

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

Summary Highlights.

- The total number of stopovers visiting Aruba decreased by 29.8% in October, from 109,024 in October 2015 to 76,491 in October 2016.
- In the first ten months of 2016 the number of stopover visitors decreased by 7.0% from 996,162 in 2015 to 926,290 in 2016.
- Traffic from the USA was down by 3.6%, from 46,778 stopovers in October 2015 to 45,080 stopovers in October 2016. Traffic was up by 1.2% from New York State but down by 6.1% from Massachusetts and down 6.0% from New Jersey.
- In the first ten months of 2016 the number of stopover visitors from the USA increased by 1.0% from 518,107 in 2015 to 523,448 in 2016.
- Traffic from Venezuela was down by 76.7% in October from 40,387 stopovers in October 2015 to 9,412 in October 2016.
- In the first ten months of 2016 the number of stopover visitors from Venezuela fell by 31.4%, from 270,889 in 2015 to 185,740 in 2016.
- Tourism receipts fell by 1.4% in the first quarter of 2016 compared to the same quarter of 2015 despite a 5.4% growth in stopover arrivals. In the second quarter visitor arrivals declined by 3.0% whilst tourism receipts fell by 0.4% both compared to second quarter 2015.
- The total number of visitor nights declined by 16.3% in October, from 665,723 in October 2015 to 556,985 in October 2016. The overall average length of stay grew by 19.3% from 6.11 nights in October 2015 to 7.14 nights in October 2016.
- The total number of visitor nights declined by 2.7% in the first ten months of 2016, from 6,792,517 in 2015 to 6,610,589 in 2016. The overall average length of stay grew by 4.7% from 6.82 nights in 2015 to 7.14 nights in 2016.
- The Dominican Republic saw a 6.6% increase in stopover traffic in the first ten months of 2016 whilst the U.S. Virgin Islands saw a 3.1% increase in stopovers in the first nine months. Traffic to Cuba grew by 11.7% in the first eight months of 2016 compared to the same period of 2015.
- Outbound travel by US citizens grew by 8.2% in the first nine months of 2016 compared to the same period for 2015 and was up by 3.1% to the Caribbean.
- The number of cruise passengers visiting Aruba in October fell by 24.7%, from 50,953 in October 2015 to 38,349 in October 2016. In the first ten months of 2016 the number of cruise visitors increased by 9.6% from 435,559 in 2015 to 477,575 in 2016.

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- As reported by Immigration card data the number of stopover visitors staying in hotels in October 2016 fell by 3.4%, and staying in timeshare resorts fell by 0.2%. The number staying in “other accommodation” fell by 67.8%. This latter category comprised 19.3% of all visitors in October 2016, down from 42.0% in October 2015.
- In October 2016 hotels saw a 2.4% decline in the overall number of visitor nights compared with October 2015. The USA generated 6.6% fewer hotel nights in October 2016 than in October 2015.
- The number of Venezuelan stopovers using “other accommodation” fell by 86.6% in October 2016 and comprised 52.0% of all Venezuelan visitors in October 2016 down from 90.3% in October 2015. The number of Venezuelans staying in hotel accommodation grew by 18.7% compared with October 2015.
- Numbers provided to AHATA show that for a sample of 15 hotels average room occupancy grew by 3.5 percentage points from 73.1% in October 2015 to 76.6% in October 2016. The average daily room rate fell by 2.4% to \$177.64 and the average RevPar grew by 2.3% to \$136.01.
- In the first ten months of 2016 average room occupancy grew by 1.8 percentage points to 79.9%. The average daily room rate fell by 5.0% to \$224.83 and the average RevPar fell by 2.9% to \$179.56.
- Performance of the hotels by category for October shows that the brand name beach front hotels saw their average room occupancies fall by 3.5 percentage points to 63.2%, with their RevPar also falling by 6.2% to \$154.32. The all-inclusive resorts saw their average room occupancies increase by 4.5 percentage points to 91.1% and their RevPar grow by 10.1% to \$123.97. The smaller independent beach front hotels saw a 0.6 percentage point decline in room occupancy to 91.3% but their RevPar grew by 4.6% to \$255.21. The non-beach front hotels saw their average room occupancies improve by 17.3 percentage points to 74.2% and saw their RevPar grow by 21.2% to \$94.55.
- In the first ten months of 2016 STR reported that hotels in three of eight Caribbean destinations saw higher average room occupancies and five saw lower average room occupancies. Six of the eight saw a lower average RevPar.
- JetBlue was the number one carrier in October 2016 and brought in 12,238 non-resident visitors. American Airlines was the number two carrier (12,148 non-residents) and Delta Air Lines brought in 10,197 non-residents.
- Of the 9,412 Venezuelans who visited Aruba in October 2016 5.8% (549) arrived in Aruba on a US scheduled carrier. In total 702 Venezuelans (7.5% 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.

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- 2.7% of non-residents carried to Aruba by American Airlines in October 2016 were residents of Venezuela. 0.8% of non-residents carried to Aruba by Delta Air Lines in October were residents of Venezuela. For most other non-Venezuelan, non-Aruban carriers it was generally less than 5%.
- There was a decline in all age categories in October 2016 with the worst decline being in the 0 -11 years category (down 52.0%) and in the 20 – 29 years category (down 46.6%).
- In October 2016 41.3% of our visitors reported they were visiting for the first time and 45.6% reported they had visited before. 13.1% 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 for October 2016 show that Aruba received a total of 5,478 reviews and achieved an average rating of 4.40 out of 5. The USVI achieved an average rating of 4.50 as did the Cayman Islands.
- The Aruba Tourism Authority has set a revised target of 5.5% more stopover visitors for 2016 compared to 2015. As well they have targeted a 6% increase in tourism receipts, to increase cruise visitor arrival numbers by a minimum of 3% above the 2013 total and to achieve a 9% per annum increase in the tourism sector's RevPar.
- 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 (April 1 – October 31 2016) compared to the same seven months of 2015. The AAA is projecting 13.4% fewer inbound air seats in the winter 2015/2016 compared to the same five months of 2015/2016.
- 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 – October 2016

Aruba: Total Visitors October 2016

	2016	%	2015	%	% change
USA	45,080	58.9%	46,778	42.9%	-3.6%
Canada	2,540	3.3%	2,437	2.2%	4.2%
Venezuela	9,412	12.3%	40,387	37.0%	-76.7%
Brazil	1,084	1.4%	1,337	1.2%	-18.9%
Colombia	2,303	3.0%	1,630	1.5%	41.3%
Argentina	1,423	1.9%	1,601	1.5%	-11.1%
Chile	859	1.1%	696	0.6%	23.4%
Netherlands	3,189	4.2%	3,053	2.8%	4.5%
Germany	524	0.7%	431	0.4%	21.6%
Italy	656	0.9%	638	0.6%	2.8%
UK	2,194	2.9%	1,441	1.3%	52.3%
Sweden	665	0.9%	649	0.6%	2.5%
Other	6,562	8.6%	7,946	7.3%	-17.4%
Total	76,491	100.0%	109,024	100.0%	-29.8%

Source: ATA

Total stopover arrivals (persons staying 24 hours or more) for October 2016 showed a 29.8% decrease compared with October 2015.

