |
| **Aruba: Total Visitors December 2014 YTD** |
|  |  |  |  |  |  |
|  | 2014 | % | 2013 | % | % change |
| USA |  576,783  | 53.8% |  556,258  | 56.8% | 3.7% |
| Canada |  43,767  | 4.1% |  44,338  | 4.5% | -1.3% |
| Venezuela |  249,593  | 23.3% |  188,020  | 19.2% | 32.7% |
| Brazil |  24,733  | 2.3% |  23,293  | 2.4% | 6.2% |
| Colombia |  23,836  | 2.2% |  19,485  | 2.0% | 22.3% |
| Argentina |  12,465  | 1.2% |  15,574  | 1.6% | -20.0% |
| Netherlands |  36,995  | 3.5% |  37,788  | 3.9% | -2.1% |
| Germany |  4,362  | 0.4% |  3,841  | 0.4% | 13.6% |
| Italy |  7,099  | 0.7% |  5,008  | 0.5% | 41.8% |
| UK |  10,447  | 1.0% |  9,315  | 1.0% | 12.2% |
| Sweden |  6,742  | 0.6% |  7,110  | 0.7% | -5.2% |
| Other |  75,260  | 7.0% |  69,226  | 7.1% | 8.7% |
| Total |  1,072,082  | 100.0% |  979,256  | 100.0% | 9.5% |
| Source: ATA |  |  |  |  |  |

Total stopover arrivals for calendar year 2014 showed a 9.5% increase over the same 12 months of 2013. Traffic from the USA was up by 3.7%, down 1.3% from Canada, up 32.7% from Venezuela, up 22.3% from Colombia, down 20.0% from Argentina and was up 6.2% from Brazil. Arrivals were down 2.1% from The Netherlands.

|  |  |  |  |
| --- | --- | --- | --- |
|  | USA | Canada | Venezuela |
|  | Visitors | % share | Visitors | % share | Visitors | % share |
| 2010 |  535,436  | 65.1% |  37,598  | 4.6% |  90,363  | 11.0% |
| 2011 |  531,111  | 61.1% |  40,487  | 4.7% |  117,838  | 13.6% |
| 2012 |  530,875  | 58.7% |  45,887  | 5.1% |  143,201  | 15.8% |
| 2013 |  556,258  | 56.8% |  44,388  | 4.5% |  188,020  | 19.2% |
| 2014 |  576,783  | 53.8% |  43,767  | 4.1% |  249,593  | 23.3% |
|  |  |  |  |  |  |  |
|  | Netherlands | Other | Total |
|  | Visitors | % share | Visitors | % share | Visitors | % share |
| 2010 |  39,786  | 4.8% |  119,146  | 14.5% |  822,329  | 100.0% |
| 2011 |  40,068  | 4.6% |  139,469  | 16.0% |  868,973  | 100.0% |
| 2012 |  39,973  | 4.4% |  143,998  | 15.9% |  903,934  | 100.0% |
| 2013 |  37,788  | 3.9% |  152,802  | 15.6% |  979,256  | 100.0% |
| 2014 |  36,995  | 3.5% |  164,944  | 15.4% |  1,072,082  | 100.0% |

**Stopovers by Month 2014**

|  |  |  |  |
| --- | --- | --- | --- |
|  | 2014 | 2013 | % change |
| Jan |  82,887  |  75,751  | 9.4% |
| Feb |  78,979  |  74,049  | 6.7% |
| Mar |  83,131  |  89,844  | -7.5% |
| Apr |  84,079  |  76,021  | 10.6% |
| May |  78,087  |  72,746  | 7.3% |
| June |  82,708  |  76,964  | 7.5% |
| July |  95,952  |  87,694  | 9.4% |
| Aug |  102,048  |  88,289  | 15.6% |
| Sep |  84,509  |  72,631  | 16.4% |
| Oct |  92,649  |  76,681  | 20.8% |
| Nov |  97,199  |  88,296  | 10.1% |
| Dec |  109,854  |  100,290  | 9.5% |
| YTD |  1,072,082  |  979,256  | 9.5% |
| Source: ATA |  |  |

**Top Producing US States.**

Florida was up 19.8%, Illinois was up 19.7%, Connecticut was up 9.5%, Massachusetts was up 8.1%, Pennsylvania was up 7.2% and New York State was up 1.5% in December 2014 compared with December 2013. Michigan, Ohio and Maryland also showed good growth.

