

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

**Summary Highlights.**

- The total number of stopovers visiting Aruba decreased by 0.8% in April, from 99,604 in April 2015 to 98,823 in April 2016.
- In the first four months of 2016 the number of stopover visitors increased by 3.8% from 394,015 in 2015 to 409,078 in 2016.
- Please note Easter Sunday fell on March 27<sup>th</sup> 2016 compared with April 5<sup>th</sup> in 2015.
- Traffic from the USA was up by 2.8%, from 56,888 stopovers in April 2015 to 58,548 stopovers in April 2016 with the largest growth coming from New York State, Florida and Connecticut. In the first four months of 2016 the number of stopover visitors from the USA increased by 2.0% from 218,676 in 2015 to 223,026 in 2016.
- Traffic from Venezuela was down by 2.5% from 22,203 stopovers in April 2015 to 21,648 in April 2016. In the first four months of 2016 the number of stopover visitors from Venezuela increased by 9.2% from 91,155 in 2015 to 99,534 in 2016.
- The total number of visitor nights declined by 3.1% in April, from 665,687 in April 2015 to 645,280 in April 2016. The overall average length of stay fell by 2.3% from 6.68 nights in April 2015 to 6.53 nights in April 2016.
- The total number of visitor nights increased by 1.2% in the first four months of 2016, from 2,812,371 in 2015 to 2,844,967 in 2016. The overall average length of stay fell by 2.6% from 7.14 nights in 2015 to 6.95 nights in 2016.
- The Dominican Republic has seen a 6.2% increase in stopover traffic in the first three months of 2016 whilst Curacao has seen a 5.0% growth. Jamaica has seen a 2.9% increase in stopovers in the first two months of 2016.
- The number of cruise passengers visiting Aruba in April grew by 1.9%, from 49,644 in April 2015 to 50,579 in April 2016. In the first four months of 2016 the number of cruise visitors increased by 24.9% from 264,635 in 2015 to 330,423 in 2016
- As reported by Immigration card data the number of stopover visitors staying in hotels in April 2016 fell by 1.0%, and staying in timeshare resorts fell by 0.5%. For the first time in as many months the number staying in "other accommodation" fell by 0.6%. This latter category comprised 29.5% of all visitors in April, little changed from April 2015 (29.4%).
- The percentage of Venezuelan stopovers using "other accommodation" increased from 81.3% of all Venezuelan visitors in April 2015 to 83.5% in April 2016 whilst the number staying in hotel accommodation fell by 15.8% compared with April 2015.

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- Numbers provided to AHATA show that for a sample of 15 hotels average room occupancy fell by 2.2 percentage points from 82.1% in April 2015 to 79.9% in April 2016. The average daily room rate fell by 14.9% to \$215.84 and the average revpar fell by 17.2% to \$172.41.
- In the first four months of 2016 average room occupancy fell by 2.8 percentage points from 82.8% in 2015 to 80.0% in 2016. The average daily room rate fell by 3.1% to \$281.89 and the average revpar fell by 6.3% to \$225.51.
- Performance of the hotels by category for April shows that the brand name beach front hotels saw their average room occupancies grow by 0.2 percentage points to 83.4%, but their revpar fell by 18.1% to \$240.34. The all-inclusive resorts saw their average room occupancies fall by 7.5 percentage points to 79.8% (partly due to the addition of 60 rooms at the Divi All Inclusive) and their revpar fell by 13.6% to \$116.22. The smaller independent beach front hotels saw a 1.8 percentage point increase in room occupancy to 93.0% but with their revpar down by 2.7% to \$264.03. The non-beach front hotels saw their average room occupancies improve by 0.3 percentage points to 69.3% but saw their revpar fall by 5.6% to \$113.66...
- Using Smith Travel Research data, in March 2016 hotels in nine separate destinations in the Caribbean, three of the nine saw a an increase in average occupancy and six of the nine saw an improvement in revpar.
- In the first quarter of 2016 STR reported that hotels in seven 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 April and brought in 15,827 non-resident visitors (up 81.3% compared with April 2015 although some of this increase was due to its merger with US Airways in October 2015). Laser Airlines was the number two carrier (14,347 non-residents) and jetBlue brought in 13,361 non-residents in April (up 17.6%).
- Of the 21,648 Venezuelans who visited Aruba in April 2016 1.2% (252) arrived in Aruba on a US scheduled carrier. In total 325 Venezuelans (1.5% 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 April 2016 were residents of Venezuela. 0.1% of non-residents carried to Aruba by Delta Air Lines in April were residents of Venezuela. For most other non-Venezuelan, non-Aruban carriers it was less than 2%.
- There was a 12% increase in the number of visitors 60 years old or older in April and a substantial decline in the number between 0 and 29 years old.

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- In April 2016 43% of all visitors reported they were visiting Aruba for the first time with 43% reporting they had visited before. 14% did not provide a response. Allocating the non-responders on a *pro rata* basis results in 50% of all stopovers visiting for the first time with 50% having visited before.
- Trip Advisor ratings for April 2016 show that Aruba received a total of 4,054 reviews and achieved an average rating of 4.40 out of 5. The Cayman Islands achieved an average rating of 4.54 with the USVI achieving an average rating of 4.51. The Caribbean average was 4.41.
- 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 5% - 7% more available hotel room nights in 2016 compared with 2015 and further projects that average room occupancies for the hotel sector will average between 73% - 75% for 2016. It is expected the general move to improved pricing will be maintained and the overall average daily room rate is projected to grow by between 3% - 5% in 2016, with revpar projected to remain unchanged with 2015 at \$185.00.
- The Aruba Airport Authority reports there will be 1.7% more available air seats in the summer of 2016 (April 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 – April 2016**

**Aruba: Total Visitors April 2016**

	2016	%	2015	%	% change
USA	58,458	59.2%	56,888	57.1%	2.8%
Canada	3,059	3.1%	3,472	3.5%	-11.9%
Venezuela	21,648	21.9%	22,203	22.3%	-2.5%
Brazil	844	0.9%	1,509	1.5%	-44.1%
Colombia	1,593	1.6%	1,397	1.4%	14.0%
Argentina	1,424	1.4%	840	0.8%	69.5%
Chile	845	0.9%	732	0.7%	15.4%
Netherlands	3,213	3.3%	2,849	2.9%	12.8%
Germany	329	0.3%	390	0.4%	-15.6%
Italy	206	0.2%	246	0.2%	-16.3%
UK	553	0.6%	579	0.6%	-4.5%
Sweden	206	0.2%	109	0.1%	89.0%
Other	6,445	6.5%	8,390	8.4%	-23.2%
<b>Total</b>	<b>98,823</b>	<b>100.0%</b>	<b>99,604</b>	<b>100.0%</b>	<b>-0.8%</b>

Source: ATA

Total stopover arrivals (persons staying 24 hours or more) for April 2016 showed a 0.8% decrease compared with April 2015. Traffic from the USA was up by 2.8%, was down 11.9% from Canada, down 2.5% from Venezuela, up 14.0% from Colombia, down 44.1% from Brazil and up 69.5% from Argentina. Arrivals were up 12.8% from The Netherlands.

