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

**March 2018 and Year to Date 2018.**

**Total stopovers grew by 9.2% in March.**

* The total number of stopovers visiting Aruba grew by 9.2% in March 2018 compared with March 2017. The number of stopover visitors was 90,133 in March 2017 and 98,467 in March 2018.
* It should be noted that Easter Good Friday fell on March 30th in 2018 with Easter Sunday falling on April 1st. In 2017 Easter Sunday fell two weeks later, on April 16th.
* In the first three months of 2018 the number of stopover visitors increased by 4.3% from 263,565 in 2017 to 274,955 in 2018.

**Stopovers from the USA were up by 13.5% in March.**

* Traffic from the USA was up by 13.5%, from 64,947 stopovers in March 2017 to 73,685 stopovers in March 2018. Traffic was up by 16.4% from New York State, up by 27.1% from Pennsylvania, up 20.0% from New Jersey but down 3.3% from Massachusetts.
* In the first three months of 2018 the number of stopover visitors from the USA increased by 9.7% from 177,179 in 2017 to 194,279 in 2018.

**Stopovers from Venezuela were down 65.5% in March.**

* Traffic from Venezuela was down by 65.5% in March from 4,117 stopovers in March 2017 to 1,419 stopovers in March 2018. The border between Venezuela and Aruba was completely closed for all of March 2018.
* In the first three months of 2018 the number of stopover visitors from Venezuela fell by 60.5%, from 18,406 in 2017 to 7,277 in 2018.

**Tourism receipts were up 3.0% in the third quarter of 2017.**

* Tourism receipts grew by 3.0% in the third quarter of 2017 compared to third quarter 2017. Stopover arrivals fell by 0.9% in the same third quarter of 2017.
* In the first nine months of 2017 the volume of tourism receipts grew by 1.2% while the volume of visitor arrivals declined by 1.2% compared with the first nine months of 2016.

**Total visitor nights grew by 10.8% in March.**

* The total number of visitor nights grew by 10.8% in March, from 642,152 in March 2017 to 711,513 in March 2018. The overall average length of stay grew by 1.4% from 7.12 nights in March 2017 to 7.23 nights in March 2018.
* The total number of visitor nights grew by 5.0% in the first three months of 2018, from 2,039,562 in 2017 to 2,142,065 in 2018. The overall average length of stay grew by 0.7% from 7.74 nights in 2017 to 7.79 nights in 2018.

**Visitors to the Dominican Republic were up 6.5% in the first three months of 2018.**

* In the first three months of 2018 the Dominican Republic saw a 6.5% increase in stopover traffic while the Cayman Islands saw a 20.6% increase in stopovers in the same three months. Jamaica saw a 6.4% increase in stopovers in the first two months of 2018.
* Outbound travel by US citizens grew by 9.3% in 2017 compared to calendar year 2016 and was up by 5.6% to the Caribbean. The Caribbean’s share of total trips taken by US citizens to international destinations fell from 9.8% in 2016 to 9.5% in 2017.

**Cruise Visitor traffic to Aruba was up by 1.5% in March.**

* The number of cruise passengers visiting Aruba in March grew by 1.5%, from 90,769 in March 2017 to 101,237 in March 2018.
* In the first three months of 2018 the number of cruise visitors to Aruba grew by 9.9% from 280,923 in 2017 to 308,838 in 2018.

**The number of hotel visitors grew by 7.3% in March.**

* As reported by Immigration card data the number of stopover visitors staying in hotels in March 2018 grew by 7.3% and staying in timeshare resorts grew by 10.6%. The number staying in “other accommodation” grew by 12.7%. This latter category comprised 21.5% of all visitors in March 2018, up from 20.8% in March 2017.
* In the first three months of 2018 the number of visitors staying in hotels grew by 5.0% compared with the same three months of 2017, the number staying in timeshare resorts grew by 2.2% and the number staying in other accommodation grew by 3.6%.
* In March 2018 hotels saw an 11.0% increase in the overall number of visitor nights compared with March 2017. The USA generated 13.7% more hotel nights in March 2018 than in March 2017.
* In the first three months of 2018 the USA generated a 9.8% increase in the number of hotel nights and increased its share of total hotel nights to 71.4%.

**The number of nights spent in apartments/guesthouses grew by 11.3% in March.**

* The number of nights spent by visitors staying in apartments or guesthouses grew by 11.3% in March, from 25,597 nights in March 2017 to 28,488 nights in March 2018. The number of nights spent by visitors staying in private homes grew by 10.8% from 133,597 in March 2017 to 148,053 in March 2018.
* In the first three months of 2018 the number of nights spent by visitors staying in apartments or guesthouses grew by 2.9% from 92,199 nights in 2017 to 94,897 nights in 2018. The number of nights spent in private homes grew by 3.8% in the first three months, from 462,311 nights in 2017 to 479,834 nights in 2018.

**Average hotel occupancy grew by 2.8 percentage points to 88.3% in March.**

* Numbers provided to AHATA show that for a sample of 14 hotels average room occupancy grew by 2.8 percentage points in March from 85.5% in March 2017 to 88.3% in March 2018. The average daily room rate grew by 14.1% to $328.95 and the average RevPar grew by 17.9% to $290.48.
* In the first three months of 2018 average room occupancy grew by 3.7 percentage points to 90.2%. The average daily room rate grew by 10.9% to $333.40 and the average RevPar grew by 15.6% to $300.75.

**All four hotel categories improved their revpar performance in March.**

* Performance of the hotels by category for March 2018 shows that the brand name beach front hotels saw their average room occupancies grow by 1.2 percentage points to 88.1%, with their RevPar growing by 19.4% to $448.58. The all-inclusive resorts saw their average room occupancies grow by 7.1 percentage points to 94.5% and their RevPar grow by 18.0% to $190.03. The smaller independent beach front hotels saw their average room occupancy grow by 3.4 percentage points to 94.5% and their RevPar grow by 10.1% to $444.09. The non-beach front hotels saw their average room occupancies fall by 3.2 percentage points to 73.9% but saw their RevPar grow by 14.0% to $167.94.
* Performance of the hotels by category for the first three months of 2018 shows that the brand name beach front hotels saw their average room occupancies grow by 2.6 percentage points to 89.5%, with their RevPar growing by 17.0% to $461.88. The all-inclusive resorts saw their average room occupancies grow by 6.0 percentage points to 95.1% and their RevPar grow by 14.1% to $193.97. The smaller independent beach front hotels saw their average room occupancy grow by 2.2 percentage points to 96.6% and their RevPar grow by 8.4% to $449.64. The non-beach front hotels saw their average room occupancies grow by 1.1 percentage points to 79.9% and saw their RevPar grow by 15.2% to $185.67.
* In the first three months of 2018 Smith Travel Research (STR) reported that hotels in four of nine Caribbean destinations saw higher average room occupancies. All nine destinations saw a higher average RevPar than for the same three months of 2017.

**JetBlue was the number one carrier in March 2017.**

* JetBlue was the number one carrier in March 2018 bringing in 22,013 non-resident visitors, (up 13.1% compared with March 2017) with American Airlines number two (17,145 non-resident pax, up 22.2% compared with March 2017) United Airlines was number three (14,353 non-residents and showing no change with March 2017).
* In the first three months of 2018 JetBlue brought in 3.9% more non-resident passengers than in the same period of 2017, growing from 54,708 visitors in 2017 to 56,825 visitors in 2018.

**The number of visitors 12-19 years old grew by 62% in March.**

* There was a 61.7% increase in March in the number of visitors 12 – 19 years old, a 40.6% increase in the number 0 – 11 years old and a 15.7% increase in the number 40 – 49 years old with the vast majority of these increases coming growth in the number of US visitors in these three categories. This suggests a big increase in family business out of the USA this past March.

**49% of our visitors in March were visiting for the first time.**

* In March 2018 49.1% of our visitors reported they were visiting for the first time and 41.5% reported they had visited before. 9.4% of our visitors did not report how many times they visited. Distributing the number who did not report on a *pro rata* basis results in an overall percentage of 54% first time and 46% repeat.
* In the first three months of 2017 the *pro rata* numbers are 50% first time and 40% repeat.

**Aruba scored 4.40 on the TripAdvisor ratings in March 2017.**

* Trip Advisor ratings for March 2017 show that Aruba received a total of 11,268 reviews and achieved an average rating of 4.40 out of 5. The USVI achieved a 4.60 rating with the Cayman Islands achieving an average rating of 4.50. Puerto Rico and Jamaica also received ratings of 4.40. The Dominican Republic and Curacao both received a 4.30 rating.

**AHATA is currently projecting a 5% growth in RevPar for 2018.**

* AHATA projects that there will be little change in the overall room inventory in 2018.
* AHATA is currently projecting that overall average hotel room occupancy in 2018 will remain flat compared with 2017 but that there will be a 5.2% improvement in the overall ADR. RevPar is projected to grow by 5.0%.

**The Aruba Airport Authority is projecting a 2% increase in air seats in 2018.**

* The AAA is projecting that Aruba will receive 5.6% fewer air seats in calendar year 2018 compared with CY 2017 with the USA generating 2% more seats.

**The ATA is targeting a 3.7% increase in stopover arrivals for 2018.**

The Aruba Tourism Authority has published the following targets for 2018.

* Total stopover arrivals to increase by 3.7% compared with 2017 final total.
* Tourism Receipts to increase by between 2% - 3.5% compared with 2017 final.
* RevPar to grow by 0.8% compared with final RevPar for 2017.
* Cruise visitor arrivals to grow by 7.0% compared with 2017 final total.

The ATA is targeting a 3.6% in stopover arrivals from the USA in 2018, a 3.0% increase in traffic from Canada, a 23.5% increase from Argentina, a 20% increase from Brazil, a 7.2% increase from the Netherlands but a 44.6% drop in traffic from the UK due to the loss of charter flights.

