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

**June 2016 and Year to Date 2016**

**Summary Highlights.**

* The total number of stopovers visiting Aruba decreased by 0.9% in June, from 87,447 in June 2015 to 86,697 in June 2016.
* In the first six months of 2016 the number of stopover visitors increased by 1.3% from 569,153 in 2015 to 576,739 in 2016.
* Traffic from the USA was up by 6.4%, from 51,256 stopovers in June 2015 to 54,520 stopovers in June 2016 with the largest growth coming from New York State, New Jersey and Massachusetts.
* In the first six months of 2016 the number of stopover visitors from the USA increased by 2.4% from 320,500 in 2015 to 328,500 in 2016.
* Traffic from Venezuela was down by 36.7% in June from 19,032 stopovers in June 2015 to 12,052 in June 2016. In the first six months of 2016 the number of stopover visitors from Venezuela fell by 5.4%, from 129,345 in 2015 to 122,347 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.
* The total number of visitor nights grew by 3.0% in June, from 594,440 in June 2015 to 612,519 in June 2016. The overall average length of stay grew by 3.9% from 6.80 nights in June 2015 to 7.07 nights in June 2016.
* The total number of visitor nights grew by 0.3% in the first six months of 2016, from 4,010,661 in 2015 to 4,023,249 in 2016. The overall average length of stay fell by 1.0% from 7.05 nights in 2015 to 6.98 nights in 2016.
* The Dominican Republic saw a 5.8% increase in stopover traffic in the first six months of 2016 whilst the Cayman Islands saw a 1.4% decrease in stopovers in the same period.
* The number of cruise passengers visiting Aruba in June grew by 14.4%, from 22,243 in June 2015 to 25,452 in June 2016. In the first six months of 2016 the number of cruise visitors increased by 20.1% from 313,325 in 2015 to 376,337 in 2016.
* As reported by Immigration card data the number of stopover visitors staying in hotels in June 2016 grew by 15.1%, but staying in timeshare resorts fell by 0.4%. For the third time in as many months the number staying in “other accommodation” fell, this time by 28.9%. This latter category comprised 19.3% of all visitors in June 2016, down from 26.9% in June 2015.
* The number of Venezuelan stopovers using “other accommodation” fell by 55.4% in June 2016 and comprised 52.3% of all Venezuelan visitors in June 2016 down from 74.3% in June 2015. The number of Venezuelans staying in hotel accommodation grew by 18.7% compared with June 2015.
* Numbers provided to AHATA show that for a sample of 15 hotels average room occupancy grew by 7.4 percentage points from 70.5% in June 2015 to 77.9% in June 2016. The average daily room rate fell by 7.0% to $185.52 and the average RevPar grew by 2.8% to $144.51.
* In the first six months of 2016 average room occupancy fell by 0.4 percentage points from 79.4% in 2015 to 79.0% in 2016. The average daily room rate fell by 5.3% to $250.66 and the average RevPar fell by 5.8% to $198.06.
* Performance of the hotels by category for June shows that the brand name beach front hotels saw their average room occupancies grow by 7.1 percentage points to 74.4%, with their RevPar increasing by 3.7% to $182.81. The all-inclusive resorts saw their average room occupancies increase by 7.2 percentage points to 86.6% and their RevPar grew by 12.6% to $118.06. The smaller independent beach front hotels saw a 5.9 percentage point decrease in room occupancy to 83.7% but their RevPar grew by 1.0% to $238.28. The non-beach front hotels saw their average room occupancies improve by 5.7 percentage points to 66.5% and saw their RevPar grow by 2.4% to $91.68.
* In the first six months of 2016 STR reported that hotels in eight of the nine Caribbean destinations saw lower average room occupancies and six of the nine saw lower average RevPar.
* American Airlines was the number one carrier in June 2016 and brought in 14,068 non-resident visitors (up 61.6% compared with June 2015 although some of this increase was due to its merger with US Airways in October 2015). United Airlines was the number two carrier (12,150 non-residents) and jetBlue brought in 9,657 non-residents.
* Of the 12,052 Venezuelans who visited Aruba in June 2016 2.8% (332) arrived in Aruba on a US scheduled carrier. In total 438 Venezuelans (3.6% 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.
* 1.1% of non-residents carried to Aruba by American Airlines in June 2016 were residents of Venezuela. 0.2% of non-residents carried to Aruba by Delta Air Lines in June were residents of Venezuela. For most other non-Venezuelan, non-Aruban carriers it was less than 2%.
* There was a 10.9% increase in the number of visitors 70 years old or older in June and a 10.4% decline in the number between 30 and 39 years old.
* In June 2016 48.2% of our visitors reported they were visiting for the first time and 38.6% reported they had visited before. 13.2% of our visitors did not report how many times they visited. Assigning the number who did not report on a *pro rata* basis results in an overall percentage of 55% first time and 45% repeat.
* Trip Advisor ratings for June 2016 show that Aruba received a total of 6,327 reviews and achieved an average rating of 4.50 out of 5. The Cayman Islands achieved an average rating of 4.57 with the USVI achieving an average rating of 4.52.
* 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.
* AHATA projects there will be about 3% more available hotel room nights in 2016 compared with 2015 and projects that average room occupancies for the hotel sector for 2016 will be similar to those for 2015, at 78%. It is further projected that the overall average daily room rate will decline by 3.0% in 2016, with RevPar projected to decline by between 2 - 3%.
* The Aruba Airport Authority reports there will be 1.7% more available air seats in the summer of 2016 (June 1 – October 31 2016) compared to the same seven months of 2015.
* Projections for cruise traffic for 2016 suggest that, based on existing schedules, the number of cruise passengers will increase by between 10% and 13% compared with 2015.

**Visitor Arrivals – June 2016**

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| **Aruba: Total Visitors June 2016** |
|  |  |  |  |  |  |
|  | 2016 | % | 2015 | % | % change |
| USA |  54,520  | 62.9% |  51,256  | 58.6% | 6.4% |
| Canada |  1,570  | 1.8% |  1,677  | 1.9% | -6.4% |
| Venezuela |  12,052  | 13.9% |  19,032  | 21.8% | -36.7% |
| Brazil |  933  | 1.1% |  1,151  | 1.3% | -18.9% |
| Colombia |  3,663  | 4.2% |  2,431  | 2.8% | 50.7% |
| Argentina |  1,362  | 1.6% |  790  | 0.9% | 72.4% |
| Chile |  1,077  | 1.2% |  600  | 0.7% | 79.5% |
| Netherlands |  2,550  | 2.9% |  2,449  | 2.8% | 4.1% |
| Germany |  286  | 0.3% |  306  | 0.3% | -6.5% |
| Italy |  563  | 0.6% |  487  | 0.6% | 15.6% |
| UK |  2,423  | 2.8% |  1,713  | 2.0% | 41.4% |
| Sweden |  126  | 0.1% |  100  | 0.1% | 26.0% |
| Other |  5,572  | 6.4% |  5,455  | 6.2% | 2.1% |
| Total |  86,697  | 100.0% |  87,447  | 100.0% | -0.9% |
| Source: ATA |  |  |  |  |  |

Total stopover arrivals (persons staying 24 hours or more) for June 2016 showed a 0.9% decrease compared with June 2015. Traffic from the USA was up by 6.4%, was down 6.4% from Canada, down 36.7% from Venezuela, up 50.7% from Colombia, down 18.9% from Brazil and up 72.4% from Argentina. Arrivals were up 4.1% from The Netherlands.

