

**MONTHLY UPDATE - ARUBA'S TOURISM INDUSTRY**  
**December 2016 and Year to Date 2016**

**Summary Highlights.**

- The total number of stopovers visiting Aruba decreased by 18.1% in December 2016, from 118,466 in December 2015 to 97,042 in December 2016.
- In calendar year (CY) 2016 the total number of stopover visitors decreased by 10.0% from 1,224,935 in 2015 to 1,101,954 in 2016.
- Traffic from the USA was up by 4.5%, from 53,339 stopovers in December 2015 to 55,746 stopovers in December 2016. Traffic was up by 3.2% from New York State, up by 9.8% from Massachusetts and up 12.4% from New Jersey.
- In CY 2016 the number of stopover visitors from the USA increased by 1.2% from 621,386 in 2015 to 628,765 in 2016.
- Traffic from Venezuela was down by 62.1% in December from 40,374 stopovers in December 2015 to 15,306 in December 2016.
- In CY 2016 the number of stopover visitors from Venezuela fell by 40.4%, from 350,918 in 2015 to 209,128 in 2016.
- Tourism receipts fell by 1.4% in the first quarter of 2016 compared to the same quarter of 2015 despite a 5.4% growth in stopover arrivals. In the second quarter visitor arrivals declined by 3.0% whilst tourism receipts fell by 0.4% both compared to second quarter 2015. In the third quarter tourism receipts grew by 0.5% despite a 14.1% decline in stopover arrivals.
- The total number of visitor nights declined by 7.2% in December, from 855,736 in December 2015 to 794,500 in December 2016. The overall average length of stay grew by 13.3% from 7.22 nights in December 2015 to 8.19 nights in December 2016.
- The total number of visitor nights declined by 4.3% in CY 2016, from 8,329,592 in 2015 to 7,975,560 in 2016. The overall average length of stay grew by 6.4% from 6.80 nights in 2015 to 7.24 nights in 2016.
- The Dominican Republic saw a 6.2% increase in stopover traffic in CY 2016 whilst Jamaica saw a 2.8% increase in stopovers in 2016. Traffic to Cuba grew by 11.7% in the first eight months of 2016 compared to the same period of 2015.
- Outbound travel by US citizens grew by 8.0% in the first eleven months of 2016 compared to the same period for 2015 and was up by 2.0% to the Caribbean.
- The number of cruise passengers visiting Aruba in December grew by 9.7%, from 91,707 in December 2015 to 100,642 in December 2016. In CY 2016 the number of cruise visitors increased by 8.1% from 607,019 in 2015 to 656,043 in 2016.
- As reported by Immigration card data the number of stopover visitors staying in hotels in December 2016 grew by 3.1%, and staying in timeshare resorts grew by 7.4%. The number staying in "other accommodation" fell by 48.2%. This latter

category comprised 27.1% of all visitors in December 2016, down from 42.8% in December 2015.

- In December 2016 hotels saw a 2.7% increase in the overall number of visitor nights compared with December 2015. The USA generated 2.6% more hotel nights in December 2016 than in December 2015.
- The number of Venezuelan stopovers using “other accommodation” fell by 75.2% in December 2016 and comprised 54.2% of all Venezuelan visitors in December 2016 down from 83.0% in December 2015. The number of Venezuelans staying in hotel accommodation fell by 4.7% compared with December 2015.
- Numbers provided to AHATA show that for a sample of 15 hotels average room occupancy grew by 0.6 percentage points from 77.2% in December 2015 to 77.8% in December 2016. The average daily room rate fell by 3.2% to \$301.75 and the average RevPar fell by 2.6% to \$234.62.
- In CY 2016 average room occupancy grew by 1.6 percentage points to 79.6%. The average daily room rate fell by 4.6% to \$228.62 and the average RevPar fell by 2.6% to \$182.03.
- Performance of the hotels by category for December shows that the brand name beach front hotels saw their average room occupancies fall by 1.4 percentage points to 76.8%, with their RevPar also falling by 4.4% to \$355.71. The all-inclusive resorts saw their average room occupancies fall by 1.9 percentage points to 77.6% but their RevPar grew by 1.8% to \$131.98. The smaller independent beach front hotels saw their average room occupancies grow by 2.9 percentage points to 92.8% and their RevPar grow by 8.1% to \$314.11. The non-beach front hotels saw their average room occupancies improve by 9.6 percentage points to 77.1% and saw their RevPar grow by 1.5% to \$150.67.
- Performance of the hotels by category for CY 2016 shows that the brand name beach front hotels saw their average room occupancies fall by 0.2 percentage points to 75.8%, with their RevPar also falling by 4.6% to \$246.36. The all-inclusive resorts saw their average room occupancies grow by 0.5 percentage points to 85.7% and their RevPar grow by 3.7% to \$132.45. The smaller independent beach front hotels saw their average room occupancies fall by 0.7 percentage points to 90.7% and their RevPar grow by 2.8% to \$288.11. The non-beach front hotels saw their average room occupancies improve by 7.6 percentage points to 73.3% and saw their RevPar grow by 2.0% to \$114.10.
- In CY 2016 STR reported that hotels in three of eight Caribbean destinations saw higher average room occupancies and five saw lower average room occupancies. Five of the eight saw a lower average RevPar.
- American Airlines was the number one carrier in December 2016 and brought in 15,796 non-resident visitors. JetBlue was the number two carrier (12,759 non-residents) and United Airlines brought in 12,749 non-residents.

## Monthly Update - Aruba's Tourism Industry: December 2016 and Year to Date 2016

- Of the 15,306 Venezuelans who visited Aruba in December 2016 5.5% (836) arrived in Aruba on a US scheduled carrier. In total 1,007 Venezuelans (6.6% 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.
- 2.9% of non-residents carried to Aruba by American Airlines in December 2016 were residents of Venezuela. 1.0% of non-residents carried to Aruba by Delta Air Lines in December were residents of Venezuela. For most other non-Venezuelan, non-Aruban carriers it was generally less than 5%.
- For CY 2016 3.6% of all non-residents arriving in Aruba by American Airlines were residents of Venezuela.
- There was a decline in almost all age categories in December 2016 with the worst declines being in the 30 - 39 years category (down 35.7%) and in the 20 – 29 years category (down 28.3%).
- In December 2016 38.5% of our visitors reported they were visiting for the first time and 46.0% reported they had visited before. 15.5% 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 45.6% first time and 54.4% repeat.
- Trip Advisor ratings for November 2016 show that Aruba received a total of 5,482 reviews and achieved an average rating of 4.40 out of 5. The USVI achieved an average rating of 4.50 as did the Cayman Islands.
- The Aruba Tourism Authority has set a revised target of 5.5% more stopover visitors for 2016 compared to 2015. As well they have targeted a 6% increase in tourism receipts, to increase cruise visitor arrival numbers by a minimum of 3% above the 2013 total and to achieve a 9% per annum increase in the tourism sector's RevPar.
- The Aruba Airport Authority is projecting 13.4% fewer inbound air seats in the winter 2016/2017 compared to the same five months of 2015/2016.

## Visitor Arrivals – December 2016

### Aruba: Total Visitors December 2016

	2016	%	2015	%	% change
USA	55,746	57.4%	53,339	45.0%	4.5%
Canada	6,011	6.2%	5,722	4.8%	5.1%
Venezuela	15,306	15.8%	40,374	34.1%	-62.1%
Brazil	1,393	1.4%	1,897	1.6%	-26.6%
Colombia	4,085	4.2%	3,148	2.7%	29.8%
Argentina	1,308	1.3%	1,152	1.0%	13.5%
Chile	538	0.6%	515	0.4%	4.5%
Netherlands	3,250	3.3%	2,871	2.4%	13.2%
Germany	387	0.4%	289	0.2%	33.9%
Italy	522	0.5%	427	0.4%	22.2%
UK	357	0.4%	320	0.3%	11.6%
Sweden	1,361	1.4%	936	0.8%	45.4%
Other	6,778	7.0%	7,476	6.3%	-9.3%
Total	97,042	100.0%	118,466	100.0%	-18.1%

Source: ATA

Total stopover arrivals (persons staying 24 hours or more) for December 2016 showed an 18.1% decrease compared with December 2015.

Traffic from the USA was up by 4.5%, was up by 5.1% from Canada, down 62.1% from Venezuela, up 29.8% from Colombia, down 26.6% from Brazil and up 13.5% from Argentina. Arrivals were up 13.2% from The Netherlands.