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**Visitor Arrivals – March 2018**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Aruba: Total Visitors March 2018** | | | | | |
|  |  |  |  |  |  |
|  | 2018 | % | 2017 | % | % change |
| USA | 73,685 | 74.8% | 64,947 | 72.1% | 13.5% |
| Canada | 6,497 | 6.6% | 5,961 | 6.6% | 9.0% |
| Venezuela | 1,419 | 1.4% | 4,117 | 4.6% | -65.5% |
| Brazil | 562 | 0.6% | 536 | 0.6% | 4.9% |
| Colombia | 2,863 | 2.9% | 1,909 | 2.1% | 50.0% |
| Argentina | 2,251 | 2.3% | 2,672 | 3.0% | -15.8% |
| Chile | 539 | 0.5% | 669 | 0.7% | -19.4% |
| Netherlands | 2,881 | 2.9% | 2,985 | 3.3% | -3.5% |
| Germany | 713 | 0.7% | 444 | 0.5% | 60.6% |
| Italy | 283 | 0.3% | 244 | 0.3% | 16.0% |
| UK | 348 | 0.4% | 264 | 0.3% | 31.8% |
| Sweden | 539 | 0.5% | 499 | 0.6% | 8.0% |
| Other | 5,887 | 6.0% | 4,886 | 5.4% | 20.5% |
| Total | 98,467 | 100.0% | 90,133 | 100.0% | 9.2% |
| Source: ATA |  |  |  |  |  |

Total stopover arrivals (persons staying 24 hours or more) for March 2018 showed a 1.0% increase compared with March 2017.

Traffic from the USA was up by 7.5%, was up by 8.2% from Canada, down 75.6% from Venezuela, down 1.4% from Colombia, up 29.0% from Brazil and up 9.2% from Argentina. Arrivals were up 6.3% from The Netherlands.

It should be noted that Easter Good Friday fell on March 30th in 2018 with Easter Sunday falling on April 1st. In 2017 Easter Sunday fell two weeks later, on April 16th.

During the whole of March 2018, the border between Venezuela and Aruba was closed to travel.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Aruba: Total Visitors March 2018 YTD** | | | | | |
|  |  |  |  |  |  |
|  | 2018 | % | 2017 | % | % change |
| USA | 194,279 | 70.7% | 177,179 | 67.2% | 9.7% |
| Canada | 20,061 | 7.3% | 18,038 | 6.8% | 11.2% |
| Venezuela | 7,277 | 2.6% | 18,406 | 7.0% | -60.5% |
| Brazil | 3,177 | 1.2% | 2,547 | 1.0% | 24.7% |
| Colombia | 6,936 | 2.5% | 6,137 | 2.3% | 13.0% |
| Argentina | 9,632 | 3.5% | 8,664 | 3.3% | 11.2% |
| Chile | 2,172 | 0.8% | 2,639 | 1.0% | -17.7% |
| Netherlands | 9,640 | 3.5% | 9,131 | 3.5% | 5.6% |
| Germany | 1,499 | 0.5% | 1,343 | 0.5% | 11.6% |
| Italy | 1,214 | 0.4% | 1,071 | 0.4% | 13.4% |
| UK | 850 | 0.3% | 780 | 0.3% | 9.0% |
| Sweden | 2,453 | 0.9% | 2,328 | 0.9% | 5.4% |
| Other | 15,765 | 5.7% | 15,302 | 5.8% | 3.0% |
| Total | 274,955 | 100.0% | 263,565 | 100.0% | 4.3% |
| Source: ATA |  |  |  |  |  |

**By Month.**

|  |  |  |  |
| --- | --- | --- | --- |
|  | 2018 | 2017 | % change |
| Jan | 91,471 | 89,269 | 2.5% |
| Feb | 85,017 | 84,163 | 1.0% |
| Mar | 98,467 | 90,133 | 9.2% |
| YTD | 274,955 | 263,565 | 4.3% |
| 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 | 2,660.0 |
| **2014** | 806.7 | 652.3 | 678.8 | 723.5 | 2,861.3 |
| **2015** | 864.4 | 672.0 | 681.4 | 718.8 | 2,936.6 |
| **2016** | 842.8 | 670.8 | 688.5 | 689.3 | 2,891.4 |
| **2017** | 870.9 | 712.3 | 709.4 |  |  |
| Source: Central Bank of Aruba | | |  |  |  |

In the third quarter of 2017 the volume of visitor arrivals declined by 0.9% while the volume of tourism receipts grew by 3.0% compared with third quarter 2016.

In the first nine months of 2017 the volume of visitor arrivals declined by 1.2% while the volume of tourism receipts grew by 1.2% compared with the first nine months of 2016.

**Top Producing US States.**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Aruba: Total Visitors: US States: March 2018** | | | | | |
|  |  |  |  |  |  |
|  | 2018 | % | 2017 | % | % change |
| New York | 13,272 | 18.0% | 11,402 | 17.6% | 16.4% |
| Massachusetts | 9,009 | 12.2% | 9,315 | 14.3% | -3.3% |
| New Jersey | 7,630 | 10.4% | 6,359 | 9.8% | 20.0% |
| Pennsylvania | 4,833 | 6.6% | 3,802 | 5.9% | 27.1% |
| Illinois | 3,022 | 4.1% | 3,074 | 4.7% | -1.7% |
| Florida | 3,581 | 4.9% | 3,577 | 5.5% | 0.1% |
| Connecticut | 2,531 | 3.4% | 2,473 | 3.8% | 2.3% |
| Maryland | 2,578 | 3.5% | 1,754 | 2.7% | 47.0% |
| Ohio | 2,809 | 3.8% | 2,690 | 4.1% | 4.4% |
| Michigan | 2,664 | 3.6% | 2,144 | 3.3% | 24.3% |
| Virginia | 2,039 | 2.8% | 1,268 | 2.0% | 60.8% |
| Texas | 1,606 | 2.2% | 1,674 | 2.6% | -4.1% |
| California | 907 | 1.2% | 782 | 1.2% | 16.0% |
| Other | 17,204 | 23.3% | 14,633 | 22.5% | 17.6% |
| Total | 73,685 | 100.0% | 64,947 | 100.0% | 13.5% |
| Source: ATA |  |  |  |  |  |

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| **Aruba: Total Visitors: US States: March 2018 YTD** | | | | | |
|  |  |  |  |  |  |
|  | 2018 | % | 2017 | % | % change |
| New York | 41,609 | 21.4% | 37,432 | 21.1% | 11.2% |
| Massachusetts | 25,867 | 13.3% | 25,439 | 14.4% | 1.7% |
| New Jersey | 20,362 | 10.5% | 17,922 | 10.1% | 13.6% |
| Pennsylvania | 12,065 | 6.2% | 10,747 | 6.1% | 12.3% |
| Illinois | 7,257 | 3.7% | 7,167 | 4.0% | 1.3% |
| Florida | 8,401 | 4.3% | 8,680 | 4.9% | -3.2% |
| Connecticut | 6,699 | 3.4% | 6,291 | 3.6% | 6.5% |
| Maryland | 5,955 | 3.1% | 4,748 | 2.7% | 25.4% |
| Ohio | 6,756 | 3.5% | 5,958 | 3.4% | 13.4% |
| Michigan | 6,224 | 3.2% | 5,345 | 3.0% | 16.4% |
| Virginia | 4,526 | 2.3% | 3,650 | 2.1% | 24.0% |
| Texas | 3,364 | 1.7% | 3,506 | 2.0% | -4.1% |
| California | 2,408 | 1.2% | 2,429 | 1.4% | -0.9% |
| Other | 42,786 | 22.0% | 37,865 | 21.4% | 13.0% |
| Total | 194,279 | 100.0% | 177,179 | 100.0% | 9.7% |
| Source: ATA |  |  |  |  |  |

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

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Aruba: Total Nights March 2018** | | | | | |
|  |  |  |  |  |  |
|  | 2018 | % | 2017 | % | % change |
| USA | 507,278 | 71.3% | 438,086 | 68.2% | 15.8% |
| Canada | 54,910 | 7.7% | 48,931 | 7.6% | 12.2% |
| Venezuela | 11,988 | 1.7% | 26,017 | 4.1% | -53.9% |
| Brazil | 3,667 | 0.5% | 3,418 | 0.5% | 7.3% |
| Colombia | 17,911 | 2.5% | 13,093 | 2.0% | 36.8% |
| Argentina | 19,439 | 2.7% | 24,760 | 3.9% | -21.5% |
| Chile | 4,107 | 0.6% | 5,186 | 0.8% | -20.8% |
| Netherlands | 33,156 | 4.7% | 35,283 | 5.5% | -6.0% |
| Germany | 6,752 | 0.9% | 3,984 | 0.6% | 69.5% |
| Italy | 2,177 | 0.3% | 2,160 | 0.3% | 0.8% |
| UK | 2,961 | 0.4% | 2,185 | 0.3% | 35.5% |
| Sweden | 6,602 | 0.9% | 5,905 | 0.9% | 11.8% |
| Other | 40,565 | 5.7% | 33,144 | 5.2% | 22.4% |
| Total | 711,513 | 100.0% | 642,152 | 100.0% | 10.8% |
| Source: ATA |  |  |  |  |  |

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| --- | --- | --- | --- | --- | --- |
| **Aruba: Average Length of Stay in Nights: March 2018** | | | | | |
|  |  |  |  |  |  |
|  | 2018 |  | 2017 |  | % change |
| USA | 6.88 |  | 6.75 |  | 2.1% |
| Canada | 8.45 |  | 8.21 |  | 3.0% |
| Venezuela | 8.45 |  | 6.32 |  | 33.7% |
| Brazil | 6.52 |  | 6.38 |  | 2.3% |
| Colombia | 6.26 |  | 6.86 |  | -8.8% |
| Argentina | 8.64 |  | 9.27 |  | -6.8% |
| Chile | 7.62 |  | 7.75 |  | -1.7% |
| Netherlands | 11.51 |  | 11.82 |  | -2.6% |
| Germany | 9.47 |  | 8.97 |  | 5.5% |
| Italy | 7.69 |  | 8.85 |  | -13.1% |
| UK | 8.51 |  | 8.28 |  | 2.8% |
| Sweden | 12.25 |  | 11.83 |  | 3.5% |
| Other | 6.89 |  | 6.78 |  | 1.6% |
| Total | 7.23 |  | 7.12 |  | 1.4% |
| Source: ATA |  |  |  |  |  |