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| **Aruba: Total Visitors June 2016 YTD** |
|  |  |  |  |  |  |
|  | 2016 | % | 2015 | % | % change |
| USA |  328,050  | 56.9% |  320,500  | 56.3% | 2.4% |
| Canada |  23,733  | 4.1% |  25,390  | 4.5% | -6.5% |
| Venezuela |  122,347  | 21.2% |  129,345  | 22.7% | -5.4% |
| Brazil |  5,863  | 1.0% |  10,508  | 1.8% | -44.2% |
| Colombia |  13,038  | 2.3% |  9,902  | 1.7% | 31.7% |
| Argentina |  9,539  | 1.7% |  6,433  | 1.1% | 48.3% |
| Chile |  5,779  | 1.0% |  4,908  | 0.9% | 17.7% |
| Netherlands |  16,912  | 2.9% |  17,280  | 3.0% | -2.1% |
| Germany |  1,957  | 0.3% |  2,031  | 0.4% | -3.6% |
| Italy |  2,075  | 0.4% |  1,913  | 0.3% | 8.5% |
| UK |  7,001  | 1.2% |  4,494  | 0.8% | 55.8% |
| Sweden |  2,995  | 0.5% |  2,835  | 0.5% | 5.6% |
| Other |  37,450  | 6.5% |  33,614  | 5.9% | 11.4% |
| Total |  576,739  | 100.0% |  569,153  | 100.0% | 1.3% |
| Source: ATA |  |  |  |  |  |

**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% |
| June |  86,697  |  87,447  | -0.9% |
| YTD |  576,739  |  569,153  | 1.3% |
| Source: ATA |  |  |

**Expenditures**

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| 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 | 685.4 | 718.7 | 2,940.5 |
| **2016** | 852.3 |   |   |   |  |
| Source: Central Bank of Aruba |  |  |  |

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| --- | --- |
|  | Tourism Receipts |
|  | (Millions of AFL) |
| Quarter | 2016 | 2015 |  change |
| 1st | 852.3 | 864.4 | -1.4% |
| 2nd |  | 672.0 |  |
| 3rd |  | 685.4 |  |
| 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.

**Top Producing US States.**

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| **Aruba: Total Visitors: US States: June 2016** |
|  |  |  |  |  |  |
|  | 2016 | % | 2015 | % | % change |
| New York |  8,272  | 15.2% |  6,970  | 13.6% | 18.7% |
| Massachusetts |  4,478  | 8.2% |  4,053  | 7.9% | 10.5% |
| New Jersey |  6,575  | 12.1% |  5,772  | 11.3% | 13.9% |
| Pennsylvania |  3,755  | 6.9% |  3,544  | 6.9% | 6.0% |
| Illinois |  1,626  | 3.0% |  1,662  | 3.2% | -2.2% |
| Florida |  3,832  | 7.0% |  3,771  | 7.4% | 1.6% |
| Connecticut |  1,593  | 2.9% |  1,347  | 2.6% | 18.3% |
| Maryland |  2,377  | 4.4% |  2,395  | 4.7% | -0.8% |
| Ohio |  1,881  | 3.5% |  1,723  | 3.4% | 9.2% |
| Michigan |  681  | 1.2% |  738  | 1.4% | -7.7% |
| Virginia |  1,588  | 2.9% |  1,617  | 3.2% | -1.8% |
| Texas |  3,628  | 6.7% |  3,836  | 7.5% | -5.4% |
| California |  1,710  | 3.1% |  2,058  | 4.0% | -16.9% |
| Other |  12,524  | 23.0% |  11,770  | 23.0% | 6.4% |
| Total |  54,520  | 100.0% |  51,256  | 100.0% | 6.4% |
| Source: ATA |  |  |  |  |  |

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| **Aruba: Total Visitors: US States: June 2016 YTD** |
|  |  |  |  |  |  |
|  | 2016 | % | 2015 | % | % change |
| New York |  64,843  | 19.8% |  59,323  | 18.5% | 9.3% |
| Massachusetts |  40,164  | 12.2% |  39,338  | 12.3% | 2.1% |
| New Jersey |  38,627  | 11.8% |  35,554  | 11.1% | 8.6% |
| Pennsylvania |  19,199  | 5.9% |  19,033  | 5.9% | 0.9% |
| Illinois |  11,303  | 3.4% |  13,035  | 4.1% | -13.3% |
| Florida |  16,459  | 5.0% |  15,954  | 5.0% | 3.2% |
| Connecticut |  12,784  | 3.9% |  12,459  | 3.9% | 2.6% |
| Maryland |  11,650  | 3.6% |  11,283  | 3.5% | 3.3% |
| Ohio |  9,862  | 3.0% |  9,923  | 3.1% | -0.6% |
| Michigan |  8,465  | 2.6% |  8,421  | 2.6% | 0.5% |
| Virginia |  8,484  | 2.6% |  8,473  | 2.6% | 0.1% |
| Texas |  10,466  | 3.2% |  10,848  | 3.4% | -3.5% |
| California |  6,839  | 2.1% |  7,212  | 2.3% | -5.2% |
| Other |  68,905  | 21.0% |  69,644  | 21.7% | -1.1% |
| Total |  328,050  | 100.0% |  320,500  | 100.0% | 2.4% |
| Source: ATA |  |  |  |  |  |

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

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| **Aruba: Total Nights June 2016** |
|  |  |  |  |  |  |
|  | 2016 | % | 2015 | % | % change |
| USA |  362,671  | 59.2% |  346,616  | 58.3% | 4.6% |
| Canada |  11,878  | 1.9% |  13,132  | 2.2% | -9.5% |
| Venezuela |  68,186  | 11.1% |  98,884  | 16.6% | -31.0% |
| Brazil |  5,740  | 0.9% |  7,356  | 1.2% | -22.0% |
| Colombia |  34,386  | 5.6% |  18,958  | 3.2% | 81.4% |
| Argentina |  11,514  | 1.9% |  7,285  | 1.2% | 58.1% |
| Chile |  8,002  | 1.3% |  4,580  | 0.8% | 74.7% |
| Netherlands |  31,541  | 5.1% |  32,515  | 5.5% | -3.0% |
| Germany |  3,069  | 0.5% |  2,992  | 0.5% | 2.6% |
| Italy |  3,996  | 0.7% |  3,402  | 0.6% | 17.5% |
| UK |  29,285  | 4.8% |  20,557  | 3.5% | 42.5% |
| Sweden |  1,498  | 0.2% |  1,023  | 0.2% | 46.4% |
| Other |  40,753  | 6.7% |  37,140  | 6.2% | 9.7% |
| Total |  612,519  | 100.0% |  594,440  | 100.0% | 3.0% |
| Source: ATA |  |  |  |  |  |

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| **Aruba: Average Length of Stay in Nights: June 2016** |
|  |  |  |  |  |  |
|  | 2016 |  | 2015 |  | % change |
| USA |  6.65  |  |  6.76  |  | -1.6% |
| Canada |  7.57  |  |  7.83  |  | -3.4% |
| Venezuela |  5.66  |  |  5.20  |  | 8.9% |
| Brazil |  6.15  |  |  6.39  |  | -3.7% |
| Colombia |  9.39  |  |  7.80  |  | 20.4% |
| Argentina |  8.45  |  |  9.22  |  | -8.3% |
| Chile |  7.43  |  |  7.63  |  | -2.7% |
| Netherlands |  12.37  |  |  13.28  |  | -6.8% |
| Germany |  10.73  |  |  9.78  |  | 9.7% |
| Italy |  7.10  |  |  6.99  |  | 1.6% |
| UK |  12.09  |  |  12.00  |  | 0.7% |
| Sweden |  11.89  |  |  10.23  |  | 16.2% |
| Other |  7.31  |  |  6.81  |  | 7.4% |
| Total |  7.07  |   |  6.80  |   | 3.9% |
| Source: ATA |  |  |  |  |  |