It is important to note that the Easter weekend fell on March 27<sup>th</sup> in 2016 and on April 5<sup>th</sup> in 2015.

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

### Aruba: Total Visitors April 2016 YTD

	2016	%	2015	%	% change
USA	223,026	54.5%	218,676	55.5%	2.0%
Canada	19,724	4.8%	21,486	5.5%	-8.2%
Venezuela	99,534	24.3%	91,155	23.1%	9.2%
Brazil	4,140	1.0%	8,000	2.0%	-48.3%
Colombia	7,298	1.8%	5,972	1.5%	22.2%
Argentina	6,931	1.7%	4,725	1.2%	46.7%
Chile	3,601	0.9%	3,428	0.9%	5.0%
Netherlands	11,612	2.8%	11,659	3.0%	-0.4%
Germany	1,364	0.3%	1,384	0.4%	-1.4%
Italy	1,261	0.3%	1,160	0.3%	8.7%
UK	1,489	0.4%	1,409	0.4%	5.7%
Sweden	2,796	0.7%	2,685	0.7%	4.1%
Other	26,302	6.4%	22,276	5.7%	18.1%
<b>Total</b>	<b>409,078</b>	<b>100.0%</b>	<b>394,015</b>	<b>100.0%</b>	<b>3.8%</b>

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%
<b>YTD</b>	<b>409,078</b>	<b>394,015</b>	<b>3.8%</b>

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	2,409.6
2012	728.7	581.2	576.5	615.1	2,501.6
2013	774.9	610.5	600.5	680.4	2,666.4
2014	806.7	652.3	678.8	723.4	2,861.2
2015	864.4	672.1	685.4	718.7	2,940.2

Source: Central Bank of Aruba

Tourism Receipts

(Millions of AFL)

Quarter	2015	2014	change
1st	864.4	806.7	7.2%
2nd	672.1	652.3	3.0%
3rd	685.4	678.8	1.0%
4th	718.7	723.4	-0.6%
YTD	2,940.6	2,861.2	2.8%

Source: Central Bank of Aruba

**Top Producing US States.**

**Aruba: Total Visitors: US States: April 2016**

	2016	%	2015	%	% change
New York	11,958	20.5%	10,558	18.6%	13.3%
Massachusetts	8,830	15.1%	8,041	14.1%	9.8%
New Jersey	6,819	11.7%	7,760	13.6%	-12.1%
Pennsylvania	2,828	4.8%	2,620	4.6%	7.9%
Illinois	1,571	2.7%	1,894	3.3%	-17.1%
Florida	2,857	4.9%	2,516	4.4%	13.6%
Connecticut	3,449	5.9%	3,060	5.4%	12.7%
Maryland	1,371	2.3%	1,755	3.1%	-21.9%
Ohio	1,376	2.4%	1,382	2.4%	-0.4%
Michigan	1,564	2.7%	1,846	3.2%	-15.3%
Virginia	1,197	2.0%	1,223	2.1%	-2.1%
Texas	1,369	2.3%	1,257	2.2%	8.9%
California	1,432	2.4%	1,171	2.1%	22.3%
Other	11,837	20.2%	11,805	20.8%	0.3%
<b>Total</b>	<b>58,458</b>	<b>100.0%</b>	<b>56,888</b>	<b>100.0%</b>	<b>2.8%</b>

Source: ATA

**Aruba: Total Visitors: US States: April 2016 YTD**

	2016	%	2015	%	% change
New York	47,820	21.4%	44,096	20.2%	8.4%
Massachusetts	30,121	13.5%	29,276	13.4%	2.9%
New Jersey	26,245	11.8%	24,131	11.0%	8.8%
Pennsylvania	12,663	5.7%	12,468	5.7%	1.6%
Illinois	8,226	3.7%	9,759	4.5%	-15.7%
Florida	9,474	4.2%	8,957	4.1%	5.8%
Connecticut	9,479	4.3%	9,366	4.3%	1.2%
Maryland	6,956	3.1%	6,542	3.0%	6.3%
Ohio	6,468	2.9%	7,057	3.2%	-8.3%
Michigan	6,708	3.0%	6,822	3.1%	-1.7%
Virginia	5,337	2.4%	5,296	2.4%	0.8%
Texas	4,824	2.2%	5,027	2.3%	-4.0%
California	3,607	1.6%	3,588	1.6%	0.5%
Other	45,098	20.2%	46,291	21.2%	-2.6%
<b>Total</b>	<b>223,026</b>	<b>100.0%</b>	<b>218,676</b>	<b>100.0%</b>	<b>2.0%</b>

Source: ATA

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

**Aruba: Total Nights April 2016**

	2016	%	2015	%	% change
USA	393,137	60.9%	380,397	57.1%	3.3%
Canada	24,046	3.7%	26,928	4.0%	-10.7%
Venezuela	93,180	14.4%	126,602	19.0%	-26.4%
Brazil	5,123	0.8%	9,458	1.4%	-45.8%
Colombia	15,025	2.3%	9,284	1.4%	61.8%
Argentina	11,751	1.8%	7,103	1.1%	65.4%
Chile	6,279	1.0%	5,343	0.8%	17.5%
Netherlands	37,687	5.8%	34,677	5.2%	8.7%
Germany	2,940	0.5%	3,563	0.5%	-17.5%
Italy	1,667	0.3%	2,093	0.3%	-20.4%
UK	5,382	0.8%	6,160	0.9%	-12.6%
Sweden	3,233	0.5%	1,073	0.2%	201.3%
Other	45,830	7.1%	53,006	8.0%	-13.5%
<b>Total</b>	<b>645,280</b>	<b>100.0%</b>	<b>665,687</b>	<b>100.0%</b>	<b>-3.1%</b>