**Aruba: Total Visitors December 2016 YTD**

	2016	%	2015	%	% change
USA	628,765	57.1%	621,386	50.7%	1.2%
Canada	42,059	3.8%	44,166	3.6%	-4.8%
Venezuela	209,128	19.0%	350,918	28.6%	-40.4%
Brazil	12,858	1.2%	20,080	1.6%	-36.0%
Colombia	28,945	2.6%	20,716	1.7%	39.7%
Argentina	18,684	1.7%	15,395	1.3%	21.4%
Chile	10,758	1.0%	9,796	0.8%	9.8%
Netherlands	36,342	3.3%	35,632	2.9%	2.0%
Germany	4,674	0.4%	4,919	0.4%	-5.0%
Italy	7,626	0.7%	7,638	0.6%	-0.2%
UK	18,428	1.7%	12,303	1.0%	49.8%
Sweden	6,267	0.6%	5,935	0.5%	5.6%
Other	77,420	7.0%	76,051	6.2%	1.8%
<b>Total</b>	<b>1,101,954</b>	<b>100.0%</b>	<b>1,224,935</b>	<b>100.0%</b>	<b>-10.0%</b>

Source: ATA

Total stopover arrivals (persons staying 24 hours or more) for calendar year 2016 showed a 10.0% decrease compared with CY 2015.

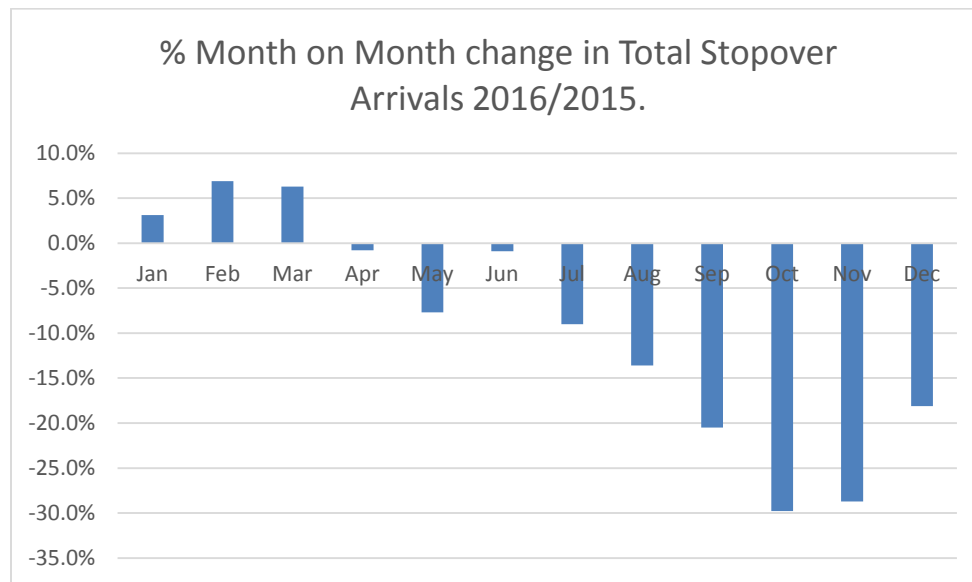
Traffic from the USA was up by 1.2%, was down by 4.8% from Canada, down 40.4% from Venezuela, up 39.7% from Colombia, down 36.0% from Brazil and up 21.4% from Argentina. Arrivals were up 2.0% from The Netherlands.

Total stopovers fell by 122,981 in 2016. They fell by 141,790 from Venezuela.

### Total Stopover Arrivals by Month 2016

	2016	2015	% change
Jan	104,072	100,914	3.1%
Feb	96,185	89,991	6.9%
Mar	109,998	103,506	6.3%
Apr	98,823	99,604	-0.8%
May	80,964	87,691	-7.7%
Jun	86,697	87,447	-0.9%
Jul	99,418	109,251	-9.0%
Aug	96,319	111,471	-13.6%
Sep	77,323	97,263	-20.5%
Oct	76,491	109,024	-29.8%
Nov	78,622	110,307	-28.7%
Dec	97,042	118,466	-18.1%
YTD	1,101,954	1,224,935	-10.0%

Source: ATA



## Expenditures

### Tourism Receipts

(In Millions of AFL)

YEAR	1st	2nd	3rd	4th	TOTAL
2010	644.5	519.8	502.5	566.2	2,233.0
2011	690.4	582.1	555.4	583.4	2,411.3
2012	728.7	581.2	576.5	615.1	2,501.5
2013	774.9	621.4	600.6	680.4	2,666.0
2014	806.6	652.3	678.8	723.4	2,861.1
2015	864.4	672.0	685.3	718.7	2,940.4
2016	852.3	669.0	689.0		

Source: Central Bank of Aruba

### Tourism Receipts

(Millions of AFL)

Quarter	2016	2015	change
1st	852.3	864.4	-1.4%
2nd	669.0	672.0	-0.4%
3rd	689.0	685.3	0.5%
4th		718.7	
YTD		2,940.5	

Source: Central Bank of Aruba

Whilst stopover visitor arrivals were up 5.4% in the first three months of 2016 tourism receipts fell by 1.4% in that quarter compared to first quarter 2015.

In the second quarter visitor arrivals declined by 3.0% whilst tourism receipts fell by 0.4% both compared to second quarter 2015.

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

Through the first nine months of 2016 tourism receipts fell by 0.5% compared with the same nine months of 2015.

## Top Producing US States.

### Aruba: Total Visitors: US States: December 2016

	2016	%	2015	%	% change
New York	11,952	21.4%	11,577	21.7%	3.2%
Massachusetts	5,699	10.2%	5,192	9.7%	9.8%
New Jersey	6,652	11.9%	5,920	11.1%	12.4%
Pennsylvania	3,137	5.6%	3,056	5.7%	2.7%
Illinois	2,926	5.2%	2,694	5.1%	8.6%
Florida	3,535	6.3%	3,180	6.0%	11.2%
Connecticut	1,500	2.7%	1,514	2.8%	-0.9%
Maryland	1,857	3.3%	2,356	4.4%	-21.2%
Ohio	1,628	2.9%	1,586	3.0%	2.6%
Michigan	1,499	2.7%	1,449	2.7%	3.5%
Virginia	1,568	2.8%	1,434	2.7%	9.3%
Texas	1,771	3.2%	1,839	3.4%	-3.7%
California	1,320	2.4%	1,171	2.2%	12.7%
Other	10,702	19.2%	10,371	19.4%	3.2%
<b>Total</b>	<b>55,746</b>	<b>100.0%</b>	<b>53,339</b>	<b>100.0%</b>	<b>4.5%</b>

Source: ATA

### Aruba: Total Visitors: US States: December 2016 YTD

	2016	%	2015	%	% change
New York	129,888	20.7%	125,088	20.1%	3.8%
Massachusetts	70,528	11.2%	68,625	11.0%	2.8%
New Jersey	80,896	12.9%	77,090	12.4%	4.9%
Pennsylvania	37,069	5.9%	36,489	5.9%	1.6%
Illinois	20,914	3.3%	23,228	3.7%	-10.0%
Florida	34,452	5.5%	33,745	5.4%	2.1%
Connecticut	22,765	3.6%	22,383	3.6%	1.7%
Maryland	22,705	3.6%	23,094	3.7%	-1.7%
Ohio	17,801	2.8%	17,471	2.8%	1.9%
Michigan	13,861	2.2%	13,776	2.2%	0.6%
Virginia	16,192	2.6%	16,480	2.7%	-1.7%
Texas	21,940	3.5%	22,850	3.7%	-4.0%
California	14,748	2.3%	15,282	2.5%	-3.5%
Other	125,006	19.9%	125,785	20.2%	-0.6%
<b>Total</b>	<b>628,765</b>	<b>100.0%</b>	<b>621,386</b>	<b>100.0%</b>	<b>1.2%</b>

Source: ATA



## Stopover Visitors by Number of Nights Stayed.

### Aruba: Total Nights December 2016

	2016	%	2015	%	% change
USA	408,630	51.4%	397,036	46.4%	2.9%
Canada	57,837	7.3%	52,445	6.1%	10.3%
Venezuela	121,466	15.3%	210,019	24.5%	-42.2%
Brazil	10,182	1.3%	13,647	1.6%	-25.4%
Colombia	46,310	5.8%	44,376	5.2%	4.4%
Argentina	12,082	1.5%	10,924	1.3%	10.6%
Chile	4,131	0.5%	3,593	0.4%	15.0%
Netherlands	45,795	5.8%	41,411	4.8%	10.6%
Germany	4,243	0.5%	2,965	0.3%	43.1%
Italy	5,177	0.7%	4,424	0.5%	17.0%
UK	3,929	0.5%	3,477	0.4%	13.0%
Sweden	17,310	2.2%	11,972	1.4%	44.6%
Other	57,408	7.2%	59,447	6.9%	-3.4%
<b>Total</b>	<b>794,500</b>	<b>100.0%</b>	<b>855,736</b>	<b>100.0%</b>	<b>-7.2%</b>

Source: ATA

### Aruba: Average Length of Stay in Nights: December 2016

	2016	2015	% change
USA	7.33	7.44	-1.5%
Canada	9.62	9.17	5.0%
Venezuela	7.94	5.20	52.6%
Brazil	7.31	7.19	1.6%
Colombia	11.34	14.10	-19.6%
Argentina	9.24	9.48	-2.6%
Chile	7.68	6.98	10.1%
Netherlands	14.09	14.42	-2.3%
Germany	10.96	10.26	6.9%
Italy	9.92	10.36	-4.3%
UK	11.01	10.87	1.3%
Sweden	12.72	12.79	-0.6%
Other	8.47	7.95	6.5%
<b>Total</b>	<b>8.19</b>	<b>7.22</b>	<b>13.3%</b>

