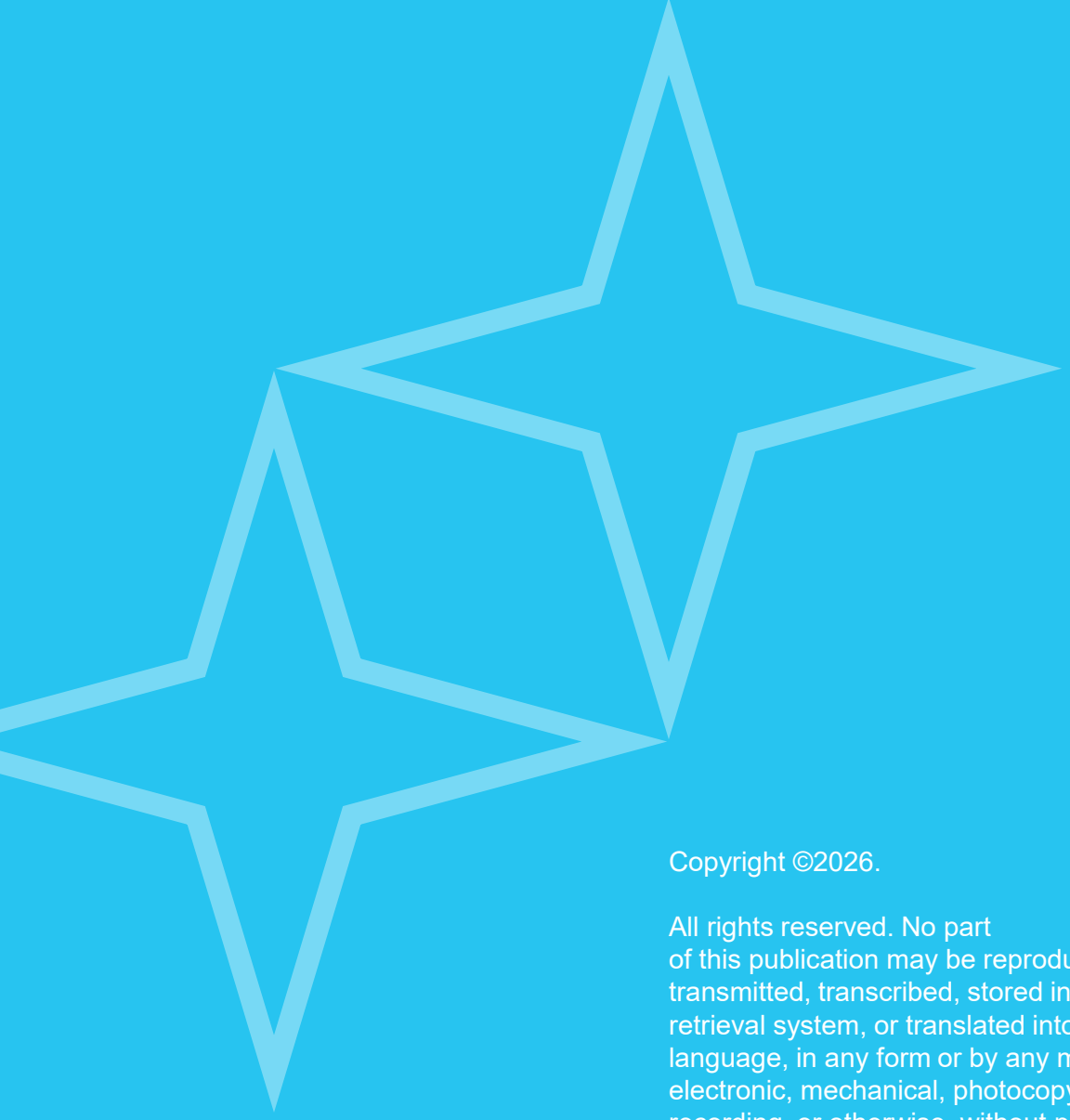




ARUBA TOURISM AUTHORITY

# ANNUAL REPORT 2025





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CHAPTER 1

FROM  
THE  
CEO

## CHAPTER 1

# FROM THE CEO



Aruba's tourism story is more than economic development; it is a reflection of who we are as an island. Following the decline of the oil industry and the emergence of a globally respected destination, Aruba has repeatedly reshaped its future by being resilient, and through strategic governance and collaboration between public and private sector. Tourism has long been central to our prosperity, but today it also demands our true commitment and sense of responsibility.

In recent years, it has become increasingly clear that Aruba has reached the limits of traditional tourism growth. That is why the Aruba Tourism Authority (A.T.A.) has embarked on a deliberate journey of transformation. With the launch of our Multi Annual Corporate Strategy 2025–2035 (MACS), we entered Plateau I of implementation, laying the foundation for a new era that shifts our focus from volume to value, more so than before. This transition reflects a bolder, more integrated approach to tourism development, one that places the protection of our island, the wellbeing of our communities, and the long-term resilience of our economy at the center of decision making.

As part of the implementation of the MACS, the A.T.A. advanced its advocacy agenda in 2025 in support of a responsible, sustainable, and regenerative guest economy. The A.T.A. did a.o. submit its Position Paper in February of 2025, through which it translated its long-term strategic ambition as well as an executive agenda for this year and the next. The document articulates a

shared vision for Aruba's guest economy through 2035, proposes a governance model for integrated destination management, and identifies priority areas for action, including; strengthened tourism governance, improved spatial planning and guest flow management, the protection and maintenance of natural and cultural assets, a deliberate shift toward high value, low impact accommodations, and enhanced coordination across government to safeguard quality of life, place, and experience for both residents and guests.