Source: ATA

**Aruba: Average Length of Stay in Nights: April 2016**

	2016	2015	% change
USA	6.73	6.69	0.6%
Canada	7.86	7.76	1.4%
Venezuela	4.30	5.70	-24.5%
Brazil	6.07	6.27	-3.2%
Colombia	9.43	6.65	41.9%
Argentina	8.25	8.46	-2.4%
Chile	7.43	7.30	1.8%
Netherlands	11.73	12.17	-3.6%
Germany	8.94	9.14	-2.2%
Italy	8.09	8.51	-4.9%
UK	9.73	10.64	-8.5%
Sweden	15.69	9.84	59.4%
Other	7.11	6.32	12.6%
<b>Total</b>	<b>6.53</b>	<b>6.68</b>	<b>-2.3%</b>

Source: ATA



**Aruba: Total Nights April 2016 YTD**

	2016	%	2015	%	% change
USA	1,638,631	57.6%	1,605,791	57.1%	2.0%
Canada	176,277	6.2%	188,611	6.7%	-6.5%
Venezuela	421,299	14.8%	481,042	17.1%	-12.4%
Brazil	36,089	1.3%	43,737	1.6%	-17.5%
Colombia	63,313	2.2%	53,056	1.9%	19.3%
Argentina	62,369	2.2%	43,423	1.5%	43.6%
Chile	28,398	1.0%	26,268	0.9%	8.1%
Netherlands	146,965	5.2%	149,097	5.3%	-1.4%
Germany	12,722	0.4%	13,431	0.5%	-5.3%
Italy	10,412	0.4%	9,944	0.4%	4.7%
UK	13,413	0.5%	14,667	0.5%	-8.5%
Sweden	35,041	1.2%	32,676	1.2%	7.2%
Other	200,038	7.0%	150,628	5.4%	32.8%
<b>Total</b>	<b>2,844,967</b>	<b>100.0%</b>	<b>2,812,371</b>	<b>100.0%</b>	<b>1.2%</b>

Source: ATA

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

	2016	2015	% change
USA	7.35	7.34	0.1%
Canada	8.94	8.78	1.8%
Venezuela	4.23	5.28	-19.8%
Brazil	8.09	6.70	20.7%
Colombia	9.07	7.13	27.3%
Argentina	9.00	9.19	-2.1%
Chile	7.89	7.66	2.9%
Netherlands	12.66	12.79	-1.0%
Germany	9.33	9.70	-3.9%
Italy	8.26	8.57	-3.7%
UK	9.01	10.41	-13.5%
Sweden	12.53	12.17	3.0%
Other	7.61	6.76	12.5%
<b>Total</b>	<b>6.95</b>	<b>7.14</b>	<b>-2.6%</b>

Source: ATA

**Competing Destination performance.**

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

	Total Stopover Visitors			Period
	2016	2015	% change	
Antigua	84,566	74,507	13.5%	Jan-Mar
Aruba	409,078	394,015	3.8%	Jan-Apr
Bahamas	NA	NA	NA	
Barbados	NA	NA	NA	
Belize	75,898	62,622	21.2%	Jan-Feb
British Virgin islands	83,450	79,175	5.4%	Jan-Feb
Cayman islands	67,586	70,183	-3.7%	Jan-Feb
Cuba	417,764	370,687	12.7%	Jan
Curacao	127,535	121,502	5.0%	Jan-Mar
Dominican Republic	1,427,088	1,343,190	6.2%	Jan-Mar
Jamaica	364,831	354,549	2.9%	Jan-Feb
Puerto Rico	NA	NA	NA	
Saint Lucia	62,298	63,634	-2.1%	Jan-Feb
Turks & Caicos Islands	86,458	74,213	16.5%	Jan-Feb
US Virgin Islands	145,644	145,936	-0.2%	Jan-Feb

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

	Total Stopover Visitors			Period
	2016	2015	% change	
Antigua	84,566	74,507	13.5%	Jan-Mar
Aruba	409,078	394,015	3.8%	Jan-Apr
Bahamas	NA	NA	NA	
Barbados	NA	NA	NA	
Belize	75,898	62,622	21.2%	Jan-Feb
British Virgin islands	83,450	79,175	5.4%	Jan-Feb
Cayman islands	67,586	70,183	-3.7%	Jan-Feb
Cuba	417,764	370,687	12.7%	Jan
Curacao	127,535	121,502	5.0%	Jan-Mar
Dominican Republic	1,427,088	1,343,190	6.2%	Jan-Mar
Jamaica	364,831	354,549	2.9%	Jan-Feb
Puerto Rico	NA	NA	NA	
Saint Lucia	62,298	63,634	-2.1%	Jan-Feb
Turks & Caicos Islands	86,458	74,213	16.5%	Jan-Feb
US Virgin Islands	145,644	145,936	-0.2%	Jan-Feb

**Cruise Traffic.**

**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%
YTD	164	330,423	138	264,635	18.8%	24.9%

Source: Aruba Port Authority.

In April 2016 Aruba saw a 1.9% increase in the number of cruise passengers compared with April 2015. Year to date the volume of cruise traffic has grown by 24.9%.