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| **Aruba: Total Nights June 2016 YTD** |
|  |  |  |  |  |  |
|  | 2016 | % | 2015 | % | % change |
| USA |  2,330,724  | 57.9% |  2,302,967  | 57.4% | 1.2% |
| Canada |  207,196  | 5.1% |  218,730  | 5.5% | -5.3% |
| Venezuela |  547,779  | 13.6% |  687,631  | 17.1% | -20.3% |
| Brazil |  46,870  | 1.2% |  59,744  | 1.5% | -21.5% |
| Colombia |  118,097  | 2.9% |  82,623  | 2.1% | 42.9% |
| Argentina |  84,474  | 2.1% |  58,526  | 1.5% | 44.3% |
| Chile |  44,546  | 1.1% |  37,174  | 0.9% | 19.8% |
| Netherlands |  210,927  | 5.2% |  219,408  | 5.5% | -3.9% |
| Germany |  18,979  | 0.5% |  19,543  | 0.5% | -2.9% |
| Italy |  16,342  | 0.4% |  15,239  | 0.4% | 7.2% |
| UK |  80,273  | 2.0% |  51,281  | 1.3% | 56.5% |
| Sweden |  37,271  | 0.9% |  34,200  | 0.9% | 9.0% |
| Other |  279,771  | 7.0% |  223,595  | 5.6% | 25.1% |
| Total |  4,023,249  | 100.0% |  4,010,661  | 100.0% | 0.3% |
| Source: ATA |  |  |  |  |  |

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| **Aruba: Average Length of Stay in Nights: June 2016 YTD** |
|  |  |  |  |  |  |
|  | 2016 |  | 2015 |  | % change |
| USA |  7.10  |  |  7.19  |  | -1.1% |
| Canada |  8.73  |  |  8.61  |  | 1.3% |
| Venezuela |  4.48  |  |  5.32  |  | -15.8% |
| Brazil |  7.58  |  |  6.61  |  | 14.6% |
| Colombia |  9.29  |  |  7.26  |  | 27.8% |
| Argentina |  8.86  |  |  9.10  |  | -2.7% |
| Chile |  7.71  |  |  7.57  |  | 1.8% |
| Netherlands |  12.47  |  |  12.70  |  | -1.8% |
| Germany |  9.70  |  |  9.62  |  | 0.8% |
| Italy |  7.88  |  |  7.97  |  | -1.1% |
| UK |  11.47  |  |  11.41  |  | 0.5% |
| Sweden |  12.44  |  |  12.06  |  | 3.2% |
| Other |  7.47  |  |  6.65  |  | 12.3% |
| Total |  6.98  |   |  7.05  |   | -1.0% |
| Source: ATA |  |  |  |  |  |

**Competing Destination performance.**

The Caribbean Tourism Organization collects data from across the region. Their most recently published figures are from June 2016 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

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|  | **Total Stopover Visitors** |
|  | 2016 | 2015 | % change | Period |
| Antigua |  127,324  |  119,217  | 6.8% | Jan-May |
| Aruba |  576,739  |  569,153  | 1.3% | Jan-Jun |
| Bahamas |  NA  |  NA  | NA |  |
| Barbados |  233,156  |  223,116  | 4.5% | Jan-Apr |
| Belize |  149,537  |  129,357  | 15.6% | Jan-Apr |
| British Virgin islands |  170,680  |  164,432  | 3.8% | Jan-Apr |
| Cayman Islands |  210,490  |  213,493  | -1.4% | Jan-Jun |
| Cuba |  417,764  |  370,687  | 12.7% | Jan |
| Curacao |  195,894  |  191,330  | 2.4% | Jan-May |
| Dominican Republic |  2,665,929  |  2,520,521  | 5.8% | Jan - Jun |
| Jamaica |  773,108  |  756,466  | 2.2% | Jan-Apr |
| Puerto Rico |  515,305  |  497,399  | 3.6% | Jan-Mar |
| Saint Lucia |  127,471  |  129,412  | -1.5% | Jan-Apr |
| Turks & Caicos Islands |  137,461  |  116,001  | 18.5% | Jan-Mar |
| US Virgin Islands |  302,760  |  303,367  | -0.2% | Jan-Apr |

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

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| --- | --- |
|  | **Total US Stopover Visitors** |
|  | 2016 | 2015 | % change | Period |
| Antigua |  53,446  |  45,026  | 18.7% | Jan-May |
| Aruba |  328,050  |  320,500  | 2.4% | Jan-Jun |
| Bahamas |  NA  |  NA  | NA |  |
| Barbados |  56,450  |  50,492  | 11.8% | Jan-Apr |
| Belize |  100,360  |  79,211  | 26.7% | Jan-Apr |
| British Virgin islands |  NA  |  NA  | NA |  |
| Cayman Islands |  168,577  |  166,460  | 1.3% | Jan-Jun |
| Cuba |  NA  |  NA  | NA |  |
| Curacao |  26,447  |  27,268  | -3.0% | Jan-May |
| Dominican Republic |  1,109,784  |  1,054,273  | 5.3% | Jan-Jun |
| Jamaica |  471,571  |  445,298  | 5.9% | Jan-Apr |
| Puerto Rico |  456,524  |  454,253  | 0.5% | Jan-Mar |
| Saint Lucia |  56,763  |  54,112  | 4.9% | Jan-Apr |
| Turks & Caicos Islands |  109,006  |  93,327  | 16.8% | Jan-Mar |
| US Virgin Islands |  NA  |  NA  | NA |  |

**Cruise Traffic.**

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| **Cruise Visitors: Aruba 2016** |
|  | 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% |
| YTD | 179 |  376,337  | 160 |  313,325  | 11.9% | 20.1% |
| Source: Aruba Port Authority. |  |  |  |  |

In June 2016 Aruba saw a 14.4% increase in the number of cruise passengers compared with June 2015. Year to date the volume of cruise traffic has grown by 20.1%.

The CTO numbers for 2016 for cruise visitor traffic show

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| --- | --- |
|  | Total Cruise Visitors |
|  | 2016 | 2015 | % change | Period |
| Antigua |  378,664  |  386,281  | -2.0% | Jan-Apr |
| Aruba |  376,337  |  313,325  | 20.1% | Jan-Jun |
| Bahamas |  NA  |  NA  | NA |  |
| Barbados |  300,543  |  280,764  | 7.0% | Jan-Apr |
| Belize |  428,515  |  447,250  | -4.2% | Jan-Apr |
| British Virgin Islands |  349,067  |  239,726  | 45.6% | Jan-Apr |
| Cayman Islands |  973,305  |  908,881  | 7.1% | Jan-Jun |
| Cozumel |  1,440,840  |  1,455,974  | -1.0% | Jan-Apr |
| Curacao |  238,499  |  264,521  | -9.8% | Jan-Apr |
| Dominican Republic |  425,011  |  278,460  | 52.6% | Jan-May |
| Jamaica |  745,220  |  654,564  | 13.8% | Jan-Apr |
| Puerto Rico |  541,139  |  665,845  | -18.7% | Jan-Apr |
| Saint Lucia |  290,586  |  351,717  | -17.4% | Jan-Apr |
| St. Maarten |  796,957  |  973,367  | -18.1% | Jan-Apr |
| Turks & Caicos Islands |  319,674  |  331,018  | -3.4% | Jan-Apr |
| US Virgin Islands |  836,188  |  842,988  | -0.8% | Jan-Apr |
| sub total |  8,415,093  |  8,372,438  | 0.5% |  |