Traffic from the USA was down by 3.6%, was up by 4.2% from Canada, down 76.7% from Venezuela, up 41.3% from Colombia, down 18.9% from Brazil and down 11.1% from Argentina. Arrivals were up 4.5% from The Netherlands.

Aruba: Total Visitors October 2016 YTD

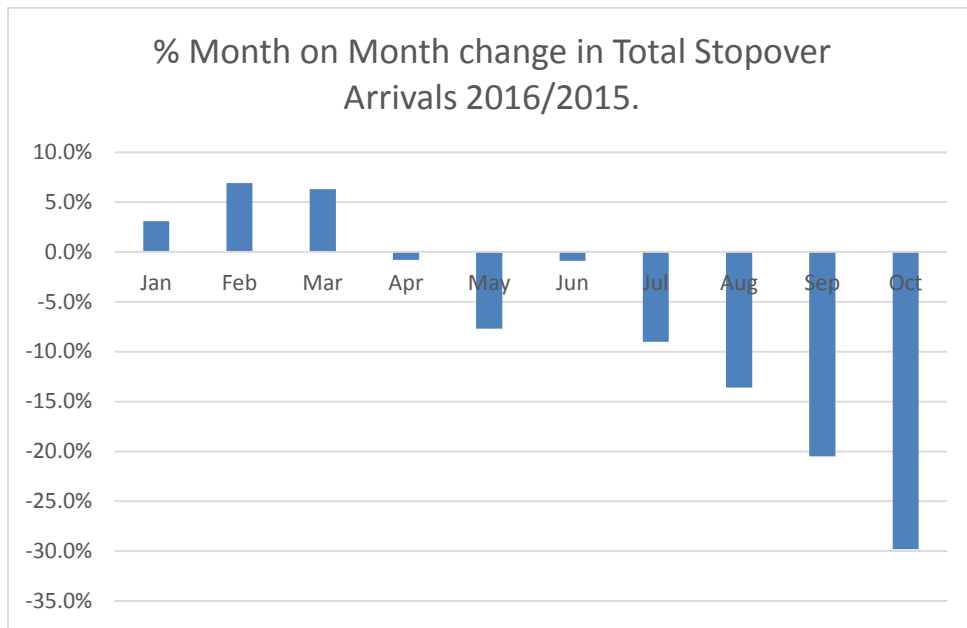
	2016	%	2015	%	% change
USA	523,448	56.5%	518,107	52.0%	1.0%
Canada	32,757	3.5%	34,960	3.5%	-6.3%
Venezuela	185,740	20.1%	270,889	27.2%	-31.4%
Brazil	10,392	1.1%	17,002	1.7%	-38.9%
Colombia	22,623	2.4%	16,225	1.6%	39.4%
Argentina	15,972	1.7%	12,785	1.3%	24.9%
Chile	9,579	1.0%	8,681	0.9%	10.3%
Netherlands	29,678	3.2%	29,649	3.0%	0.1%
Germany	3,728	0.4%	4,126	0.4%	-9.6%
Italy	6,752	0.7%	6,922	0.7%	-2.5%
UK	17,170	1.9%	11,031	1.1%	55.7%
Sweden	4,041	0.4%	3,791	0.4%	6.6%
Other	64,410	7.0%	61,994	6.2%	3.9%
Total	926,290	100.0%	996,162	100.0%	-7.0%

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%
Jun	86,697	87,447	-0.9%
Jul	99,418	109,251	-9.0%
Aug	96,319	111,471	-13.6%
Sep	77,323	97,263	-20.5%
Oct	76,491	109,024	-29.8%
YTD	926,290	996,162	-7.0%

Source: ATA



Expenditures

Tourism Receipts

(In Millions of AFL)

YEAR	1st	2nd	3rd	4th	TOTAL
2010	644.5	519.8	502.5	566.2	2,233.0
2011	690.4	582.1	555.4	583.4	2,411.3
2012	728.7	581.2	576.5	615.1	2,501.5
2013	774.9	621.4	600.6	680.4	2,666.0
2014	806.6	652.3	678.8	723.4	2,861.1
2015	864.4	672.0	685.4	718.7	2,940.5
2016	852.3	669.0			

Source: Central Bank of Aruba

Tourism Receipts

(Millions of AFL)

Quarter	2016	2015	change
1st	852.3	864.4	-1.4%
2nd	669.0	672.0	-0.4%
3rd		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.

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

Top Producing US States.

Aruba: Total Visitors: US States: October 2016

	2016	%	2015	%	% change
New York	9,261	20.5%	9,148	19.6%	1.2%
Massachusetts	6,024	13.4%	6,412	13.7%	-6.1%
New Jersey	5,597	12.4%	5,957	12.7%	-6.0%
Pennsylvania	2,758	6.1%	2,831	6.1%	-2.6%
Illinois	1,122	2.5%	1,360	2.9%	-17.5%
Florida	2,595	5.8%	2,563	5.5%	1.2%
Connecticut	1,855	4.1%	1,766	3.8%	5.0%
Maryland	1,359	3.0%	1,422	3.0%	-4.4%
Ohio	1,320	2.9%	1,260	2.7%	4.8%
Michigan	740	1.6%	860	1.8%	-14.0%
Virginia	948	2.1%	1,192	2.5%	-20.5%
Texas	1,132	2.5%	1,471	3.1%	-23.0%
California	978	2.2%	1,088	2.3%	-10.1%
Other	9,391	20.8%	9,448	20.2%	-0.6%
Total	45,080	100.0%	46,778	100.0%	-3.6%

Source: ATA

Aruba: Total Visitors: US States: October 2016 YTD

	2016	%	2015	%	% change
New York	108,619	20.8%	104,249	20.1%	4.2%
Massachusetts	59,077	11.3%	57,935	11.2%	2.0%
New Jersey	66,699	12.7%	64,265	12.4%	3.8%
Pennsylvania	31,078	5.9%	30,671	5.9%	1.3%
Illinois	16,271	3.1%	18,659	3.6%	-12.8%
Florida	28,056	5.4%	27,644	5.3%	1.5%
Connecticut	19,320	3.7%	19,116	3.7%	1.1%
Maryland	18,979	3.6%	18,826	3.6%	0.8%
Ohio	15,049	2.9%	14,652	2.8%	2.7%
Michigan	11,260	2.2%	11,247	2.2%	0.1%
Virginia	13,518	2.6%	13,905	2.7%	-2.8%
Texas	18,867	3.6%	19,597	3.8%	-3.7%
California	12,366	2.4%	13,134	2.5%	-5.8%
Other	104,289	19.9%	104,207	20.1%	0.1%
Total	523,448	100.0%	518,107	100.0%	1.0%

Source: ATA

Stopover Visitors by Number of Nights Stayed.