The CTO numbers for 2016 for cruise visitor traffic show

	Total Cruise Visitors			
	2016	2015	% change	Period
Antigua	236,049	214,981	9.8%	Jan-Feb
Aruba	330,423	264,635	24.9%	Jan-Apr
Bahamas	NA	NA	NA	
Barbados	NA	NA	NA	
Belize	201,109	222,466	-9.6%	Jan-Feb
British Virgin islands	203,877	140,994	44.6%	Jan-Feb
Cayman Islands	372,747	344,817	8.1%	Jan-Feb
Cozumel	1,128,088	1,134,897	-0.6%	Jan-Mar
Curacao	128,102	150,886	-15.1%	Jan-Feb
Dominican Republic	NA	NA	NA	
Jamaica	384,211	318,319	20.7%	Jan-Feb
Puerto Rico	NA	NA	NA	
Saint Lucia	176,959	146,611	20.7%	Jan-Feb
St. Maarten	463,329	536,882	-13.7%	Jan-Feb
Turks & Caicos Islands	264,274	276,437	-4.4%	Jan-Mar
US Virgin Islands	433,750	410,748	5.6%	Jan-Feb

### 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				
	April 2016		April 2015		% change
	Visitors	%	Visitors	%	
Hotels	46,471	47.0%	46,958	47.1%	-1.0%
Timeshare	23,245	23.5%	23,371	23.5%	-0.5%
Apts/Priv Homes	29,107	29.5%	29,275	29.4%	-0.6%
<b>Total</b>	<b>98,823</b>	<b>100.0%</b>	<b>99,604</b>	<b>100.0%</b>	<b>-0.8%</b>

Source: ATA

The hotels category includes High Rise hotels, Low Rise hotels and the Tropicana. As shown above in April 2016 the number of visitors staying in hotel accommodation declined by 1.0%, those staying in a timeshare resort declined by 0.5% and those staying in apartments, guest houses or private homes declined by 0.6%.

	Place of Stay: Visitor Nights 2016				
	April 2016		April 2015		% change
	Nights	%	Nights	%	
Hotels	275,708	42.7%	277,931	41.8%	-0.8%
Timeshare	183,563	28.4%	179,395	26.9%	2.3%
Apts/Priv Homes	186,009	28.8%	208,361	31.3%	-10.7%
<b>Total</b>	<b>645,280</b>	<b>100.0%</b>	<b>665,687</b>	<b>100.0%</b>	<b>-3.1%</b>

Source: ATA

	Average Length of Stay in Nights 2016		
	April 2016	April 2015	% change
	Nights	Nights	
Hotels	5.93	5.92	0.2%
Timeshare	7.90	7.68	2.9%
Apts/Priv Homes	6.39	7.12	-10.2%
<b>Total</b>	<b>6.53</b>	<b>6.68</b>	<b>-2.3%</b>

Source: ATA

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### Visitors 2016

	April 2016 YTD		April 2015 YTD		% change
	Visitors	%	Visitors	%	
Hotels	182,460	44.6%	191,154	48.5%	-4.5%
Timeshare	87,387	21.4%	89,786	22.8%	-2.7%
Apts/Priv Homes	139,231	34.0%	113,075	28.7%	23.1%
<b>Total</b>	<b>409,078</b>	<b>100.0%</b>	<b>394,015</b>	<b>100.0%</b>	<b>3.8%</b>

Source: ATA

### Visitor Nights Full Year 2016

	April 2016 YTD		April 2015 YTD		% change
	Nights	%	Nights	%	
Hotels	1,150,848	40.5%	1,195,983	42.5%	-3.8%
Timeshare	779,990	27.4%	780,312	27.7%	0.0%
Apts/Priv Homes	914,129	32.1%	836,076	29.7%	9.3%
<b>Total</b>	<b>2,844,967</b>	<b>100.0%</b>	<b>2,812,371</b>	<b>100.0%</b>	<b>1.2%</b>

Source: ATA

### Average Length of Stay in Nights 2016

	April 2016 YTD	April 2015 YTD	% change
	Nights	Nights	
Hotels	6.31	6.26	0.8%
Timeshare	8.93	8.69	2.7%
Apts/Priv Homes	6.57	7.39	-11.2%
<b>Total</b>	<b>6.95</b>	<b>7.14</b>	<b>-2.6%</b>

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 April fell by 15.8%. Interestingly the number using private homes/apartments and condominiums grew by just 0.1% and comprised 83.5% of all Venezuelan visitors in April 2016, up from 81.3% in April 2015.

Due to a sharp decline in the average length of stay the number of nights spent by Venezuelans in Aruba fell by 26.4% in April 2016 compared to April 2015.

Visitors from Venezuela 2016					
	April 2016		April 2015		% change
	Visitors	%	Visitors	%	
Hotels	2,877	13.3%	3,415	15.4%	-15.8%
Timeshare	688	3.2%	730	3.3%	-5.8%
Apts/Priv Homes	18,083	83.5%	18,058	81.3%	0.1%
<b>Total</b>	<b>21,648</b>	<b>100.0%</b>	<b>22,203</b>	<b>100.0%</b>	<b>-2.5%</b>

Source: ATA

Visitor Nights from Venezuela 2016					
	April 2016		April 2015		% change
	Nights	%	Nights	%	
Hotels	11,393	12.2%	13,143	10.4%	-13.3%
Timeshare	3,987	4.3%	3,901	3.1%	2.2%
Apts/Priv Homes	77,800	83.5%	109,558	86.5%	-29.0%
<b>Total</b>	<b>93,180</b>	<b>100.0%</b>	<b>126,602</b>	<b>100.0%</b>	<b>-26.4%</b>

Source: ATA

Average Length of Stay Venezuela 2016					
	April 2016		April 2015		% change
	Nights		Nights		
Hotels	3.96	nts	3.85	nts	2.9%
Timeshare	5.80	nts	5.34	nts	8.4%
Apts/Priv Homes	4.30	nts	6.07	nts	-29.1%
<b>Total</b>	<b>4.30</b>	<b>nts</b>	<b>5.70</b>	<b>nts</b>	<b>-24.5%</b>

Source: ATA

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

### Visitors from Venezuela 2016

	April 2016 YTD		April 2015 YTD		% change
	Visitors	%	Visitors	%	
Hotels	12,462	12.5%	20,069	22.0%	-37.9%
Timeshare	2,906	2.9%	4,627	5.1%	-37.2%
Apts/Priv Homes	84,166	84.6%	66,459	72.9%	26.6%
<b>Total</b>	<b>99,534</b>	<b>100.0%</b>	<b>91,155</b>	<b>100.0%</b>	<b>9.2%</b>

Source: ATA

### Visitor Nights from Venezuela 2016

	April 2016 YTD		April 2015 YTD		% change
	Nights	%	Nights	%	
Hotels	52,766	12.5%	79,264	16.5%	-33.4%
Timeshare	16,837	4.0%	24,505	5.1%	-31.3%
Apts/Priv Homes	351,696	83.5%	377,273	78.4%	-6.8%
<b>Total</b>	<b>421,299</b>	<b>100.0%</b>	<b>481,042</b>	<b>100.0%</b>	<b>-12.4%</b>