**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 |
|  | June 2016 | June 2015 |  |
|  | Visitors | % | Visitors | % | % change |
| Hotels | 46,720 | 53.9% | 40,577 | 46.4% | 15.1% |
| Timeshare | 23,232 | 26.8% | 23,333 | 26.7% | -0.4% |
| Apts/Priv Homes | 16,745 | 19.3% | 23,537 | 26.9% | -28.9% |
| Total | 86,697 | 100.0% | 87,447 | 100.0% | -0.9% |
| Source: ATA |  |  |  |  |  |

The hotels category includes High Rise hotels, Low Rise hotels and the Tropicana. As shown above in June 2016 the number of visitors staying in hotel accommodation increased by 15.1%, those staying in a timeshare resort declined by 0.4% and those staying in apartments, guest houses or private homes declined by 28.9%.

|  |  |
| --- | --- |
|  | Place of Stay: Visitor Nights 2016 |
|  | June 2016 | June 2015 |  |
|  | Nights | % | Nights | % | % change |
| Hotels | 281,909 | 46.0% | 246,612 | 41.5% | 14.3% |
| Timeshare | 177,711 | 29.0% | 178,474 | 30.0% | -0.4% |
| Apts/Priv Homes | 152,899 | 25.0% | 169,354 | 28.5% | -9.7% |
| Total | 612,519 | 100.0% | 594,440 | 100.0% | 3.0% |
| Source: ATA |  |  |  |  |  |
|  |  |  |  |  |  |
|  | Average Length of Stay in Nights 2016 |
|  | June 2016 | June 2015 |  |
|  | Nights |  | Nights |  | % change |
| Hotels | 6.03 |  | 6.08 |  | -0.7% |
| Timeshare | 7.65 |  | 7.65 |  | 0.0% |
| Apts/Priv Homes | 9.13 |  | 7.20 |  | 26.9% |
| Total | 7.07 |   | 6.80 |   | 3.9% |
| Source: ATA |  |  |  |  |  |

|  |  |
| --- | --- |
|  | Visitors 2016 |
|  | June 2016 YTD | June 2015 YTD |  |
|  | Visitors | % | Visitors | % | % change |
| Hotels | 271,556 | 55.4% | 271,893 | 56.4% | -0.1% |
| Timeshare | 131,520 | 26.8% | 136,563 | 28.3% | -3.7% |
| Apts/Priv Homes | 173,663 | 35.4% | 160,697 | 33.4% | 8.1% |
| Total | 576,739 | 100.0% | 569,153 | 100.0% | 1.3% |
| Source: ATA |  |  |  |  |  |
|  |  |  |  |  |  |
|  | Visitor Nights Full Year 2016 |
|  | June 2016 YTD | June 2015 YTD |  |
|  | Nights | % | Nights | % | % change |
| Hotels | 1,692,616 | 49.6% | 1,684,378 | 49.3% | 0.5% |
| Timeshare | 1,116,737 | 32.7% | 1,144,418 | 33.5% | -2.4% |
| Apts/Priv Homes | 1,213,896 | 35.6% | 1,181,865 | 34.6% | 2.7% |
| Total | 4,023,249 | 100.0% | 4,010,661 | 100.0% | 0.3% |
| Source: ATA |  |  |  |  |  |
|  |  |  |  |  |  |
|  | Average Length of Stay in Nights 2016 |
|  | June 2016 YTD | June 2015 YTD |  |
|  | Nights |  | Nights |  | % change |
| Hotels | 6.23 |  | 6.20 |  | 0.6% |
| Timeshare | 8.49 |  | 8.38 |  | 1.3% |
| Apts/Priv Homes | 6.99 |  | 7.35 |  | -5.0% |
| Total | 6.98 |   | 7.05 |   | -1.0% |
| 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 has continued during 2016.

The number of visitors from Venezuela using hotel accommodation in June increased by 18.7%. Interestingly the number using private homes/apartments and condominiums fell by 55.4% and comprised 52.3% of all Venezuelan visitors in June 2016, down from 74.3% in June 2015.

|  |  |
| --- | --- |
|  | Visitors from Venezuela 2016 |
|  | June 2016 | June 2015 |  |
|  | Visitors | % | Visitors | % | % change |
| Hotels | 4,668 | 38.7% | 3,933 | 20.7% | 18.7% |
| Timeshare | 1,085 | 9.0% | 964 | 5.1% | 12.6% |
| Apts/Priv Homes | 6,299 | 52.3% | 14,135 | 74.3% | -55.4% |
| Total | 12,052 | 100.0% | 19,032 | 100.0% | -36.7% |
| Source: ATA |  |  |  |  |  |
|  |  |  |  |  |  |
|  | Visitor Nights from Venezuela 2016 |
|  | June 2016 | June 2015 |  |
|  | Nights | % | Nights | % | % change |
| Hotels | 17,610 | 30.2% | 15,500 | 14.4% | 13.6% |
| Timeshare | 5,970 | 10.2% | 5,341 | 5.0% | 11.8% |
| Apts/Priv Homes | 44,606 | 76.5% | 78,043 | 72.5% | -42.8% |
| Total | 68,186 | 100.0% | 98,884 | 100.0% | -31.0% |
| Source: ATA |  |  |  |  |  |
|  |  |  |  |  |  |
|  | Average Length of Stay Venezuela 2016 |
|  | June 2016 | June 2015 |  |
|  | Nights |  | Nights |  | % change |
| Hotels | 3.77 | nts | 3.94 | nts | -4.3% |
| Timeshare | 5.50 | nts | 5.54 | nts | -0.7% |
| Apts/Priv Homes | 7.08 | nts | 5.52 | nts | 28.3% |
| Total | 5.66 | nts | 5.20 | nts | 8.9% |
| Source: ATA |  |  |  |  |  |

|  |  |
| --- | --- |
|  | Visitors from Venezuela 2016 |
|  | June 2016 YTD | June 2015 YTD |  |
|  | Visitors | % | Visitors | % | % change |
| Hotels | 19,518 | 16.0% | 27,556 | 21.3% | -29.2% |
| Timeshare | 4,609 | 3.8% | 6,325 | 4.9% | -27.1% |
| Apts/Priv Homes | 98,220 | 80.3% | 95,464 | 73.8% | 2.9% |
| Total | 122,347 | 100.0% | 129,345 | 100.0% | -5.4% |
| Source: ATA |  |  |  |  |  |
|  |  |  |  |  |  |
|  | Visitor Nights from Venezuela 2016 |
|  | June 2016 YTD | June 2015 YTD |  |
|  | Nights | % | Nights | % | % change |
| Hotels | 79,808 | 14.6% | 108,547 | 15.8% | -26.5% |
| Timeshare | 26,358 | 4.8% | 34,330 | 5.0% | -23.2% |
| Apts/Priv Homes | 441,613 | 80.6% | 544,754 | 79.2% | -18.9% |
| Total | 547,779 | 100.0% | 687,631 | 100.0% | -20.3% |
| Source: ATA |  |  |  |  |  |
|  |  |  |  |  |  |
|  | Average Length of Stay Venezuela 2016 |
|  | June 2016 YTD | June 2015 YTD |  |
|  | Nights |  | Nights |  | % change |
| Hotels | 4.09 | nts | 3.94 | nts | 3.8% |
| Timeshare | 5.72 | nts | 5.43 | nts | 5.4% |
| Apts/Priv Homes | 4.50 | nts | 5.71 | nts | -21.2% |
| Total | 4.48 | nts | 5.32 | nts | -15.8% |
| Source: ATA |  |  |  |  |  |

**Hotel Performance Aruba 2016**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  | 2016/2015 |  |
| **June 2016** | 2016 | 2015 | % change |  |
| Rooms |  4,914  |  4,848  | 1.4% |  |
| ARN |  147,420  |  130,710  | 12.8% |  |
| ORN |  114,837  |  92,110  | 24.7% |  |
| % occupancy | 77.9% | 70.5% | 7.4% | points |
| ADR | $185.52 | $199.46 | -7.0% |  |
| Rev Par | $144.51 | $140.56 | 2.8% |  |
| ***Based on data from 15 properties.*** |  |  |  |

Total transient hotel room inventory for Aruba in June 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 and that the Riu Palace Aruba closed on April 13th 2015 for renovation. Both factors contributed towards the 12.8% increase in available room nights compared with June 2015.