An important milestone in this journey was the continued evolution of our marketing, promotional, and communication strategy through The Aruba Effect. Grounded in the understanding that responsible tourism is a global imperative, this approach represents a deliberate shift from transactional tourism toward a value-based model. It reframes the guest destination relationship by inviting travelers to engage with Aruba not as consumers, but as respectful guests in someone else's home, a principle captured in the message "When you love Aruba, it loves you back." By setting expectations early and attracting values aligned visitors, the Aruba Effect reinforces our belief that the right visitor mindset is essential to preserving Aruba's cultural identity, ecological integrity, and long-term quality of life.

Throughout the year, A.T.A. also continued to strengthen the quality, safety, and usability of Aruba's public and recreational spaces. Through coordinated improvements across trails, coastal areas, public amenities, and cultural sites, we reinforced long-term stewardship of the island's shared assets while supporting a more balanced and meaningful visitor experience.

As we move away from the traditional metrics that have defined our success in the past, we still need to acknowledge our destination's outstanding performance. In 2025, Aruba delivered consistent and positive tourism results. Aruba welcomed a total of 1,515,102 stay-over guests, marking a 7% increase compared to 2024. North America and Latin America showed strong performance, with North America experiencing a 3.5% rise in stay-over guests and Latin America achieving a 27% increase from the previous year. Europe concluded the year with a 3% increase, a notable accomplishment despite ongoing regional challenges.

In 2025, AHATA member hotels outperformed the average daily rate (ADR) by 12%, with RevPAR increasing by 5% year over year. Short-term vacation rentals recorded a 10.5% revenue growth, despite an 11.5% decline in ADR, supported by higher occupancy (61% vs. 54% in 2024). The share of stay-over guests using alternative accommodations increased from 33% to 35%, while their share of visitor nights rose from 37% to 39%, surpassing the combined share of European Plan and All-Inclusive accommodations (35%).

A.T.A. continues to advocate for a balanced accommodation mix to support Aruba's long-term tourism sustainability. Aruba maintained a high level of visitor satisfaction in 2025, with a monthly average satisfaction score of 9 out of a possible 10. This outstanding rating is a testament to the hard work and dedication of everyone involved in delivering exceptional experiences to our guests. Aruba excelled in overall satisfaction, reflecting our collective commitment to excellence in

hospitality and service.

These economic results continue to demonstrate tourism's role as a key economic pillar; however, they are not to be viewed in isolation, but alongside A.T.A.'s deliberate shift toward value-driven growth, responsible destination management, and long-term societal and environmental balance.

Operationally, A.T.A. delivered several key organizational milestones in 2025, including the timely submission of critical governance documents such as the 2024 Annual Report and the 2026 Corporate Plan and Budget, both of which received the Supervisory Board's and Minister of Tourism's approval respectively.

As we present the 14th Annual Report of the Aruba Tourism Authority, we reflect on 2025 as a pivotal year, one in which we took deliberate steps toward reshaping tourism's role in Aruba's future. While meaningful progress was booked, the road ahead remains complex and requires continued alignment across government, industry, and the community.

Futureproofing Aruba is a shared responsibility. The choices we make today, prioritizing value over volume, managing pressure on high impact areas, attracting the right guests, and reinforcing responsible behavior, will define the Aruba of tomorrow. As the Aruba Tourism Authority, we remain committed to guiding this transition, ensuring that tourism continues to support our economy while protecting our island and its people for generations to come. The choices we make today will define the Aruba of tomorrow.

**Ronella Croes**  
CEO, Aruba Tourism Authority



## A.T.A.'S ADVOCACY AGENDA

In 2025, the A.T.A. advanced its advocacy agenda through targeted stakeholder engagement in support of sustainable tourism, community involvement, and alignment with national policy priorities. A key milestone was the submission of A.T.A.'s Position Paper in February 2025, which was shared during engagements with leaders involved in the formation of the new cabinet. The paper articulates A.T.A.'s long-term vision for Aruba's guest economy through 2035, proposes a governance model for integrated destination management, and identifies priority areas to support the transition toward a responsible, sustainable, and regenerative guest economy.

In parallel, A.T.A. leadership engaged academic, youth, and civic audiences through keynote addresses and presentations at platforms including the University of Aruba, Rotaract, the Curaçao Hotel and Tourism Association (CHATA), CreActivo (Aruba's cultural and creative industries conference), Immigration Aruba, World Tourism Day, Climate Week in New York, at the Dutch premiere of the Turning the Tide documentary, and at the *Genootschap Nederland en Aruba* gathering in the Netherlands. Such engagements –and these are merely a few examples– reinforced shared understanding of A.T.A.'s strategic priorities and its role in long-term destination stewardship.

In its role as Destination Marketing and Management Organization (DMMO), the A.T.A. developed several advisory papers in 2025 to support informed decision-making on tourism policy and destination-management issues. Topics included a proposed moratorium on watersports, potential impacts on U.S. demand linked to Trump Administration decisions (including developments related to Venezuela and changes in U.S. tariffs), beach policy and spatial planning, safety considerations, and the Aruba Happy One Pass (biometric border crossing).

The A.T.A. also played an integral role in CORVI/NCRC initiatives, including meetings and workshops focused on Aruba's Climate Risks, Impacts & Vulnerabilities, and contributed to Aruba 2025: A Nature Inclusive Vision (Wageningen University). In addition, the organization commissioned a global study on Responsible Tourism to better understand how travelers define, value, and act on it; completed a bathymetric study of the waters at Bushiri; and once again prioritized youth engagement through another edition of Voices of Tourism.