Aruba: Total Nights October 2016

	2016	%	2015	%	% change
USA	325,169	58.4%	334,884	50.3%	-2.9%
Canada	20,942	3.8%	20,357	3.1%	2.9%
Venezuela	48,098	8.6%	156,281	23.5%	-69.2%
Brazil	6,939	1.2%	8,160	1.2%	-15.0%
Colombia	16,978	3.0%	11,811	1.8%	43.7%
Argentina	11,748	2.1%	13,269	2.0%	-11.5%
Chile	6,189	1.1%	4,799	0.7%	29.0%
Netherlands	35,977	6.5%	36,523	5.5%	-1.5%
Germany	5,273	0.9%	4,319	0.6%	22.1%
Italy	4,397	0.8%	4,346	0.7%	1.2%
UK	25,988	4.7%	16,958	2.5%	53.2%
Sweden	7,136	1.3%	6,373	1.0%	12.0%
Other	42,151	7.6%	47,643	7.2%	-11.5%
Total	556,985	100.0%	665,723	100.0%	-16.3%

Source: ATA

Aruba: Average Length of Stay in Nights: October 2016

	2016	2015	% change
USA	7.21	7.16	0.8%
Canada	8.24	8.35	-1.3%
Venezuela	5.11	3.87	32.1%
Brazil	6.40	6.10	4.9%
Colombia	7.37	7.25	1.7%
Argentina	8.26	8.29	-0.4%
Chile	7.20	6.90	4.5%
Netherlands	11.28	11.96	-5.7%
Germany	10.06	10.02	0.4%
Italy	6.70	6.81	-1.6%
UK	11.85	11.77	0.7%
Sweden	10.73	9.82	9.3%
Other	6.42	6.00	7.1%
Total	7.28	6.11	19.3%

Source: ATA

Aruba: Total Nights October 2016 YTD

	2016	%	2015	%	% change
USA	3,669,519	60.6%	3,658,821	59.7%	0.3%
Canada	283,485	4.7%	296,248	4.8%	-4.3%
Venezuela	978,234	16.2%	1,363,204	22.2%	-28.2%
Brazil	77,827	1.3%	102,700	1.7%	-24.2%
Colombia	199,845	3.3%	131,640	2.1%	51.8%
Argentina	140,714	2.3%	113,462	1.9%	24.0%
Chile	73,663	1.2%	65,409	1.1%	12.6%
Netherlands	368,793	6.1%	375,560	6.1%	-1.8%
Germany	36,408	0.6%	39,347	0.6%	-7.5%
Italy	49,110	0.8%	52,232	0.9%	-6.0%
UK	203,616	3.4%	129,339	2.1%	57.4%
Sweden	48,321	0.8%	43,418	0.7%	11.3%
Other	481,054	7.9%	421,137	6.9%	14.2%
Total	6,610,589	109.2%	6,792,517	110.9%	-2.7%

Source: ATA

Aruba: Average Length of Stay in Nights: October 2016 YTD

	2016	2015	% change
USA	7.01	7.06	-0.7%
Canada	8.65	8.47	2.1%
Venezuela	5.27	5.03	4.7%
Brazil	7.26	6.61	9.9%
Colombia	8.96	7.44	20.5%
Argentina	8.81	8.87	-0.7%
Chile	7.69	7.53	2.1%
Netherlands	12.43	12.67	-1.9%
Germany	9.77	9.54	2.4%
Italy	7.27	7.55	-3.6%
UK	11.86	11.73	1.1%
Sweden	11.96	11.45	4.4%
Other	7.47	6.79	9.9%
Total	7.14	6.82	4.7%

Source: ATA

Competing Destination performance.

The Caribbean Tourism Organization collects data from across the region. Their most recently published figures are from November 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	217,304	200,465	8.4%	Jan-Oct
Aruba	926,290	996,162	-7.0%	Jan-Oct
Bahamas	1,000,754	973,496	2.8%	Jan-Oct
Barbados	457,670	432,580	5.8%	Jan-Sep
Belize	315,512	271,291	16.3%	Jan-Oct
British Virgin Islands	302,841	291,474	3.9%	Jan-Aug
Cayman Islands	296,447	295,560	0.3%	Jan-Sep
Cuba	2,715,478	2,430,238	11.7%	Jan-Aug
Curacao	332,920	337,647	-1.4%	Jan-Sep
Dominican Republic	4,256,557	3,992,233	6.6%	Jan-Oct
Jamaica	1,652,612	1,610,733	2.6%	Jan-Sep
Puerto Rico	1,131,795	1,123,928	0.7%	Jan-Jul
Saint Lucia	288,931	286,923	0.7%	Jan-Oct
Turks & Caicos Islands	356,489	299,571	19.0%	Jan-Sep
US Virgin Islands	612,162	593,756	3.1%	Jan-Sep
Source CTO				

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

Total US Stopover Visitors				
	2016	2015	% change	Period
Antigua	90,449	76,200	18.7%	Jan-Oct
Aruba	523,448	518,107	1.0%	Jan-Oct
Bahamas	795,514	757,632	5.0%	Jan-Jul
Barbados	123,820	111,852	10.7%	Jan-Sep
Belize	210,906	170,498	23.7%	Jan-Oct
British Virgin Islands	NA	NA	NA	NA
Cayman Islands	234,094	226,397	3.4%	Jan-Sep
Cuba	171,445	100,305	70.9%	Jan-Aug
Curacao	45,309	45,999	-1.5%	Jan-Sep
Dominican Republic	1,778,809	1,694,169	5.0%	Jan-Oct
Jamaica	1,083,134	1,030,575	5.1%	Jan-Sep
Puerto Rico	862,227	880,722	-2.1%	Jan-Jul
Saint Lucia	132,067	128,220	3.0%	Jan-Oct
Turks & Caicos Islands	290,888	247,564	17.5%	Jan-Sep
US Virgin Islands	NA	NA	NA	NA
Source CTO				

US Citizens Outbound Travel 2016.

U.S. Citizens Outbound Travel - Caribbean			
	2016	2015	% change
Jan	588,925	560,268	5.1%
Feb	643,467	610,837	5.3%
Mar	809,877	755,526	7.2%
Apr	687,500	671,777	2.3%
May	641,598	647,866	-1.0%
Jun	803,919	783,320	2.6%
Jul	890,781	852,692	4.5%
Aug	640,065	656,606	-2.5%
Sep	416,980	403,601	3.3%
YTD	6,128,112	5,942,493	3.1%

Source: ITA: National Travel & Tourism Office

U.S. Citizens Outbound Travel - Total			
	2016	2015	% change
Jan	5,329,529	4,861,589	9.6%
Feb	5,201,686	4,696,331	10.8%
Mar	6,508,516	5,797,906	12.3%
Apr	5,834,736	5,473,174	6.6%
May	6,757,900	6,369,370	6.1%
Jun	8,227,499	7,751,682	6.1%
Jul	9,072,024	8,235,479	10.2%
Aug	7,438,193	7,066,754	5.3%
Sep	6,291,971	5,781,623	8.8%
YTD	60,897,584	56,284,519	8.2%