In June 2016 the hotel sector saw a 7.4 percentage point increase in average room occupancy, from 70.5% to 77.9%, and a 7.0% decrease in the average daily room rate (ADR). With a higher average room occupancy but lower ADR revenue per available room (rev par) grew by 2.8% compared with June 2015.

**Year to Date.**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  | 2016/2015 |  |
| **June 2016 YTD** | 2016 | 2015 | % change |  |
| Rooms |  4,908  |  4,848  | 1.2% |  |
| ARN |  891,242  |  838,792  | 6.3% |  |
| ORN |  704,214  |  666,102  | 5.7% |  |
| % occupancy | 79.0% | 79.4% | -0.4% | points |
| ADR | $250.66 | $264.78 | -5.3% |  |
| Rev Par | $198.06 | $210.27 | -5.8% |  |
| ***Based on data from 15 properties.*** |  |  |  |

**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% |
| June | 77.9% | 70.5% | 7.4% | $185.52  | $199.46  | -7.0% | $144.51  | $140.56  | 2.8% |
| YTD | 79.0% | 79.4% | -0.4% | $250.66  | $264.78  | -5.3% | $198.06  | $210.27  | -5.8% |

**Performance by Category – June 2016.**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  |   |   |   | June 2016 |   |   |   |
|  | Rooms | ARN | ORN | %opy | Revenue | $ADR | $RevPar |
| Brand Name Beach Front |  2,033  |  60,990  |  45,360  | 74.4% | $11,149,315.00 | $245.80 | $182.81 |
| All Inclusives |  1,841  |  55,230  |  47,828  | 86.6% | $6,520,493.00 | $136.33 | $118.06 |
| Small Independent Beach Front |  176  |  5,280  |  4,417  | 83.7% | $1,258,115.00 | $284.83 | $238.28 |
| Non Beach Front |  864  |  25,920  |  17,232  | 66.5% | $2,376,360.00 | $137.90 | $91.68 |
| Total |  4,914  |  147,420  |  114,837  | 77.9% | $21,304,283.00 | $185.52 | $144.51 |
|  |  |  |  |  |  |  |  |
|  |   |   |   | June 2015 |   |   |   |
|  | Rooms | ARN | ORN | %opy | Revenue | $ADR | $RevPar |
| Brand Name Beach Front |  2,040  |  61,200  |  41,144  | 67.2% | $10,783,871.00 | $262.10 | $176.21 |
| All Inclusives |  1,777  |  38,580  |  30,640  | 79.4% | $4,046,629.00 | $132.07 | $104.89 |
| Small Independent Beach Front |  176  |  5,280  |  4,726  | 89.5% | $1,245,763.00 | $263.60 | $235.94 |
| Non Beach Front |  855  |  25,650  |  15,600  | 60.8% | $2,296,063.00 | $147.18 | $89.52 |
| Total |  4,848  |  130,710  |  92,110  | 70.5% | $18,372,326.00 | $199.46 | $140.56 |
|  |  |  |  |  |  |  |  |
|  |   |   |   | Per Cent Change |   |   |
|  | Rooms | ARN | ORN | % pt change | Revenue | $ADR | $RevPar |
| Brand Name Beach Front | -0.3% | -0.3% | 10.2% | 7.1% | 3.4% | -6.2% | 3.7% |
| All Inclusives | 3.6% | 43.2% | 56.1% | 7.2% | 61.1% | 3.2% | 12.6% |
| Small Independent Beach Front | 0.0% | 0.0% | -6.5% | -5.9% | 1.0% | 8.1% | 1.0% |
| Non Beach Front | 1.1% | 1.1% | 10.5% | 5.7% | 3.5% | -6.3% | 2.4% |
| Total | 1.4% | 12.8% | 24.7% | 7.4% | 16.0% | -7.0% | 2.8% |

**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.

**Performance by Category – Year to Date.**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **June YTD 2016** |   |   |   | 2016 |   |   |   |
|  | Rooms | ARN | ORN | %opy | Revenue | $ADR | $RevPar |
| Brand Name Beach Front |  2,033  |  370,426  |  288,167  | 77.8% | $102,261,886.00 | $354.87 | $276.07 |
| All Inclusives |  1,841  |  332,812  |  279,828  | 84.1% | $45,811,217.00 | $163.71 | $137.65 |
| Small Independent Beach Front |  176  |  32,032  |  28,679  | 89.5% | $10,014,007.00 | $349.18 | $312.63 |
| Non Beach Front |  862  |  155,972  |  107,540  | 68.9% | $18,433,630.00 | $171.41 | $118.19 |
| Total |  4,912  |  891,242  |  704,214  | 79.0% | $176,520,740.00 | $250.66 | $198.06 |
|  |  |  |  |  |  |  |  |
| **June YTD 2015** |   |   |   | 2015 |   |   |   |
|  | Rooms | ARN | ORN | %opy | Revenue | $ADR | $RevPar |
| Brand Name Beach Front |  2,040  |  369,240  |  285,336  | 77.3% | $107,296,197.00 | $376.03 | $290.59 |
| All Inclusives |  1,777  |  282,848  |  246,378  | 87.1% | $39,990,577.00 | $162.31 | $141.39 |
| Small Independent Beach Front |  176  |  31,856  |  29,124  | 91.4% | $9,841,794.00 | $337.93 | $308.95 |
| Non Beach Front |  855  |  154,848  |  105,264  | 68.0% | $19,240,192.00 | $182.78 | $124.25 |
| Total |  4,848  |  838,792  |  666,102  | 79.4% |  $ 176,368,760.00  | $264.78 | $210.27 |
|  |  |  |  |  |  |  |  |
| **June YTD** |   |   |   | Per Cent Change |   |   |
|  | Rooms | ARN | ORN | % pt change | Revenue | $ADR | $RevPar |
| Brand Name Beach Front | -0.3% | 0.3% | 1.0% | 0.5% | -4.7% | -5.6% | -5.0% |
| All Inclusives | 3.6% | 17.7% | 13.6% | -3.0% | 14.6% | 0.9% | -2.6% |
| Small Independent Beach Front | 0.0% | 0.6% | -1.5% | -1.9% | 1.7% | 3.3% | 1.2% |
| Non Beach Front | 0.8% | 0.7% | 2.2% | 1.0% | -4.2% | -6.2% | -4.9% |
| Total | 1.3% | 6.3% | 5.7% | -0.4% | 0.1% | -5.3% | -5.8% |