Collectively, these advocacy efforts contributed to a pivotal shift in Aruba's tourism discourse - from traditional growth-driven approaches toward a regenerative tourism framework.



# SUSTAINABLE TOURISM PRACTICES

In 2025, A.T.A. reaffirmed its commitment to sustainable tourism by adopting the High-Value, Low-Impact (HVLI) model. This model underpins Aruba's sustainable tourism development and is embedded within A.T.A.'s five strategic pillars, which are part of the newly developed Multi-Annual Corporate Strategy (MACS) 2025–2035.

A key component of MACS development was defining A.T.A.'s Sustainability Ambition, which is intended to inspire, commit, and guide the organization in making choices that prioritize the preservation and enhancement of Aruba's environment, culture, and quality of life.

Sustainable tourism initiatives are embedded throughout A.T.A.'s efforts, including marketing. A.T.A.'s core and corporate commitments were subsequently refined into four sustainability commitments that serve as guiding principles for organizational transformation. These commitments adopt a holistic approach to the value of the guest economy and drive meaningful change. The first three commitments align with the UN SDG framework, balancing environmental, economic, and socio-cultural dimensions to ensure long-term sustainability, recognizing that economic growth must be supported by a socially just, thriving society and a healthy environment. The fourth commitment reflects A.T.A.'s corporate contribution to sustainability.

Throughout this report several key sustainable tourism initiatives that were undertaken in 2025 can be observed, demonstrating A.T.A.'s ongoing dedication to environmental conservation, cultural preservation, and responsible tourism development. These efforts included strategic collaborations with stakeholders such as the Aruba Conservation Foundation (ACF) and CEDE Aruba, alongside other public- and private-sector partners. A.T.A. increased on-island outreach, running awareness campaigns to communicate and encourage positive behaviors among local residents through the Ban Serio campaign.

A.T.A.'s research, advisory work, and advocacy for responsible destination management remained central to its strategy and reinforced its long-term commitment to sustainability.



CHAPTER 2

# SUPERVISORY BOARD

# SUPERVISORY BOARD

The Supervisory Board's primary function is to supervise and confirm that the organization properly performs its core tasks and responsibilities within the legal framework set out in the State Ordinance.

The Supervisory Board is charged with ensuring that the strategic business plan of the organization and the resulting plans of actions and budgets are aimed toward the realization of the Tourism Policy as defined by the Government of Aruba. Additionally, the Supervisory Board is charged

with monitoring the performance of management, being the CEO, and ensuring that the institution's internal control and risk management systems are effective.

The Supervisory Board is part of the system of checks and balances and ensures that decisions reflect the A.T.A. and Aruba's best interests.

## Supervisory board composition and membership

The Supervisory Board members are appointed, as per the State Ordinance, for a period of four years. The A.T.A. has a Supervisory Board consisting of a maximum seven members who are experts in business operations and tourism. As per the regulations applicable to the Supervisory Board, the following applies:



### Francisco Quant

#### Chairman

Date of Birth: December 5th, 1969

First Appointed on: January 1, 2018

End of 2<sup>nd</sup> Term: January 1, 2026

Francisco Quant has more than 20 years of banking experience. As assistant to the Managing Director and as part of the Management Team at Caribbean Mercantile Bank N.V., where Mr. Quant worked for over 17 years, he was in charge of Retail Loans, Credit Card, Insurance and Investment departments of the banks. The affinity with the tourism industry was always present. Mr. Quant served as the General Manager at Tierra del Sol Resort & Golf for nine years. Presently, he operates as a consultant in the industry.



## Gregory Croeze

### Board Member

Date of Birth: February 15, 1977  
 First Appointed on: July 1, 2019  
 End of 2<sup>nd</sup> Term: July 1, 2027

Gregory Croeze is an Aruban born financial director with over 17 years of experience in the financial and healthcare field. After working for 8 years in auditing at Big Four accounting firms, Mr. Croeze decided to switch to the medical field. Mr. Croeze was the CFO at Instituto Medico San Nicolas for more than 8 years and as of April 2020 is a member of the Board of Directors at the Horacio Oduber Hospital. Mr. Croeze's vast experience in the financial field is an added value to the Supervisory Board of A.T.A. Mr. Croeze also has a seat on the Supervisory Board of the Aruba Ports Authority and in the past served as board member and treasurer of the Aruba Excellence Foundation (AEF). Mr. Croeze holds an MBA degree from the University of Central Florida.



## Joe Najjar

### Board Member

Date of Birth: January 18, 1957  
 First Appointed on: January 6, 2020  
 End of 2<sup>nd</sup> Term: January 9, 2028

Joe Najjar has called Aruba home since 1995. With more than 30 years of experience in the hospitality industry, including several years with Marriott and Wyndham properties in the US and later Radisson and Wyndham resorts in Aruba, he is currently leading La Cabana Beach Resort and Casino, a premier Timeshare Resort. In addition to being the current chairman of the board of AHATA, Mr. Najjar has been involved on various Boards and the Community services that La Cabana has embraced over the years. Mr. Najjar continues to focus on enhancing Aruba's Product and its environment to help ensure sustainability for our Tourism industry.



## Tisa LaSorte

### Board Member

Date of Birth: April 9, 1962  
 First Appointed on: September 1, 2021  
 End of 2<sup>nd</sup> Term: March 31, 2029

Tisa LaSorte is an Aruba native whose career started as a TV reporter at TeleAruba, after which she moved to the U.S. where she worked for 20 years in broadcast news management. Upon her return to Aruba, she entered the tourism industry as General Manager of Pelican Tours & Watersports followed by an executive management position at Bucuti & Tara Beach Resort. Tisa is currently President and CEO of the Aruba Hotel and Tourism Association. She also serves as President of Aruba's Social Economic Council, Board Member of the Aruba Trade and Industry Association, and Board Trustee of the University of Aruba.