Source: ITA: National Travel & Tourism Office

U.S. Citizens Outbound Travel - Caribbean Share			
	2016	2015	% pt change
Jan	11.1%	11.5%	-0.5%
Feb	12.4%	13.0%	-0.6%
Mar	12.4%	13.0%	-0.6%
Apr	11.8%	12.3%	-0.5%
May	9.5%	10.2%	-0.7%
Jun	9.8%	10.1%	-0.3%
Jul	9.8%	10.4%	-0.5%
Aug	8.6%	9.3%	-0.7%
Sep	6.6%	7.0%	-0.4%
YTD	10.1%	10.6%	-0.5%

Source: ITA: National Travel & Tourism Office

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U.S. Citizens Outbound Travel - Jan - Sept 2016 YTD					
	2016	% share	2015	% share	% change
Europe	10,776,760	17.7%	10,089,550	17.9%	6.8%
Caribbean	6,128,112	10.1%	5,942,493	10.6%	3.1%
Asia	3,899,950	6.4%	3,543,489	6.3%	10.1%
South America	1,512,370	2.5%	1,339,340	2.4%	12.9%
Central America	2,305,722	3.8%	2,101,037	3.7%	9.7%
Oceania	516,412	0.8%	461,504	0.8%	11.9%
Middle East	1,620,682	2.7%	1,502,753	2.7%	7.8%
Africa	279,846	0.5%	266,680	0.5%	4.9%
Mexico (Air)	6,722,087	11.0%	5,980,252	10.6%	12.4%
Mexico (Other)	15,926,426	26.2%	14,953,789	26.6%	6.5%
Canada	11,209,280	18.4%	10,103,632	18.0%	10.9%
Total	60,897,647	100.0%	56,284,519	100.0%	8.2%

Source: ITA: National Travel & Tourism Office

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%
May	8	20,462	13	26,447	-38.5%	-22.6%
Jun	7	25,452	9	22,243	-22.2%	14.4%
Jul	8	18,921	10	23,627	-20.0%	-19.9%
Aug	11	22,557	10	23,282	10.0%	-3.1%
Sep	7	21,411	13	24,372	-46.2%	-12.1%
Oct	17	38,349	20	50,953	-15.0%	-24.7%
YTD	222	477,575	213	435,559	4.2%	9.6%

Source: Aruba Port Authority.

In October 2016 Aruba saw a 24.7% decrease in the number of cruise passengers compared with October 2015. Year to date the volume of cruise traffic has grown by 9.6%.

The CTO numbers for 2016 for cruise visitor traffic show

	Total Cruise Visitors			
	2016	2015	% change	Period
Antigua	414,574	440,094	-5.8%	Jan-Sep
Aruba	477,575	435,559	9.6%	Jan-Oct
Bahamas	2,451,944	2,410,060	1.7%	Jan-Aug
Barbados	394,410	396,148	-0.4%	Jan-Sep
Belize	758,315	733,264	3.4%	Jan-Oct
British Virgin Islands	465,870	315,083	47.9%	Jan-Aug
Cayman Islands	1,280,236	1,210,997	5.7%	Jan-Sep
Cozumel	2,852,625	2,686,632	6.2%	Jan-Oct
Curacao	323,717	355,010	-8.8%	Jan-Sep
Dominican Republic	561,454	336,597	66.8%	Jan-Sep
Jamaica	1,223,608	1,116,513	9.6%	Jan-Sep
Puerto Rico	819,226	923,393	-11.3%	Jan-Jul
Saint Lucia	391,944	506,129	-22.6%	Jan-Oct
St. Maarten	1,029,027	1,249,699	-17.7%	Jan-Jul
Turks & Caicos Islands	686,383	745,333	-7.9%	Jan-Oct
US Virgin Islands	1,406,316	1,431,856	-1.8%	Jan-Oct
sub total	15,537,224	15,292,367	1.6%	

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Source CTO

Place of Stay

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

	Place of Stay: Visitors 2016				
	Oct 2016		Oct 2015		% change
	Visitors	%	Visitors	%	
Hotels	40,485	52.9%	41,910	38.4%	-3.4%
Timeshare	21,259	27.8%	21,309	19.5%	-0.2%
Apts/Priv Homes	14,747	19.3%	45,805	42.0%	-67.8%
Total	76,491	100.0%	109,024	100.0%	-29.8%

Source: ATA

The hotels category includes High Rise hotels, Low Rise hotels and the Tropicana. As shown above in October 2016 the number of visitors staying in hotel accommodation fell by 3.4%, those staying in a timeshare resort fell by 0.2% and those staying in apartments, guest houses or private homes declined by 67.8%.

	Place of Stay: Visitor Nights 2016				
	Oct 2016		Oct 2015		% change
	Nights	%	Nights	%	
Hotels	256,033	46.0%	262,227	39.4%	-2.4%
Timeshare	178,718	32.1%	176,976	26.6%	1.0%
Apts/Priv Homes	122,234	21.9%	226,520	34.0%	-46.0%
Total	556,985	100.0%	665,723	100.0%	-16.3%

Source: ATA

	Average Length of Stay in Nights 2016		
	Oct 2016	Oct 2015	% change
	Nights	Nights	
Hotels	6.32	6.26	1.1%
Timeshare	8.41	8.31	1.2%
Apts/Priv Homes	8.29	4.95	67.6%
Total	7.28	6.11	19.3%

Source: ATA

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	Visitors 2016				
	Oct 2016 YTD		Oct 2015 YTD		% change
	Visitors	%	Visitors	%	
Hotels	454,993	49.1%	452,848	45.5%	0.5%
Timeshare	226,174	24.4%	230,663	23.2%	-1.9%
Apts/Priv Homes	245,123	26.5%	312,651	31.4%	-21.6%
Total	926,290	100.0%	996,162	100.0%	-7.0%

Source: ATA

	Visitor Nights Full Year 2016				
	Oct 2016 YTD		Oct 2015 YTD		% change
	Nights	%	Nights	%	
Hotels	2,853,816	43.2%	2,823,649	41.6%	1.1%
Timeshare	1,877,097	28.4%	1,896,328	27.9%	-1.0%
Apts/Priv Homes	1,879,676	28.4%	2,072,540	30.5%	-9.3%
Total	6,610,589	100.0%	6,792,517	100.0%	-2.7%

Source: ATA

	Average Length of Stay in Nights 2016		
	Oct 2016 YTD	Oct 2015 YTD	% change
	Nights	Nights	
Hotels	6.27	6.24	0.6%
Timeshare	8.30	8.22	1.0%
Apts/Priv Homes	7.67	6.63	15.7%
Total	7.14	6.82	4.7%

Source: ATA

Hotel Nights by Market.