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| **Aruba: Total Visitors: US States: December 2014** |
|  |  |  |  |  |  |
|  | 2014 | % | 2013 | % | % change |
| New York |  11,562  | 23.0% |  11,390  | 24.5% | 1.5% |
| Massachusetts |  5,093  | 10.1% |  4,713  | 10.1% | 8.1% |
| New Jersey |  5,764  | 11.4% |  5,954  | 12.8% | -3.2% |
| Pennsylvania |  3,087  | 6.1% |  2,880  | 6.2% | 7.2% |
| Illinois |  2,642  | 5.2% |  2,207  | 4.7% | 19.7% |
| Connecticut |  1,596  | 3.2% |  1,457  | 3.1% | 9.5% |
| Florida |  2,978  | 5.9% |  2,486  | 5.3% | 19.8% |
| Ohio |  1,502  | 3.0% |  1,334  | 2.9% | 12.6% |
| Maryland |  1,801  | 3.6% |  1,569  | 3.4% | 14.8% |
| Michigan |  1,439  | 2.9% |  1,166  | 2.5% | 23.4% |
| Other |  12,903  | 25.6% |  11,409  | 24.5% | 13.1% |
| Total |  50,367  | 100.0% |  46,565  | 100.0% | 8.2% |
| Source: ATA |  |  |  |  |  |

Over the year as a whole the major markets of the north-east and mid-Atlantic showed relatively little growth.

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| **Aruba: Total Visitors: US States: December 2014 YTD** |
|  |  |  |  |  |  |
|  | 2014 | % | 2013 | % | % change |
| New York |  122,970  | 21.3% |  121,872  | 21.9% | 0.9% |
| Massachusetts |  64,659  | 11.2% |  62,970  | 11.3% | 2.7% |
| New Jersey |  75,503  | 13.1% |  75,395  | 13.6% | 0.1% |
| Pennsylvania |  35,488  | 6.2% |  34,814  | 6.3% | 1.9% |
| Illinois |  20,484  | 3.6% |  18,206  | 3.3% | 12.5% |
| Connecticut |  20,990  | 3.6% |  21,158  | 3.8% | -0.8% |
| Florida |  30,098  | 5.2% |  26,726  | 4.8% | 12.6% |
| Ohio |  16,264  | 2.8% |  15,310  | 2.8% | 6.2% |
| Maryland |  19,889  | 3.4% |  19,632  | 3.5% | 1.3% |
| Michigan |  12,863  | 2.2% |  12,094  | 2.2% | 6.4% |
| Other |  157,575  | 27.3% |  148,081  | 26.6% | 6.4% |
| Total |  576,783  | 100.0% |  556,258  | 100.0% | 3.7% |
| Source: ATA |  |  |  |  |  |

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

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| **Aruba: Total Nights December 2014** |
|  |  |  |  |  |  |
|  | 2014 | % | 2013 | % | % change |
| USA |  378,150  | 45.8% |  353,037  | 45.3% | 7.1% |
| Canada |  63,651  | 7.7% |  54,721  | 7.0% | 16.3% |
| Venezuela |  212,405  | 25.7% |  191,799  | 24.6% | 10.7% |
| Brazil |  21,035  | 2.5% |  19,723  | 2.5% | 6.7% |
| Colombia |  28,541  | 3.5% |  34,986  | 4.5% | -18.4% |
| Argentina |  5,079  | 0.6% |  6,329  | 0.8% | -19.8% |
| Netherlands |  38,874  | 4.7% |  40,184  | 5.2% | -3.3% |
| Germany |  3,120  | 0.4% |  3,388  | 0.4% | -7.9% |
| Italy |  4,881  | 0.6% |  3,289  | 0.4% | 48.4% |
| UK |  2,987  | 0.4% |  2,909  | 0.4% | 2.7% |
| Sweden |  18,041  | 2.2% |  15,014  | 1.9% | 20.2% |
| Other |  49,665  | 6.0% |  54,303  | 7.0% | -8.5% |
| Total |  826,429  | 100.0% |  779,682  | 100.0% | 6.0% |
| Source: ATA |  |  |  |  |  |

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| **Aruba: Average Length of Stay in Nights: December 2014** |
|  |  |  |  |  |  |
|  | 2014 |  | 2013 |  | % change |
| USA |  7.51  |  |  7.58  |  | -1.0% |
| Canada |  9.41  |  |  9.30  |  | 1.2% |
| Venezuela |  6.02  |  |  6.43  |  | -6.4% |
| Brazil |  7.60  |  |  7.32  |  | 3.8% |
| Colombia |  10.92  |  |  11.52  |  | -5.3% |
| Argentina |  9.73  |  |  8.31  |  | 17.1% |
| Netherlands |  13.82  |  |  13.59  |  | 1.7% |
| Germany |  10.06  |  |  10.79  |  | -6.7% |
| Italy |  9.68  |  |  9.79  |  | -1.1% |
| UK |  10.37  |  |  9.57  |  | 8.4% |
| Sweden |  12.63  |  |  12.24  |  | 3.2% |
| Other |  8.01  |  |  8.50  |  | -5.8% |
| Total |  7.52  |   |  7.77  |   | -3.2% |
| Source: ATA |  |  |  |  |  |