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| --- | --- | --- | --- | --- | --- |
| **Aruba: Total Nights March 2018 YTD** | | | | | |
|  |  |  |  |  |  |
|  | 2018 | % | 2017 | % | % change |
| USA | 1,433,012 | 66.9% | 1,310,895 | 64.3% | 9.3% |
| Canada | 183,785 | 8.6% | 166,231 | 8.2% | 10.6% |
| Venezuela | 47,206 | 2.2% | 102,441 | 5.0% | -53.9% |
| Brazil | 21,268 | 1.0% | 16,476 | 0.8% | 29.1% |
| Colombia | 49,454 | 2.3% | 48,757 | 2.4% | 1.4% |
| Argentina | 89,012 | 4.2% | 81,154 | 4.0% | 9.7% |
| Chile | 17,241 | 0.8% | 21,737 | 1.1% | -20.7% |
| Netherlands | 117,065 | 5.5% | 118,920 | 5.8% | -1.6% |
| Germany | 14,302 | 0.7% | 11,211 | 0.5% | 27.6% |
| Italy | 10,381 | 0.5% | 9,528 | 0.5% | 9.0% |
| UK | 7,832 | 0.4% | 7,071 | 0.3% | 10.8% |
| Sweden | 30,734 | 1.4% | 28,700 | 1.4% | 7.1% |
| Other | 120,773 | 5.6% | 116,441 | 5.7% | 3.7% |
| Total | 2,142,065 | 100.0% | 2,039,562 | 100.0% | 5.0% |
| Source: ATA |  |  |  |  |  |

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| --- | --- | --- | --- | --- | --- |
| **Aruba: Average Length of Stay in Nights: March 2018 YTD** | | | | | |
|  |  |  |  |  |  |
|  | 2018 |  | 2017 |  | % change |
| USA | 7.38 |  | 7.40 |  | -0.3% |
| Canada | 9.16 |  | 9.22 |  | -0.6% |
| Venezuela | 6.49 |  | 5.57 |  | 16.6% |
| Brazil | 6.69 |  | 6.47 |  | 3.5% |
| Colombia | 7.13 |  | 7.94 |  | -10.3% |
| Argentina | 9.24 |  | 9.37 |  | -1.3% |
| Chile | 7.94 |  | 8.24 |  | -3.6% |
| Netherlands | 12.14 |  | 13.02 |  | -6.8% |
| Germany | 9.54 |  | 8.35 |  | 14.3% |
| Italy | 8.55 |  | 8.90 |  | -3.9% |
| UK | 9.21 |  | 9.07 |  | 1.6% |
| Sweden | 12.53 |  | 12.33 |  | 1.6% |
| Other | 7.66 |  | 7.61 |  | 0.7% |
| Total | 7.79 |  | 7.74 |  | 0.7% |
| Source: ATA |  |  |  |  |  |

**Competing Destination performance.**

The Caribbean Tourism Organization collects data from across the region. Their most recently published figures are from March 2018 which show a limited set of data for 2018.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Total Stopover Visitors** | | | |
|  | 2018 | 2017 | % change | Period |
| Antigua | 85,271 | 78,982 | 8.0% | Jan-Mar |
| Aruba | 274,955 | 263,565 | 4.3% | Jan-Mar |
| Bahamas | NA | NA | NA | NA |
| Barbados | NA | NA | NA | NA |
| Belize | 48,118 | 38,525 | 24.9% | Jan |
| British Virgin Islands | NA | NA | NA | NA |
| Cayman Islands | 134,170 | 111,237 | 20.6% | Jan-Mar |
| Cuba | NA | NA | NA | NA |
| Curacao | 74,180 | 74,650 | -0.6% | Jan-Feb |
| Dominican Republic | 1,591,715 | 1,495,249 | 6.5% | Jan-Mar |
| Jamaica | 388,184 | 364,831 | 6.4% | Jan-Feb |
| Puerto Rico\* | 68,958 | 154,614 | -55.4% | Jan |
| Saint Lucia | 32,755 | 31,647 | 3.5% | Jan |
| Turks & Caicos Islands | NA | NA | NA | NA |
| US Virgin Islands\*\* | 60,406 | 152,262 | -60.3% | Jan-Feb |
| \* Hotel Non-Resident Registrations | |  |  |  |
| \*\* Air Arrivals |  |  |  |  |
| Source CTO |  |  |  |  |

The same CTO report also shows data for stopover visitor arrivals for 2018 from the USA to certain destinations.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Total US Stopover Visitors** | | | |
|  | 2018 | 2017 | % change | Period |
| Antigua | 31,824 | 30,472 | 4.4% | Jan-Mar |
| Aruba | 194,279 | 177,179 | 9.7% | Jan-Mar |
| Bahamas | NA | NA | NA | NA |
| Barbados | NA | NA | NA | NA |
| Belize | 29,042 | 23,516 | 23.5% | Jan |
| British Virgin Islands | NA | NA | NA | NA |
| Cayman Islands | 111,017 | 89,821 | 23.6% | Jan-Mar |
| Cuba | NA | NA | NA | NA |
| Curacao | 11,953 | 10,549 | 13.3% | Jan-Feb |
| Dominican Republic | 578,671 | 530,725 | 9.0% | Jan-Mar |
| Jamaica | 226,908 | 210,990 | 7.5% | Jan-Feb |
| Puerto Rico\* | 52,571 | 136,904 | -61.6% | Jan |
| Saint Lucia | 13,997 | 12,794 | 9.4% | Jan |
| Turks & Caicos Islands | NA | NA | NA | NA |
| US Virgin Islands\*\* | NA | NA | NA | NA |
| \* Hotel Non-Resident Registrations | |  |  |  |
| Source CTO |  |  |  |  |

The following shows the percentage change in stopover visitor arrivals for calendar year 2017 compared to the same period in 2016.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Total Stopover Visitors** | | | |
|  | 2017 | 2016 | % change | Period |
| Antigua | 247,320 | 265,187 | -6.7% | Jan-Dec |
| Aruba | 1,070,548 | 1,101,954 | -2.9% | Jan-Dec |
| Bahamas | NA | NA | NA | NA |
| Barbados | 661,160 | 631,480 | 4.7% | Jan-Dec |
| Belize | 427,111 | 385,479 | 10.8% | Jan-Dec |
| British Virgin Islands | 334,630 | 407,588 | -17.9% | Jan-Dec |
| Cayman Islands | 418,403 | 385,451 | 8.5% | Jan-Dec |
| Cuba | 4,257,754 | 3,557,021 | 19.7% | Jan-Dec |
| Curacao | 397,886 | 441,115 | -9.8% | Jan-Dec |
| Dominican Republic | 5,354,017 | 5,134,110 | 4.3% | Jan-Dec |
| Jamaica | 2,352,915 | 2,182,667 | 7.8% | Jan-Dec |
| Puerto Rico\* | 1,598,559 | 1,790,100 | -10.7% | Jan-Dec |
| Saint Lucia | 386,127 | 347,862 | 11.0% | Jan-Dec |
| Turks & Caicos Islands | 416,434 | 453,632 | -8.2% | Jan-Dec |
| US Virgin Islands\*\* | 636,812 | 796,889 | -20.1% | Jan-Dec |
| \* Hotel Non-Resident Registrations | |  |  |  |
| \*\* Air Arrivals |  |  |  |  |
| Source CTO |  |  |  |  |
|  |  |  |  |  |
|  | **Total US Stopover Visitors** | | | |
|  | 2017 | 2016 | % change | Period |
| Antigua | 96,347 | 108,652 | -11.3% | Jan-Dec |
| Aruba | 695,718 | 628,765 | 10.6% | Jan-Dec |
| Bahamas | NA | NA | NA | NA |
| Barbados | 188,460 | 168,871 | 11.6% | Jan-Dec |
| Belize | 276,566 | 254,431 | 8.7% | Jan-Dec |
| British Virgin Islands | NA | NA | NA | NA |
| Cayman Islands | 340,955 | 300,571 | 13.4% | Jan-Dec |
| Cuba | 173,128 | 59,494 | 191.0% | Jan-Dec |
| Curacao | 60,939 | 59,627 | 2.2% | Jan-Dec |
| Dominican Republic | 2,073,963 | 2,085,186 | -0.5% | Jan-Dec |
| Jamaica | 1,509,963 | 1,405,925 | 7.4% | Jan-Dec |
| Puerto Rico\* | 1,410,772 | 1,594,093 | -11.5% | Jan-Dec |
| Saint Lucia | 168,223 | 157,512 | 6.8% | Jan-Dec |
| Turks & Caicos Islands | 208,753 | 212,147 | -1.6% | Jan-Jun |
| US Virgin Islands | 384,924 | 396,829 | -3.0% | Jan-Jun |
| \* Hotel Non-Resident Registrations | |  |  |  |
| Source CTO |  |  |  |  |