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

Aruba: Total Hotel Nights October 2016

	2016	%	2015	%	% change
USA	147,483	57.6%	157,955	60.2%	-6.6%
Canada	12,423	4.9%	12,060	4.6%	3.0%
Venezuela	14,294	5.6%	12,277	4.7%	16.4%
Brazil	5,624	2.2%	6,548	2.5%	-14.1%
Colombia	6,229	2.4%	4,727	1.8%	31.8%
Argentina	9,473	3.7%	10,897	4.2%	-13.1%
Netherlands	9,207	3.6%	10,505	4.0%	-12.4%
Germany	2,477	1.0%	2,460	0.9%	0.7%
Italy	3,060	1.2%	3,504	1.3%	-12.7%
UK	21,232	8.3%	13,952	5.3%	52.2%
Other	24,531	9.6%	27,342	10.4%	-10.3%
Total	256,033	100.0%	262,227	100.0%	-2.4%

Source: ATA

Aruba: Total Hotel Nights October YTD 2016

	2016	%	2015	%	% change
USA	1,776,699	62.3%	1,779,303	63.2%	-0.1%
Canada	157,142	5.5%	176,578	6.3%	-11.0%
Venezuela	181,009	6.3%	191,918	6.8%	-5.7%
Brazil	51,577	1.8%	87,329	3.1%	-40.9%
Colombia	51,633	1.8%	43,173	1.5%	19.6%
Argentina	106,251	3.7%	83,654	3.0%	27.0%
Netherlands	78,821	2.8%	88,016	3.1%	-10.4%
Germany	16,563	0.6%	20,491	0.7%	-19.2%
Italy	32,398	1.1%	33,842	1.2%	-4.3%
UK	168,372	5.9%	96,551	3.4%	74.4%
Other	233,351	8.2%	216,600	7.7%	7.7%
Total	2,853,816	100.0%	2,817,455	100.0%	1.3%

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 October increased by 18.7%. Interestingly the number using private homes/apartments and condominiums fell by 86.6% and comprised 52.0% of all Venezuelan visitors in October 2016, down from 90.3% in October 2015.

	Visitors from Venezuela 2016				
	Oct 2016		Oct 2015		% change
	Visitors	%	Visitors	%	
Hotels	3,662	38.9%	3,084	7.6%	18.7%
Timeshare	855	9.1%	817	2.0%	4.7%
Apts/Priv Homes	4,895	52.0%	36,486	90.3%	-86.6%
Total	9,412	100.0%	40,387	100.0%	-76.7%

Source: ATA

	Visitor Nights from Venezuela 2016				
	Oct 2016		Oct 2015		% change
	Nights	%	Nights	%	
Hotels	14,294	29.7%	12,277	7.9%	16.4%
Timeshare	4,721	9.8%	4,128	2.6%	14.4%
Apts/Priv Homes	29,083	60.5%	139,876	89.5%	-79.2%
Total	48,098	100.0%	156,281	100.0%	-69.2%

Source: ATA

	Average Length of Stay Venezuela 2016				
	Oct 2016		Oct 2015		% change
	Nights		Nights		
Hotels	3.90	nts	3.98	nts	-1.9%
Timeshare	5.52	nts	5.05	nts	9.3%
Apts/Priv Homes	5.94	nts	3.83	nts	55.0%
Total	5.11	nts	3.87	nts	32.1%

Source: ATA

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Visitors from Venezuela 2016

	Oct 2016 YTD		Oct 2015 YTD		% change
	Visitors	%	Visitors	%	
Hotels	41,101	22.1%	45,556	16.8%	-9.8%
Timeshare	18,095	9.7%	18,339	6.8%	-1.3%
Apts/Priv Homes	126,544	68.1%	206,994	76.4%	-38.9%
Total	185,740	100.0%	270,889	100.0%	-31.4%

Source: ATA

Visitor Nights from Venezuela 2016

	Oct 2016 YTD		Oct 2015 YTD		% change
	Nights	%	Nights	%	
Hotels	181,009	18.5%	191,918	14.1%	-5.7%
Timeshare	133,346	13.6%	129,571	9.5%	2.9%
Apts/Priv Homes	663,879	67.9%	1,041,715	76.4%	-36.3%
Total	978,234	100.0%	1,363,204	100.0%	-28.2%

Source: ATA

Average Length of Stay Venezuela 2016

	Oct 2016 YTD		Oct 2015 YTD		% change
	Nights		Nights		
Hotels	4.40	nts	4.21	nts	4.5%
Timeshare	7.37	nts	7.07	nts	4.3%
Apts/Priv Homes	5.25	nts	5.03	nts	4.2%
Total	5.27	nts	5.03	nts	4.7%

Source: ATA

Hotel Performance Aruba 2016

October 2016	2016	2015	2016/2015	
			% change	
Rooms	4,919	4,858	1.3%	
ARN	152,489	150,598	1.3%	
ORN	116,752	110,090	6.1%	
% occupancy	76.6%	73.1%	3.5%	points
ADR	\$177.64	\$181.93	-2.4%	
Rev Par	\$136.01	\$133.00	2.3%	

Based on data from 15 properties.

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

In October 2016 the hotel sector saw a 3.5 percentage point increase in average room occupancy, from 73.1% to 76.6%, but a 2.4% decrease in the average daily room rate (ADR). With a higher average room occupancy but lower ADR revenue per available room (rev par) increased by 2.3% compared with October 2015.

Year to Date.

October 2016 YTD	2016	2015	2016/2015	
			% change	
Rooms	4,919	4,858	1.3%	
ARN	1,496,665	1,431,757	4.5%	
ORN	1,195,285	1,118,486	6.9%	
% occupancy	79.9%	78.1%	1.8%	points
ADR	\$224.83	\$236.67	-5.0%	
Rev Par	\$179.56	\$184.89	-2.9%	

Based on data from 15 properties.

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By Month.

2016	Avg Occupancy			ADR			RevPar		
	2016	2015	% pt chng	2016	2015	% chng	2016	2015	% chng
Jan	78.2%	84.9%	-6.7%	\$299.55	\$305.87	-2.1%	\$234.15	\$259.78	-9.9%
Feb	84.1%	87.0%	-2.9%	\$307.59	\$308.25	-0.2%	\$258.72	\$268.04	-3.5%
Mar	78.1%	77.1%	1.0%	\$304.10	\$293.17	3.7%	\$237.45	\$225.98	5.1%
Apr	79.9%	82.1%	-2.2%	\$215.84	\$253.63	-14.9%	\$172.41	\$208.34	-17.2%
May	76.3%	74.2%	2.1%	\$187.89	\$200.87	-6.5%	\$143.32	\$148.98	-3.8%
Jun	77.9%	70.5%	7.4%	\$185.52	\$199.46	-7.0%	\$144.51	\$140.56	2.8%
Jul	84.1%	81.9%	2.2%	\$204.80	\$216.78	-5.5%	\$172.28	\$177.51	-2.9%
Aug	83.8%	78.9%	4.9%	\$192.12	\$203.30	-5.5%	\$161.04	\$160.32	0.5%
Sep	79.9%	71.1%	8.8%	\$174.57	\$176.04	-0.8%	\$139.48	\$125.25	11.4%
Oct	76.6%	73.1%	3.5%	\$177.64	\$181.93	-2.4%	\$136.01	\$133.00	2.3%
YTD	79.9%	78.1%	1.8%	\$224.83	\$236.67	-5.0%	\$179.56	\$184.89	-2.9%

Performance by Category – October 2016.