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| **Aruba: Total Nights December 2014 YTD** |
|  |  |  |  |  |  |
|  | 2014 | % | 2013 | % | % change |
| USA |  4,136,448  | 53.8% |  4,005,635  | 56.2% | 3.3% |
| Canada |  381,710  | 5.0% |  376,897  | 5.3% | 1.3% |
| Venezuela |  1,419,401  | 18.5% |  1,056,837  | 14.8% | 34.3% |
| Brazil |  166,082  | 2.2% |  154,011  | 2.2% | 7.8% |
| Colombia |  188,310  | 2.4% |  171,911  | 2.4% | 9.5% |
| Argentina |  109,994  | 1.4% |  131,884  | 1.9% | -16.6% |
| Netherlands |  466,068  | 6.1% |  468,814  | 6.6% | -0.6% |
| Germany |  42,872  | 0.6% |  37,160  | 0.5% | 15.4% |
| Italy |  56,230  | 0.7% |  39,819  | 0.6% | 41.2% |
| UK |  118,846  | 1.5% |  108,693  | 1.5% | 9.3% |
| Sweden |  78,308  | 1.0% |  85,246  | 1.2% | -8.1% |
| Other |  528,634  | 6.9% |  489,864  | 6.9% | 7.9% |
| Total |  7,692,903  | 100.0% |  7,126,771  | 100.0% | 7.9% |
| Source: ATA |  |  |  |  |  |

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| **Aruba: Average Length of Stay in Nights: December 2014 YTD** |
|  |  |  |  |  |  |
|  | 2014 |  | 2013 |  | % change |
| USA |  7.17  |  |  7.20  |  | -0.4% |
| Canada |  8.72  |  |  8.50  |  | 2.6% |
| Venezuela |  5.69  |  |  5.62  |  | 1.2% |
| Brazil |  6.71  |  |  6.61  |  | 1.6% |
| Colombia |  7.90  |  |  8.82  |  | -10.5% |
| Argentina |  8.82  |  |  8.47  |  | 4.2% |
| Netherlands |  12.60  |  |  12.41  |  | 1.5% |
| Germany |  9.83  |  |  9.67  |  | 1.6% |
| Italy |  7.92  |  |  7.95  |  | -0.4% |
| UK |  11.38  |  |  11.67  |  | -2.5% |
| Sweden |  11.61  |  |  11.99  |  | -3.1% |
| Other |  7.02  |  |  7.08  |  | -0.7% |
| Total |  7.18  |   |  7.28  |   | -1.4% |
| Source: ATA |  |  |  |  |  |

**Competing Destination performance.**

The Caribbean Tourism Organization collects data from across the region. Their most recent figures are from December 4 2014 which show a limited set of numbers for 2014. The following shows the percentage change in stopover visitor arrivals compared to the same period in 2013.

* Aruba up 9.5% (through December)
* Bahamas up 3.5% (through July)
* Barbados down 0.6% (through October)
* Belize up 10.8% (through October)
* Cayman Islands up 12.6% (through October)
* Cuba up 4.9% (through November)
* Curacao up 1.9% (through November)
* Dominican Republic up 9.7% (through November)
* Jamaica up 3.3% (through November)
* Puerto Rico up 6.0% (through September)
* Saint Lucia up 5.8% (through November)
* USVI up 3.8% (through October)

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

* Aruba up 3.7% (through December)
* Bahamas up 2.7% (through July)
* Barbados down 4.5% (through October)
* Belize up 10.1% (through October)
* Cayman Islands up 9.8% (through October)
* Curacao down 16.7% (through November)
* Dominican Republic up 12.4% (through November)
* Jamaica up 1.4% (through November)
* Puerto Rico up 6.2% (through September)
* Saint Lucia up 12.8% (through November)

**Cruise Traffic.**

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| **Cruise Visitors: Aruba 2014** |
|  | 2014 | 2013 | Per cent change |
|  | Calls | Passengers | Calls | Passengers | Calls | Passengers |
| Jan | 50 |  97,471  | 62 |  118,542  | -19.4% | -17.8% |
| Feb | 41 |  80,562  | 43 |  88,888  | -4.7% | -9.4% |
| Mar | 42 |  80,375  | 41 |  84,229  | 2.4% | -4.6% |
| Apr | 28 |  59,215  | 34 |  70,808  | -17.6% | -16.4% |
| May | 13 |  34,780  | 16 |  26,688  | -18.8% | 30.3% |
| June | 7 |  19,815  | 12 |  20,226  | -41.7% | -2.0% |
| July  | 16 |  37,174  | 15 |  27,776  | 6.7% | 33.8% |
| Aug | 14 |  31,036  | 9 |  21,470  | 55.6% | 44.6% |
| Sep | 13 |  25,782  | 11 |  20,752  | 18.2% | 24.2% |
| Oct  | 26 |  51,131  | 24 |  44,404  | 8.3% | 15.1% |
| Nov | 35 |  67,246  | 36 |  68,549  | -2.8% | -1.9% |
| Dec | 43 |  82,367  | 50 |  96,236  | -14.0% | -14.4% |
| YTD |  328  |  667,095  |  353  |  688,568  | -7.1% | -3.1% |
| Source: Aruba Port Authority. |  |  |  |  |