**US Citizens Outbound Travel 2017.**

|  |  |  |  |
| --- | --- | --- | --- |
| U.S. Citizens Outbound Travel - Caribbean | | | |
|  | 2017 | 2016 | % change |
| Jan | 621,686 | 588,925 | 5.6% |
| Feb | 683,538 | 643,467 | 6.2% |
| Mar | 822,751 | 809,877 | 1.6% |
| Apr | 783,076 | 687,500 | 13.9% |
| May | 714,117 | 641,598 | 11.3% |
| Jun | 865,847 | 803,919 | 7.7% |
| Jul | 959,510 | 890,781 | 7.7% |
| Aug | 718,092 | 640,065 | 12.2% |
| Sep | 356,693 | 416,980 | -14.5% |
| Oct | 473,086 | 451,579 | 4.8% |
| Nov | 567,498 | 547,257 | 3.7% |
| Dec | 754,622 | 751,937 | 0.4% |
| YTD | 8,320,516 | 7,878,885 | 5.6% |
| Source: ITA: National Travel & Tourism Office | | | |
|  |  |  |  |
| U.S. Citizens Outbound Travel - Total | | | |
|  | 2017 | 2016 | % change |
| Jan | 5,678,852 | 5,374,945 | 5.7% |
| Feb | 5,569,635 | 5,253,191 | 6.0% |
| Mar | 6,985,660 | 6,596,701 | 5.9% |
| Apr | 6,923,482 | 5,882,169 | 17.7% |
| May | 7,461,884 | 6,771,961 | 10.2% |
| Jun | 9,294,010 | 8,275,983 | 12.3% |
| Jul | 9,780,425 | 9,122,195 | 7.2% |
| Aug | 8,213,226 | 7,420,570 | 10.7% |
| Sep | 6,841,226 | 6,276,564 | 9.0% |
| Oct | 6,521,256 | 6,042,845 | 7.9% |
| Nov | 6,497,371 | 5,766,891 | 12.7% |
| Dec | 7,936,416 | 7,442,151 | 6.6% |
| YTD | 87,703,442 | 80,226,167 | 9.3% |
| Source: ITA: National Travel & Tourism Office | | | |

|  |  |  |  |
| --- | --- | --- | --- |
| U.S. Citizens Outbound Travel - Caribbean Share | | | |
|  | 2017 | 2016 | % pt change |
| Jan | 10.9% | 11.0% | 0.0% |
| Feb | 12.3% | 12.2% | 0.0% |
| Mar | 11.8% | 12.3% | -0.5% |
| Apr | 11.3% | 11.7% | -0.4% |
| May | 9.6% | 9.5% | 0.1% |
| Jun | 9.3% | 9.7% | -0.4% |
| Jul | 9.8% | 9.8% | 0.0% |
| Aug | 8.7% | 8.6% | 0.1% |
| Sep | 5.2% | 6.6% | -1.4% |
| Oct | 7.3% | 7.5% | -0.2% |
| Nov | 8.7% | 9.5% | -0.8% |
| Dec | 9.5% | 10.1% | -0.6% |
| YTD | 9.5% | 9.8% | -0.3% |
| Source: ITA: National Travel & Tourism Office | | | |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| U.S. Citizens Outbound Travel - January - December 2017 YTD | | | | | |
|  | 2017 | % share | 2016 | % share | % change |
| Europe | 15,792,769 | 18.0% | 13,614,365 | 17.0% | 16.0% |
| Caribbean | 8,320,516 | 9.5% | 7,878,885 | 9.8% | 5.6% |
| Asia | 5,770,890 | 6.6% | 5,382,958 | 6.7% | 7.2% |
| South America | 1,925,300 | 2.2% | 2,010,477 | 2.5% | -4.2% |
| Central America | 3,032,002 | 3.5% | 2,984,133 | 3.7% | 1.6% |
| Oceania | 776,496 | 0.9% | 724,883 | 0.9% | 7.1% |
| Middle East | 2,306,334 | 2.6% | 2,176,309 | 2.7% | 6.0% |
| Africa | 403,151 | 0.5% | 364,892 | 0.5% | 10.5% |
| Mexico (Air) | 9,810,713 | 11.2% | 8,933,753 | 11.1% | 9.8% |
| Mexico (Other) | 25,239,347 | 28.8% | 22,260,645 | 27.7% | 13.4% |
| Canada | 14,325,924 | 16.3% | 13,894,867 | 17.3% | 3.1% |
| Total | 87,703,442 | 100.0% | 80,226,167 | 100.0% | 9.3% |
| Source: ITA: National Travel & Tourism Office | | |  |  |  |

**Cruise Traffic.**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Cruise Visitors: Aruba 2018** | | | | | | |
|  | 2018 | | 2017 | | Per cent change | |
|  | Calls | Passengers | Calls | Passengers | Calls | Passengers |
| January | 53 | 108,298 | 44 | 89,734 | 20.5% | 20.7% |
| February | 41 | 99,303 | 38 | 91,420 | 7.9% | 8.6% |
| March | 40 | 101,237 | 41 | 99,769 | -2.4% | 1.5% |
| YTD | 134 | 308,838 | 123 | 280,923 | 8.9% | 9.9% |
| Source: Aruba Port Authority. | | |  |  |  |  |

In March 2018 Aruba saw a 1.5% increase in the number of cruise passengers compared with March 2017. Year to date the volume of cruise traffic has grown by 9.9% compared with the same period for 2017.

The CTO numbers for 2018 for cruise visitor traffic show: -

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Total Cruise Visitors** | | | |
|  | 2018 | 2017 | % change | Period |
| Antigua | 163,702 | 128,782 | 27.1% | Jan |
| Aruba | 308,838 | 280,923 | 9.9% | Jan-Mar |
| Bahamas | 427,579 | 407,272 | 5.0% | Jan |
| Barbados | NA | NA | NA | NA |
| Belize | 131,509 | 127,061 | 3.5% | Jan |
| British Virgin Islands | NA | NA | NA | NA |
| Cayman Islands | 218,430 | 181,765 | 20.2% | Jan |
| Cozumel | 844,854 | 822,975 | 2.7% | Jan-Feb |
| Curacao | 232,759 | 130,810 | 77.9% | Jan-Feb |
| Dominican Republic | 243,347 | 317,110 | -23.3% | Jan-Feb |
| Jamaica | 249,690 | 205,812 | 21.3% | Jan |
| Puerto Rico | NA | NA | NA | NA |
| Saint Lucia | 134,380 | 119,593 | 12.4% | Jan |
| St. Kitts & Nevis | NA | NA | NA | NA |
| St. Maarten | NA | NA | NA | NA |
| Turks & Caicos Islands | NA | NA | NA | NA |
| US Virgin Islands | 273,525 | 361,618 | -24.4% | Jan-Feb |
| sub total | 3,228,613 | 3,083,721 | 4.7% |  |
| Source CTO |  |  |  |  |

The CTO numbers for calendar year 2017 for cruise visitor traffic show

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Total Cruise Visitors** | | | |
|  | 2017 | 2016 | % change | Period |
| Antigua | 792,861 | 608,503 | 30.3% | Jan-Dec |
| Aruba | 792,403 | 656,043 | 20.8% | Jan-Dec |
| Bahamas | 4,626,259 | 4,690,374 | -1.4% | Jan-Dec |
| Barbados | 681,211 | 594,096 | 14.7% | Jan-Dec |
| Belize | 1,014,232 | 1,005,394 | 0.9% | Jan-Dec |
| British Virgin Islands | 397,608 | 521,121 | -23.7% | Jan-Oct |
| Cayman Islands | 1,728,444 | 1,711,849 | 1.0% | Jan-Dec |
| Cozumel | 4,103,787 | 3,637,321 | 12.8% | Jan-Dec |
| Curacao | 635,006 | 469,498 | 35.3% | Jan-Dec |
| Dominican Republic | 1,107,951 | 809,286 | 36.9% | Jan-Dec |
| Jamaica | 1,923,274 | 1,655,562 | 16.2% | Jan-Dec |
| Puerto Rico | 1,226,899 | 1,401,866 | -12.5% | Jan-Dec |
| Saint Lucia | 668,006 | 587,953 | 13.6% | Jan-Dec |
| St. Kitts & Nevis | 701,675 | 616,302 | 13.9% | Jan-Aug |
| St. Maarten | 1,237,760 | 1,668,863 | -25.8% | Jan-Dec |
| Turks & Caicos Islands | 827,409 | 846,963 | -2.3% | Jan-Dec |
| US Virgin Islands | 1,304,303 | 1,776,735 | -26.6% | Jan- Dec |
| sub total | 23,769,088 | 23,257,729 | 2.2% |  |
| 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 2018 | | | | | |
|  | March 2018 | | March 2017 | |  |
|  | Visitors | % | Visitors | % | % change |
| Hotels | 53,004 | 53.8% | 49,392 | 54.8% | 7.3% |
| Timeshare | 24,337 | 24.7% | 22,003 | 24.4% | 10.6% |
| Apts/Priv Homes | 21,126 | 21.5% | 18,738 | 20.8% | 12.7% |
| Total | 98,467 | 100.0% | 90,133 | 100.0% | 9.2% |
| Source: ATA |  |  |  |  |  |