**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 June 2016 compared with June 2015 and for June YTD.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **June 2016** | Average Room Occupancy | Average Daily Rate | RevPar | #Hotels in |
|  | 2016 | 2015 | % pt change | 2016 | 2015 | % change | 2016 | 2015 | % change | Sample |
| Aruba | 77.9% | 70.5% | 7.4% | $185.52 | $199.46 | -7.0% | $144.51 | $140.56 | 2.8% | 15 |
| Barbados | 59.2% | 57.2% | 2.0% | $211.35 | $199.83 | 5.8% | $125.21 | $114.34 | 9.5% | 33 |
| Cancun | 73.9% | 72.8% | 1.1% | $175.87 | $188.61 | -6.8% | $129.92 | $137.30 | -5.4% | 54 |
| Cayman Islands | 68.0% | 63.7% | 4.3% | $272.02 | $283.66 | -4.1% | $184.93 | $180.72 | 2.3% | 8 |
| Curacao | 51.6% | 61.6% | -10.0% | $130.57 | $128.38 | 1.7% | $67.36 | $79.13 | -14.9% | 13 |
| Dominican Republic | 73.2% | 69.2% | 4.0% | $123.30 | $121.43 | 1.5% | $90.24 | $84.05 | 7.4% | 29 |
| Jamaica | 69.1% | 74.3% | -5.2% | $190.70 | $198.69 | -4.0% | $131.70 | $147.64 | -10.8% | 10 |
| Puerto Rico | 74.9% | 79.8% | -4.9% | $158.21 | $161.90 | -2.3% | $118.55 | $129.13 | -8.2% | 43 |
| USVI | 78.1% | 81.4% | -3.3% | $289.11 | $273.83 | 5.6% | $225.91 | $222.89 | 1.4% | 7 |
| Caribbean | 64.7% | 69.0% | -4.3% | $179.49 | $195.84 | -8.3% | $116.20 | $135.07 | -14.0% | 249 |
| Source: STR. |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |
| **June YTD 2016** | Average Room Occupancy | Average Daily Rate | RevPar | #Hotels in |
|  | 2016 | 2015 | % pt change | 2016 | 2015 | % change | 2016 | 2015 | % change | Sample |
| Aruba | 79.0% | 79.4% | -0.4% | $250.66 | $264.78 | -5.3% | $198.06 | $210.27 | -5.8% | 15 |
| Barbados | 71.6% | 71.4% | 0.2% | $320.93 | $314.81 | 1.9% | $229.80 | $224.91 | 2.2% | 33 |
| Cancun | 73.3% | 78.4% | -5.1% | $211.37 | $201.21 | 5.0% | $154.94 | $157.72 | -1.8% | 54 |
| Cayman Islands | 75.1% | 76.8% | -1.7% | $399.35 | $409.30 | -2.4% | $299.95 | $314.30 | -4.6% | 8 |
| Curacao | 68.0% | 71.7% | -3.7% | $151.64 | $158.86 | -4.5% | $103.13 | $113.88 | -9.4% | 13 |
| Dominican Republic | 75.1% | 75.2% | -0.1% | $142.38 | $139.95 | 1.7% | $106.98 | $105.23 | 1.7% | 29 |
| Jamaica | 71.1% | 77.0% | -5.9% | $251.79 | $264.08 | -4.7% | $179.00 | $203.41 | -12.0% | 10 |
| Puerto Rico | 74.8% | 78.6% | -3.8% | $202.35 | $205.72 | -1.6% | $151.39 | $161.74 | -6.4% | 43 |
| USVI | 80.0% | 83.5% | -3.5% | $383.21 | $363.73 | 5.4% | $306.40 | $303.62 | 0.9% | 7 |
| Caribbean | 70.1% | 72.6% | -2.5% | $244.38 | $249.65 | -2.1% | $171.27 | $181.29 | -5.5% | 249 |
| Source: STR. |  |  |  |  |  |  |  |  |  |  |

**Visitors by Carrier.**

The table below shows the number of non-resident visitors brought in by various airline carriers during June 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.

|  |
| --- |
| **Stopovers: By Airline: June 2016** |
| (Non-resident stopover Arrivals) |  |  |  |  |
|  | 2016 | % share | 2015 | % share | % change |
| Laser |  6,700  | 7.7% |  8,846  | 10.1% | -24.3% |
| American Airlines |  14,068  | 16.2% |  8,704  | 10.0% | 61.6% |
| jetBlue |  9,657  | 11.1% |  7,682  | 8.8% | 25.7% |
| United Airlines |  12,150  | 14.0% |  10,365  | 11.9% | 17.2% |
| Delta Air Lines |  9,903  | 11.4% |  9,515  | 10.9% | 4.1% |
| Southwest/Air Tran |  8,580  | 9.9% |  7,825  | 8.9% | 9.6% |
| Insel Air |  3,745  | 4.3% |  4,980  | 5.7% | -24.8% |
| Avior |  1,175  | 1.4% |  2,786  | 3.2% | -57.8% |
| Copa |  3,247  | 3.7% |  2,275  | 2.6% | 42.7% |
| Avianca |  2,812  | 3.2% |  2,353  | 2.7% | 19.5% |
| Sunwing |  636  | 0.7% |  657  | 0.8% | -3.2% |
| Aruba Airlines |  1,619  | 1.9% |  1,032  | 1.2% | 56.9% |
| KLM |  2,005  | 2.3% |  1,919  | 2.2% | 4.5% |
| Aserca |  1,167  | 1.3% |  2,130  | 2.4% | -45.2% |
| WestJet |  57  | 0.1% |  288  | 0.3% | -80.2% |
| Venezolana |  337  | 0.4% |  1,333  | 1.5% | -74.7% |
| ArkeFly |  1,042  | 1.2% |  1,077  | 1.2% | -3.2% |
| Thomas Cook |  -  | 0.0% |  -  | 0.0% | 0.0% |
| Air Canada |  355  | 0.4% |  401  | 0.5% | -11.5% |
| GOL |  -  | 0.0% |  587  | 0.7% | -100.0% |
| Surinam Airways |  764  | 0.9% |  431  | 0.5% | 77.3% |
| Spirit Airlines |  569  | 0.7% |  528  | 0.6% | 7.8% |
| US Airways |  -  | 0.0% |  7,499  | 8.6% | -100.0% |
| Tiara Air |  -  | 0.0% |  -  | 0.0% | 100.0% |
| Private |  863  | 1.0% |  823  | 0.9% | 4.9% |
| Charter |  839  | 1.0% |  803  | 0.9% | 4.5% |
| Other |  4,407  | 5.1% |  2,608  | 3.0% | 69.0% |
| TOTAL |  86,697  | 100.0% |  87,447  | 100.0% | -0.9% |
| Source: ATA |  |  |  |  |  |