In December Aruba saw a 14.4% decline in the number of cruise passengers compared with December 2013. Year to date there have been 25 fewer calls resulting in a decline of 3.1 % in the overall number of cruise passengers.

The CTO numbers for 2014 for cruise visitor traffic show

* Aruba down 3.1% (through December)
* Bahamas up 2.9% (through October)
* Barbados down 0.6% (through October)
* Belize up 44.3% (through October)
* Cayman Islands up 20.1% (through October)
* Curacao up 9.7% (through November)
* Jamaica up 12.2% (through November)
* Puerto Rico up 10.0% (through August)
* Saint Lucia up 5.7% (through November)
* St. Maarten up 16.5% (through October)
* Turks and Caicos Islands up 39.9% (through June)
* USVI up 1.9% (through November)

**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 2014 |
|  | December 2014 | December 2013 |  |
|  | Visitors | % | Visitors | % | % change |
| Hotels | 52,782 | 48.0% | 50,503 | 50.4% | 4.5% |
| Timeshare | 23,999 | 21.8% | 22,168 | 22.1% | 8.3% |
| Apts/Priv Homes | 33,073 | 30.1% | 27,619 | 27.5% | 19.7% |
| Total | 109,854 | 100.0% | 100,290 | 100.0% | 9.5% |
| Source: ATA |  |  |  |  |  |

The hotels category includes High Rise hotels, Low Rise hotels and the Tropicana. As shown above in December 2014 the number of visitors staying in hotel accommodation increased by 4.5%, those staying in a timeshare resort grew by 8.3% and those staying in apartments, guest houses or private homes grew by 19.7%. Some of the decline in stays at hotels and growth in stays at timeshare resorts in December could be due to more accurate allocation of visitors amongst the three Marriott properties compared to December 2013. It should be noted the Riu Palace Antillas (previously the Westin Aruba) re-opened on Saturday October 11 2014.

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| --- | --- |
|  | Place of Stay: Visitor Nights 2014 |
|  | December 2014 | December 2013 |  |
|  | Nights | % | Nights | % | % change |
| Hotels | 338,687 | 41.0% | 334,739 | 42.9% | 1.2% |
| Timeshare | 211,923 | 25.6% | 195,667 | 25.1% | 8.3% |
| Apts/Priv Homes | 275,819 | 33.4% | 249,276 | 32.0% | 10.6% |
| Total | 826,429 | 100.0% | 779,682 | 100.0% | 6.0% |
| Source: ATA |  |  |  |  |  |

|  |  |
| --- | --- |
|  | Average Length of Stay in Nights 2014 |
|  | December 2014 | December 2013 |  |
|  | Nights | Nights | % change |
| Hotels | 6.42 | nts | 6.63 | nts | -3.2% |
| Timeshare | 8.83 | nts | 8.83 | nts | 0.0% |
| Apts/Priv Homes | 8.34 | nts | 9.03 | nts | -7.6% |
| Total | 7.52 | nts | 7.77 | nts | -3.2% |
| Source: ATA |  |  |  |  |  |

In calendar year 2014 the overall number of visitors grew by 9.5% but the number using hotel accommodations fell by 0.2%, whilst those using time-share resorts grew by 7.5%. The number of visitors staying in apartments, private homes and other similar accommodation grew by 41.2% and accounted for 24.0% of all visitors in 2014 compared to 18.6% in 2013.

|  |  |
| --- | --- |
|  | Visitors 2014 |
|  | December 2014 YTD | December 2013 YTD |  |
|  | Visitors | % | Visitors | % | % change |
| Hotels | 545,219 | 50.9% | 546,201 | 55.8% | -0.2% |
| Timeshare | 270,098 | 25.2% | 251,197 | 25.7% | 7.5% |
| Apts/Priv Homes | 256,765 | 24.0% | 181,858 | 18.6% | 41.2% |
| Total | 1,072,082 | 100.0% | 979,256 | 100.0% | 9.5% |
| Source: ATA |  |  |  |  |  |