Source: ATA

### Average Length of Stay Venezuela 2016

	April 2016 YTD		April 2015 YTD		% change
	Nights		Nights		
Hotels	4.23	nts	3.95	nts	7.2%
Timeshare	5.79	nts	5.30	nts	9.4%
Apts/Priv Homes	4.18	nts	5.68	nts	-26.4%
<b>Total</b>	<b>4.23</b>	<b>nts</b>	<b>5.28</b>	<b>nts</b>	<b>-19.8%</b>

Source: ATA



### Hotel Performance Aruba 2016

April 2016	2016	2015	2016/2015	
			% change	
Rooms	4,912	4,848	1.3%	
ARN	147,420	136,602	7.9%	
ORN	117,758	112,210	4.9%	
% occupancy	79.9%	82.1%	-2.2%	points
ADR	\$215.84	\$253.63	-14.9%	
Rev Par	\$172.41	\$208.34	-17.2%	

*Based on data from 15 properties.*

Total transient hotel room inventory for Aruba in April 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 13<sup>th</sup> 2015 for renovation. Both factors contributed towards the 7.9% increase in available room nights compared with April 2015.

In April 2016 the hotel sector saw a 2.2 percentage point decrease in average room occupancy, from 82.1% to 79.9%, and a 14.9% decrease in the average daily room rate (ADR). With a lower average room occupancy and lower ADR revenue per available room (rev par) fell by 17.2% compared with April 2015. It is important to remember that Easter fell on March 27<sup>th</sup> 2016 compared with April 5<sup>th</sup> in 2015.

### Year to Date.

April 2016 YTD	2016	2015	2016/2015	
			% change	
Rooms	4,908	4,848	1.2%	
ARN	591,488	573,015	3.2%	
ORN	473,180	473,819	-0.1%	
% occupancy	80.0%	82.8%	-2.8%	points
ADR	\$281.89	\$290.99	-3.1%	
Rev Par	\$225.51	\$240.61	-6.3%	

*Based on data from 15 properties.*

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

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%
YTD	80.0%	82.8%	-2.8%	\$281.89	\$290.99	-3.1%	\$225.51	\$240.61	-6.3%

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

### Performance by Category – April 2016.

	April 2016						
	Rooms	ARN	ORN	%opy	Revenue	\$ADR	\$RevPar
Brand Name Beach Front	2,033	60,990	50,841	83.4%	\$14,658,041.00	\$288.31	\$240.34
All Inclusives	1,841	55,230	44,051	79.8%	\$6,418,806.00	\$145.71	\$116.22
Small Independent Beach Front	176	5,280	4,910	93.0%	\$1,394,089.00	\$283.93	\$264.03
Non Beach Front	864	25,920	17,956	69.3%	\$2,946,113.00	\$164.07	\$113.66
Total	4,914	147,420	117,758	79.9%	\$25,417,049.00	\$215.84	\$172.41

	April 2015						
	Rooms	ARN	ORN	%opy	Revenue	\$ADR	\$RevPar
Brand Name Beach Front	2,040	61,200	50,917	83.2%	\$17,954,474.00	\$352.62	\$293.37
All Inclusives	1,777	44,472	38,788	87.2%	\$5,983,041.00	\$154.25	\$134.54
Small Independent Beach Front	176	5,280	4,816	91.2%	\$1,433,338.00	\$297.62	\$271.47
Non Beach Front	855	25,650	17,689	69.0%	\$3,089,456.00	\$174.65	\$120.45
Total	4,848	136,602	112,210	82.1%	\$28,460,309.00	\$253.63	\$208.34

	Per Cent Change						
	Rooms	ARN	ORN	% pt change	Revenue	\$ADR	\$RevPar
Brand Name Beach Front	-0.3%	-0.3%	-0.1%	0.2%	-18.4%	-18.2%	-18.1%
All Inclusives	3.6%	24.2%	13.6%	-7.5%	7.3%	-5.5%	-13.6%
Small Independent Beach Front	0.0%	0.0%	2.0%	1.8%	-2.7%	-4.6%	-2.7%
Non Beach Front	1.1%	1.1%	1.5%	0.3%	-4.6%	-6.1%	-5.6%
Total	1.4%	7.9%	4.9%	-2.3%	-10.7%	-14.9%	-17.2%

### Brand Name Beachfront Hotels

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

### All Inclusives Resorts.

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

### Small Independent Beach Front Hotels.

Bucuti & Tara Beach Resort, the Manchebo Beach Resort

### Non Beachfront Hotels.

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

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

### Performance by Category – Year to Date.

April YTD 2016	2016						
	Rooms	ARN	ORN	%opy	Revenue	\$ADR	\$RevPar
Brand Name Beach Front	2,033	246,413	197,821	80.3%	\$79,577,179.00	\$402.27	\$322.94
All Inclusives	1,841	220,511	183,030	83.0%	\$32,759,220.00	\$178.98	\$148.56
Small Independent Beach Front	176	21,296	19,547	91.8%	\$7,426,746.00	\$379.94	\$348.74
Non Beach Front	862	103,268	72,782	70.5%	\$13,621,500.00	\$187.15	\$131.90
<b>Total</b>	<b>4,912</b>	<b>591,488</b>	<b>473,180</b>	<b>80.0%</b>	<b>\$ 133,384,645.00</b>	<b>\$281.89</b>	<b>\$225.51</b>

April YTD 2015	2015						
	Rooms	ARN	ORN	%opy	Revenue	\$ADR	\$RevPar
Brand Name Beach Front	2,040	244,800	200,713	82.0%	\$84,741,041.00	\$422.20	\$346.16
All Inclusives	1,777	204,402	180,675	88.4%	\$31,257,885.00	\$173.01	\$152.92
Small Independent Beach Front	176	21,120	19,397	91.8%	\$7,273,678.00	\$374.99	\$344.40
Non Beach Front	855	102,693	73,034	71.1%	\$14,602,079.00	\$199.94	\$142.19
<b>Total</b>	<b>4,848</b>	<b>573,015</b>	<b>473,819</b>	<b>82.8%</b>	<b>\$ 137,874,683.00</b>	<b>\$290.99</b>	<b>\$240.61</b>