|  |
| --- |
| **Stopovers: By Airline: June 2016 YTD** |
| (Non-resident stopover Arrivals) |  |  |  |  |
|  | 2016 YTD | % share | 2015 YTD | % share | % change |
| Laser |  70,936  | 12.3% |  37,300  | 6.6% | 90.2% |
| American Airlines |  83,917  | 14.6% |  53,726  | 9.4% | 56.2% |
| jetBlue |  70,080  | 12.2% |  62,643  | 11.0% | 11.9% |
| United Airlines |  72,521  | 12.6% |  71,535  | 12.6% | 1.4% |
| Delta Air Lines |  55,204  | 9.6% |  55,859  | 9.8% | -1.2% |
| Southwest/Air Tran |  45,038  | 7.8% |  42,899  | 7.5% | 5.0% |
| Insel Air |  24,698  | 4.3% |  34,526  | 6.1% | -28.5% |
| Avior |  14,982  | 2.6% |  19,598  | 3.4% | -23.6% |
| Copa |  14,468  | 2.5% |  14,575  | 2.6% | -0.7% |
| Avianca |  15,011  | 2.6% |  13,207  | 2.3% | 13.7% |
| Sunwing |  9,305  | 1.6% |  10,773  | 1.9% | -13.6% |
| Aruba Airlines |  12,614  | 2.2% |  12,371  | 2.2% | 2.0% |
| KLM |  11,456  | 2.0% |  12,550  | 2.2% | -8.7% |
| Aserca |  9,969  | 1.7% |  18,124  | 3.2% | -45.0% |
| WestJet |  5,063  | 0.9% |  4,511  | 0.8% | 12.2% |
| Venezolana |  3,834  | 0.7% |  9,792  | 1.7% | -60.8% |
| ArkeFly |  6,879  | 1.2% |  7,172  | 1.3% | -4.1% |
| Thomas Cook |  1,877  | 0.3% |  1,916  | 0.3% | -2.0% |
| Air Canada |  4,511  | 0.8% |  4,161  | 0.7% | 8.4% |
| GOL |  984  | 0.2% |  3,707  | 0.7% | -73.5% |
| Surinam Airways |  3,836  | 0.7% |  2,523  | 0.4% | 52.0% |
| Spirit Airlines |  2,775  | 0.5% |  3,089  | 0.5% | -10.2% |
| US Airways |  -  | 0.0% |  49,916  | 8.8% | -100.0% |
| Tiara Air |  127  | 0.0% |  -  | 0.0% | 100.0% |
| Private |  6,036  | 1.0% |  6,982  | 1.2% | -13.5% |
| Charter |  15,167  | 2.6% |  6,273  | 1.1% | 141.8% |
| Other |  15,451  | 2.7% |  9,425  | 1.7% | 63.9% |
| TOTAL |  576,739  | 100.0% |  569,153  | 100.0% | 1.3% |
| Source: ATA |  |  |  |  |  |

**Carriers Used by Venezuelans.**

|  |
| --- |
| **Venezuelan Stopovers: By Airline: June 2016** |
| (Non-resident stopover Arrivals) |  |  |  |  |  |
|  | June 2016 | % share | June 2015 | % share | % change |
| **US Carriers** |  |  |  |  |  |
| American Airlines |  160  | 1.3% |  546  | 2.9% | -70.7% |
| Delta Air Lines |  23  | 0.2% |  181  | 1.0% | -87.3% |
| United Airlines |  40  | 0.3% |  200  | 1.1% | -80.0% |
| US Airways |  -  | 0.0% |  91  | 0.5% | -100.0% |
| Southwest/Air Tran |  87  | 0.7% |  30  | 0.2% | 190.0% |
| jetBlue |  15  | 0.1% |  24  | 0.1% | -37.5% |
| Spirit Airlines |  7  | 0.1% |  16  | 0.1% | -56.3% |
| Total US Carriers |  332  | 2.8% |  1,088  | 5.7% | -69.5% |
|  |  |  |  |  |  |
| **Canada** |  |  |  |  |  |
| Air Canada |  4  | 0.0% |  8  | 0.0% | -50.0% |
| WestJet |  1  | 0.0% |  19  | 0.1% | -94.7% |
| Total Canada |  5  | 0.0% |  27  | 0.1% | -81.5% |
|  |  |  |  |  |  |
| **Europe** |  |  |  |  |  |
| KLM |  47  | 0.4% |  38  | 0.2% | 23.7% |
| Arke Fly |  6  | 0.0% |  21  | 0.1% | 100.0% |
| Total Europe |  53  | 0.4% |  59  | 0.3% | -10.2% |
|  |  |  |  |  |  |
| **Other Non-Venezuelan** |  |  |  |  |  |
| Copa |  24  | 0.2% |  58  | 0.3% | -58.6% |
| Surinam Airlines |  24  | 0.2% |  18  | 0.1% | 33.3% |
| Total Other Non Venez |  48  | 0.4% |  76  | 0.4% | -36.8% |
|  |  |  |  |  |  |
| **Total (Non Aruba/Non Venezuelan)** |  438  | 3.6% |  1,250  | 6.6% | -65.0% |
|  |  |  |  |  |  |
| Other (Aruban/Venezuelan) |  11,614  | 96.4% |  17,782  | 93.4% | -34.7% |
| **Total** |  12,052  | 100.0% |  19,032  | 100.0% | -36.7% |
| Source: ATA |  |  |  |  |  |

A portion of Venezuelan business to Aruba in June 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 332 residents of Venezuela (2.8% 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 69.5% compared to June 2015. In total 438 residents of Venezuela (3.6% of all Venezuelans visiting Aruba) arrived in Aruba by a scheduled carrier other than one based in Venezuela or Aruba.

|  |
| --- |
| **Venezuelan Stopovers: By Airline: June 2016** |
| (Non-resident stopover Arrivals) |  |  |  |
|  | Inbound To Aruba by Carrier Used |
| **Carriers** | Total | Venezuelans | % |
| **US Carriers** |  |  |  |
| American Airlines |  14,068  |  160  | 1.1% |
| Delta Air Lines |  9,903  |  23  | 0.2% |
| United Airlines |  12,150  |  40  | 0.3% |
| US Airways |  -  |  -  | 0.0% |
| Southwest/Air Tran |  8,580  |  87  | 1.0% |
| jetBlue |  9,657  |  15  | 0.2% |
| Spirit Airlines |  569  |  7  | 1.2% |
| Total US Carriers |  54,927  |  332  | 0.6% |
|  |  |  |  |
| **Canada** |  |  |  |
| Air Canada |  355  |  4  | 1.1% |
| WestJet |  57  |  1  | 1.8% |
| Total Canada |  412  |  5  | 1.2% |
|  |  |  |  |
| **Europe** |  |  |  |
| KLM |  2,005  |  47  | 2.3% |
| Arke Fly |  1,042  |  6  | 0.6% |
| Total Europe |  3,047  |  53  | 1.7% |
|  |  |  |  |
| **Other Non-Venezuelan** |  |  |  |
| Copa |  3,247  |  24  | 0.7% |
| Surinam Airlines |  764  |  24  | 3.1% |
| Total Other Non Venez |  4,011  |  48  | 1.2% |
|  |  |  |  |
| **Total (Non Aruba/Non Venezuelan)** |  62,397  |  438  | 0.7% |
|  |  |  |  |
| Other (Aruban/Venezuelan) |  24,300  |  11,614  | 47.8% |
| **Total** |  86,697  |  12,052  | 13.9% |
| Source ATA |  |  |  |

The above table shows the number of Venezuelan residents who arrived in Aruba as a percentage of the total non-residents carried by an airline.