In calendar year 2014 the overall number of visitor nights grew by 7.9% but the number of nights spent in apartments, private homes and other similar accommodation grew by 28.1% and accounted for 27.0% of all visitor nights in 2014 compared to 22.8% in 2013.

|  |  |
| --- | --- |
|  | Visitor Nights YTD 2014 |
|  | December 2014 YTD | December 2013 YTD |  |
|  | Nights | % | Nights | % | % change |
| Hotels | 3,389,296 | 44.1% | 3,425,503 | 48.1% | -1.1% |
| Timeshare | 2,225,069 | 28.9% | 2,078,555 | 29.2% | 7.0% |
| Apts/Priv Homes | 2,078,538 | 27.0% | 1,622,713 | 22.8% | 28.1% |
| Total | 7,692,903 | 100.0% | 7,126,771 | 100.0% | 7.9% |
| Source: ATA |  |  |  |  |  |
|  |  |  |  |  |  |
|  | Average Length of Stay in Nights 2014 |
|  | December 2014 YTD | December 2013 YTD |  |
|  | Nights | Nights | % change |
| Hotels | 6.22 | nts | 6.27 | nts | -0.9% |
| Timeshare | 8.24 | nts | 8.27 | nts | -0.4% |
| Apts/Priv Homes | 8.10 | nts | 8.92 | nts | -9.3% |
| Total | 7.18 | nts | 7.28 | nts | -1.4% |
| Source: ATA |  |  |  |  |  |

There has been a sharp change in the use of accommodation by Venezuelan visitors in calendar year 2014. The number of visitors using hotel accommodation grew by just 0.6% whilst the number using private homes/apartments and condominiums has grown by 79.3% and comprised 55.4% of all Venezuelan visitors in calendar year 2014, up from 41.0% in 2013.

|  |  |
| --- | --- |
|  | Visitors from Venezuela 2014 |
|  | December 2014 YTD | December 2013 YTD |  |
|  | Visitors | % | Visitors | % | % change |
| Hotels | 82,546 | 33.1% | 82,049 | 43.6% | 0.6% |
| Timeshare | 28,770 | 11.5% | 28,853 | 15.3% | -0.3% |
| Apts/Priv Homes | 138,277 | 55.4% | 77,118 | 41.0% | 79.3% |
| Total | 249,593 | 100.0% | 188,020 | 100.0% | 32.7% |
| Source: ATA |  |  |  |  |  |

**Hotel Performance Aruba 2014**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  | 2014/2013 |  |
| **December 2014** | 2014 | 2013 | % change |  |
| Rooms |  4,368  |  4,849  | -9.9% |  |
| Available Room Nights |  135,408  |  150,319  | -9.9% |  |
| Occupied Room Nights |  105,326  |  113,322  | -7.1% |  |
| % occupancy | 77.8% | 75.4% | 2.4% | points |
| ADR | $323.83 | $278.38 | 16.3% |  |
| Rev Par | $251.89 | $209.86 | 20.0% |  |
| ***Based on data from 15 properties.*** |  |  |  |

Total transient hotel room inventory for Aruba in December 2014 stood at 5,318 rooms with the main change being the addition of the 320 room Ritz Carlton Aruba which opened on November 22 2013 and the re-opening of the 481 room Riu Palace Antillas in October 2014. (This property was closed from March 1st until October 11th 2014 for renovation).

The sample upon which these numbers are based does not include the Riu Palace Antillas although it included the Westin during 2013. This resulted in a 9.9% decline in the number of available transient room nights in December 2014 compared with December 2013.

In addition there were an estimated total of 3,430 timeshare units.