The hotels category includes High Rise hotels, Low Rise hotels and the Tropicana. As shown above in March 2018 the number of visitors staying in hotel accommodation increased by 7.3%, those staying in a timeshare resort increased by 10.6% and those staying in apartments, guest houses or private homes increased by 12.7%.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Place of Stay: Visitor Nights 2018 | | | | | |
|  | March 2018 | | March 2017 | |  |
|  | Nights | % | Nights | % | % change |
| Hotels | 327,820 | 46.1% | 295,394 | 46.0% | 11.0% |
| Timeshare | 207,130 | 29.1% | 187,549 | 29.2% | 10.4% |
| Apts/Priv Homes | 176,563 | 24.8% | 159,209 | 24.8% | 10.9% |
| Total | 711,513 | 100.0% | 642,152 | 100.0% | 10.8% |
| Source: ATA |  |  |  |  |  |
|  |  |  |  |  |  |
| Average Length of Stay in Nights 2018 | | | | | |
|  | March 2018 | | March 2017 | |  |
|  | Nights |  | Nights |  | % change |
| Hotels | 6.18 |  | 5.98 |  | 3.4% |
| Timeshare | 8.51 |  | 8.52 |  | -0.2% |
| Apts/Priv Homes | 8.36 |  | 8.50 |  | -1.6% |
| Total | 7.23 |  | 7.12 |  | 1.4% |
| Source: ATA |  |  |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Visitors 2018 | | | | | |
|  | March 2018 YTD | | March 2017 YTD | |  |
|  | Visitors | % | Visitors | % | % change |
| Hotels | 147,163 | 53.5% | 140,217 | 53.2% | 5.0% |
| Timeshare | 65,306 | 23.8% | 63,627 | 24.1% | 2.6% |
| Apts/Priv Homes | 62,486 | 22.7% | 59,721 | 22.7% | 4.6% |
| Total | 274,955 | 100.0% | 263,565 | 100.0% | 4.3% |
| Source: ATA |  |  |  |  |  |
|  |  |  |  |  |  |
| Visitor Nights Full Year 2018 | | | | | |
|  | March 2018 YTD | | March 2017 YTD | |  |
|  | Nights | % | Nights | % | % change |
| Hotels | 960,511 | 44.8% | 891,449 | 43.7% | 7.7% |
| Timeshare | 606,776 | 28.3% | 593,470 | 29.1% | 2.2% |
| Apts/Priv Homes | 574,778 | 26.8% | 554,643 | 27.2% | 3.6% |
| Total | 2,142,065 | 100.0% | 2,039,562 | 100.0% | 5.0% |
| Source: ATA |  |  |  |  |  |
|  |  |  |  |  |  |
| Average Length of Stay in Nights 2018 | | | | | |
|  | March 2018 YTD | | March 2017 YTD | |  |
|  | Nights |  | Nights |  | % change |
| Hotels | 6.53 |  | 6.36 |  | 2.7% |
| Timeshare | 9.29 |  | 9.33 |  | -0.4% |
| Apts/Priv Homes | 9.20 |  | 9.29 |  | -1.0% |
| Total | 7.79 |  | 7.74 |  | 0.7% |
| 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 March 2018** | | | | | |
|  |  |  |  |  |  |
|  | 2018 | % | 2017 | % | % change |
| USA | 252,386 | 77.0% | 221,958 | 75.1% | 13.7% |
| Canada | 25,594 | 7.8% | 24,955 | 8.4% | 2.6% |
| Venezuela | 1,586 | 0.5% | 4,640 | 1.6% | -65.8% |
| Brazil | 2,080 | 0.6% | 2,389 | 0.8% | -12.9% |
| Colombia | 6,009 | 1.8% | 4,131 | 1.4% | 45.5% |
| Argentina | 12,554 | 3.8% | 13,548 | 4.6% | -7.3% |
| Netherlands | 4,683 | 1.4% | 4,818 | 1.6% | -2.8% |
| Germany | 1,571 | 0.5% | 1,439 | 0.5% | 9.2% |
| Italy | 885 | 0.3% | 911 | 0.3% | -2.9% |
| UK | 1,461 | 0.4% | 855 | 0.3% | 70.9% |
| Other | 19,011 | 5.8% | 15,750 | 5.3% | 20.7% |
| Total | 327,820 | 100.0% | 295,394 | 100.0% | 11.0% |
| Source: ATA |  |  |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Aruba: Total Hotel Nights March YTD 2018** | | | | | |
|  |  |  |  |  |  |
|  | 2018 | % | 2017 | % | % change |
| USA | 685,832 | 71.4% | 624,604 | 70.1% | 9.8% |
| Canada | 86,323 | 9.0% | 79,512 | 8.9% | 8.6% |
| Venezuela | 8,192 | 0.9% | 21,688 | 2.4% | -62.2% |
| Brazil | 13,764 | 1.4% | 11,861 | 1.3% | 16.0% |
| Colombia | 14,522 | 1.5% | 12,559 | 1.4% | 15.6% |
| Argentina | 59,746 | 6.2% | 52,504 | 5.9% | 13.8% |
| Netherlands | 18,629 | 1.9% | 16,380 | 1.8% | 13.7% |
| Germany | 3,790 | 0.4% | 3,849 | 0.4% | -1.5% |
| Italy | 3,808 | 0.4% | 3,143 | 0.4% | 21.2% |
| UK | 3,144 | 0.3% | 2,629 | 0.3% | 19.6% |
| Other | 62,761 | 6.5% | 62,720 | 7.0% | 0.1% |
| Total | 960,511 | 100.0% | 891,449 | 100.0% | 7.7% |
| Source: ATA |  |  |  |  |  |

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

**March 2018.**

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **March 2018** | 2018 | | | | 2017 | | | | Per Cent Change | |
| Nights | Aprtmnt/ |  | Private |  | Aprtmnt/ |  | Private |  | Aprtmnt/ | Private |
|  | Gst Hse | % share | Home | % share | Gst Hse | % share | Home | % share | Gst Hse | Home |
| USA | 10,431 | 36.6% | 58,870 | 39.8% | 6,795 | 26.5% | 41,180 | 30.8% | 53.5% | 43.0% |
| Canada | 1,776 | 6.2% | 13,970 | 9.4% | 1,238 | 4.8% | 10,368 | 7.8% | 43.5% | 34.7% |
| Venezuela | 557 | 2.0% | 9,167 | 6.2% | 1,335 | 5.2% | 18,731 | 14.0% | -58.3% | -51.1% |
| Brazil | 251 | 0.9% | 1,422 | 1.0% | 173 | 0.7% | 711 | 0.5% | 45.1% | 100.0% |
| Colombia | 919 | 3.2% | 10,003 | 6.8% | 390 | 1.5% | 8,315 | 6.2% | 135.6% | 20.3% |
| Argentina | 746 | 2.6% | 4,902 | 3.3% | 1,854 | 7.2% | 8,384 | 6.3% | -59.8% | -41.5% |
| Netherlands | 5,073 | 17.8% | 22,467 | 15.2% | 5,819 | 22.7% | 23,814 | 17.8% | -12.8% | -5.7% |
| Germany | 577 | 2.0% | 4,021 | 2.7% | 641 | 2.5% | 1,818 | 1.4% | -10.0% | 121.2% |
| U.K. | 85 | 0.3% | 1,005 | 0.7% | 245 | 1.0% | 736 | 0.6% | -65.3% | 36.5% |
| Italy | 300 | 1.1% | 765 | 0.5% | 79 | 0.3% | 958 | 0.7% | 279.7% | -20.1% |
| Other | 7,773 | 27.3% | 21,461 | 14.5% | 7,028 | 27.5% | 18,582 | 13.9% | 10.6% | 15.5% |
| Total | 28,488 | 100.0% | 148,053 | 100.0% | 25,597 | 100.0% | 133,597 | 100.0% | 11.3% | 10.8% |
| Source: ATA |  |  |  |  |  |  |  |  |  |  |

**Year to Date.**

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **March 2018 YTD** | 2018 | | | | 2017 | | | | Per Cent Change | |
| Nights | Aprtmnt/ |  | Private |  | Aprtmnt/ |  | Private |  | Aprtmnt/ | Private |
|  | Gst Hse | % share | Home | % share | Gst Hse | % share | Home | % share | Gst Hse | Home |
| USA | 32,682 | 34.4% | 175,824 | 36.6% | 24,708 | 26.8% | 133,063 | 28.8% | 32.3% | 32.1% |
| Canada | 6,978 | 7.4% | 53,451 | 11.1% | 6,080 | 6.6% | 46,501 | 10.1% | 14.8% | 14.9% |
| Venezuela | 2,801 | 3.0% | 34,699 | 7.2% | 5,039 | 5.5% | 70,515 | 15.3% | -44.4% | -50.8% |
| Brazil | 1,282 | 1.4% | 5,482 | 1.1% | 785 | 0.9% | 3,104 | 0.7% | 63.3% | 76.6% |
| Colombia | 2,099 | 2.2% | 30,410 | 6.3% | 2,013 | 2.2% | 32,204 | 7.0% | 4.3% | -5.6% |
| Argentina | 3,011 | 3.2% | 19,433 | 4.0% | 4,526 | 4.9% | 18,713 | 4.0% | -33.5% | 3.8% |
| Netherlands | 19,431 | 20.5% | 76,258 | 15.9% | 19,771 | 21.4% | 79,979 | 17.3% | -1.7% | -4.7% |
| Germany | 1,332 | 1.4% | 8,466 | 1.8% | 1,487 | 1.6% | 5,789 | 1.3% | -10.4% | 46.2% |
| U.K. | 789 | 0.8% | 3,224 | 0.7% | 805 | 0.9% | 2,957 | 0.6% | -2.0% | 9.0% |
| Italy | 849 | 0.9% | 4,903 | 1.0% | 708 | 0.8% | 4,545 | 1.0% | 19.9% | 7.9% |
| Other | 23,643 | 24.9% | 67,684 | 14.1% | 26,277 | 28.5% | 64,941 | 14.0% | -10.0% | 4.2% |
| Total | 94,897 | 100.0% | 479,834 | 100.0% | 92,199 | 100.0% | 462,311 | 100.0% | 2.9% | 3.8% |
| Source: ATA |  |  |  |  |  |  |  |  |  |  |

**Hotel Performance Aruba 2018**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  | 2018/2017 |  |
| **March 2018** | 2018 | 2017 | % change |  |
| Rooms | 4,572 | 4,580 | -0.2% |  |
| ARN | 141,732 | 141,980 | -0.2% |  |
| ORN | 125,155 | 121,324 | 3.2% |  |
| % occupancy | 88.3% | 85.5% | 2.8% | points |
| ADR | $328.95 | $288.24 | 14.1% |  |
| Rev Par | $290.48 | $246.31 | 17.9% |  |
| ***Based on data from 14 properties.*** | |  |  |  |

Total transient hotel room inventory for Aruba in March 2018 stood at 5,275 rooms. In addition to the transient hotel room inventory there were an estimated total of 3,440 timeshare units.

The above numbers reflect a sample of 14 hotels. The sample includes all major hotels except the Hilton Aruba.

In March 2018 the hotel sector saw a 2.8 percentage point increase in average room occupancy, from 85.5% to 88.3%, and a 14.1% increase in the average daily room rate (ADR) from $288.24 to $328.95. With a higher average room occupancy and higher ADR revenue per available room (RevPar) grew by 17.9% compared with March 2017.