Thus 1.1% of all non-residents arriving in Aruba on American Airlines in June 2016 were residents of Venezuela and 0.2% of all non-residents arriving in Aruba on Delta Air Lines in June 2016 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% |  |

In June 2016 1.1% 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 June 2016 came in the 12-19 years old categories (up 11.2%) and with 10.9% growth in the 70 years old and older categories. There was a 7.1% decline in the number of visitors 20-29 years old and a 10.4% decline in the number 30-39 years old.

|  |
| --- |
| **Age of All Stopover Visitors June 2016** |
|  |  |  |  |  |  |
|  | 2016 | % share | 2015 | % share | % change |
| 0 - 11 yrs |  6,697  | 7.7% |  7,323  | 8.4% | -8.5% |
| 12 - 19 yrs |  7,597  | 8.8% |  6,832  | 7.8% | 11.2% |
| 20 - 29 yrs |  13,240  | 15.3% |  14,254  | 16.3% | -7.1% |
| 30 - 39 yrs |  14,957  | 17.3% |  16,687  | 19.1% | -10.4% |
| 40 - 49 yrs |  15,945  | 18.4% |  15,591  | 17.8% | 2.3% |
| 50 - 59 yrs |  15,466  | 17.8% |  14,651  | 16.8% | 5.6% |
| 60 - 69 yrs |  9,026  | 10.4% |  8,712  | 10.0% | 3.6% |
| 70 yrs or more |  3,766  | 4.3% |  3,397  | 3.9% | 10.9% |
| Not Stated |  3  | 0.0% |  -  | 0.0% | 100.0% |
| Total |  86,697  | 100.0% |  87,447  | 100.0% | -0.9% |
| Source: ATA |  |  |  |  |  |

|  |
| --- |
| **Age of All Stopover Visitors June 2016 YTD** |
|  |  |  |  |  |  |
|  | 2016 | % share | 2015 | % share | % change |
| 0 - 11 yrs |  47,323  | 8.2% |  47,121  | 8.3% | 0.4% |
| 12 - 19 yrs |  33,837  | 5.9% |  31,853  | 5.6% | 6.2% |
| 20 - 29 yrs |  76,787  | 13.3% |  77,468  | 13.6% | -0.9% |
| 30 - 39 yrs |  99,777  | 17.3% |  101,950  | 17.9% | -2.1% |
| 40 - 49 yrs |  100,063  | 17.3% |  97,172  | 17.1% | 3.0% |
| 50 - 59 yrs |  109,850  | 19.0% |  107,441  | 18.9% | 2.2% |
| 60 - 69 yrs |  76,967  | 13.3% |  75,366  | 13.2% | 2.1% |
| 70 yrs or more |  32,121  | 5.6% |  30,737  | 5.4% | 4.5% |
| Not Stated |  14  | 0.0% |  45  | 0.0% | -68.9% |
| Total |  576,739  | 100.0% |  569,153  | 100.0% | 1.3% |
| Source: ATA |  |  |  |  |  |

**First Time/Repeat Visitors.**

|  |
| --- |
| **Number of visits to Aruba: June 2016** |
|  |  |  |  |  |  |
| Number of Times Visited | 2016 | % share | 2015 | % share | % change |
| First Time |  41,760  | 48.2% |  41,601  | 47.6% | 0.4% |
| 2 - 5 times |  19,869  | 22.9% |  21,267  | 24.3% | -6.6% |
| 6 - 9 times |  5,473  | 6.3% |  4,847  | 5.5% | 12.9% |
| 10 or more |  8,148  | 9.4% |  7,212  | 8.2% | 13.0% |
| Not Stated |  11,447  | 13.2% |  12,520  | 14.3% | -8.6% |
| Total |  86,697  | 100.0% |  87,447  | 100.0% | -0.9% |
| Source: ATA: Self-reported by visitors |  |  |  |  |

In June 2016 48.2% of our visitors reported they were visiting for the first time and 38.6% reported they had visited before. 13.2% of our visitors did not report how many times they visited. Assigning the number who did not report on a *pro rata* basis results in an overall percentage of 55% first time and 45% repeat.

|  |
| --- |
| **Number of visits to Aruba: June 2016 YTD** |
|  |  |  |  |  |  |
| Number of Times Visited | 2016 | % share | 2015 | % share | % change |
| First Time |  240,614  | 41.7% |  244,893  | 43.0% | -1.7% |
| 2 - 5 times |  151,657  | 26.3% |  142,658  | 25.1% | 6.3% |
| 6 - 9 times |  38,077  | 6.6% |  37,929  | 6.7% | 0.4% |
| 10 or more |  60,859  | 10.6% |  58,732  | 10.3% | 3.6% |
| Not Stated |  85,532  | 14.8% |  84,941  | 14.9% | 0.7% |
| Total |  576,739  | 100.0% |  569,153  | 100.0% | 1.3% |
| Source: ATA: Self-reported by visitors |  |  |  |  |

Year to date 2016 41.7% of our visitors reported they were visiting for the first time and 43.5% reported they had visited before. 14.8% 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% first time and 51% repeat.

**Trip Advisor Ratings.**

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

|  |
| --- |
| **Trip Advisor Ratings for June 2016** |
|   | Number of Reviews |
| Aruba | 6,327 |  |
| Bahamas | 5,005 |  |
| Cayman | 2,884 |  |
| Curacao | 2,357 |  |
| Puerto Rico | 10,106 |  |
| USVI | 4,926 |  |
|  |  |  |
|  | Average Rating |  |
| Cayman | 4.57 |  |
| USVI | 4.52 |  |
| Aruba | 4.50 |  |
| Puerto Rico | 4.42 |  |
| Curacao | 4.34 |  |
| Bahamas | 4.23 |  |

**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. It is likely these numbers are subject to revision.

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.**

|  |  |  |  |
| --- | --- | --- | --- |
|  | June 2016 | June 2015 |  |
| as of | 6/15/2016 | 6/15/2015 | % change |
| Euro | $1.124 | $1.126 | -0.2% |
| UK Pound | $1.418 | $1.556 | -8.9% |
| Canadian Dollar | $0.775 | $0.811 | -4.4% |
| Colombian Peso\* | 2993 | 2532 | -15.4% |
| Brazilian Real\*\* | 3.471 | 3.097 | -10.8% |
| \* 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.

**Forecast**

Consequently it is forecast by AHATA that overall average room occupancy for 2016 for the hotel sector will remain at about the same level as in 2015, but that ADR will decline by about 3% compared to full year 2015 and that as a result RevPar will decline by between 2% - 3% compared with 2015.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Projected | Actual | 2016/2015 |  |
| **December 2016 YTD** | 2016 | 2015 | % change |  |
| Rooms |  4,908  |  4,848  | 1.2% |  |
| ARN |  1,785,244  |  1,725,914  | 3.4% |  |
| ORN |  1,399,809  |  1,346,974  | 3.9% |  |
| % occupancy | 78.4% | 78.0% | 0.4% | points |
| ADR | $231.01 | $238.19 | -3.0% |  |
| Rev Par | $181.13 | $185.89 | -2.6% |  |
| ***Based on data from 15 properties.*** |  |  |  |

The Aruba Airport Authority reports there will be 1.7% more air seats in the summer of 2016 (June 1 – October 31 2016) compared to the same seven months of 2015. The USA gateways will see 4.4% fewer seats largely due to the loss of the third daily flight out of Miami.

|  |
| --- |
| **SUMMER 2016: TOTAL AIRLIFT (June 1 - October 31 2016)** |
|  | 2016 | 2015 | Change | % change |
|  | Seats | Seats | Seats |  |
| USA |  498,975  |  522,061  |  (23,086) | -4.4% |
| Canada |  15,414  |  15,128  |  286  | 1.9% |
| Europe |  52,065  |  40,608  |  11,457  | 28.2% |
| Latin America |  433,084  |  404,746  |  28,338  | 7.0% |
| Total |  999,538  |  982,543  |  16,995  | 1.7% |
| Source: AAA |  |  |  |  |

Projections for 2016 for cruise traffic suggest that based on existing schedules the number of cruise passengers will increase by between 10% and 13% compared to 2015. However this growth rate could fall below 10% if certain calls which have been scheduled do not materialize.