Source: ATA

**Aruba: Total Nights December 2016 YTD**

	2016	%	2015	%	% change
USA	4,425,032	55.5%	4,408,215	52.9%	0.4%
Canada	370,256	4.6%	378,042	4.5%	-2.1%
Venezuela	1,141,833	14.3%	1,726,591	20.7%	-33.9%
Brazil	95,431	1.2%	124,458	1.5%	-23.3%
Colombia	262,297	3.3%	186,298	2.2%	40.8%
Argentina	164,575	2.1%	136,149	1.6%	20.9%
Chile	82,270	1.0%	73,431	0.9%	12.0%
Netherlands	455,529	5.7%	453,836	5.4%	0.4%
Germany	45,978	0.6%	47,053	0.6%	-2.3%
Italy	57,193	0.7%	59,460	0.7%	-3.8%
UK	217,039	2.7%	143,357	1.7%	51.4%
Sweden	76,573	1.0%	70,183	0.8%	9.1%
Other	581,554	7.3%	522,519	6.3%	11.3%
<b>Total</b>	<b>7,975,560</b>	<b>100.0%</b>	<b>8,329,592</b>	<b>100.0%</b>	<b>-4.3%</b>

Source: ATA

**Aruba: Average Length of Stay in Nights: December 2016 YTD**

	2016	2015	% change
USA	7.04	7.09	-0.8%
Canada	8.80	8.56	2.8%
Venezuela	5.46	4.92	11.0%
Brazil	7.24	6.69	8.3%
Colombia	9.16	8.40	9.1%
Argentina	8.81	8.84	-0.4%
Chile	7.65	7.50	2.0%
Netherlands	12.53	12.74	-1.6%
Germany	9.84	9.57	2.8%
Italy	7.50	7.78	-3.7%
UK	11.78	11.65	1.1%
Sweden	12.22	11.83	3.3%
Other	7.51	6.87	9.3%
<b>Total</b>	<b>7.24</b>	<b>6.80</b>	<b>6.4%</b>

Source: ATA

### Competing Destination performance.

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

	Total Stopover Visitors			Period
	2016	2015	% change	
Antigua	238,597	222,123	7.4%	Jan-Nov
<b>Aruba</b>	<b>1,101,954</b>	<b>1,224,935</b>	<b>-10.0%</b>	<b>Jan-Dec</b>
Bahamas	1,204,271	1,175,233	2.5%	Jan-Sep
Barbados	457,670	432,580	5.8%	Jan-Sep
Belize	315,512	271,291	16.3%	Jan-Oct
British Virgin Islands	406,027	393,018	3.3%	Jan-Dec
Cayman Islands	385,451	385,378	0.0%	Jan-Dec
Cuba	2,715,478	2,430,238	11.7%	Jan-Aug
Curacao	441,331	467,538	-5.6%	Jan-Dec
Dominican Republic	5,134,110	4,832,956	6.2%	Jan-Dec
Jamaica	2,181,684	2,123,042	2.8%	Jan-Dec
Puerto Rico*	1,488,998	1,490,876	-0.1%	Jan-Oct
Saint Lucia	288,931	286,923	0.7%	Jan-Oct
Turks & Caicos Islands	356,489	299,571	19.0%	Jan-Sep
US Virgin Islands	658,441	634,336	3.8%	Jan-Oct

\* Hotel Non Resident Registrations

Source CTO

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

Total US Stopover Visitors				
	2016	2015	% change	Period
Antigua	98,444	83,183	18.3%	Jan-Nov
<b>Aruba</b>	<b>628,765</b>	<b>621,386</b>	<b>1.2%</b>	<b>Jan-Dec</b>
Bahamas	953,867	916,291	4.1%	Jan-Sep
Barbados	123,820	111,852	10.7%	Jan-Sep
Belize	210,906	170,498	23.7%	Jan-Oct
British Virgin Islands	NA	NA	NA	NA
Cayman Islands	300,571	291,759	3.0%	Jan-Dec
Cuba	171,445	100,305	70.9%	Jan-Aug
Curacao	59,714	63,188	-5.5%	Jan-Dec
Dominican Republic	2,085,186	2,001,909	4.2%	Jan-Dec
Jamaica	1,406,058	1,344,149	4.6%	Jan-Dec
Puerto Rico*	1,237,749	1,240,229	-0.2%	Jan-Sep
Saint Lucia	132,067	128,220	3.0%	Jan-Oct
Turks & Caicos Islands	290,888	247,564	17.5%	Jan-Sep
US Virgin Islands	NA	NA	NA	NA

\* Hotel Non Resident Registrations

Source CTO

## US Citizens Outbound Travel 2016.

U.S. Citizens Outbound Travel - Caribbean			
	2016	2015	% change
Jan	588,925	560,268	5.1%
Feb	643,467	610,837	5.3%
Mar	809,877	755,526	7.2%
Apr	687,500	671,777	2.3%
May	641,598	647,866	-1.0%
Jun	803,919	783,320	2.6%
Jul	890,781	852,692	4.5%
Aug	640,065	656,606	-2.5%
Sep	416,980	403,601	3.3%
Oct	451,579	477,299	-5.4%
Nov	502,982	523,274	-3.9%
YTD	7,082,673	6,943,066	2.0%

Source: ITA: National Travel & Tourism Office

U.S. Citizens Outbound Travel - Total			
	2016	2015	% change
Jan	5,329,529	4,861,589	9.6%
Feb	5,201,686	4,696,331	10.8%
Mar	6,508,516	5,797,906	12.3%
Apr	5,834,736	5,473,174	6.6%
May	6,757,900	6,369,370	6.1%
Jun	8,227,499	7,751,682	6.1%
Jul	9,072,024	8,235,479	10.2%
Aug	7,438,193	7,066,754	5.3%
Sep	6,291,971	5,781,623	8.8%
Oct	6,063,359	5,499,394	10.3%
Nov	5,599,045	5,405,054	3.6%
YTD	72,559,988	67,188,967	8.0%

Source: ITA: National Travel & Tourism Office

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U.S. Citizens Outbound Travel - Caribbean Share			
	2016	2015	% pt change
Jan	11.1%	11.5%	-0.5%
Feb	12.4%	13.0%	-0.6%
Mar	12.4%	13.0%	-0.6%
Apr	11.8%	12.3%	-0.5%
May	9.5%	10.2%	-0.7%
Jun	9.8%	10.1%	-0.3%
Jul	9.8%	10.4%	-0.5%
Aug	8.6%	9.3%	-0.7%
Sep	6.6%	7.0%	-0.4%
Oct	7.4%	8.7%	-1.2%
Nov	9.0%	9.7%	-0.7%
YTD	9.8%	10.3%	-0.6%

Source: ITA: National Travel & Tourism Office

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

Source: ITA: National Travel & Tourism Office

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

### Cruise Traffic.

	2016		2015		Per cent change	
	Calls	Passengers	Calls	Passengers	Calls	Passengers
Jan	52	101,534	42	77,819	23.8%	30.5%
Feb	38	81,574	38	76,067	0.0%	7.2%
Mar	48	96,736	34	61,105	41.2%	58.3%
Apr	26	50,579	24	49,644	8.3%	1.9%
May	8	20,462	13	26,447	-38.5%	-22.6%
Jun	7	25,452	9	22,243	-22.2%	14.4%
Jul	8	18,921	10	23,627	-20.0%	-19.9%
Aug	11	22,557	10	23,282	10.0%	-3.1%
Sep	7	21,411	13	24,372	-46.2%	-12.1%
Oct	17	38,349	20	50,953	-15.0%	-24.7%
Nov	38	77,826	35	79,753	8.6%	-2.4%
Dec	47	100,642	48	91,707	-2.1%	9.7%
YTD	307	656,043	296	607,019	3.7%	8.1%

Source: Aruba Port Authority.

In December 2016 Aruba saw a 9.7% increase in the number of cruise passengers compared with December 2015.

The volume of cruise traffic in calendar year 2016 grew by 8.1% compared to CY 2015.