**Year to Date**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  | 2018/2017 |  |
| **March 2018 YTD** | 2018 | 2017 | % change |  |
| Rooms | 4,572 | 4,580 | -0.2% |  |
| ARN | 410,578 | 411,762 | -0.3% |  |
| ORN | 370,369 | 356,148 | 4.0% |  |
| % occupancy | 90.2% | 86.5% | 3.7% | points |
| ADR | $333.40 | $300.72 | 10.9% |  |
| Rev Par | $300.75 | $260.10 | 15.6% |  |
| ***Based on data from 14 properties.*** | |  |  |  |

**By Month.**

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2018** | Avg Occupancy | | | ADR | | | RevPar | | |
|  | 2018 | 2017 | % pt chng | 2018 | 2017 | % pt chng | 2018 | 2017 | % pt chng |
| Jan | 89.4% | 85.0% | 4.4% | $332.11 | $301.69 | 10.1% | $296.92 | $256.42 | 15.8% |
| Feb | 93.2% | 89.3% | 3.9% | $339.71 | $312.96 | 8.5% | $316.77 | $279.56 | 13.3% |
| Mar | 88.3% | 85.5% | 2.8% | $328.95 | $288.24 | 14.1% | $290.48 | $246.31 | 17.9% |
| YTD | 90.2% | 86.5% | 3.7% | $333.40 | $300.72 | 10.9% | $300.75 | $260.10 | 15.6% |

**Performance by Category – March 2018.**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| March |  |  |  | 2018 |  |  |  |
|  | Rooms | ARN | ORN | % opy | Revenue | $ADR | $RevPar |
| Brand Name Beach Front | 1,678 | 52,018 | 45,847 | 88.1% | $23,334,388.00 | $508.96 | $448.58 |
| All Inclusives | 1,844 | 57,164 | 53,992 | 94.5% | $10,862,615.00 | $201.19 | $190.03 |
| Small Independent Beach Front | 176 | 5,456 | 5,292 | 97.0% | $2,422,941.00 | $457.85 | $444.09 |
| Non-Beach Front | 874 | 27,094 | 20,024 | 73.9% | $4,550,205.00 | $227.24 | $167.94 |
| Total | 4,572 | 141,732 | 125,155 | 88.3% | $41,170,149.00 | $328.95 | $290.48 |
|  |  |  |  |  |  |  |  |
|  |  |  |  | 2017 |  |  |  |
|  | Rooms | ARN | ORN | %opy | Revenue | $ADR | $RevPar |
| Brand Name Beach Front | 1,678 | 52,018 | 45,247 | 87.0% | $19,544,752.00 | $431.96 | $375.73 |
| All Inclusives | 1,832 | 56,792 | 49,608 | 87.4% | $9,141,988.00 | $184.28 | $160.97 |
| Small Independent Beach Front | 176 | 5,456 | 5,108 | 93.6% | $2,200,861.00 | $430.87 | $403.38 |
| Non-Beach Front | 894 | 27,714 | 21,361 | 77.1% | $4,083,332.00 | $191.16 | $147.34 |
| Total | 4,580 | 141,980 | 121,324 | 85.5% | $34,970,933.00 | $288.24 | $246.31 |
|  |  |  |  |  |  |  |  |
|  |  |  |  | Percentage Change | |  |  |
|  | Rooms | ARN | ORN | % pt change | Revenue | $ADR | $RevPar |
| Brand Name Beach Front | 0.0% | 0.0% | 1.3% | 1.2% | 19.4% | 17.8% | 19.4% |
| All Inclusives | 0.7% | 0.7% | 8.8% | 7.1% | 18.8% | 9.2% | 18.0% |
| Small Independent Beach Front | 0.0% | 0.0% | 3.6% | 3.4% | 10.1% | 6.3% | 10.1% |
| Non-Beach Front | -2.2% | -2.2% | -6.3% | -3.2% | 11.4% | 18.9% | 14.0% |
| Total | -0.2% | -0.2% | 3.2% | 2.9% | 17.7% | 14.1% | 17.9% |

**Brand Name Beachfront Hotels**

The Aruba Marriott, the Holiday Inn, the Hyatt Regency Aruba, and the Ritz Carlton Aruba.

**All Inclusives Resorts.**

Divi Tamarijn and Divi All Inclusive, the Barcelo Aruba, the Riu Palace and the Riu Palace Antillas.

**Small Independent Beach Front Hotels.**

Bucuti & Tara Beach Resort, the Manchebo Beach Resort

**Non Beachfront Hotels.**

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

**March - Year to Date.**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **March 2018 YTD** |  |  |  | 2018 YTD |  |  |  |
|  | Rooms | ARN | ORN | % opy | Revenue | $ADR | $RevPar |
| Brand Name Beach Front | 1,678 | 151,020 | 135,089 | 89.5% | $69,753,162.00 | $516.35 | $461.88 |
| All Inclusives | 1,841 | 165,867 | 157,776 | 95.1% | $32,172,825.00 | $203.91 | $193.97 |
| Small Independent Beach Front | 176 | 15,840 | 15,302 | 96.6% | $7,122,319.00 | $465.45 | $449.64 |
| Non-Beach Front | 894 | 77,851 | 62,202 | 79.9% | $14,454,844.00 | $232.39 | $185.67 |
| Total | 4,589 | 410,578 | 370,369 | 90.2% | $123,503,150.00 | $333.40 | $300.75 |
|  |  |  |  |  |  |  |  |
|  |  |  |  | 2017 YTD |  |  |  |
|  | Rooms | ARN | ORN | %opy | Revenue | $ADR | $RevPar |
| Brand Name Beach Front | 1,678 | 151,020 | 131,118 | 86.8% | $59,593,788.00 | $454.51 | $394.61 |
| All Inclusives | 1,841 | 165,212 | 147,313 | 89.2% | $28,092,904.00 | $190.70 | $170.04 |
| Small Independent Beach Front | 176 | 15,840 | 14,952 | 94.4% | $6,571,874.00 | $439.53 | $414.89 |
| Non-Beach Front | 894 | 79,690 | 62,765 | 78.8% | $12,840,654.36 | $204.58 | $161.13 |
| Total | 4,589 | 411,762 | 356,148 | 86.5% | $107,099,220.36 | $300.72 | $260.10 |
|  |  |  |  |  |  |  |  |
|  |  |  |  | Percentage Change | |  |  |
|  | Rooms | ARN | ORN | % pt change | Revenue | $ADR | $RevPar |
| Brand Name Beach Front | 0.0% | 0.0% | 3.0% | 2.6% | 17.0% | 13.6% | 17.0% |
| All Inclusives | 0.0% | 0.4% | 7.1% | 6.0% | 14.5% | 6.9% | 14.1% |
| Small Independent Beach Front | 0.0% | 0.0% | 2.3% | 2.2% | 8.4% | 5.9% | 8.4% |
| Non-Beach Front | 0.0% | -2.3% | -0.9% | 1.1% | 12.6% | 13.6% | 15.2% |
| Total | 0.0% | -0.3% | 4.0% | 3.7% | 15.3% | 10.9% | 15.6% |

**Competing Destination performance.**

Smith Travel Research (STR) collects data from hotels across the Caribbean on behalf of the CHTA. The following numbers are based on this STR report and show the performance figures for hotels in various Caribbean countries for March 2018 compared with March 2017.

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **March 2018** | Average Room Occupancy | | | Average Daily Rate | | | RevPar | | | #Hotels in |
|  | 2018 | 2017 | % pt change | 2018 | 2017 | % change | 2018 | 2017 | % change | Sample |
| Aruba | 88.3% | 85.5% | 2.8% | $328.95 | $288.24 | 14.1% | $290.48 | $246.31 | 17.9% | 14 |
| Bahamas | 72.5% | 72.4% | 0.1% | $360.79 | $344.46 | 4.7% | $261.51 | $249.22 | 4.9% | 12 |
| Barbados | 76.6% | 76.9% | -0.3% | $372.30 | $358.47 | 3.9% | $285.19 | $275.83 | 3.4% | 40 |
| Cancun | 79.5% | 77.4% | 2.1% | $256.96 | $242.81 | 5.8% | $204.24 | $188.00 | 8.6% | 28 |
| Cayman Islands | 87.8% | 79.7% | 8.1% | $635.97 | $496.61 | 28.1% | $558.43 | $395.63 | 41.1% | 9 |
| Curacao | 73.0% | 76.7% | -3.7% | $180.04 | $152.58 | 18.0% | $131.40 | $117.04 | 12.3% | 12 |
| Dominican Republic | 78.9% | 80.3% | -1.4% | $176.11 | $160.20 | 9.9% | $138.91 | $128.66 | 8.0% | 38 |
| Jamaica | 75.3% | 77.8% | -2.5% | $298.53 | $278.64 | 7.1% | $224.85 | $216.71 | 3.8% | 11 |
| Puerto Rico | 80.3% | 77.1% | 3.2% | $235.44 | $216.32 | 8.8% | $189.12 | $166.76 | 13.4% | 36 |
| USVI | NA | 88.2% | NA | NA | $488.73 | NA | NA | $431.26 | NA | 3 |
| Caribbean | 73.9% | 75.5% | -1.6% | $256.67 | $250.28 | 2.6% | $189.69 | $189.08 | 0.3% | 256 |
| Source: STR. |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |
| **March YTD 2018** | Average Room Occupancy | | | Average Daily Rate | | | RevPar | | | #Hotels in |
|  | 2018 | 2017 | % pt change | 2018 | 2017 | % change | 2018 | 2017 | % change | Sample |
| Aruba | 90.2% | 86.5% | 3.7% | $333.40 | $300.72 | 10.9% | $300.75 | $260.10 | 15.6% | 14 |
| Bahamas | 59.8% | 62.3% | -2.5% | $316.51 | $300.86 | 5.2% | $189.35 | $187.44 | 1.0% | 12 |
| Barbados | 77.3% | 77.2% | 0.1% | $393.87 | $380.42 | 3.5% | $304.31 | $293.76 | 3.6% | 40 |
| Cancun | 77.7% | 77.9% | -0.2% | $246.02 | $241.78 | 1.8% | $191.22 | $188.26 | 1.6% | 28 |
| Cayman Islands | 82.3% | 71.6% | 10.7% | $571.95 | $473.18 | 20.9% | $470.45 | $338.77 | 38.9% | 9 |
| Curacao | 76.5% | 78.2% | -1.7% | $185.48 | $160.83 | 15.3% | $141.89 | $125.80 | 12.8% | 12 |
| Dominican Republic | 78.5% | 79.6% | -1.1% | $166.38 | $160.86 | 3.4% | $130.58 | $128.08 | 2.0% | 38 |
| Jamaica | 75.6% | 76.4% | -0.8% | $289.25 | $270.01 | 7.1% | $218.65 | $206.36 | 6.0% | 11 |
| Puerto Rico | 78.7% | 71.6% | 7.1% | $228.69 | $211.45 | 8.2% | $179.87 | $151.49 | 18.7% | 36 |
| USVI | NA | 84.2% | NA | NA | $477.43 | NA | NA | $402.19 | NA | 3 |
| Caribbean | 71.9% | 73.2% | -1.3% | $244.96 | $244.76 | 0.1% | $176.16 | $179.28 | -1.7% | 256 |
| Source: STR. |  |  |  |  |  |  |  |  |  |  |