## Charleson Oduber

### Board Member

Date of Birth: November 19, 1978  
 First Appointed on: September 1, 2022  
 End of Term: September 1, 2026

Charleson G. Oduber is an Aruban-born professional with a broad experience in Aruba's overall economy, and its market dynamics as well as in different legal aspects such as Corporate Governance and Private Law. With over 17 years of work experience at the housing mortgage bank Fundacion Cas pa Comunidad Arubano (FCCA), he holds the position of Deputy Director of Technical & Commercial affairs, since 2018. Mr. Oduber has a bachelor's degree in industrial engineering with commercial affinity, which he obtained at the Technische Hogeschool Rijswijk (TH Rijswijk) in the Netherlands. He also holds a master's degree in Private Law, which he obtained at the University of Aruba. Mr. Oduber has always had an interest in Aruba's tourism industry development.



## Jo-Anne Arends

### Board Member

Date of Birth: May 31, 1979  
 First Appointed on: August 1, 2025  
 End of Term: July 31, 2029

Jo-Anne Arends, Aruban-born, is a Business Development Executive at Aruba Airport Authority (AAA) with over 15 years of experience in the aviation sector. She specializes in developing new business segments and managing a portfolio of more than 25 airline partners, with strong expertise in market planning and the development of innovative, tailored strategies to attract new business, supported by data-driven analysis, marketing strategy, forecasting, and strategic pricing. Over the years, she has built strong relationships with government and industry stakeholders and plays an integral role in Aruba's destination and aviation development strategy. In her role, she serves as a key liaison between AAA and major stakeholders, supporting aviation development and the continued growth of Aruba's tourism sector. Ms. Arends previously served as Chair of the Airlift Committee (since 2011) and is also a member of the World Fuel Air Elite Board Abroad.

## Changes in Supervisory Board composition during the year:

### Gerald Tsu

#### Board Member

First Appointed on: September 1, 2021  
 End of 1st Term: September 30, 2025

### Janien Huistra

#### Board Member

First Appointed on: April 1, 2017  
 End of Term: April 1, 2025



**Based on the State ordinance, the following governance structure was established:**

- Tourism policy and targets set by the Government are the frameworks for decisions and goals of the A.T.A.
- The Budgets and Annual Statements are presented to the Minister of Tourism for approval. Prior to approval, the Minister must make these available for viewing and commenting by Parliament for a period of 10 working days.
- The A.T.A. has Supervisory Board members who are experts in business operations and tourism:
  - Three members are appointed upon the recommendation of the Minister of Tourism;
  - Three members are appointed by the Minister based on the recommendation of the Aruba Hotel and Tourism Association (AHATA) (two candidates are nominated for each of the three seats);
  - One member is appointed based on a recommendation of two candidates brought forward by the six afore mentioned members.
  - The Minister appoints the Chairman of the Supervisory Board from the members.
- The Supervisory Board appoints the CEO

of the A.T.A.

- The Supervisory Board and management meet monthly or every other month, and if necessary, additional meetings are scheduled accordingly. Supervisory Board-only meetings are also scheduled from time to time.
- The Minister of Tourism, the Supervisory Board, and management meet when deemed necessary.

**State Ordinance**

Reporting to Parliament through the Minister of Tourism, A.T.A.'s legislative requirements are outlined in the State Ordinance – “Landsverordening instelling A.T.A. Sui Generis (AB 2011 No 13, AB 2011 No 14 and AB 2015 No 63)”.

**Supervisory Board Attendance**

The Supervisory Board held 17 Supervisory Board meetings during the year. The Supervisory Board had an average attendance of 80.8%. The CEO attended the Supervisory Board meetings and was joined by the CMO and the CFO. Other A.T.A. Executives, and in some instances contracted parties or other stakeholders, did join meetings in line with the agenda set.

Under article 14 of the State Ordinance, Afl. 750 is the compensation granted to each Supervisory Board member per attended meeting

(with a maximum of Afl. 24,000 per year per Supervisory Board member). A total of Afl. 63,000 was paid as compensation to the Supervisory Board in 2025 (maximum overall: Afl. 189,000.00).

review by the independent auditor over calendar year 2025.

## Highlights of topics discussed during the Supervisory Board meetings

Important topics which were discussed during the Supervisory Board meetings did include the presentation and approval of the Annual Report 2024 and the Corporate Plan and Budget 2026, as well as key marketing and destination services projects. In addition, the standard agenda points were discussed, such as the monthly approval of minutes of previous Supervisory Board meeting(s), the approval of purchase orders and agreements, and the revision of the monthly financial report.

### Approval of Purchase Orders

Through the decision to make the tendering rules that apply to the government also applicable for the A.T.A., in instances where these rules grant authority to the Minister of Tourism, they are to be executed by the Supervisory Board. In as far as these rules stipulate that the involvement of the Minister of Finance is required, this involvement is exercised by the Minister of Tourism.

The above-mentioned thus means that the Supervisory Board has to approve a number of purchase requests in line with the tendering rules. As a result, the Supervisory Board did approve 102 Board approval letters.