	October 2016						
	Rooms	ARN	ORN	%opy	Revenue	\$ADR	\$RevPar
Brand Name Beach Front	2,033	63,023	39,814	63.2%	\$9,725,490.00	\$244.27	\$154.32
All Inclusives	1,841	57,071	51,969	91.1%	\$7,074,926.00	\$136.14	\$123.97
Small Independent Beach Front	176	5,456	4,981	91.3%	\$1,392,452.00	\$279.55	\$255.21
Non-Beach Front	869	26,939	19,988	74.2%	\$2,547,152.00	\$127.43	\$94.55
Total	4,919	152,489	116,752	76.6%	\$20,740,020.00	\$177.64	\$136.01

	October 2015						
	Rooms	ARN	ORN	%opy	Revenue	\$ADR	\$RevPar
Brand Name Beach Front	2,040	63,240	42,159	66.7%	\$10,405,644.00	\$246.82	\$164.54
All Inclusives	1,777	55,087	47,656	86.5%	\$6,200,966.00	\$130.12	\$112.57
Small Independent Beach Front	176	5,456	5,013	91.9%	\$1,330,906.00	\$265.49	\$243.93
Non-Beach Front	865	26,815	15,262	56.9%	\$2,091,341.00	\$137.03	\$77.99
Total	4,858	150,598	110,090	73.1%	\$20,028,857.00	\$181.93	\$133.00

	Per Cent Change						
	Rooms	ARN	ORN	% pt change	Revenue	\$ADR	\$RevPar
Brand Name Beach Front	-0.3%	-0.3%	-5.6%	-3.5%	-6.5%	-1.0%	-6.2%
All Inclusives	3.6%	3.6%	9.1%	4.5%	14.1%	4.6%	10.1%
Small Independent Beach Front	0.0%	0.0%	-0.6%	-0.6%	4.6%	5.3%	4.6%
Non-Beach Front	0.5%	0.5%	31.0%	17.3%	21.8%	-7.0%	21.2%
Total	1.3%	1.3%	6.1%	3.5%	3.6%	-2.4%	2.3%

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 Inclusive 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.

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

Performance by Category – Year to Date.

October YTD 2016	2016						
	Rooms	ARN	ORN	%opy	Revenue	\$ADR	\$RevPar
Brand Name Beach Front	2,033	620,485	470,857	75.9%	\$148,938,118.00	\$316.31	\$240.04
All Inclusives	1,841	559,255	485,745	86.9%	\$74,996,464.00	\$154.39	\$134.10
Small Independent Beach Front	176	53,680	48,536	90.4%	\$15,470,358.00	\$318.74	\$288.20
Non-Beach Front	862	263,245	190,147	72.2%	\$29,331,771.00	\$154.26	\$111.42
Total	4,912	1,496,665	1,195,285	79.9%	\$268,736,711.00	\$224.83	\$179.56

October YTD 2015	2015						
	Rooms	ARN	ORN	%opy	Revenue	\$ADR	\$RevPar
Brand Name Beach Front	2,040	620,160	470,515	75.9%	\$156,386,652.00	\$332.37	\$252.17
All Inclusives	1,777	496,509	428,277	86.3%	\$64,468,595.00	\$150.53	\$129.84
Small Independent Beach Front	176	53,504	48,997	91.6%	\$15,105,389.00	\$308.29	\$282.32
Non-Beach Front	855	261,584	170,427	65.2%	\$28,756,177.00	\$168.73	\$109.93
Total	4,848	1,431,757	1,118,486	78.1%	\$ 264,716,813.00	\$236.67	\$184.89

October YTD 2016	Per Cent Change						
	Rooms	ARN	ORN	% pt change	Revenue	\$ADR	\$RevPar
Brand Name Beach Front	-0.3%	0.1%	0.1%	0.0%	-4.8%	-4.8%	-4.8%
All Inclusives	3.6%	12.6%	13.4%	0.6%	16.3%	2.6%	3.3%
Small Independent Beach Front	0.0%	0.3%	-0.9%	-1.2%	2.4%	3.4%	2.1%
Non-Beach Front	0.8%	0.6%	11.6%	7.1%	2.0%	-8.6%	1.4%
Total	1.3%	4.5%	6.9%	1.7%	1.5%	-5.0%	-2.9%

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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 October 2016 compared with October 2015 and for October YTD.

October 2016	Average Room Occupancy			Average Daily Rate			RevPar			#Hotels in
	2016	2015	% pt change	2016	2015	% change	2016	2015	% change	Sample
Aruba	76.6%	73.1%	3.5%	\$177.64	\$181.93	-2.4%	\$136.01	\$133.00	2.3%	15
Barbados	58.4%	59.4%	-1.0%	\$226.17	\$209.73	7.8%	\$132.08	\$124.52	6.1%	33
Cancun	58.8%	57.2%	1.6%	\$154.32	\$164.64	-6.3%	\$90.71	\$94.16	-3.7%	47
Cayman Islands	na	na	na	na	na	na	na	na	na	7
Curacao	69.5%	69.4%	0.1%	\$137.82	\$135.08	2.0%	\$95.73	\$93.70	2.2%	12
Dominican Republic	63.1%	55.6%	7.5%	\$108.58	\$105.24	3.2%	\$68.48	\$58.50	17.1%	29
Jamaica	54.6%	56.2%	-1.6%	\$177.58	\$175.79	1.0%	\$97.04	\$98.83	-1.8%	11
Puerto Rico	55.2%	64.2%	-9.0%	\$143.75	\$154.44	-6.9%	\$79.42	\$99.22	-20.0%	42
USVI	65.0%	60.9%	4.1%	\$196.27	\$195.51	0.4%	\$127.59	\$119.09	7.1%	6
Caribbean	54.7%	56.1%	-1.4%	\$147.45	\$152.21	-3.1%	\$80.71	\$85.42	-5.5%	240

Source: STR.

October YTD 2016	Average Room Occupancy			Average Daily Rate			RevPar			#Hotels in
	2016	2015	% pt change	2016	2015	% change	2016	2015	% change	Sample
Aruba	79.9%	78.1%	1.8%	\$224.83	\$236.67	-5.0%	\$179.56	\$184.89	-2.9%	15
Barbados	66.3%	67.0%	-0.7%	\$276.00	\$275.86	0.1%	\$183.01	\$184.94	-1.0%	33
Cancun	71.1%	73.8%	-2.7%	\$202.82	\$198.65	2.1%	\$144.29	\$146.51	-1.5%	47
Cayman Islands	na	na	na	na	na	na	na	na	na	7
Curacao	68.1%	70.9%	-2.8%	\$146.01	\$151.15	-3.4%	\$99.44	\$107.16	-7.2%	12
Dominican Republic	73.4%	70.5%	2.9%	\$132.96	\$131.16	1.4%	\$97.65	\$92.52	5.5%	29
Jamaica	66.9%	71.1%	-4.2%	\$229.25	\$238.39	-3.8%	\$153.45	\$169.44	-9.4%	11
Puerto Rico	71.2%	75.2%	-4.0%	\$181.81	\$187.54	-3.1%	\$129.38	\$141.04	-8.3%	42
USVI	78.5%	77.0%	1.5%	\$327.87	\$315.70	3.9%	\$257.44	\$243.14	5.9%	6
Caribbean	67.1%	68.5%	-1.4%	\$198.62	\$198.93	-0.2%	\$133.31	\$136.23	-2.1%	240

Source: STR.