## Monthly Update - Aruba's Tourism Industry: December 2016 and Year to Date 2016

The CTO numbers for 2016 for cruise visitor traffic show

	Total Cruise Visitors			Period
	2016	2015	% change	
Antigua	414,574	440,094	-5.8%	Jan-Sep
<b>Aruba</b>	<b>656,043</b>	<b>607,019</b>	<b>8.1%</b>	<b>Jan-Dec</b>
Bahamas	2,451,944	2,410,060	1.7%	Jan-Jun
Barbados	394,410	396,148	-0.4%	Jan-Sep
Belize	758,315	733,264	3.4%	Jan-Oct
British Virgin Islands	465,870	315,083	47.9%	Jan-Aug
Cayman Islands	1,361,547	1,311,871	3.8%	Jan-Oct
Cozumel	2,852,625	2,686,632	6.2%	Jan-Oct
Curacao	354,953	385,021	-7.8%	Jan-Oct
Dominican Republic	561,454	336,597	66.8%	Jan-Sep
Jamaica	1,313,841	1,204,232	9.1%	Jan-Oct
Puerto Rico	1,086,956	1,152,332	-5.7%	Jan-Sep
Saint Lucia	391,944	506,129	-22.6%	Jan-Oct
St. Maarten	1,029,027	1,249,699	-17.7%	Jan-Jul
Turks & Caicos Islands	686,383	745,333	-7.9%	Jan-Oct
US Virgin Islands	1,406,316	1,431,856	-1.8%	Jan-Oct
sub total	16,186,202	15,911,370	1.7%	

Source CTO



## Place of Stay

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

Place of Stay: Visitors 2016					
	Dec 2016		Dec 2015		% change
	Visitors	%	Visitors	%	
Hotels	47,429	48.9%	46,006	38.8%	3.1%
Timeshare	23,308	24.0%	21,700	18.3%	7.4%
Apts/Priv Homes	26,305	27.1%	50,760	42.8%	-48.2%
<b>Total</b>	<b>97,042</b>	<b>100.0%</b>	<b>118,466</b>	<b>100.0%</b>	<b>-18.1%</b>

Source: ATA

The hotels category includes High Rise hotels, Low Rise hotels and the Tropicana. As shown above in December 2016 the number of visitors staying in hotel accommodation increased by 3.1%, those staying in a timeshare resort grew by 7.4% and those staying in apartments, guest houses or private homes declined by 48.2%.

Place of Stay: Visitor Nights 2016					
	Dec 2016		Dec 2015		% change
	Nights	%	Nights	%	
Hotels	313,920	39.5%	305,783	35.7%	2.7%
Timeshare	209,675	26.4%	193,105	22.6%	8.6%
Apts/Priv Homes	270,905	34.1%	356,848	41.7%	-24.1%
<b>Total</b>	<b>794,500</b>	<b>100.0%</b>	<b>855,736</b>	<b>100.0%</b>	<b>-7.2%</b>

Source: ATA

Average Length of Stay in Nights 2016			
	Dec 2016	Dec 2015	% change
	Nights	Nights	
Hotels	6.62	6.65	-0.4%
Timeshare	9.00	8.90	1.1%
Apts/Priv Homes	10.30	7.03	46.5%
<b>Total</b>	<b>8.19</b>	<b>7.22</b>	<b>13.3%</b>

Source: ATA

## Monthly Update - Aruba's Tourism Industry: December 2016 and Year to Date 2016

### Visitors 2016

	Dec 2016 YTD		Dec 2015 YTD		% change
	Visitors	%	Visitors	%	
Hotels	544,788	54.2%	541,409	48.9%	0.6%
Timeshare	270,195	26.9%	274,265	24.8%	-1.5%
Apts/Priv Homes	286,971	28.6%	409,261	37.0%	-29.9%
<b>Total</b>	<b>1,101,954</b>	<b>100.0%</b>	<b>1,224,935</b>	<b>100.0%</b>	<b>-10.0%</b>

Source: ATA

### Visitor Nights Full Year 2016

	Dec 2016 YTD		Dec 2015 YTD		% change
	Nights	%	Nights	%	
Hotels	3,428,713	47.7%	3,397,194	45.5%	0.9%
Timeshare	2,259,015	31.5%	2,272,466	30.4%	-0.6%
Apts/Priv Homes	2,287,832	31.9%	2,659,932	35.6%	-14.0%
<b>Total</b>	<b>7,975,560</b>	<b>100.0%</b>	<b>8,329,592</b>	<b>100.0%</b>	<b>-4.3%</b>

Source: ATA

### Average Length of Stay in Nights 2016

	Dec 2016 YTD	Dec 2015 YTD	% change
	Nights	Nights	
Hotels	6.29	6.27	0.3%
Timeshare	8.36	8.29	0.9%
Apts/Priv Homes	7.97	6.50	22.7%
<b>Total</b>	<b>7.24</b>	<b>6.80</b>	<b>6.4%</b>

Source: ATA

### Hotel Nights by Market.

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

#### Aruba: Total Hotel Nights December 2016

	2016	%	2015	%	% change
USA	195,754	62.4%	190,710	62.4%	2.6%
Canada	27,809	8.9%	28,112	9.2%	-1.1%
Venezuela	25,529	8.1%	24,889	8.1%	2.6%
Brazil	7,203	2.3%	9,936	3.2%	-27.5%
Colombia	8,328	2.7%	5,808	1.9%	43.4%
Argentina	8,049	2.6%	7,330	2.4%	9.8%
Netherlands	7,996	2.5%	8,269	2.7%	-3.3%
Germany	1,526	0.5%	928	0.3%	64.4%
Italy	2,108	0.7%	1,851	0.6%	13.9%
UK	1,172	0.4%	1,462	0.5%	-19.8%
Other	28,446	9.1%	26,488	8.7%	7.4%
Total	313,920	100.0%	305,783	100.0%	2.7%

Source: ATA

#### Aruba: Total Hotel Nights December YTD 2016

	2016	%	2015	%	% change
USA	2,142,864	62.5%	2,141,732	63.0%	0.1%
Canada	200,239	5.8%	223,190	6.6%	-10.3%
Venezuela	217,612	6.3%	226,889	6.7%	-4.1%
Brazil	64,181	1.9%	103,000	3.0%	-37.7%
Colombia	65,441	1.9%	52,360	1.5%	25.0%
Argentina	123,099	3.6%	100,123	2.9%	22.9%
Netherlands	95,070	2.8%	104,070	3.1%	-8.6%
Germany	20,724	0.6%	23,905	0.7%	-13.3%
Italy	36,033	1.1%	37,050	1.1%	-2.7%
UK	176,688	5.2%	105,704	3.1%	67.2%
Other	286,762	8.4%	279,171	8.2%	2.7%
Total	3,428,713	100.0%	3,397,194	100.0%	0.9%

Source: ATA

### Use of Accommodation by visitors from Venezuela.

During 2015 there was a sharp change in the use of accommodation by Venezuelan visitors, a trend which continued during 2016.

The number of visitors from Venezuela using hotel accommodation in December fell by 4.7%. The number of visitors using private homes/apartments and condominiums fell by 75.2% and comprised 54.2% of all Venezuelan visitors in December 2016, down from 83.0% in December 2015.

Visitors from Venezuela 2016					
	Dec 2016		Dec 2015		
	Visitors	%	Visitors	%	% change
Hotels	4,462	29.2%	4,684	11.6%	-4.7%
Timeshare	2,545	16.6%	2,173	5.4%	17.1%
Apts/Priv Homes	8,299	54.2%	33,517	83.0%	-75.2%
<b>Total</b>	<b>15,306</b>	<b>100.0%</b>	<b>40,374</b>	<b>100.0%</b>	<b>-62.1%</b>

Source: ATA

Visitor Nights from Venezuela 2016					
	Dec 2016		Dec 2015		
	Nights	%	Nights	%	% change
Hotels	25,529	21.0%	24,889	11.9%	2.6%
Timeshare	23,606	19.4%	19,743	9.4%	19.6%
Apts/Priv Homes	72,331	59.5%	165,387	78.7%	-56.3%
<b>Total</b>	<b>121,466</b>	<b>100.0%</b>	<b>210,019</b>	<b>100.0%</b>	<b>-42.2%</b>

Source: ATA

Average Length of Stay Venezuela 2016					
	Dec 2016		Dec 2015		
	Nights		Nights		% change
Hotels	5.72	nts	5.31	nts	7.7%
Timeshare	9.28	nts	9.09	nts	2.1%
Apts/Priv Homes	8.72	nts	4.93	nts	76.6%
<b>Total</b>	<b>7.94</b>	<b>nts</b>	<b>5.20</b>	<b>nts</b>	<b>52.6%</b>

Source: ATA

## Monthly Update - Aruba's Tourism Industry: December 2016 and Year to Date 2016

### Visitors from Venezuela 2016

	Dec 2016 YTD		Dec 2015 YTD		
	Visitors	%	Visitors	%	% change
Hotels	48,489	25.0%	52,922	17.0%	-8.4%
Timeshare	21,259	11.0%	21,104	6.8%	0.7%
Apts/Priv Homes	139,380	71.9%	276,892	89.2%	-49.7%
<b>Total</b>	<b>209,128</b>	<b>100.0%</b>	<b>350,918</b>	<b>100.0%</b>	<b>-40.4%</b>

Source: ATA

### Visitor Nights from Venezuela 2016

	Dec 2016 YTD		Dec 2015 YTD		
	Nights	%	Nights	%	% change
Hotels	217,612	21.3%	226,889	15.0%	-4.1%
Timeshare	160,434	15.7%	152,109	10.0%	5.5%
Apts/Priv Homes	763,787	74.9%	1,347,593	88.9%	-43.3%
<b>Total</b>	<b>1,141,833</b>	<b>100.0%</b>	<b>1,726,591</b>	<b>100.0%</b>	<b>-33.9%</b>

Source: ATA

### Average Length of Stay Venezuela 2016

	Dec 2016 YTD		Dec 2015 YTD		
	Nights		Nights		% change
Hotels	4.49	nts	4.29	nts	4.7%
Timeshare	7.55	nts	7.21	nts	4.7%
Apts/Priv Homes	5.48	nts	4.87	nts	12.6%
<b>Total</b>	<b>5.46</b>	<b>nts</b>	<b>4.92</b>	<b>nts</b>	<b>11.0%</b>

Source: ATA

## Hotel Performance Aruba 2016

December 2016	2016	2015	2016/2015 % change	
Rooms	4,903	4,846	1.2%	
ARN	151,993	150,226	1.2%	
ORN	118,179	116,008	1.9%	
% occupancy	77.8%	77.2%	0.6%	points
ADR	\$301.75	\$311.77	-3.2%	
Rev Par	\$234.62	\$240.76	-2.6%	

***Based on data from 15 properties.***

Total transient hotel room inventory for Aruba in December 2016 stood at 5,378 rooms. In addition to the transient hotel room inventory there were an estimated total of 3,430 timeshare units. It should be noted that the Divi All Inclusive added 60 rooms in February 2016.