### External Accountant

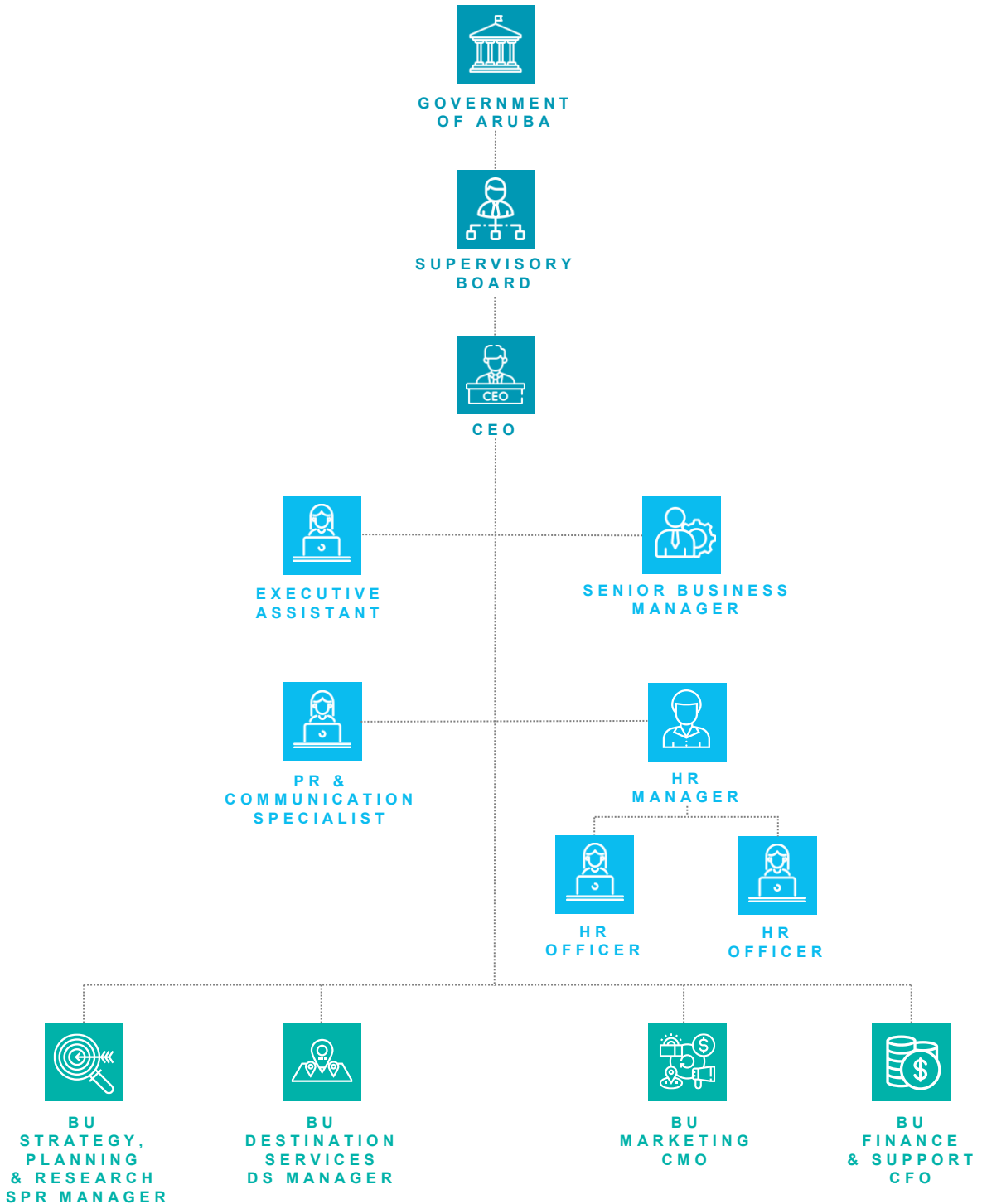
The audit results are an integral part of A.T.A.'s Annual Report 2025 and were conducted by EY partially in 2025 and partially in 2026. The external audit resulted in another positive



CHAPTER 3  
CORPORATE  
PROFILE

The Aruba Tourism Authority (A.T.A.) is the Destination Marketing and Management Organization (DMMO) of Aruba responsible for uniting tourist interests amongst the on- and off-island stakeholders/partners for the purpose of coordinating destination marketing, destination development and destination partnerships.

### A.T.A. Organizational Chart



## Our Aspiration at a Glance

A.T.A.'s Aspiration 2035 form the foundation upon which we will drive the transition from traditional tourism to a responsible and ultimately regenerative guest economy.

### SUSTAINABILITY AMBITION

**Environmental Commitment**

The guest economy restores and nurtures the natural environment of Aruba

**Social Commitment**

The guest economy enriches our values, culture and heritage and makes people flourish through jobs, knowledge exchange, and well-being

**Economic Commitment**

The guest economy thrives and grows incremental value to the Aruban economy and its assets