Visitors by Carrier.

The table below shows the number of non-resident visitors brought in by various airline carriers during October 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: October 2016					
(Non-resident stopover Arrivals)					
	2016	% share	2015	% share	% change
Laser	4,189	5.5%	22,361	20.5%	-81.3%
American Airlines	12,148	15.9%	11,448	10.5%	6.1%
jetBlue	12,238	16.0%	12,309	11.3%	-0.6%
United Airlines	7,317	9.6%	6,709	6.2%	9.1%
Delta Air Lines	10,197	13.3%	9,371	8.6%	8.8%
Southwest/Air Tran	3,576	4.7%	3,964	3.6%	-9.8%
Insel Air	4,498	5.9%	6,955	6.4%	-35.3%
Avior	175	0.2%	4,384	4.0%	-96.0%
Copa	2,664	3.5%	2,508	2.3%	6.2%
Avianca	1,623	2.1%	2,343	2.1%	-30.7%
Sunwing	908	1.2%	746	0.7%	21.7%
Aruba Airlines	1,188	1.6%	4,774	4.4%	-75.1%
KLM	2,357	3.1%	2,318	2.1%	1.7%
Aserca	2,479	3.2%	3,598	3.3%	-31.1%
WestJet	119	0.2%	569	0.5%	-79.1%
Venezolana	59	0.1%	1,977	1.8%	-97.0%
ArkeFly	1,378	1.8%	1,200	1.1%	14.8%
Thomas Cook	337	0.4%	329	0.3%	0.0%
Air Canada	669	0.9%	494	0.5%	35.4%
GOL	-	0.0%	600	0.6%	-100.0%
Surinam Airways	626	0.8%	451	0.4%	38.8%
Spirit Airlines	703	0.9%	618	0.6%	13.8%
US Airways	-	0.0%	3,715	3.4%	-100.0%
Tiara Air	-	0.0%	300	0.3%	0.0%
Private	684	0.9%	957	0.9%	-28.5%
Charter	2,366	3.1%	1,319	1.2%	79.4%
Other	3,993	5.2%	2,707	2.5%	47.5%
TOTAL	76,491	100.0%	109,024	100.0%	-29.8%

Source: ATA

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Stopovers: By Airline: October 2016 YTD

(Non-resident stopover Arrivals)

	2016 YTD	% share	2015 YTD	% share	% change
Laser	105,185	12.4%	108,815	12.3%	-3.3%
American Airlines	134,996	15.9%	93,195	10.5%	44.9%
jetBlue	117,992	13.9%	111,292	12.5%	6.0%
United Airlines	114,035	13.4%	108,752	12.3%	4.9%
Delta Air Lines	95,775	11.3%	94,380	10.6%	1.5%
Southwest/Air Tran	64,987	7.6%	62,542	7.0%	3.9%
Insel Air	42,240	5.0%	60,428	6.8%	-30.1%
Avior	16,404	1.9%	36,926	4.2%	-55.6%
Copa	26,489	3.1%	25,198	2.8%	5.1%
Avianca	24,147	2.8%	22,665	2.6%	6.5%
Sunwing	12,521	1.5%	13,960	1.6%	-10.3%
Aruba Airlines	20,469	2.4%	27,630	3.1%	-25.9%
KLM	20,417	2.4%	21,087	2.4%	-3.2%
Aserca	23,068	2.7%	31,161	3.5%	-26.0%
WestJet	6,188	0.7%	6,341	0.7%	-2.4%
Venezolana	5,120	0.6%	18,332	2.1%	-72.1%
ArkeFly	11,896	1.4%	12,465	1.4%	-4.6%
Thomas Cook	2,214	0.3%	2,245	0.3%	-1.4%
Air Canada	6,846	0.8%	6,085	0.7%	12.5%
GOL	984	0.1%	6,843	0.8%	-85.6%
Surinam Airways	6,548	0.8%	4,170	0.5%	57.0%
Spirit Airlines	5,230	0.6%	5,425	0.6%	-3.6%
US Airways	-	0.0%	72,322	8.2%	-100.0%
Tiara Air	127	0.0%	479	0.1%	-73.5%
Private	9,068	1.1%	11,113	1.3%	-18.4%
Charter	21,149	2.5%	10,776	1.2%	96.3%
Other	32,195	3.8%	21,535	2.4%	49.5%
TOTAL	926,290	109.0%	996,162	112.3%	-7.0%

Source: ATA

Carriers Used by Venezuelans.

Venezuelan Stopovers: By Airline: October 2016

(Non-resident stopover Arrivals)

	Oct 2016	% share	Oct 2015	% share	% change
US Carriers					
American Airlines	334	3.5%	341	0.8%	-2.1%
Delta Air Lines	81	0.9%	35	0.1%	131.4%
United Airlines	12	0.1%	32	0.1%	-62.5%
US Airways	-	0.0%	14	0.0%	-100.0%
Southwest/Air Tran	47	0.5%	40	0.1%	17.5%
jetBlue	42	0.4%	24	0.1%	75.0%
Spirit Airlines	33	0.4%	15	0.0%	120.0%
Total US Carriers	549	5.8%	501	1.2%	9.6%
Canada					
Air Canada	16	0.2%	1	0.0%	1500.0%
WestJet	7	0.1%	4	0.0%	75.0%
Total Canada	23	0.2%	5	0.0%	360.0%
Europe					
KLM	36	0.4%	37	0.1%	-2.7%
Arke Fly	19	0.2%	3	0.0%	533.3%
Total Europe	55	0.6%	40	0.1%	37.5%
Other Non-Venezuelan					
Copa	35	0.4%	41	0.1%	-14.6%
Surinam Airlines	40	0.4%	11	0.0%	263.6%
Total Other Non Venez	75	0.8%	52	0.1%	44.2%
Total (Non-Aruba/Non Venezuelan)	702	7.5%	598	1.5%	17.4%
Other (Aruban/Venezuelan)	8,710	92.5%	39,789	98.5%	-78.1%
Total	9,412	100.0%	40,387	100.0%	-76.7%

Source: ATA

A portion of Venezuelan business to Aruba in October 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 549 residents of Venezuela (5.8% 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 up by 9.6% compared to October 2015. In total 702 residents of Venezuela (7.5% 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: October 2016

(Non-resident stopover Arrivals)

Carriers	Inbound To Aruba by Carrier Used		
	Total	Venezuelans	%
US Carriers			
American Airlines	12,148	334	2.7%
Delta Air Lines	10,197	81	0.8%
United Airlines	7,317	12	0.2%
US Airways	-	-	0.0%
Southwest/Air Tran	3,576	47	1.3%
jetBlue	12,238	42	0.3%
Spirit Airlines	703	33	4.7%
Total US Carriers	46,179	549	1.2%
Canada			
Air Canada	669	16	2.4%
WestJet	119	7	5.9%
Total Canada	788	23	2.9%
Europe			
KLM	2,357	36	1.5%
Arke Fly	1,378	19	1.4%
Total Europe	3,735	55	1.5%
Other Non-Venezuelan			
Copa	2,664	35	1.3%
Surinam Airlines	626	40	6.4%
Total Other Non Venez	3,290	75	2.3%
Total (Non Aruba/Non Venezuelan)	53,992	702	1.3%
Other (Aruban/Venezuelan)	22,499	8,710	38.7%
Total	76,491	9,412	12.3%

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.