In December 2016 the hotel sector saw a 0.6 percentage point increase in average room occupancy, from 77.2% to 77.8%, but a 3.2% decrease in the average daily room rate (ADR). With a higher average room occupancy but lower ADR revenue per available room (rev par) fell by 2.6% compared with December 2015.

## Calendar Year 2016

December 2016 YTD	2016	2015	2016/2015 % change	
Rooms	4,919	4,858	1.3%	
ARN	1,796,348	1,727,843	4.0%	
ORN	1,430,242	1,347,060	6.2%	
% occupancy	79.6%	78.0%	1.6%	points
ADR	\$228.62	\$239.64	-4.6%	
Rev Par	\$182.03	\$186.83	-2.6%	

***Based on data from 15 properties.***

## Monthly Update - Aruba's Tourism Industry: December 2016 and Year to Date 2016

### By Month.

2016	Avg Occupancy			ADR			RevPar		
	2016	2015	% pt chng	2016	2015	% chng	2016	2015	% chng
Jan	78.2%	84.9%	-6.7%	\$299.55	\$305.87	-2.1%	\$234.15	\$259.78	-9.9%
Feb	84.1%	87.0%	-2.9%	\$307.59	\$308.25	-0.2%	\$258.72	\$268.04	-3.5%
Mar	78.1%	77.1%	1.0%	\$304.10	\$293.17	3.7%	\$237.45	\$225.98	5.1%
Apr	79.9%	82.1%	-2.2%	\$215.84	\$253.63	-14.9%	\$172.41	\$208.34	-17.2%
May	76.3%	74.2%	2.1%	\$187.89	\$200.87	-6.5%	\$143.32	\$148.98	-3.8%
Jun	77.9%	70.5%	7.4%	\$185.52	\$199.46	-7.0%	\$144.51	\$140.56	2.8%
Jul	84.1%	81.9%	2.2%	\$204.80	\$216.78	-5.5%	\$172.28	\$177.51	-2.9%
Aug	83.8%	78.9%	4.9%	\$192.12	\$203.30	-5.5%	\$161.04	\$160.32	0.5%
Sep	79.9%	71.1%	8.8%	\$174.57	\$176.04	-0.8%	\$139.48	\$125.25	11.4%
Oct	76.6%	73.1%	3.5%	\$177.64	\$181.93	-2.4%	\$136.01	\$133.00	2.3%
Nov	79.1%	77.2%	1.9%	\$193.39	\$194.77	-0.7%	\$152.91	\$150.31	1.7%
Dec	77.8%	77.2%	0.6%	\$301.75	\$311.77	-3.2%	\$234.62	\$240.76	-2.6%
YTD	79.6%	78.0%	1.6%	\$228.62	\$239.64	-4.6%	\$182.03	\$186.83	-2.6%

## Monthly Update - Aruba's Tourism Industry: December 2016 and Year to Date 2016

### Performance by Category – December 2016.

	December 2016						
	Rooms	ARN	ORN	%opy	Revenue	\$ADR	\$RevPar
Brand Name Beach Front	2,035	63,085	48,470	76.8%	\$22,439,857.00	\$462.96	\$355.71
All Inclusives	1,841	57,071	44,296	77.6%	\$7,532,067.00	\$170.04	\$131.98
Small Independent Beach Front	176	5,456	5,064	92.8%	\$1,713,781.00	\$338.42	\$314.11
Non Beach Front	851	26,381	20,349	77.1%	\$3,974,718.00	\$195.33	\$150.67
Total	4,903	151,993	118,179	77.8%	\$35,660,423.00	\$301.75	\$234.62

	December 2015						
	Rooms	ARN	ORN	%opy	Revenue	\$ADR	\$RevPar
Brand Name Beach Front	2,040	63,240	49,476	78.2%	\$23,518,054.00	\$475.34	\$371.89
All Inclusives	1,777	55,087	43,780	79.5%	\$7,140,043.00	\$163.09	\$129.61
Small Independent Beach Front	176	5,456	4,905	89.9%	\$1,585,847.00	\$323.31	\$290.66
Non Beach Front	853	26,443	17,847	67.5%	\$3,924,330.00	\$219.89	\$148.41
Total	4,846	150,226	116,008	77.2%	\$36,168,274.00	\$311.77	\$240.76

	Per Cent Change						
	Rooms	ARN	ORN	% pt change	Revenue	\$ADR	\$RevPar
Brand Name Beach Front	-0.2%	-0.2%	-2.0%	-1.4%	-4.6%	-2.6%	-4.4%
All Inclusives	3.6%	3.6%	1.2%	-1.9%	5.5%	4.3%	1.8%
Small Independent Beach Front	0.0%	0.0%	3.2%	2.9%	8.1%	4.7%	8.1%
Non Beach Front	-0.2%	-0.2%	14.0%	9.6%	1.3%	-11.2%	1.5%
Total	1.2%	1.2%	1.9%	0.5%	-1.4%	-3.2%	-2.6%

### Brand Name Beachfront Hotels

The Aruba Marriott, the Holiday Inn, the Hyatt Regency Aruba, the Ritz Carlton Aruba and the Hilton Aruba Caribbean Resort & Casino.

### All Inclusives Resorts.

Divi Tamarijn and Divi All Inclusive, the Occidental Grand, the Riu Palace and the Riu Palace Antillas.

### Small Independent Beach Front Hotels.

Bucuti & Tara Beach Resort, the Manchebo Beach Resort

### Non Beachfront Hotels.

The Mill Resort, the Talk of the Town, the Renaissance Aruba, the Tropicana Aruba Resort & Casino.



## Monthly Update - Aruba's Tourism Industry: December 2016 and Year to Date 2016

### Performance by Category – Year to Date.

	December 2016 YTD						
	Rooms	ARN	ORN	%opy	Revenue	\$ADR	\$RevPar
Brand Name Beach Front	2,035	744,620	564,513	75.8%	\$183,446,742.00	\$324.96	\$246.36
All Inclusives	1,841	671,556	575,833	85.7%	\$88,947,755.00	\$154.47	\$132.45
Small Independent Beach Front	176	64,416	58,447	90.7%	\$18,559,058.00	\$317.54	\$288.11
Non Beach Front	851	315,756	231,449	73.3%	\$36,027,281.00	\$155.66	\$114.10
<b>Total</b>	<b>4,903</b>	<b>1,796,348</b>	<b>1,430,242</b>	<b>79.6%</b>	<b>\$326,980,836.00</b>	<b>\$228.62</b>	<b>\$182.03</b>

	December 2015 YTD						
	Rooms	ARN	ORN	%opy	Revenue	\$ADR	\$RevPar
Brand Name Beach Front	2,040	744,600	565,842	76.0%	\$192,379,318.00	\$339.99	\$258.37
All Inclusives	1,777	604,906	515,786	85.3%	\$77,279,858.00	\$149.83	\$127.76
Small Independent Beach Front	176	64,240	58,749	91.5%	\$17,998,982.00	\$306.37	\$280.18
Non Beach Front	853	314,097	206,413	65.7%	\$35,151,139.00	\$170.30	\$111.91
<b>Total</b>	<b>4,846</b>	<b>1,727,843</b>	<b>1,347,060</b>	<b>78.0%</b>	<b>\$322,809,297.00</b>	<b>\$239.64</b>	<b>\$186.83</b>

	Per Cent Change						
	Rooms	ARN	ORN	% pt change	Revenue	\$ADR	\$RevPar
Brand Name Beach Front	-0.2%	0.0%	-0.2%	-0.2%	-4.6%	-4.4%	-4.6%
All Inclusives	3.6%	11.0%	11.6%	0.5%	15.1%	3.1%	3.7%
Small Independent Beach Front	0.0%	0.3%	-0.5%	-0.7%	3.1%	3.6%	2.8%
Non Beach Front	-0.2%	0.5%	12.1%	7.6%	2.5%	-8.6%	2.0%
<b>Total</b>	<b>1.2%</b>	<b>4.0%</b>	<b>6.2%</b>	<b>1.7%</b>	<b>1.3%</b>	<b>-4.6%</b>	<b>-2.6%</b>

## Monthly Update - Aruba's Tourism Industry: December 2016 and Year to Date 2016

### Competing Destination performance.

Smith Travel Research collects data from hotels across the Caribbean on behalf of the CHTA. The following numbers are based on this STR report and show the performance figures for hotels in various Caribbean countries for December and CY 2016 compared December and CY 2015.