April YTD	Per Cent Change						
	Rooms	ARN	ORN	% pt change	Revenue	\$ADR	\$RevPar
Brand Name Beach Front	-0.3%	0.7%	-1.4%	-1.7%	-6.1%	-4.7%	-6.7%
All Inclusives	3.6%	7.9%	1.3%	-5.4%	4.8%	3.5%	-2.9%
Small Independent Beach Front	0.0%	0.8%	0.8%	-0.1%	2.1%	1.3%	1.3%
Non Beach Front	0.8%	0.6%	-0.3%	-0.6%	-6.7%	-6.4%	-7.2%
<b>Total</b>	<b>1.3%</b>	<b>3.2%</b>	<b>-0.1%</b>	<b>-2.8%</b>	<b>-3.3%</b>	<b>-3.1%</b>	<b>-6.3%</b>

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

### Competing Destination performance.

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

March 2016	Average Room Occupancy			Average Daily Rate			RevPar			#Hotels in
	2016	2015	% pt change	2016	2015	% change	2016	2015	% change	Sample
Aruba	78.1%	77.1%	1.0%	\$304.10	\$293.17	3.7%	\$237.45	\$225.98	5.1%	15
Barbados	75.3%	75.1%	0.2%	\$382.81	\$359.40	6.5%	\$288.26	\$269.99	6.8%	32
Cancun	79.0%	80.5%	-1.5%	\$245.14	\$222.37	10.2%	\$193.78	\$179.01	8.3%	50
Cayman Islands	85.1%	90.2%	-5.1%	\$521.08	\$490.82	6.2%	\$443.26	\$442.86	0.1%	8
Curacao	72.8%	71.3%	1.5%	\$166.42	\$162.48	2.4%	\$121.22	\$115.82	4.7%	13
Dominican Republic	74.5%	80.6%	-6.1%	\$165.73	\$154.54	7.2%	\$123.45	\$124.58	-0.9%	30
Jamaica	79.7%	83.3%	-3.6%	\$280.96	\$330.61	-15.0%	\$224.01	\$275.54	-18.7%	10
Puerto Rico	78.4%	84.9%	-6.5%	\$231.26	\$234.50	-1.4%	\$181.20	\$199.13	-9.0%	43
USVI	82.9%	88.4%	-5.5%	\$469.94	\$430.32	9.2%	\$389.79	\$380.27	2.5%	7
Caribbean	74.0%	77.5%	-3.5%	\$293.51	\$288.24	1.8%	\$217.32	\$223.53	-2.8%	229

Source: STR.

March YTD 2016	Average Room Occupancy			Average Daily Rate			RevPar			#Hotels in
	2016	2015	% pt change	2016	2015	% change	2016	2015	% change	Sample
Aruba	80.0%	82.8%	-2.8%	\$303.77	\$302.58	0.4%	\$243.13	\$250.71	-3.0%	15
Barbados	79.7%	79.0%	0.7%	\$389.91	\$371.81	4.9%	\$310.86	\$293.74	5.8%	32
Cancun	74.9%	81.2%	-6.3%	\$233.80	\$217.79	7.4%	\$175.12	\$176.83	-1.0%	50
Cayman Islands	77.6%	83.1%	-5.5%	\$482.14	\$470.10	2.6%	\$374.09	\$390.68	-4.2%	8
Curacao	77.0%	76.7%	0.3%	\$166.37	\$176.60	-5.8%	\$128.13	\$135.45	-5.4%	13
Dominican Republic	78.1%	80.5%	-2.4%	\$159.75	\$154.17	3.6%	\$124.80	\$124.18	0.5%	30
Jamaica	74.1%	79.2%	-5.1%	\$288.26	\$310.11	-7.0%	\$213.47	\$245.67	-13.1%	10
Puerto Rico	76.9%	80.0%	-3.1%	\$233.27	\$230.93	1.0%	\$179.49	\$184.84	-2.9%	43
USVI	80.8%	83.8%	-3.0%	\$460.47	\$425.65	8.2%	\$372.01	\$356.82	4.3%	7
Caribbean	73.1%	75.6%	-2.5%	\$281.75	\$281.96	-0.1%	\$205.86	\$213.04	-3.4%	229

Source: STR.

### Visitors by Carrier.

The table below shows the number of non-resident visitors brought in by various airline carriers during April 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: April 2016**

(Non-resident stopover Arrivals)

	Apr 2016	% share	Apr 2015	% share	% change
Laser	14,347	14.5%	6,062	6.1%	136.7%
American Airlines	15,827	16.0%	8,728	8.8%	81.3%
jetBlue	13,361	13.5%	11,358	11.4%	17.6%
United Airlines	11,835	12.0%	13,589	13.6%	-12.9%
Delta Air Lines	9,661	9.8%	9,250	9.3%	4.4%
Southwest/Air Tran	7,439	7.5%	7,058	7.1%	5.4%
Insel Air	3,992	4.0%	6,073	6.1%	-34.3%
Avior	2,232	2.3%	4,477	4.5%	-50.1%
Copa	2,153	2.2%	2,224	2.2%	-3.2%
Avianca	2,423	2.5%	2,004	2.0%	20.9%
Sunwing	1,092	1.1%	1,448	1.5%	-24.6%
Aruba Airlines	1,941	2.0%	3,065	3.1%	-36.7%
KLM	2,130	2.2%	2,061	2.1%	3.3%
Aserca	1,596	1.6%	3,553	3.6%	-55.1%
Westjet	1,020	1.0%	761	0.8%	34.0%
Venezolana	393	0.4%	2,164	2.2%	-81.8%
ArkeFly	1,382	1.4%	1,220	1.2%	13.3%
Thomas Cook	-	0.0%	-	0.0%	0.0%
Air Canada	594	0.6%	546	0.5%	8.8%
GOL	-	0.0%	761	0.8%	-100.0%
Surinam Airways	590	0.6%	456	0.5%	29.4%
Spirit Airlines	514	0.5%	545	0.5%	-5.7%
US Airways	-	0.0%	9,039	9.1%	-100.0%
Tiara Air	127	0.1%	-	0.0%	100.0%
Private	873	0.9%	1,166	1.2%	-25.1%
Charter	1,472	1.5%	580	0.6%	153.8%
Other	1,829	1.9%	1,416	1.4%	29.2%
<b>TOTAL</b>	<b>98,823</b>	<b>100.0%</b>	<b>99,604</b>	<b>100.0%</b>	<b>-0.8%</b>