**Sustainable Destination Management Organization**

Exemplary in ESG Sustainability

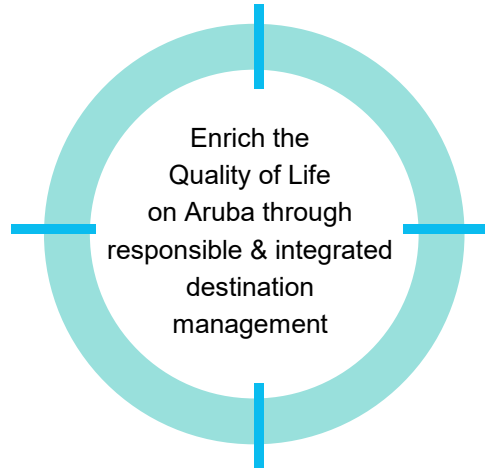
### VISION



**Un Aruba dushi pa biba  
ta un Aruba dushi pa bishita**

*Aruba as a wonderful place  
to live is a wonderful place to visit*

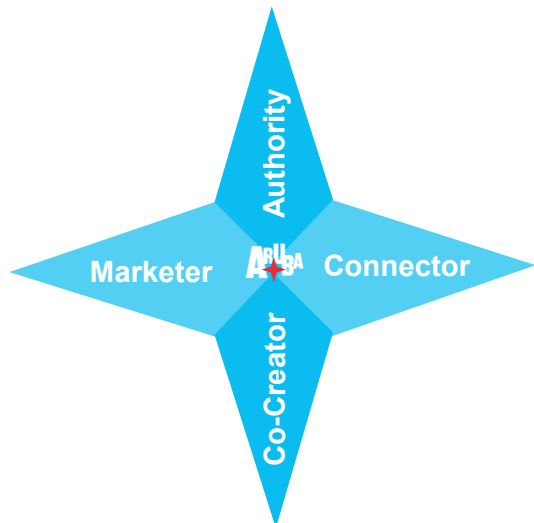
### CORE PURPOSE



### CORE VALUES



### ROLES



## Our Strategic Objectives

20 strategic objectives define our focus across the five strategic pillars, ensuring a comprehensive and forward-looking approach to driving the transition of our guest economy.

<p>I.</p> <p><b>QUALITY OF LIFE &amp; PLACE</b></p>	<p>II.</p> <p><b>QUALITY OF EXPERIENCE</b></p>	<p>III.</p> <p><b>QUALITY OF ECONOMIC IMPACT</b></p>
<p><b>1.1 Manage guest economy impact</b> Enhance insights in efforts and impact to manage the guest economy and livability to an effective balance</p>	<p><b>2.1 Develop niches</b> Systematic development of and alignment around niches for sustainable long-term development of our island</p>	<p><b>3.1 Strengthen brand identity</b> Foster an inspirational, life-changing, and regenerative experience that leaves a lasting impression on both guests and the local community</p>
<p><b>1.2 Invest in destination safety</b> Safeguard the safety of guests and residents</p>	<p><b>2.2 Enable and support Delivery of diverse Quality experiences for everyone</b> Stimulate and facilitate delivery of diverse and authentic quality experiences and services aligned to the Aruba brand and niches to appeal to high-value guests and residents</p>	<p><b>3.2 Innovate marketing communication</b> Advance shareable and scalable marketing communication and impact through digital excellence</p>
<p><b>1.3 Placemaking</b> Enhance and reinvent functionality and aesthetics of destination public spaces to enrich residents and guests</p>	<p><b>2.3 Enhance on-island communication</b> Stimulate and facilitate delivery of diverse, unique and authentic quality experiences and services aligned to the Aruba brand and niches to appeal to high-value guests and residents in equal measure</p>	<p><b>3.3 Strengthen high value portfolio</b> Target high-value guest segments from a balanced mix of source markets, emphasizing value over volume</p>
<p><b>1.4 Improve guest flow management</b> Optimize the flow of guests, reducing congestion and minimizing environmental impacts</p>	<p><b>2.4 Drive exceptional service quality</b> Stimulate the service quality improvement in the hospitality and services sector to provide more personalized and attentive services true to our unique Aruban hospitality which sets us apart from other destinations</p>	<p><b>3.4 Improve industry capabilities</b> Elevate capabilities and skills to support a sustainable and competitive guest economy</p>
<p><b>1.5 Oversee current and future accommodations</b> Optimize the flow of guests, reducing congestion and minimizing environmental impacts</p>		

**IV.  
QUALITY  
OF NATURAL ENVIRONMENT  
& CULTURAL HERITAGE**

**4.1**

**Promote ecological and social Responsible behavior**

Take co-leadership role in educating and engaging the local community, guest industry, marketing service providers, event organizations and guests on ecological and social responsible behavior

**4.2**

**Facilitate environmental Conservation & regeneration**

Fulfill an active role in the development and deployment of policies and plans on environmental conservation and regeneration through advocacy, advisory, co-creation and support

**4.3**

**Facilitate cultural heritage conservation**

Fulfill an active role in the development and deployment of policies and plans on cultural heritage conservation through advocacy, advisory, co-creation and support

**V.  
QUALITY  
OF ORGANIZATION**

**5.1**

**Strengthen organizational outreach**

Fortify our capabilities to influence and align around shaping the direction of our guest economy through active outreach

**5.2**

**Achieve organizational excellence in esg**

Enhance organizational resilience long-term value creation and reputation by integrating ESG (Environmental, Social, and Governance) principles into our business operations, culture, oversight, and decision-making.

**5.3**

**Enhance organizational capabilities**

Improve organizational focus and efficiency to enable effective integrated destination management

**5.4**

**Nurture employee experience**

Cultivate a work environment that fosters empowerment, ownership and a sense of engagement, well-being and growth



CHAPTER 4

# ARUBA TOURISM INDUSTRY







# KEY TOURISM PERFORMANCE INDICATORS

We measure our progress using a set of MACS Key Indicators aligned with each strategic pillar. These indicators track both industry-wide outcomes, which rely on collective efforts, and internal performance metrics specific to the Destination Marketing and Management Organization (DMMO). Together, these Key Indicators provide a transparent view of how our collective tourism efforts drive the destination’s success and guide us toward a regenerative guest economy that sustains and enriches Aruba’s environment, culture, and community. While we play a critical role in overseeing progress, we do not bear sole accountability for outcomes that require collaboration among multiple stakeholders.