December 2016	Average Room Occupancy			Average Daily Rate			RevPar			#Hotels in
	2016	2015	% pt change	2016	2015	% change	2016	2015	% change	Sample
Aruba	77.8%	77.2%	0.6%	\$301.75	\$311.77	-3.2%	\$234.62	\$240.76	-2.6%	15
Barbados	71.9%	75.9%	-4.0%	\$406.72	\$387.40	5.0%	\$292.54	\$294.07	-0.5%	36
Cancun	73.0%	67.8%	5.2%	\$265.17	\$256.06	3.6%	\$193.54	\$173.72	11.4%	59
Cayman Islands	na	na	na	na	na	na	na	na	na	8
Curacao	69.1%	73.7%	-4.6%	\$182.22	\$171.39	6.3%	\$125.92	\$126.34	-0.3%	11
Dominican Republic	67.4%	72.5%	-5.1%	\$164.70	\$157.79	4.4%	\$110.98	\$114.44	-3.0%	30
Jamaica	71.3%	73.0%	-1.7%	\$293.04	\$308.87	-5.1%	\$208.86	\$225.52	-7.4%	11
Puerto Rico	70.0%	72.3%	-2.3%	\$222.27	\$249.10	-10.8%	\$155.53	\$180.03	-13.6%	41
USVI	74.2%	75.2%	-1.0%	\$448.37	\$417.46	7.4%	\$332.79	\$313.74	6.1%	7
Caribbean	65.4%	68.5%	-3.1%	\$261.31	\$264.82	-1.3%	\$170.99	\$181.37	-5.7%	256

Source: STR.

December YTD 2016	Average Room Occupancy			Average Daily Rate			RevPar			#Hotels in
	2016	2015	% pt change	2016	2015	% change	2016	2015	% change	Sample
Aruba	79.6%	78.0%	1.6%	\$228.62	\$239.64	-4.6%	\$182.03	\$186.83	-2.6%	15
Barbados	67.6%	68.6%	-1.0%	\$280.46	\$278.88	0.6%	\$189.60	\$191.34	-0.9%	36
Cancun	71.1%	72.8%	-1.7%	\$207.88	\$202.19	2.8%	\$147.86	\$147.13	0.5%	59
Cayman Islands	na	na	na	na	na	na	na	na	na	8
Curacao	68.7%	71.4%	-2.7%	\$147.61	\$151.02	-2.3%	\$101.35	\$107.88	-6.1%	11
Dominican Republic	72.8%	70.7%	2.1%	\$134.92	\$132.09	2.1%	\$98.21	\$93.34	5.2%	30
Jamaica	67.6%	71.1%	-3.5%	\$231.76	\$242.04	-4.2%	\$156.55	\$171.99	-9.0%	11
Puerto Rico	69.9%	74.4%	-4.5%	\$182.79	\$190.34	-4.0%	\$127.83	\$141.57	-9.7%	41
USVI	77.2%	76.4%	0.8%	\$335.66	\$321.57	4.4%	\$259.19	\$245.73	5.5%	7
Caribbean	66.7%	68.3%	-1.6%	\$201.50	\$202.14	-0.3%	\$134.48	\$138.12	-2.6%	256

Source: STR.

## Visitors by Carrier.

The table below shows the number of non-resident visitors brought in by various airline carriers during December 2016. 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. Note that US Airways merged with American Airlines during October 2015.

<b>Stopovers: By Airline: December 2016</b>					
(Non-resident stopover Arrivals)					
	2016	% share	2015	% share	% change
Laser	7,729	8.0%	22,356	18.9%	-65.4%
American Airlines	15,796	16.3%	13,271	11.2%	19.0%
jetBlue	12,759	13.1%	11,592	9.8%	10.1%
United Airlines	12,749	13.1%	8,085	6.8%	57.7%
Delta Air Lines	10,398	10.7%	8,347	7.0%	24.6%
Southwest/Air Tran	5,993	6.2%	5,969	5.0%	0.4%
Insel Air	3,683	3.8%	6,437	5.4%	-42.8%
Avior	259	0.3%	4,590	3.9%	-94.4%
Copa	3,254	3.4%	2,792	2.4%	16.5%
Avianca	2,703	2.8%	2,577	2.2%	4.9%
Sunwing	1,850	1.9%	1,646	1.4%	12.4%
Aruba Airlines	2,353	2.4%	3,243	2.7%	-27.4%
KLM	2,756	2.8%	1,742	1.5%	58.2%
Aserca	2,697	2.8%	3,651	3.1%	-26.1%
WestJet	-	0.0%	1,053	0.9%	-100.0%
Venezolana	-	0.0%	2,061	1.7%	-100.0%
ArkeFly	1,128	1.2%	908	0.8%	24.2%
Thomas Cook	952	1.0%	358	0.3%	165.9%
Air Canada	1,093	1.1%	536	0.5%	103.9%
GOL	-	0.0%	644	0.5%	-100.0%
Surinam Airways	690	0.7%	521	0.4%	32.4%
Spirit Airlines	438	0.5%	313	0.3%	39.9%
US Airways	-	0.0%	-	0.0%	0.0%
Tiara Air	-	0.0%	-	0.0%	0.0%
Private	3,136	3.2%	1,624	1.4%	93.1%
Charter	2,482	2.6%	11,192	9.4%	-77.8%
Other	2,144	2.2%	2,958	2.5%	-27.5%
<b>TOTAL</b>	<b>97,042</b>	<b>100.0%</b>	<b>118,466</b>	<b>100.0%</b>	<b>-18.1%</b>

Source: ATA

## Monthly Update - Aruba's Tourism Industry: December 2016 and Year to Date 2016

### Stopovers: By Airline: December 2016 YTD

(Non-resident stopover Arrivals)

	2016 YTD	% share	2015 YTD	% share	% change
Laser	116,918	10.6%	153,417	12.5%	-23.8%
American Airlines	163,162	14.8%	120,489	9.8%	35.4%
jetBlue	141,701	12.9%	133,956	10.9%	5.8%
United Airlines	137,593	12.5%	125,510	10.2%	9.6%
Delta Air Lines	115,882	10.5%	111,285	9.1%	4.1%
Southwest/Air Tran	76,755	7.0%	75,321	6.1%	1.9%
Insel Air	49,560	4.5%	73,181	6.0%	-32.3%
Avior	16,726	1.5%	45,865	3.7%	-63.5%
Copa	32,457	2.9%	30,296	2.5%	7.1%
Avianca	29,293	2.7%	27,528	2.2%	6.4%
Sunwing	15,246	1.4%	16,907	1.4%	-9.8%
Aruba Airlines	24,043	2.2%	35,423	2.9%	-32.1%
KLM	25,938	2.4%	25,081	2.0%	3.4%
Aserca	27,338	2.5%	38,421	3.1%	-28.8%
WestJet	6,440	0.6%	8,052	0.7%	-20.0%
Venezolana	5,120	0.5%	22,412	1.8%	-77.2%
ArkeFly	14,279	1.3%	14,694	1.2%	-2.8%
Thomas Cook	3,828	0.3%	3,562	0.3%	7.5%
Air Canada	8,469	0.8%	7,186	0.6%	17.9%
GOL	984	0.1%	7,915	0.6%	-87.6%
Surinam Airways	8,057	0.7%	5,137	0.4%	56.8%
Spirit Airlines	6,104	0.6%	6,181	0.5%	-1.2%
US Airways	-	0.0%	72,322	5.9%	-100.0%
Tiara Air	127	0.0%	479	0.0%	-73.5%
Private	13,704	1.2%	13,450	1.1%	1.9%
Charter	25,257	2.3%	24,372	2.0%	3.6%
Other	36,973	3.4%	26,493	2.2%	39.6%
<b>TOTAL</b>	<b>1,101,954</b>	<b>100.0%</b>	<b>1,224,935</b>	<b>100.0%</b>	<b>-10.0%</b>

Source: ATA

## Monthly Update - Aruba's Tourism Industry: December 2016 and Year to Date 2016

### Carriers Used by Venezuelans.

#### Venezuelan Stopovers: By Airline: December 2016

(Non-resident stopover Arrivals)