In December 2014 the hotel sector saw a 2.4 percentage point increase in average room occupancy, from 75.4% to 77.8%, with a 16.3% increase in average daily room rate (ADR) and an 20.0% increase in revenue per available room (rev par). Note that the increase in ADR was due primarily to four things, first the addition of the Ritz Carlton, second the amount of revenue charged as rooms revenue for the all-inclusive properties changed from 45% to 50% compared to same time last year, third a general increase in pricing, and fourth the closure of the Westin Hotel.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  | 2014/2013 |  |
| **Year to Date December 2014** | 2014 | 2013 | % change |  |
| Rooms |  4,368  |  4,529  | -3.6% |  |
| Available Room Nights |  1,623,342  |  1,666,317  | -2.6% |  |
| Occupied Room Nights |  1,287,436  |  1,292,944  | -0.4% |  |
| % occupancy | 79.3% | 77.6% | 1.7% | points |
| ADR | $233.85 | $198.11 | 18.0% |  |
| Rev Par | $185.46 | $153.72 | 20.6% |  |
| ***Based on data from 15 properties.*** |  |  |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **2014** | Avg Occupancy | ADR | RevPar |
|  | 2014 | 2013 | % pt chng | 2014 | 2013 | % chng | 2014 | 2013 | % chng |
| Jan | 81.3% | 81.8% | -0.5% | $287.82  | $248.62  | 15.8% | $234.04  | $203.41  | 15.1% |
| Feb | 81.1% | 84.1% | -3.0% | $291.64  | $253.82  | 14.9% | $236.62  | $213.42  | 10.9% |
| Mar | 80.2% | 80.7% | -0.5% | $293.46  | $246.26  | 19.2% | $235.28  | $198.69  | 18.4% |
| Apr | 75.1% | 79.1% | -4.0% | $254.04  | $181.02  | 40.3% | $190.68  | $143.22  | 33.1% |
| May | 75.7% | 72.3% | 3.4% | $189.56  | $162.12  | 16.9% | $143.57  | $117.15  | 22.6% |
| June | 73.6% | 71.3% | 2.3% | $192.73  | $161.95  | 19.0% | $141.85  | $115.45  | 22.8% |
| July | 85.2% | 81.3% | 3.9% | $203.97  | $172.46  | 18.3% | $173.71  | $140.24  | 23.9% |
| Aug | 87.3% | 81.0% | 6.3% | $199.54  | $171.18  | 16.6% | $174.20  | $138.70  | 25.6% |
| Sep | 77.9% | 73.5% | 4.4% | $176.37  | $156.56  | 12.7% | $137.36  | $115.03  | 19.4% |
| Oct | 77.7% | 73.8% | 3.9% | $186.03  | $161.13  | 15.5% | $144.46  | $118.85  | 21.5% |
| Nov | 78.3% | 77.2% | 1.1% | $195.18  | $167.61  | 16.4% | $152.81  | $129.42  | 18.1% |
| Dec | 77.8% | 75.4% | 2.4% | $323.83  | $278.38  | 16.3% | $251.89  | $209.86  | 20.0% |
| Full year | 79.3% | 77.6% | 1.7% | $233.85  | $198.11  | 18.0% | $185.46  | $153.72  | 20.6% |

**Competing Destination performance.**

Smith Travel Research collects data from hotels across the Caribbean on behalf of the CHTA. The following numbers are based on this STR report and show the percentage change in revenue per available room (revpar) for hotels in various Caribbean countries for the first eleven months of 2014 (January through November) compared with the same eleven months of 2013.

* Aruba (through December) 20.6%
* Bahamas (through September) 11.6%
* Barbados 10.1%
* Cancun 13.9%
* Cayman Islands 4.7%
* Curacao 0.4%
* Dominican Republic 12.3%
* Jamaica 22.9%
* Puerto Rico 5.0%
* USVI 3.4%

**Visitors by Carrier.**

The table below shows the number of non-resident visitors brought in by various airline carriers during December 2014. 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 which used any one of the carriers.

|  |
| --- |
| **Stopovers: By Airline: December 2014** |
| (Non-resident stopover Arrivals) |  |  |  |  |
|  | December 2014 | % share | December 2013 | % share | % change |
| jetBlue |  11,845  | 10.8% |  11,970  | 11.9% | -1.0% |
| United Airlines |  10,921  | 9.9% |  8,581  | 8.6% | 27.3% |
| Delta Air Lines |  9,138  | 8.3% |  8,903  | 8.9% | 2.6% |
| American Airlines |  9,149  | 8.3% |  6,480  | 6.5% | 41.2% |
| US Airways |  7,856  | 7.2% |  7,808  | 7.8% | 0.6% |
| Southwest/AirTran |  6,361  | 5.8% |  5,211  | 5.2% | 22.1% |
| Insel Air |  7,311  | 6.7% |  4,627  | 4.6% | 58.0% |
| Copa |  3,145  | 2.9% |  3,066  | 3.1% | 2.6% |
| Tiara Air |  -  | 0.0% |  5,867  | 5.9% | -100.0% |
| KLM |  2,179  | 2.0% |  2,111  | 2.1% | 3.2% |
| Aserca |  3,550  | 3.2% |  4,064  | 4.1% | -12.6% |
| Avianca |  2,019  | 1.8% |  2,710  | 2.7% | -25.5% |
| Sunwing |  2,417  | 2.2% |  2,120  | 2.1% | 14.0% |
| Aruba Airlines |  10,914  | 9.9% |  5,583  | 5.6% | 95.5% |
| Thomas Cook |  960  | 0.9% |  1,263  | 1.3% | -24.0% |
| GOL |  860  | 0.8% |  1,412  | 1.4% | -39.1% |
| Laser |  6,436  | 5.9% |  2,494  | 2.5% | 158.1% |
| ArkeFly |  1,167  | 1.1% |  981  | 1.0% | 19.0% |
| Avior |  2,754  | 2.5% |  2,587  | 2.6% | 6.5% |
| Westjet |  1,123  | 1.0% |  1,116  | 1.1% | 0.6% |
| Air Canada |  873  | 0.8% |  671  | 0.7% | 30.1% |
| Spirit Airlines |  447  | 0.4% |  450  | 0.4% | -0.7% |
| Surinam Airways |  458  | 0.4% |  705  | 0.7% | -35.0% |
| Venezolana |  2,274  | 2.1% |  1,965  | 2.0% | 15.7% |
| Private |  2,667  | 2.4% |  2,266  | 2.3% | 17.7% |
| Other |  3,030  | 2.8% |  5,279  | 5.3% | -42.6% |
| TOTAL |  109,854  | 100.0% |  100,290  | 100.0% | 9.5% |
| Source: ATA |  |  |  |  |  |