The indicators presented in this section reflect economic performance measures, providing insight into tourism’s contribution to Aruba’s economy and overall destination performance.

## Key Tourism Performance Indicators (2023-2025)

The table presents year-over-year percentage changes in key tourism performance indicators, including initial 2025 projections as set out in the A.T.A. Corporate Plan (2025).

	Year-over-Year % Change	2023 Actual	2024 Actual	2025 Projection	2025 Actual
	Tourism Receipts	14%	12%	3%	8%
	Stay-over Guest Arrivals	14%	13%	1%	7%
	Hotel Performance RevPAR	15%	12%	4%	5%
	Cruise Visitor Arrivals	23%	20%	1%	8%

*Note: In addition to these Key Indicators, the A.T.A. tracks multiple KPIs internally covering various objectives and tactics, reflective of the accountability and performance of our team members and engaged partners.*

### Tourism Receipts 2015-2025

#### ESTIMATED FINAL 2025

vs 2025 Projection: +3%

vs 2024: +8%

Tourism receipts, which encompasses the total on-island expenditures during the trip, recovered consistently. The estimated final for the full year 2025 is AFL. 5.6 billion, an 8% growth in comparison to 2024.

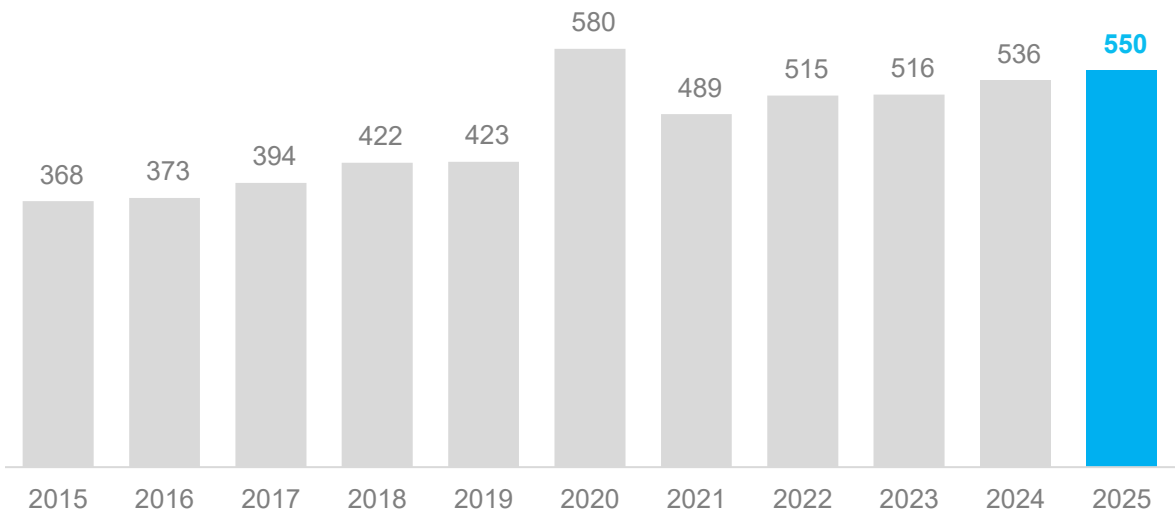


Source: CBA  
2025 is Estimated Final

### Average Daily Tourist Spending (ADTS) 2015-2025

vs 2024: +3%

In the past three years, the average daily tourist spending (ADTS) has steadily increased, with a visitor spending of an average of AFL. 550 per day in 2025, which is a 3% growth compared to 2024.



Source: CBA/A.T.A.

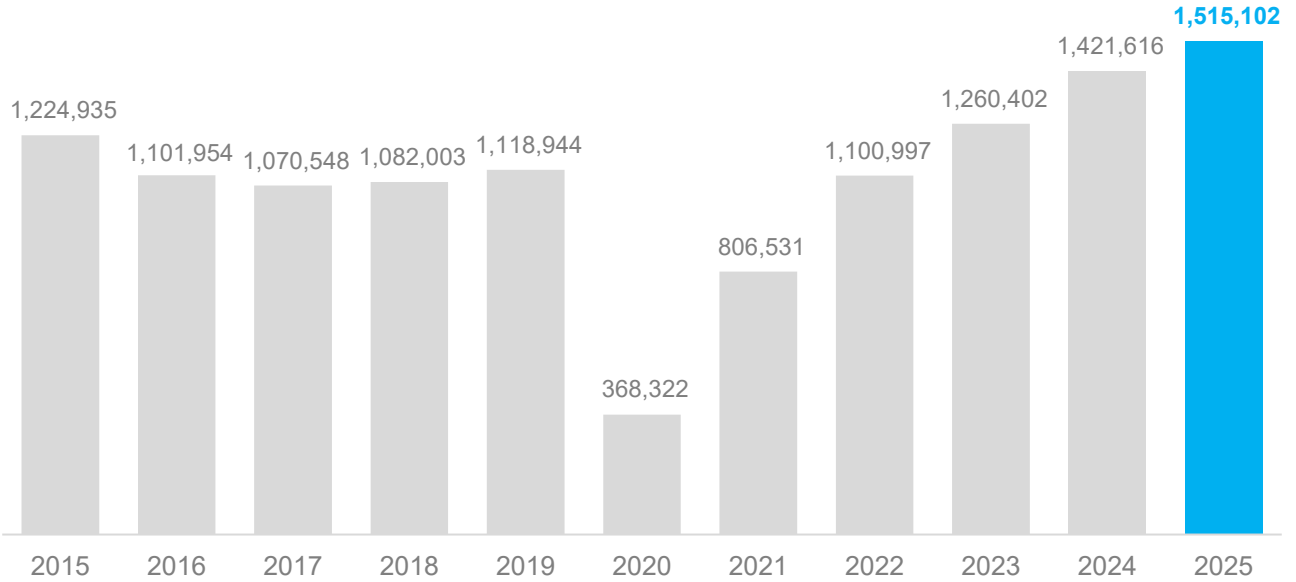
### Stay-Over Guest Arrivals

**ACTUAL 2025**

vs 2025 Projection: +1%

vs 2024: +7%

Aruba closed 2025 with a growth of 7% in stay-over guest arrivals compared to the 2024.