	Dec 2016	% share	Dec 2015	% share	% change
<b>US Carriers</b>					
American Airlines	460	3.0%	578	1.4%	-20.4%
Delta Air Lines	107	0.7%	69	0.2%	55.1%
United Airlines	110	0.7%	56	0.1%	96.4%
US Airways	-	0.0%	-	0.0%	0.0%
Southwest/Air Tran	88	0.6%	76	0.2%	15.8%
jetBlue	59	0.4%	59	0.1%	0.0%
Spirit Airlines	12	0.1%	3	0.0%	300.0%
<b>Total US Carriers</b>	<b>836</b>	<b>5.5%</b>	<b>841</b>	<b>2.1%</b>	<b>-0.6%</b>
<b>Canada</b>					
Air Canada	15	0.1%	-	0.0%	100.0%
WestJet	-	0.0%	10	0.0%	-100.0%
<b>Total Canada</b>	<b>15</b>	<b>0.1%</b>	<b>10</b>	<b>0.0%</b>	<b>50.0%</b>
<b>Europe</b>					
KLM	48	0.3%	39	0.1%	23.1%
Arke Fly	12	0.1%	7	0.0%	71.4%
<b>Total Europe</b>	<b>60</b>	<b>0.4%</b>	<b>46</b>	<b>0.1%</b>	<b>30.4%</b>
<b>Other Non-Venezuelan</b>					
Copa	62	0.4%	102	0.3%	-39.2%
Surinam Airlines	34	0.2%	13	0.0%	161.5%
<b>Total Other Non Venez</b>	<b>96</b>	<b>0.6%</b>	<b>115</b>	<b>0.3%</b>	<b>-16.5%</b>
<b>Total (Non Aruba/Non Venezuelan)</b>	<b>1,007</b>	<b>6.6%</b>	<b>1,012</b>	<b>2.5%</b>	<b>-0.5%</b>
Other (Aruban/Venezuelan)	14,299	93.4%	39,362	97.5%	-63.7%
<b>Total</b>	<b>15,306</b>	<b>100.0%</b>	<b>40,374</b>	<b>100.0%</b>	<b>-62.1%</b>

Source: ATA

## Monthly Update - Aruba's Tourism Industry: December 2016 and Year to Date 2016

A portion of Venezuelan business to Aruba in December 2016 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 836 residents of Venezuela (5.5% of all Venezuelans visiting Aruba) arrived in Aruba by a scheduled US carrier (i.e. were returning to Venezuela via Aruba) so were probably visiting the USA. This was down by 0.6% compared to December 2015. In total 1,007 residents of Venezuela (6.6% of all Venezuelans visiting Aruba) arrived in Aruba by a scheduled carrier other than one based in Venezuela or Aruba.

## Monthly Update - Aruba's Tourism Industry: December 2016 and Year to Date 2016

### Venezuelan Stopovers: By Airline: December 2016 YTD

(Non-resident stopover Arrivals)

	Dec 2016 YTD	% share	Dec 2015 YTD	% share	% change
<b>US Carriers</b>					
American Airlines	5,804	2.8%	13,091	3.7%	-55.7%
Delta Air Lines	665	0.3%	3,062	0.9%	-78.3%
United Airlines	990	0.5%	2,846	0.8%	-65.2%
US Airways	-	0.0%	1,586	0.5%	0.0%
Southwest/Air Tran	777	0.4%	826	0.2%	-5.9%
jetBlue	411	0.2%	658	0.2%	-37.5%
Spirit Airlines	188	0.1%	175	0.0%	7.4%
<b>Total US Carriers</b>	<b>8,835</b>	<b>4.2%</b>	<b>22,244</b>	<b>6.3%</b>	<b>-60.3%</b>
<b>Canada</b>					
Air Canada	142	0.1%	121	0.0%	100.0%
WestJet	107	0.1%	171	0.0%	-37.4%
<b>Total Canada</b>	<b>249</b>	<b>0.1%</b>	<b>292</b>	<b>0.1%</b>	<b>-14.7%</b>
<b>Europe</b>					
KLM	462	0.2%	631	0.2%	-26.8%
Arke Fly	143	0.1%	128	0.0%	11.7%
<b>Total Europe</b>	<b>605</b>	<b>0.3%</b>	<b>759</b>	<b>0.2%</b>	<b>-20.3%</b>
<b>Other Non-Venezuelan</b>					
Copa	477	0.2%	1,274	0.4%	-62.6%
Surinam Airlines	509	0.2%	350	0.1%	45.4%
<b>Total Other Non Venez</b>	<b>986</b>	<b>0.5%</b>	<b>1,624</b>	<b>0.5%</b>	<b>-39.3%</b>
<b>Total (Non Aruba/Non Venezuelan)</b>	<b>10,675</b>	<b>5.1%</b>	<b>24,919</b>	<b>7.1%</b>	<b>-57.2%</b>
Other (Aruban/Venezuelan)	198,453	94.9%	325,999	92.9%	-39.1%
<b>Total</b>	<b>209,128</b>	<b>100.0%</b>	<b>350,918</b>	<b>100.0%</b>	<b>-40.4%</b>

Source: ATA

The above table shows that in CY 2016 8,835 residents of Venezuela (4.2% 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 60.3% compared to CY 2015. In total 10,675 residents of Venezuela (5.1% of all Venezuelans visiting Aruba) arrived in Aruba in CY 2016 by a scheduled carrier other than one based in Venezuela or Aruba, down 57.2% compared to CY 2015.

## Monthly Update - Aruba's Tourism Industry: December 2016 and Year to Date 2016

### Venezuelan Stopovers: By Airline: December 2016

(Non-resident stopover Arrivals)

Carriers	Inbound To Aruba by Carrier Used		
	Total	Venezuelans	%
<b>US Carriers</b>			
American Airlines	15,796	460	2.9%
Delta Air Lines	10,398	107	1.0%
United Airlines	12,749	110	0.9%
US Airways	-	-	0.0%
Southwest/Air Tran	5,993	88	1.5%
jetBlue	12,759	59	0.5%
Spirit Airlines	438	12	2.7%
<b>Total US Carriers</b>	<b>58,133</b>	<b>836</b>	<b>1.4%</b>
<b>Canada</b>			
Air Canada	1,093	15	1.4%
WestJet	-	-	0.0%
<b>Total Canada</b>	<b>1,093</b>	<b>15</b>	<b>1.4%</b>
<b>Europe</b>			
KLM	2,756	48	1.7%
Arke Fly	1,128	12	1.1%
<b>Total Europe</b>	<b>3,884</b>	<b>60</b>	<b>1.5%</b>
<b>Other Non-Venezuelan</b>			
Copa	3,254	62	1.9%
Surinam Airlines	690	34	4.9%
<b>Total Other Non Venez</b>	<b>3,944</b>	<b>96</b>	<b>2.4%</b>
<b>Total (Non Aruba/Non Venezuelan)</b>	<b>67,054</b>	<b>1,007</b>	<b>1.5%</b>
Other (Aruban/Venezuelan)	29,988	14,299	47.7%
<b>Total</b>	<b>97,042</b>	<b>15,306</b>	<b>15.8%</b>

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 2.9% of all non-residents arriving in Aruba on American Airlines in December 2016 were residents of Venezuela and 1.0% of all non-residents arriving in Aruba on Delta Air Lines in December 2016 were residents of Venezuela.



## Monthly Update - Aruba's Tourism Industry: December 2016 and Year to Date 2016

### Venezuelan Stopovers: By Airline: December 2016 YTD

(Non-resident stopover Arrivals)

Carriers	Inbound To Aruba by Carrier Used		
	Total	Venezuelans	%
<b>US Carriers</b>			
American Airlines	163,162	5,804	3.6%
Delta Air Lines	115,882	665	0.6%
United Airlines	137,593	990	0.7%
US Airways	-	-	0.0%
Southwest/Air Tran	76,755	777	1.0%
jetBlue	141,701	411	0.3%
Spirit Airlines	6,104	188	3.1%
<b>Total US Carriers</b>	<b>641,197</b>	<b>8,835</b>	<b>1.4%</b>
<b>Canada</b>			
Air Canada	8,469	142	1.7%
WestJet	6,441	107	1.7%
<b>Total Canada</b>	<b>14,910</b>	<b>249</b>	<b>1.7%</b>
<b>Europe</b>			
KLM	25,938	462	1.8%
Arke Fly	14,279	143	1.0%
<b>Total Europe</b>	<b>40,217</b>	<b>605</b>	<b>1.5%</b>
<b>Other Non-Venezuelan</b>			
Copa	32,457	477	1.5%
Surinam Airlines	8,057	509	6.3%
<b>Total Other Non Venez</b>	<b>40,514</b>	<b>986</b>	<b>2.4%</b>
<b>Total (Non Aruba/Non Venezuelan)</b>	<b>736,838</b>	<b>10,675</b>	<b>1.4%</b>
Other (Aruban/Venezuelan)	365,116	198,453	54.4%
<b>Total</b>	<b>1,101,954</b>	<b>209,128</b>	<b>19.0%</b>

Source ATA

During CY 2016 3.6% of all non-residents arriving in Aruba on American Airlines were residents of Venezuela and 0.6% of all non-residents arriving in Aruba on Delta Air Lines were residents of Venezuela.

**Venezuelans arriving on American Airlines.**

Percentage of all Non Resident Passengers arriving  
in Aruba on American Airlines who were  
residents of Venezuela

	2016
Jan	15.1%
Feb	2.0%
Mar	1.6%
Apr	1.1%
May	1.2%
Jun	1.1%
Jul	1.5%
Aug	4.5%
Sep	8.1%
Oct	2.7%
Nov	2.4%
Dec	2.9%

In December 2016 2.9% of all non-resident passengers arriving in Aruba on an American Airlines flight were residents of Venezuela. This is down substantially from January 2016 when the number was 15.1%.