**Visitors by Carrier.**

The table below shows the number of non-resident visitors brought in by various airline carriers during March 2018. It does not show the number of passengers in transit (for example from The Netherlands through to Bonaire) nor does it show the number of returning residents of Aruba which used any one of the carriers.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | **Stopovers: By Airline: March 2018** | | | | | |
|  | (Non-resident stopover Arrivals) | |  |  |  |  |
|  |  | 2018 | % share | 2017 | % share | % change |
| 1 | JetBlue | 22,013 | 22.4% | 19,463 | 21.6% | 13.1% |
| 2 | American Airlines | 17,145 | 17.4% | 14,030 | 15.6% | 22.2% |
| 3 | United Airlines | 14,353 | 14.6% | 14,348 | 15.9% | 0.0% |
| 4 | Delta Air Lines | 11,823 | 12.0% | 10,720 | 11.9% | 10.3% |
| 5 | Southwest | 8,039 | 8.2% | 6,670 | 7.4% | 20.5% |
| 6 | Copa | 2,484 | 2.5% | 2,378 | 2.6% | 4.5% |
| 7 | Insel Air | 1,813 | 1.8% | 2,706 | 3.0% | -33.0% |
| 8 | KLM | 2,811 | 2.9% | 2,450 | 2.7% | 14.7% |
| 9 | Avianca | 3,998 | 4.1% | 1,912 | 2.1% | 109.1% |
| 10 | Sunwing | 1,967 | 2.0% | 2,446 | 2.7% | -19.6% |
| 11 | Laser | - | 0.0% | 655 | 0.7% | -100.0% |
| 12 | Aruba Airlines | 1,753 | 1.8% | 1,643 | 1.8% | 6.7% |
| 13 | WestJet | 1,698 | 1.7% | 1,137 | 1.3% | 49.3% |
| 14 | Air Canada | 1,507 | 1.5% | 1,590 | 1.8% | -5.2% |
| 15 | ArkeFly | 1,071 | 1.1% | 1,118 | 1.2% | -4.2% |
| 16 | Aires | 719 | 0.7% | 700 | 0.8% | 2.7% |
| 17 | Sun Country | 613 | 0.6% | - | 0.0% | 100.0% |
| 18 | Aserca | - | 0.0% | 920 | 1.0% | -100.0% |
| 19 | Surinam Airways | 643 | 0.7% | 465 | 0.5% | 38.3% |
| 20 | Thomas Cook | 348 | 0.4% | 321 | 0.4% | 8.4% |
| 21 | Spirit Airlines | 652 | 0.7% | 326 | 0.4% | 100.0% |
| 22 | Pawa | - | 0.0% | 422 | 0.5% | -100.0% |
| 23 | Avior | - | 0.0% | 141 | 0.2% | -100.0% |
| 24 | Private | 323 | 0.3% | 831 | 0.9% | -61.1% |
| 25 | Charter | 1,942 | 2.0% | 1,767 | 2.0% | 9.9% |
|  | Other | 752 | 0.8% | 974 | 1.1% | -22.8% |
|  | TOTAL | 98,467 | 100.0% | 90,133 | 100.0% | 9.2% |
|  | Source: ATA |  |  |  |  |  |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | **Stopovers: By Airline: March 2018 YTD** | | | | | |
|  | (Non-resident stopover Arrivals) | |  |  |  |  |
|  |  | 2018 | % share | 2017 | % share | % change |
| 1 | JetBlue | 56,825 | 20.7% | 54,708 | 20.8% | 3.9% |
| 2 | American Airlines | 45,667 | 16.6% | 38,658 | 14.7% | 18.1% |
| 3 | United Airlines | 41,611 | 15.1% | 39,246 | 14.9% | 6.0% |
| 4 | Delta Air Lines | 32,123 | 11.7% | 31,064 | 11.8% | 3.4% |
| 5 | Southwest | 20,900 | 7.6% | 18,927 | 7.2% | 10.4% |
| 6 | Copa | 9,030 | 3.3% | 8,825 | 3.3% | 2.3% |
| 7 | Insel Air | 5,198 | 1.9% | 8,446 | 3.2% | -38.5% |
| 8 | KLM | 8,594 | 3.1% | 7,634 | 2.9% | 12.6% |
| 9 | Avianca | 11,902 | 4.3% | 6,675 | 2.5% | 78.3% |
| 10 | Sunwing | 7,051 | 2.6% | 7,167 | 2.7% | -1.6% |
| 11 | Laser | 416 | 0.2% | 3,550 | 1.3% | -88.3% |
| 12 | Aruba Airlines | 3,999 | 1.5% | 5,467 | 2.1% | -26.9% |
| 13 | WestJet | 5,045 | 1.8% | 2,832 | 1.1% | 78.1% |
| 14 | Air Canada | 4,732 | 1.7% | 4,587 | 1.7% | 3.2% |
| 15 | ArkeFly | 3,181 | 1.2% | 3,116 | 1.2% | 2.1% |
| 16 | Aires | 2,688 | 1.0% | 2,434 | 0.9% | 10.4% |
| 17 | Sun Country | 1,583 | 0.6% | - | 0.0% | 100.0% |
| 18 | Aserca | 114 | 0.0% | 2,370 | 0.9% | -95.2% |
| 19 | Surinam Airways | 1,729 | 0.6% | 1,739 | 0.7% | -0.6% |
| 20 | Thomas Cook | 1,675 | 0.6% | 1,544 | 0.6% | 8.5% |
| 21 | Spirit Airlines | 1,499 | 0.5% | 959 | 0.4% | 56.3% |
| 22 | Pawa | 216 | 0.1% | 1,002 | 0.4% | -78.4% |
| 23 | Avior | 65 | 0.0% | 393 | 0.1% | -83.5% |
| 24 | Private | 1,461 | 0.5% | 3,783 | 1.4% | -61.4% |
| 25 | Charter | 6,320 | 2.3% | 5,550 | 2.1% | 13.9% |
|  | Other | 1,331 | 0.5% | 2,889 | 1.1% | -53.9% |
|  | TOTAL | 274,955 | 100.0% | 263,565 | 100.0% | 4.3% |
|  | Source: ATA |  |  |  |  |  |

**Age of Visitors.**

The biggest positive changes in age demographics in March 2018 came in the 12 – 19 years category (up by 61.7%), the 0 - 11 years old category (up by 40.6%) and the 40 – 49 years old category (up by 15.7%) which suggests there was a big increase in family business in March 2018.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Age of All Stopover Visitors March 2018** | | | | | |
|  |  |  |  |  |  |
|  | 2018 | % share | 2017 | % share | % change |
| 0 - 11 yrs | 7,839 | 8.0% | 5,574 | 6.2% | 40.6% |
| 12 - 19 yrs | 8,828 | 9.0% | 5,460 | 6.1% | 61.7% |
| 20 - 29 yrs | 10,858 | 11.0% | 11,192 | 12.4% | -3.0% |
| 30 - 39 yrs | 13,261 | 13.5% | 13,034 | 14.5% | 1.7% |
| 40 - 49 yrs | 17,336 | 17.6% | 14,985 | 16.6% | 15.7% |
| 50 - 59 yrs | 20,201 | 20.5% | 19,548 | 21.7% | 3.3% |
| 60 - 69 yrs | 13,746 | 14.0% | 14,180 | 15.7% | -3.1% |
| 70 yrs or more | 6,395 | 6.5% | 6,157 | 6.8% | 3.9% |
| Not Stated | 3 | 0.0% | 3 | 0.0% | 0.0% |
| Total | 98,467 | 100.0% | 90,133 | 100.0% | 9.2% |
| Source: ATA |  |  |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Age of All Stopover Visitors March 2018 YTD** | | | | | |
|  |  |  |  |  |  |
|  | 2018 | % share | 2017 | % share | % change |
| 0 - 11 yrs | 19,911 | 7.2% | 18,040 | 6.8% | 10.4% |
| 12 - 19 yrs | 18,282 | 6.6% | 14,567 | 5.5% | 25.5% |
| 20 - 29 yrs | 28,464 | 10.4% | 29,430 | 11.2% | -3.3% |
| 30 - 39 yrs | 36,195 | 13.2% | 36,734 | 13.9% | -1.5% |
| 40 - 49 yrs | 44,894 | 16.3% | 42,855 | 16.3% | 4.8% |
| 50 - 59 yrs | 58,335 | 21.2% | 56,298 | 21.4% | 3.6% |
| 60 - 69 yrs | 45,493 | 16.5% | 44,430 | 16.9% | 2.4% |
| 70 yrs or more | 23,357 | 8.5% | 21,203 | 8.0% | 10.2% |
| Not Stated | 24 | 0.0% | 8 | 0.0% | 200.0% |
| Total | 274,955 | 100.0% | 263,565 | 100.0% | 4.3% |
| Source: ATA |  |  |  |  |  |

**Age of Visitors from the USA.**

The biggest changes in age demographics in March 2018 for visitors from the USA came in the 12 – 19 years category (up by 71.4%), the 0 – 11 years category (up 51.3%) and the 40 – 49 years category (up 22.0%) again suggesting a big increase in family business from the USA in March.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Age of All US Stopover Visitors March 2018** | | | | | |
|  |  |  |  |  |  |
|  | 2018 | % share | 2017 | % share | % change |
| 0 - 11 yrs | 5,810 | 7.9% | 3,840 | 5.9% | 51.3% |
| 12 - 19 yrs | 7,369 | 10.0% | 4,300 | 6.6% | 71.4% |
| 20 - 29 yrs | 7,552 | 10.2% | 7,463 | 11.5% | 1.2% |
| 30 - 39 yrs | 8,477 | 11.5% | 7,955 | 12.2% | 6.6% |
| 40 - 49 yrs | 12,783 | 17.3% | 10,480 | 16.1% | 22.0% |
| 50 - 59 yrs | 15,548 | 21.1% | 14,782 | 22.8% | 5.2% |
| 60 - 69 yrs | 10,942 | 14.8% | 11,250 | 17.3% | -2.7% |
| 70 yrs or more | 5,201 | 7.1% | 4,874 | 7.5% | 6.7% |
| Not Stated | 3 | 0.0% | 3 | 0.0% | 0.0% |
| Total | 73,685 | 100.0% | 64,947 | 100.0% | 13.5% |
| Source: ATA |  |  |  |  |  |
|  |  |  |  |  |  |
| **Age of All US Stopover Visitors March YTD 2018** | | | | | |
|  |  |  |  |  |  |
|  | 2018 | % share | 2017 | % share | % change |
| 0 - 11 yrs | 13,250 | 6.8% | 10,953 | 6.2% | 21.0% |
| 12 - 19 yrs | 13,677 | 7.0% | 9,996 | 5.6% | 36.8% |
| 20 - 29 yrs | 18,144 | 9.3% | 17,215 | 9.7% | 5.4% |
| 30 - 39 yrs | 22,112 | 11.4% | 20,741 | 11.7% | 6.6% |
| 40 - 49 yrs | 30,633 | 15.8% | 27,588 | 15.6% | 11.0% |
| 50 - 59 yrs | 42,442 | 21.8% | 40,028 | 22.6% | 6.0% |
| 60 - 69 yrs | 35,264 | 18.2% | 33,963 | 19.2% | 3.8% |
| 70 yrs or more | 18,741 | 9.6% | 16,688 | 9.4% | 12.3% |
| Not Stated | 16 | 0.0% | 7 | 0.0% | 128.6% |
| Total | 194,279 | 100.0% | 177,179 | 100.0% | 9.7% |
| Source: ATA |  |  |  |  |  |