|  |
| --- |
| **Stopovers: By Airline: December 2014 YTD** |
| (Non-resident stopover Arrivals) |  |  |  |  |
|  | December 2014 YTD | % share | December 2013 YTD | % share | % change |
| jetBlue |  136,162  | 12.7% |  137,786  | 14.1% | -1.2% |
| United Airlines |  120,327  | 11.2% |  103,482  | 10.6% | 16.3% |
| Delta Air Lines |  108,382  | 10.1% |  101,110  | 10.3% | 7.2% |
| American Airlines |  82,887  | 7.7% |  75,909  | 7.8% | 9.2% |
| US Airways |  87,999  | 8.2% |  88,469  | 9.0% | -0.5% |
| Southwest Airlines |  53,261  | 5.0% |  59,774  | 6.1% | -10.9% |
| Insel Air |  64,971  | 6.1% |  45,025  | 4.6% | 44.3% |
| Copa |  34,370  | 3.2% |  28,891  | 3.0% | 19.0% |
| Tiara Air |  12,698  | 1.2% |  54,980  | 5.6% | -76.9% |
| KLM |  26,636  | 2.5% |  23,792  | 2.4% | 12.0% |
| Aserca |  39,517  | 3.7% |  35,074  | 3.6% | 12.7% |
| Avianca |  25,905  | 2.4% |  30,816  | 3.1% | -15.9% |
| Sunwing |  15,188  | 1.4% |  15,197  | 1.6% | -0.1% |
| Aruba Airlines |  44,757  | 4.2% |  18,588  | 1.9% | 140.8% |
| Thomas Cook |  4,515  | 0.4% |  4,970  | 0.5% | -9.2% |
| GOL |  12,227  | 1.1% |  12,278  | 1.3% | -0.4% |
| Laser |  39,268  | 3.7% |  16,494  | 1.7% | 138.1% |
| ArkeFly |  13,870  | 1.3% |  14,884  | 1.5% | -6.8% |
| Avior |  26,754  | 2.5% |  6,117  | 0.6% | 337.4% |
| Westjet |  8,678  | 0.8% |  9,968  | 1.0% | -12.9% |
| Air Canada |  7,977  | 0.7% |  7,258  | 0.7% | 9.9% |
| Spirit Airlines |  6,471  | 0.6% |  5,902  | 0.6% | 9.6% |
| Surinam Airways |  6,022  | 0.6% |  6,043  | 0.6% | -0.3% |
| Venezolana |  13,579  | 1.3% |  18,496  | 1.9% | -26.6% |
| Private |  16,298  | 1.5% |  12,830  | 1.3% | 27.0% |
| Other |  63,363  | 5.9% |  45,123  | 4.6% | 40.4% |
| TOTAL |  1,072,082  | 100.0% |  979,256  | 100.0% | 9.5% |
| Source: ATA |  |  |  |  |  |

**Age of Visitors.**

The biggest changes in age demographics in December came in the 20 - 29 years category (up 13.8%) with much below average growth in the 12 – 19 years category.

|  |
| --- |
| **Age of All Stopover Visitors December 2014** |
|  |  |  |  |  |  |
|  | 2014 | % share | 2013 | % share | % change |
| 0 - 11 yrs |  11,249  | 10.2% |  10,393  | 10.4% | 8.2% |
| 12 - 19 yrs |  9,404  | 8.6% |  8,815  | 8.8% | 6.7% |
| 20 - 29 yrs |  17,173  | 15.6% |  15,086  | 15.0% | 13.8% |
| 30 - 39 yrs |  18,408  | 16.8% |  17,145  | 17.1% | 7.4% |
| 40 - 49 yrs |  18,027  | 16.4% |  16,832  | 16.8% | 7.1% |
| 50 - 59 yrs |  18,142  | 16.5% |  16,199  | 16.2% | 12.0% |
| 60 - 69 yrs |  11,993  | 10.9% |  10,973  | 10.9% | 9.3% |
| 70 yrs or more |  5,423  | 4.9% |  4,815  | 4.8% | 12.6% |
| Not Stated |  35  | 0.0% |  32  | 0.0% | 9.4% |
| Total |  109,854  | 100.0% |  100,290  | 100.0% | 9.5% |
| Source: ATA |  |  |  |  |  |