## Age of Visitors.

The biggest changes in age demographics in December 2016 came in the 30 - 39 years and 20 - 29 years old categories (down 35.7% and 28.3% respectively). The number of young children also fell substantially (down 28.2%).

### Age of All Stopover Visitors December 2016

	2016	% share	2015	% share	% change
0 - 11 yrs	8,862	9.1%	12,350	10.4%	-28.2%
12 - 19 yrs	8,856	9.1%	9,298	7.8%	-4.8%
20 - 29 yrs	14,367	14.8%	20,043	16.9%	-28.3%
30 - 39 yrs	13,952	14.4%	21,713	18.3%	-35.7%
40 - 49 yrs	15,651	16.1%	18,834	15.9%	-16.9%
50 - 59 yrs	17,645	18.2%	18,689	15.8%	-5.6%
60 - 69 yrs	11,755	12.1%	12,165	10.3%	-3.4%
70 yrs or more	5,949	6.1%	5,374	4.5%	10.7%
Not Stated	5	0.0%	-	0.0%	100.0%
<b>Total</b>	<b>97,042</b>	<b>100.0%</b>	<b>118,466</b>	<b>100.0%</b>	<b>-18.1%</b>

Source: ATA

### Age of All Stopover Visitors December 2016 YTD

	2016	% share	2015	% share	% change
0 - 11 yrs	90,065	8.2%	108,380	8.8%	-16.9%
12 - 19 yrs	72,272	6.6%	72,489	5.9%	-0.3%
20 - 29 yrs	148,444	13.5%	183,130	15.0%	-18.9%
30 - 39 yrs	185,042	16.8%	233,675	19.1%	-20.8%
40 - 49 yrs	191,596	17.4%	208,011	17.0%	-7.9%
50 - 59 yrs	208,316	18.9%	214,276	17.5%	-2.8%
60 - 69 yrs	144,123	13.1%	145,384	11.9%	-0.9%
70 yrs or more	62,063	5.6%	59,543	4.9%	4.2%
Not Stated	33	0.0%	47	0.0%	-29.8%
<b>Total</b>	<b>1,101,954</b>	<b>100.0%</b>	<b>1,224,935</b>	<b>100.0%</b>	<b>-10.0%</b>

Source: ATA

### Age of Visitors from the USA.

The biggest changes in age demographics in December 2016 for visitors from the USA came in the 70 year and more (up by 15.1%) and in the 20 - 29 years old categories (up by 10.5%). There was a 7.5% decline in the number of visitors between 20 – 29 years.

#### Age of All US Stopover Visitors December 2016

	2016	% share	2015	% share	% change
0 - 11 yrs	4,298	7.7%	4,540	8.5%	-5.3%
12 - 19 yrs	5,151	9.2%	4,815	9.0%	7.0%
20 - 29 yrs	8,049	14.4%	7,283	13.7%	10.5%
30 - 39 yrs	6,827	12.2%	7,384	13.8%	-7.5%
40 - 49 yrs	8,785	15.8%	8,450	15.8%	4.0%
50 - 59 yrs	11,068	19.9%	10,215	19.2%	8.4%
60 - 69 yrs	7,896	14.2%	7,463	14.0%	5.8%
70 yrs or more	3,669	6.6%	3,189	6.0%	15.1%
Not Stated	3	0.0%	-	0.0%	100.0%
<b>Total</b>	<b>55,746</b>	<b>100.0%</b>	<b>53,339</b>	<b>100.0%</b>	<b>4.5%</b>

Source: ATA

#### Age of All US Stopover Visitors December 2016 YTD

	2016	% share	2015	% share	% change
0 - 11 yrs	42,359	6.7%	42,943	6.9%	-1.4%
12 - 19 yrs	43,445	6.9%	40,723	6.6%	6.7%
20 - 29 yrs	71,723	11.4%	71,492	11.5%	0.3%
30 - 39 yrs	84,945	13.5%	91,800	14.8%	-7.5%
40 - 49 yrs	107,981	17.2%	105,917	17.0%	1.9%
50 - 59 yrs	133,734	21.3%	129,148	20.8%	3.6%
60 - 69 yrs	100,903	16.0%	97,845	15.7%	3.1%
70 yrs or more	43,652	6.9%	41,511	6.7%	5.2%
Not Stated	23	0.0%	7	0.0%	228.6%
<b>Total</b>	<b>628,765</b>	<b>100.0%</b>	<b>621,386</b>	<b>100.0%</b>	<b>1.2%</b>

Source: ATA

### First Time/Repeat Visitors.

In December 2016 38.5% of our visitors reported they were visiting for the first time and 46.0% reported they had visited before. 15.5% 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 45.6% first time and 54.4% repeat.

#### Number of visits to Aruba: December 2016

Number of Times Visited	2016	% share	2015	% share	% change
First Time	37,349	38.5%	46,709	39.4%	-20.0%
2 - 5 times	23,536	24.3%	32,054	27.1%	-26.6%
6 - 9 times	7,503	7.7%	7,564	6.4%	-0.8%
10 or more	13,568	14.0%	13,097	11.1%	3.6%
Not Stated	15,086	15.5%	19,042	16.1%	-20.8%
Total	97,042	100.0%	118,466	100.0%	-18.1%

Source: ATA: Self-reported by visitors

CY 2016 42.0% of our visitors reported they were visiting for the first time and 43.3% reported they had visited before. 14.7% of our visitors did not report how many times they visited. Assigning the number who did not report on a *pro rata* basis results in an overall percentage of 49.2% first time and 50.8% repeat.

#### Number of visits to Aruba: December 2016 YTD

Number of Times Visited	2016	% share	2015	% share	% change
First Time	462,945	42.0%	528,868	43.2%	-12.5%
2 - 5 times	278,271	25.3%	312,817	25.5%	-11.0%
6 - 9 times	75,391	6.8%	75,007	6.1%	0.5%
10 or more	123,500	11.2%	119,172	9.7%	3.6%
Not Stated	161,847	14.7%	189,071	15.4%	-14.4%
Total	1,101,954	100.0%	1,224,935	100.0%	-10.0%

Source: ATA: Self-reported by visitors

### **Trip Advisor Ratings.**

Trip Advisor has made data available to us which shows the total number of reviews received for the overall Caribbean and for five of our competitors (that is all reviews of hotels, restaurants, attractions and the destination as a whole) for November 2016. The ratings are out of 5.

#### **TripAdvisor Ratings for November 2016**

	Number of Reviews
Aruba	5,482
Bahamas	3,218
Cayman Islands	2,514
Curacao	2,291
Puerto Rico	8,041
USVI	3,827

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

### **Targets for 2016.**

The Aruba Tourism Authority has set as a target an increase of 5.5% more stopover visitors in 2016 compared to 2015. As well they have targeted a 6% increase in tourism receipts, to increase cruise visitor arrival numbers by a minimum of 3% over the 2013 total and to achieve a 9% per annum increase in the tourism sector's RevPar.

By market the ATA is targeting a growth in stopover visitors from the USA of 6% in 2016 over the 2015 total, and a growth of 3% from Canada. Latin America has traditionally been very difficult to forecast and the ATA is projecting no growth from the Venezuelan market in 2016 over the 2015 total, 5% growth from the Brazilian market, 30% from Colombia and 4% from Argentina. Chile is projected to show a 15% increase in traffic over the 2015 total. From Europe the Netherlands is projected to show 1% growth over 2015, Germany 2.0%, Italy 2.5% and the UK 70%.

## Change in Currency Exchange Rates.

	December 2016	December 2015	
as of	12/15/2016	12/15/2015	% change
Euro	\$1.037	\$1.091	-4.9%
UK Pound	\$1.238	\$1.505	-17.7%
Canadian Dollar	\$0.746	\$0.728	2.5%
Colombian Peso*	2994	3321	10.9%
Brazilian Real**	3.395	3.899	14.8%

\* Pesos per \$1.00

\*\* Reals per \$1.00

## Inventory.

It is currently forecasted by AHATA that there will be an increase of 3% - 4% in available room nights during 2016 due to the addition of 60 rooms at the Divi Tamarijn/All Inclusive, the addition of 74 renovated rooms at the Tropicana Aruba and the full year operation of the Riu Palace (which was closed for three months in 2015 for renovation). Please note that the Hilton Aruba currently plans renovations during the course of 2016 which will involve the closure of some rooms.

## Airline Seats

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

Inbound Air Seats - Winter 2016/2017				
December 1 2015 - March 31 2016				
	2016/2017	2015/2016	Change	% change
USA	384,411	360,093	24,318	6.8%
Canada	28,994	23,553	5,441	23.1%
Europe	36,799	28,801	7,998	27.8%
Latin America	215,881	357,703	(141,822)	-39.6%
Caribbean	75,508	86,172	(10,664)	-12.4%
Total	741,593	856,322	(114,729)	-13.4%

Source: Aruba Airport Authority.