Source: ATA

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

### Stopovers: By Airline: April 2016 YTD

(Non-resident stopover Arrivals)

	Apr 2016 YTD	% share	Apr 2015 YTD	% share	% change
Laser	57,367	14.0%	22,736	5.8%	152.3%
American Airlines	56,986	13.9%	36,310	9.2%	56.9%
jetBlue	51,145	12.5%	45,835	11.6%	11.6%
United Airlines	49,309	12.1%	52,478	13.3%	-6.0%
Delta Air Lines	36,060	8.8%	36,541	9.3%	-1.3%
Southwest/Air Tran	28,815	7.0%	27,138	6.9%	6.2%
Insel Air	16,937	4.1%	23,584	6.0%	-28.2%
Avior	12,562	3.1%	13,417	3.4%	-6.4%
Copa	9,170	2.2%	10,325	2.6%	-11.2%
Avianca	9,498	2.3%	8,748	2.2%	8.6%
Sunwing	7,986	2.0%	9,468	2.4%	-15.7%
Aruba Airlines	9,838	2.4%	9,274	2.4%	6.1%
KLM	7,647	1.9%	8,494	2.2%	-10.0%
Aserca	8,067	2.0%	13,443	3.4%	-40.0%
Westjet	4,710	1.2%	3,819	1.0%	23.3%
Venezolana	3,359	0.8%	7,000	1.8%	-52.0%
ArkeFly	4,740	1.2%	4,803	1.2%	-1.3%
Thomas Cook	1,877	0.5%	1,916	0.5%	-2.0%
Air Canada	3,557	0.9%	3,261	0.8%	9.1%
GOL	984	0.2%	2,419	0.6%	-59.3%
Surinam Airways	2,384	0.6%	1,674	0.4%	42.4%
Spirit Airlines	1,708	0.4%	1,837	0.5%	-7.0%
US Airways	-	0.0%	35,028	8.9%	-100.0%
Tiara Air	127	0.0%	-	0.0%	100.0%
Private	4,482	1.1%	5,328	1.4%	-15.9%
Charter	13,460	3.3%	4,886	1.2%	175.5%
Other	6,303	1.5%	4,253	1.1%	48.2%
<b>TOTAL</b>	<b>409,078</b>	<b>100.0%</b>	<b>394,015</b>	<b>100.0%</b>	<b>3.8%</b>

Source: ATA

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

### Carriers Used by Venezuelans.

#### Venezuelan Stopovers: By Airline: April 2016

(Non-resident stopover Arrivals)

	Apr 2016	% share	Apr 2015	% share	% change
<b>US Carriers</b>					
American Airlines	177	0.8%	1,093	4.9%	-83.8%
Delta Air Lines	13	0.1%	234	1.1%	-94.4%
United Airlines	24	0.1%	252	1.1%	-90.5%
US Airways	-	0.0%	193	0.9%	-100.0%
Southwest/Air Tran	24	0.1%	48	0.2%	100.0%
jetBlue	13	0.1%	21	0.1%	-38.1%
Spirit Airlines	1	0.0%	7	0.0%	-85.7%
<b>Total US Carriers</b>	<b>252</b>	<b>1.2%</b>	<b>1,848</b>	<b>8.3%</b>	<b>-86.4%</b>
<b>Canada</b>					
Air Canada	2	0.0%	11	0.0%	-81.8%
Westjet	11	0.1%	8	0.0%	37.5%
<b>Total Canada</b>	<b>13</b>	<b>0.1%</b>	<b>19</b>	<b>0.1%</b>	<b>-31.6%</b>
<b>Europe</b>					
KLM	13	0.1%	14	0.1%	-7.1%
Arke Fly	9	0.0%	3	0.0%	100.0%
<b>Total Europe</b>	<b>22</b>	<b>0.1%</b>	<b>17</b>	<b>0.1%</b>	<b>29.4%</b>
<b>Other Non-Venezuelan</b>					
Copa	28	0.1%	73	0.3%	-61.6%
Surinam Airlines	10	0.0%	19	0.1%	-47.4%
<b>Total Other Non Venez</b>	<b>38</b>	<b>0.2%</b>	<b>92</b>	<b>0.4%</b>	<b>-58.7%</b>
<b>Total (Non Aruba/Non Venezuelan)</b>	<b>325</b>	<b>1.5%</b>	<b>1,976</b>	<b>8.9%</b>	<b>-83.6%</b>
Other (Aruban/Venezuelan)	21,323	98.5%	20,227	91.1%	5.4%
<b>Total</b>	<b>21,648</b>	<b>100.0%</b>	<b>22,203</b>	<b>100.0%</b>	<b>-2.5%</b>

Source: ATA



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

A portion of Venezuelan business to Aruba in April 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 252 residents of Venezuela (1.2% 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 86.4% compared to April 2015. In total 325 residents of Venezuela (1.5% of all Venezuelans visiting Aruba) arrived in Aruba by a scheduled carrier other than one based in Venezuela or Aruba.

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### Venezuelan Stopovers: By Airline: April 2016

(Non-resident stopover Arrivals)

Carriers	Inbound To Aruba by Carrier Used		
	Total	Venezuelans	%
<b>US Carriers</b>			
American Airlines	15,827	177	1.1%
Delta Air Lines	9,661	13	0.1%
United Airlines	11,835	24	0.2%
US Airways	-	-	0.0%
Southwest/Air Tran	7,439	48	0.6%
jetBlue	13,361	13	0.1%
Spirit Airlines	514	1	0.2%
<b>Total US Carriers</b>	<b>58,637</b>	<b>276</b>	<b>0.5%</b>
<b>Canada</b>			
Air Canada	594	2	0.3%
Westjet	1,020	11	1.1%
<b>Total Canada</b>	<b>1,614</b>	<b>13</b>	<b>0.8%</b>
<b>Europe</b>			
KLM	2,130	13	0.6%
Arke Fly	1,382	9	0.7%
<b>Total Europe</b>	<b>3,512</b>	<b>22</b>	<b>0.6%</b>
<b>Other Non-Venezuelan</b>			
Copa	2,153	28	1.3%
Surinam Airlines	590	10	1.7%
<b>Total Other Non Venez</b>	<b>2,743</b>	<b>38</b>	<b>1.4%</b>
<b>Total (Non Aruba/Non Venezuelan)</b>	<b>66,506</b>	<b>349</b>	<b>0.5%</b>
Other (Aruban/Venezuelan)	32,317	21,299	65.9%
<b>Total</b>	<b>98,823</b>	<b>21,648</b>	<b>21.9%</b>