In calendar year 2014 there was an 11.2% increase in the number of visitors 0 – 11 years old compared to calendar year 2013, a 10.6% increase in the number of visitors 30 – 39 years old and increases of 11.0% in the number of visitors 20 - 29 years old, and an 11.3% increase in the number over 70.

|  |
| --- |
| **Age of All Stopover Visitors December 2014 YTD** |
|  |  |  |  |  |  |
|  | 2014 | % share | 2013 | % share | % change |
| 0 - 11 yrs |  93,301  | 8.7% |  83,920  | 8.6% | 11.2% |
| 12 - 19 yrs |  67,267  | 6.3% |  62,916  | 6.4% | 6.9% |
| 20 - 29 yrs |  147,018  | 13.7% |  132,496  | 13.5% | 11.0% |
| 30 - 39 yrs |  192,517  | 18.0% |  174,035  | 17.8% | 10.6% |
| 40 - 49 yrs |  186,755  | 17.4% |  172,757  | 17.6% | 8.1% |
| 50 - 59 yrs |  194,750  | 18.2% |  178,954  | 18.3% | 8.8% |
| 60 - 69 yrs |  134,590  | 12.6% |  124,068  | 12.7% | 8.5% |
| 70 yrs or more |  55,457  | 5.2% |  49,844  | 5.1% | 11.3% |
| Not Stated |  427  | 0.0% |  266  | 0.0% | 60.5% |
| Total |  1,072,082  | 100.0% |  979,256  | 100.0% | 9.5% |
| Source: ATA |  |  |  |  |  |

**Projections for 2015.**

The Aruba Tourism Authority has set as a target an increase of 2.5% more stopover visitors in 2015 compared to 2013. As well they have targeted a 4% increase in tourism receipts, to maintain cruise visitor arrival numbers at a minimum of the 2013 total and to achieve a 9% per annum increase in the tourism sector’s revpar.

By market the ATA is projecting a growth in stopover visitors from the USA of 2% in 2015 over the 2014 total, and a growth of 5% from Canada. Latin America has traditionally been very difficult to forecast and the ATA is projecting no growth from the Venezuelan market in 2015 over the 2014 total, 15% growth from the Brazilian market, 10.5% from Colombia and 5% from Argentina. Chile is projected to show a 25% increase in traffic over the 2014 total. From Europe the Netherlands is projected to show 1% growth over 2014, Germany 2.5%, Italy 5% and the UK 9.4%. It should be noted that on January 25 2014 the exchange rate was US$1.36 to one euro. One year later (1/25/15) it stands at $1.12 to the Euro, an 18% fall in value. And on January 25 2014 the British pound stood at $1.65 to the pound and one year later (1/25/15) it stands at $1.50 to the pound, a 9% decline in value.

2015 will see the first full year of operation of the newly renovated 482 room Riu Palace Antillas. The 491 room Riu Palace will be closed for three months between April 13th and July 11th 2015 for renovation. Consequently, as a whole, there will be 4% more available hotel room nights in 2015 than in 2014. However this does not take into consideration the increase in condominium rooms which will be added to overall inventory and will be made available through rental pools for transient accommodation. Prime examples of this are the 120 unit Blue Residences and the 78 unit Palm Aruba condominium complexes.

All of the above suggests that average room occupancies for the hotel sector will average between 76% - 78% for 2015. It is expected the general move to improved pricing will be maintained and the overall average daily room rate is projected to grow by between 5% - 10% in 2015, and revpar is projected to grow by a similar rate.

The Aruba Airport Authority reports there will be 10% more air seats in the winter of 2014/2015 (December 1 2014 –March 31 2015) compared to the same five months of 2014/2015. (This number includes seats provided by Tiara Air, Aruba Airlines, SLM and Insel Air). The USA gateways will see 13% more seats, Canada 24% more seats, Europe 7% fewer seats, and Latin America 4% more seats. It should be noted however that because jetBlue will switch back to using its 150 seat A320 equipment out of New York rather than the larger 190 seat A321 planes that were used in the winter of 2014 this will result in a fall of about 8% in available seats out of the New York DMA this coming winter.

Current projections for cruise traffic suggest that based on existing schedules the number of cruise passengers will decline by about 5% in 2015 compared to 2014.

For current estimates as to the contribution of tourism to the economy of Aruba see the following website. <http://www.wttc.org/site_media/uploads/downloads/aruba2013.pdf>