**First Time/Repeat Visitors.**

In March 2018 49.1% of our visitors reported they were visiting for the first time and 41.5% reported they had visited before. 9.4% 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 54.2% first time and 45.8% repeat.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Number of visits to Aruba: March 2018** | | | | | |
|  |  |  |  |  |  |
| Number of Times Visited | 2018 | % share | 2017 | % share | % change |
| First Time | 48,322 | 49.1% | 40,962 | 45.4% | 18.0% |
| 2 - 5 times | 23,598 | 24.0% | 20,878 | 23.2% | 13.0% |
| 6 - 9 times | 6,319 | 6.4% | 6,008 | 6.7% | 5.2% |
| 10 or more | 10,962 | 11.1% | 10,395 | 11.5% | 5.5% |
| Not Stated | 9,266 | 9.4% | 11,890 | 13.2% | -22.1% |
| Total | 98,467 | 100.0% | 90,133 | 100.0% | 9.2% |
| Source: ATA: Self-reported by visitors | |  |  |  |  |
|  |  |  |  |  |  |
| **Number of visits to Aruba: March 2018 YTD** | | | | | |
|  |  |  |  |  |  |
| Number of Times Visited | 2018 | % share | 2017 | % share | % change |
| First Time | 124,029 | 45.1% | 109,635 | 41.6% | 13.1% |
| 2 - 5 times | 67,968 | 24.7% | 62,936 | 23.9% | 8.0% |
| 6 - 9 times | 19,760 | 7.2% | 19,448 | 7.4% | 1.6% |
| 10 or more | 34,766 | 12.6% | 34,334 | 13.0% | 1.3% |
| Not Stated | 28,432 | 10.3% | 37,212 | 14.1% | -23.6% |
| Total | 274,955 | 100.0% | 263,565 | 100.0% | 4.3% |
| Source: ATA: Self-reported by visitors | |  |  |  |  |

Year to date 2018 45.1% of our visitors reported they were visiting for the first time and 44.5% reported they had visited before. 10.3% 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 50.3% first time and 49.7% repeat.

**Trip Advisor Ratings.**

Trip Advisor has made data available to us which shows the total number of reviews received for the overall Caribbean and for seven of our competitors (that is all reviews of hotels, restaurants, attractions and the destination as a whole) for March 2018. The ratings are out of 5.

|  |  |  |
| --- | --- | --- |
| **TripAdvisor Ratings for March 2018** | | |
|  | Number of Reviews | |
| Aruba | 11,268 |  |
| Bahamas | 8,900 |  |
| Cayman Islands | 6,824 |  |
| Curacao | 5,486 |  |
| Dominican Republic | 33,604 |  |
| Jamaica | 14,290 |  |
| Puerto Rico | 8,194 |  |
| USVI | 3,566 |  |
|  |  |  |
|  | Average Rating |  |
| USVI | 4.60 |  |
| Cayman | 4.50 |  |
| Aruba | 4.40 |  |
| Puerto Rico | 4.40 |  |
| Jamaica | 4.40 |  |
| Curacao | 4.30 |  |
| Dominican Republic | 4.30 |  |
| Bahamas | 4.20 |  |

**Change in Currency Exchange Rates.**

|  |  |  |  |
| --- | --- | --- | --- |
|  | March 2018 | March 2017 |  |
| as of | 3/15/2018 | 3/15/2017 | % change |
| Euro | $1.232 | $1.093 | 12.7% |
| UK Pound | $1.396 | $1.288 | 8.4% |
| Canadian Dollar | $0.766 | $0.729 | 5.1% |
| Colombian Peso\* | 2846 | 2918 | 2.5% |
| Brazilian Real\*\* | 3.285 | 3.123 | -4.9% |
| \* 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 2018. The only substantive change is the planned opening of the 116 room Hyatt Place Airport hotel in late 2018. Both the Hyatt Regency Aruba and the Mill Resort will undergo extensive refreshment during 2018 which will result in some rooms being taken out of order during the course of the year.

**Hotel Performance Forecast – 2018**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Hotel Performance Forecast 2018** | | | | |
|  | 2018 | 2017 | 2018/2017 |  |
|  | Projected | Projected | % change |  |
| % occupancy | 84.4% | 84.6% | -0.2% | points |
| ADR | $249.63 | $237.22 | 5.2% |  |
| Rev Par | $210.62 | $200.60 | 5.0% |  |
| Revised as of 2/26/18 | |  |  |  |

**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 2018. 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 AAA is projecting that Aruba will receive 5.6% fewer air seats in calendar year 2018 compared with CY 2017 with the USA generating 2.1% more seats.

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | Full Year 2018 | | | | | | |
| **Available Air Seats into Aruba.** | 2016 | 2017 | change | % change | 2018\* | change | % change |
|  | Avl Seats | Avl Seats | Avl Seats | 17/16 | Avl Seats | Avl Seats | 18/17 |
| USA | 889,860 | 972,324 | 82,464 | 9.3% | 991,161 | 18,837 | 1.9% |
| USA (excluding local carriers) | 813,662 | 903,227 | 89,565 | 11.0% | 921,834 | 18,607 | 2.1% |
| Canada | 41,855 | 47,584 | 5,729 | 13.7% | 45,195 | -2,389 | -5.0% |
| Europe | 158,589 | 171,518 | 12,929 | 8.2% | 178,600 | 7,082 | 4.1% |
| Dutch Caribbean & Caribbean | 206,430 | 184,048 | -22,382 | -10.8% | 124,506 | -59,542 | -32.4% |
| Central America | 59,077 | 52,790 | -6,287 | -10.6% | 51,996 | -794 | -1.5% |
| Venezuela | 451,761 | 216,360 | -235,401 | -52.1% | 145,656 | -70,704 | -32.7% |
| Rest of South America. | 123,819 | 122,660 | -1,159 | -0.9% | 130,518 | 7,858 | 6.4% |
| **Total** | 1,931,391 | 1,767,284 | -164,107 | -8.5% | 1,667,632 | -99,652 | -5.6% |
| Total (excluding local carriers to USA) | 1,855,193 | 1,698,187 | -157,006 | -8.5% | 1,598,305 | -99,882 | -5.9% |
| \* Projected |  |  |  |  |  |  |  |
| As of March 26, 2018 |  |  |  |  |  |  |  |
| Source: Aruba Airport Authority |  |  |  |  |  |  |  |

**Targets for 2018.**

The Aruba Tourism Authority has published the following targets for 2018.

* Total stopover arrivals to increase by 3.7% compared with 2017 final total.
* Tourism Receipts to increase by between 2% - 3.5% compared with 2017 final.
* RevPar to grow by 5.0% compared with final RevPar for 2017.
* Cruise visitor arrivals to grow by 7.0% compared with 2017 final total.

**2018 Stopover Visitor Targets by Country of Origin.**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Total Stopover Arrivals** |  | Estimated | Estimated |  |  |
|  | Actual | Final | Final | Target | Target |
|  | Visitors | Visitors | % change | Visitors | % change |
|  | 2016 | 2017 | 2017 | 2018 | 2018 |
| USA | 628,765 | 679,066 | 8.0% | 703,510 | 3.6% |
| Canada | 42,059 | 44,162 | 5.0% | 45,490 | 3.0% |
| Venezuela | 209,128 | 83,651 | -60.0% | 83,650 | 0.0% |
| Colombia | 28,945 | 36,181 | 25.0% | 39,800 | 10.0% |
| Argentina | 18,684 | 24,289 | 30.0% | 30,000 | 23.5% |
| Brazil | 12,858 | 12,858 | 0.0% | 15,430 | 20.0% |
| Chile | 10,758 | 11,296 | 5.0% | 12,430 | 10.0% |
| Peru | 3,133 | 4,700 | 50.0% | 5,400 | 14.9% |
| Ecuador | 2,460 | 2,091 | -15.0% | 3,030 | 44.9% |
| Mexico | 1,798 | 1,978 | 10.0% | 2,370 | 19.8% |
| Other L.A. | 14,245 | 11,418 | -19.8% | 12,560 | 10.0% |
| The Netherlands | 36,342 | 41,500 | 14.2% | 44,500 | 7.2% |
| U.K. | 18,428 | 19,902 | 8.0% | 11,030 | -44.6% |
| Italy | 7,626 | 7,817 | 2.5% | 8,000 | 2.3% |
| Sweden | 6,267 | 7,583 | 21.0% | 8,250 | 8.8% |
| Germany | 4,674 | 5,212 | 11.5% | 5,900 | 13.2% |
| Other Europe | 13,406 | 14,761 | 10.1% | 19,094 | 29.4% |
| Rest of the World | 42,378 | 20,592 | -51.4% | 16,850 | -18.2% |
| Total | 1,101,954 | 1,029,057 | -6.6% | 1,067,294 | 3.7% |
| Source: ATA |  |  |  |  |  |