Source ATA

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

Thus 1.1% of all non-residents arriving in Aruba on American Airlines in April 2016 were residents of Venezuela and 0.1% of all non-residents arriving in Aruba on Delta Air Lines in April 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%

In April 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 April 2016 came in the 0-29 years old categories (down 9.6%) with 12% growth in the 60 years old and older categories.

**Age of All Stopover Visitors April 2016**

	2016	% share	2015	% share	% change
0 - 11 yrs	8,550	8.7%	9,172	9.2%	-6.8%
12 - 19 yrs	5,185	5.2%	5,898	5.9%	-12.1%
20 - 29 yrs	11,669	11.8%	13,031	13.1%	-10.5%
30 - 39 yrs	17,986	18.2%	19,073	19.1%	-5.7%
40 - 49 yrs	17,963	18.2%	17,835	17.9%	0.7%
50 - 59 yrs	19,183	19.4%	18,311	18.4%	4.8%
60 - 69 yrs	13,290	13.4%	11,935	12.0%	11.4%
70 yrs or more	4,992	5.1%	4,343	4.4%	14.9%
Not Stated	5	0.0%	6	0.0%	-16.7%
<b>Total</b>	<b>98,823</b>	<b>100.0%</b>	<b>99,604</b>	<b>100.0%</b>	<b>-0.8%</b>

Source: ATA

**Age of All Stopover Visitors April 2016 YTD**

	2016	% share	2015	% share	% change
0 - 11 yrs	36,566	8.9%	34,454	8.7%	6.1%
12 - 19 yrs	23,752	5.8%	22,393	5.7%	6.1%
20 - 29 yrs	51,611	12.6%	49,421	12.5%	4.4%
30 - 39 yrs	70,247	17.2%	67,817	17.2%	3.6%
40 - 49 yrs	69,485	17.0%	66,616	16.9%	4.3%
50 - 59 yrs	77,428	18.9%	75,550	19.2%	2.5%
60 - 69 yrs	56,102	13.7%	54,703	13.9%	2.6%
70 yrs or more	23,877	5.8%	23,018	5.8%	3.7%
Not Stated	10	0.0%	43	0.0%	-76.7%
<b>Total</b>	<b>409,078</b>	<b>100.0%</b>	<b>394,015</b>	<b>100.0%</b>	<b>3.8%</b>

Source: ATA

**First Time/Repeat Visitors.**

**Number of visits to Aruba: April 2016**

Number of Times Visited	2016	% share	2015	% share	% change
First Time	42,504	43.0%	45,601	45.8%	-6.8%
2 - 5 times	26,624	26.9%	24,573	24.7%	8.3%
6 - 9 times	6,429	6.5%	6,219	6.2%	3.4%
10 or more	9,619	9.7%	8,700	8.7%	10.6%
Not Stated	13,647	13.8%	14,511	14.6%	-6.0%
<b>Total</b>	<b>98,823</b>	<b>100.0%</b>	<b>99,604</b>	<b>100.0%</b>	<b>-0.8%</b>

Source: ATA: Self-reported by visitors

In April 2016 43.0% of our visitors reported they were visiting for the first time and 43.1% reported they had visited before. 13.8% 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 50% first time and 50% repeat.

**Number of visits to Aruba: April 2016 YTD**

Number of Times Visited	2016	% share	2015	% share	% change
First Time	162,015	39.6%	163,731	41.6%	-1.0%
2 - 5 times	111,809	27.3%	99,986	25.4%	11.8%
6 - 9 times	27,587	6.7%	27,464	7.0%	0.4%
10 or more	44,688	10.9%	43,155	11.0%	3.6%
Not Stated	62,979	15.4%	59,679	15.1%	5.5%
<b>Total</b>	<b>409,078</b>	<b>100.0%</b>	<b>394,015</b>	<b>100.0%</b>	<b>3.8%</b>

Source: ATA: Self-reported by visitors

Year to date 2016 39.6% of our visitors reported they were visiting for the first time and 44.9% reported they had visited before. 15.4% 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 47% first time and 53% 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 April 2016. The ratings are out of 5.

#### TripAdvisor Ratings for April 2016

	Number of Reviews
Aruba	4,054
Bahamas	3,456
Cayman	2,421
Curacao	909
Puerto Rico	8,938
USVI	5,090
Caribbean	49,728

#### Average Rating

Cayman	4.54
USVI	4.51
Caribbean	4.41
Puerto Rico	4.40
Aruba	4.40
Curacao	4.36
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.

	April 2016	April 2015	
as of	4/15/2016	4/15/2016	% change
Euro	\$1.129	\$1.060	6.5%
UK Pound	\$1.421	\$1.478	-3.9%
Canadian Dollar	\$0.778	\$0.807	-3.6%
Colombian Peso*	2998	2533	-15.5%
Brazilian Real**	3.538	3.060	-13.5%

\* Pesos per \$1.00  
 \*\* Reals per \$1.00

### Inventory.

It is currently forecasted by AHATA that there will be an increase of 5% - 7% 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 both the Bucuti & Tara Beach and the Hilton Aruba currently plan 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 decline somewhat to between 73% - 75% from 78% in 2015, that ADR will grow by 3% - 5% compared to full year 2015 and that as a result revpar will remain basically unchanged.

The Aruba Airport Authority reports there will be 1.7% more air seats in the summer of 2016 (April 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.

<b>SUMMER 2016: TOTAL AIRLIFT (April 1 - October 31 2016)</b>				
	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%
<b>Total</b>	<b>999,538</b>	<b>982,543</b>	<b>16,995</b>	<b>1.7%</b>

Source: AAA

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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.