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Thus 2.7% of all non-residents arriving in Aruba on American Airlines in October 2016 were residents of Venezuela and 0.8% of all non-residents arriving in Aruba on Delta Air Lines in October 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%
Jul	1.5%
Aug	4.5%
Sep	8.1%
Oct	2.7%

In October 2016 2.7% 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 October 2016 came in the 0 – 11 years and 20-29 years old categories (down 52.0% and 46.6% respectively).

Age of All Stopover Visitors October 2016

	2016	% share	2015	% share	% change
0 - 11 yrs	3,954	5.2%	8,244	7.6%	-52.0%
12 - 19 yrs	1,940	2.5%	3,144	2.9%	-38.3%
20 - 29 yrs	9,244	12.1%	17,305	15.9%	-46.6%
30 - 39 yrs	13,002	17.0%	23,391	21.5%	-44.4%
40 - 49 yrs	12,466	16.3%	17,489	16.0%	-28.7%
50 - 59 yrs	16,706	21.8%	19,409	17.8%	-13.9%
60 - 69 yrs	13,238	17.3%	14,087	12.9%	-6.0%
70 yrs or more	5,938	7.8%	5,955	5.5%	-0.3%
Not Stated	3	0.0%	-	0.0%	100.0%
Total	76,491	100.0%	109,024	100.0%	-29.8%

Source: ATA

Age of All Stopover Visitors October 2016 YTD

	2016	% share	2015	% share	% change
0 - 11 yrs	76,097	8.2%	86,727	8.7%	-12.3%
12 - 19 yrs	60,246	6.5%	59,290	6.0%	1.6%
20 - 29 yrs	125,420	13.5%	146,749	14.7%	-14.5%
30 - 39 yrs	158,200	17.1%	188,906	19.0%	-16.3%
40 - 49 yrs	162,192	17.5%	170,456	17.1%	-4.8%
50 - 59 yrs	174,461	18.8%	176,598	17.7%	-1.2%
60 - 69 yrs	119,388	12.9%	118,991	11.9%	0.3%
70 yrs or more	50,262	5.4%	48,400	4.9%	3.8%
Not Stated	24	0.0%	45	0.0%	-46.7%
Total	926,290	100.0%	996,162	100.0%	-7.0%

Source: ATA

Age of Visitors from the USA.

The biggest changes in age demographics in October 2016 for visitors from the USA came in the 0 -11 years and 12 – 19 years old categories (down 15.9% and 17.1% respectively) with modest growth (2.7%) in the 60 - 69 years old cohort. There was a 13.7% decline in the number of visitors between 30 – 39 years.

Age of All US Stopover Visitors October 2016

	2016	% share	2015	% share	% change
0 - 11 yrs	1,430	3.2%	1,700	3.6%	-15.9%
12 - 19 yrs	551	1.2%	665	1.4%	-17.1%
20 - 29 yrs	4,639	10.3%	4,871	10.4%	-4.8%
30 - 39 yrs	6,268	13.9%	7,263	15.5%	-13.7%
40 - 49 yrs	6,664	14.8%	7,157	15.3%	-6.9%
50 - 59 yrs	11,087	24.6%	11,054	23.6%	0.3%
60 - 69 yrs	9,850	21.9%	9,594	20.5%	2.7%
70 yrs or more	4,590	10.2%	4,474	9.6%	2.6%
Not Stated	-	0.0%	-	0.0%	100.0%
Total	45,080	100.0%	46,778	100.0%	-3.6%

Source: ATA

Age of All US Stopover Visitors October 2016 YTD

	2016	% share	2015	% share	% change
0 - 11 yrs	34,748	6.6%	35,054	6.8%	-0.9%
12 - 19 yrs	35,999	6.9%	33,857	6.5%	6.3%
20 - 29 yrs	59,291	11.3%	59,804	11.5%	-0.9%
30 - 39 yrs	71,483	13.7%	76,996	14.9%	-7.2%
40 - 49 yrs	90,615	17.3%	88,888	17.2%	1.9%
50 - 59 yrs	111,972	21.4%	108,416	20.9%	3.3%
60 - 69 yrs	83,712	16.0%	81,034	15.6%	3.3%
70 yrs or more	35,611	6.8%	34,053	6.6%	4.6%
Not Stated	16	0.0%	5	0.0%	220.0%
Total	523,448	100.0%	518,107	100.0%	1.0%

Source: ATA

First Time/Repeat Visitors.

In October 2016 41.3% of our visitors reported they were visiting for the first time and 45.6% reported they had visited before. 13.1% 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.

Number of visits to Aruba: October 2016

Number of Times Visited	2016	% share	2015	% share	% change
First Time	31,596	41.3%	47,400	43.5%	-33.3%
2 - 5 times	18,792	24.6%	28,916	26.5%	-35.0%
6 - 9 times	5,699	7.5%	5,992	5.5%	-4.9%
10 or more	10,366	13.6%	10,112	9.3%	2.5%
Not Stated	10,038	13.1%	16,604	15.2%	-39.5%
Total	76,491	100.0%	109,024	100.0%	-29.8%

Source: ATA: Self-reported by visitors

Year to date 2016 42.6% of our visitors reported they were visiting for the first time and 42.7% reported they had visited before. 14.7% of our visitors did not report how many times they visited. Assigning the number who did not report on a *pro rata* basis results in an overall percentage of 49.9% first time and 50.1% repeat.

Number of visits to Aruba: October 2016 YTD

Number of Times Visited	2016	% share	2015	% share	% change
First Time	394,267	42.6%	434,633	43.6%	-9.3%
2 - 5 times	235,037	25.4%	250,563	25.2%	-6.2%
6 - 9 times	61,578	6.6%	61,287	6.2%	0.5%
10 or more	99,338	10.7%	95,400	9.6%	4.1%
Not Stated	136,070	14.7%	154,279	15.5%	-11.8%
Total	926,290	100.0%	996,162	100.0%	-7.0%

Source: ATA: Self-reported by visitors

Trip Advisor Ratings.

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

TripAdvisor Ratings for October 2016

	Number of Reviews
Aruba	5,478
Bahamas	2,385
Cayman	1,988
Curacao	2,217
Puerto Rico	7,710
USVI	3,030

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

Targets for 2016.

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

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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.

	October 2016	October 2015	
as of	10/15/2016	10/15/2015	% change
Euro	\$1.097	\$1.142	-3.9%
UK Pound	\$1.219	\$1.547	-21.2%
Canadian Dollar	\$0.761	\$0.775	-1.8%
Colombian Peso*	2920	2906	-0.5%
Brazilian Real**	3.206	3.843	19.9%

* 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 (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.

SUMMER 2016: TOTAL AIRLIFT (April 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

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

Source: Aruba Airport Authority.

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.