## Stay-over Guest Arrivals 2024-2025

In 2025, the market share of stay-over visitor arrivals by region was dominated by North America at 78%, followed by Latin America at 14%, and Europe at 5%.

	ACTUAL 2024	PROJECTION 2025	ACTUAL 2025	MARKET SHARE 2025	VARIANCE A2025 VS A2024 %
<b>NORTH AMERICA</b>					
USA	1,062,610	1,080,000	1,092,842		3%
Canada	70,852	69,000	80,013		13%
<b>TOTAL</b>	<b>1,133,462</b>	<b>1,149,000</b>	<b>1,172,855</b>	<b>78%</b>	<b>3%</b>
<b>LATIN AMERICA</b>					
Colombia	65,572	59,900	60,856		-7%
Argentina	27,416	28,900	69,743		154%
Brazil	17,359	25,900	28,761		66%
Chile	14,187	16,700	12,601		-11%
Peru	19,798	23,100	19,272		-3%
Ecuador	11,250	11,300	9,930		-12%
Other LATAM (incl. Venezuela)	26,766	19,200	30,776		15%
<b>TOTAL</b>	<b>182,348</b>	<b>185,000</b>	<b>231,939</b>	<b>14%</b>	<b>27%</b>
<b>EUROPE</b>					
The Netherlands	35,713	41,600	36,593		2%
UK	7,490	7,300	4,852		-35%
Italy	6,483	7,700	6,892		6%
Sweden	902	1,500	1,118		24%
German Speaking Markets	7,176	10,200	7,848		9%
Belgium	1,569	2,100	1,748		11%
Other Europe	10,007	11,100	12,180		22%
<b>TOTAL</b>	<b>69,340</b>	<b>81,500</b>	<b>71,231</b>	<b>5%</b>	<b>3%</b>
<b>REST OF THE WORLD</b>					
<b>TOTAL</b>	<b>36,466</b>	<b>35,000</b>	<b>39,077</b>	<b>3%</b>	<b>7%</b>
<b>TOTAL</b>	<b>1,421,616</b>	<b>1,450,500</b>	<b>1,515,102</b>	<b>100%</b>	<b>6.6%</b>

Notes:

Targets are A.T.A.'s internal performance metrics

Projections are industry-wide outcomes, greatly reliant on collective efforts

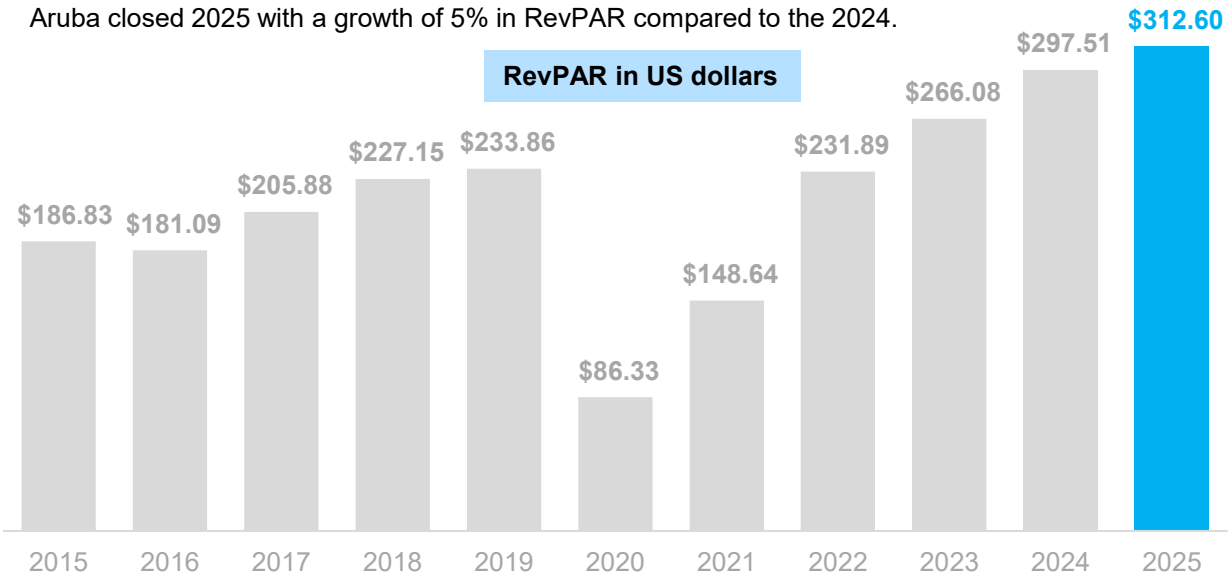
### Hotel Performance 2015-2025 | Revenue Per Available Room (RevPAR)

**RESULTS 2025**

vs 2025 Projection: +4%

vs 2024: +5%

Aruba closed 2025 with a growth of 5% in RevPAR compared to the 2024.



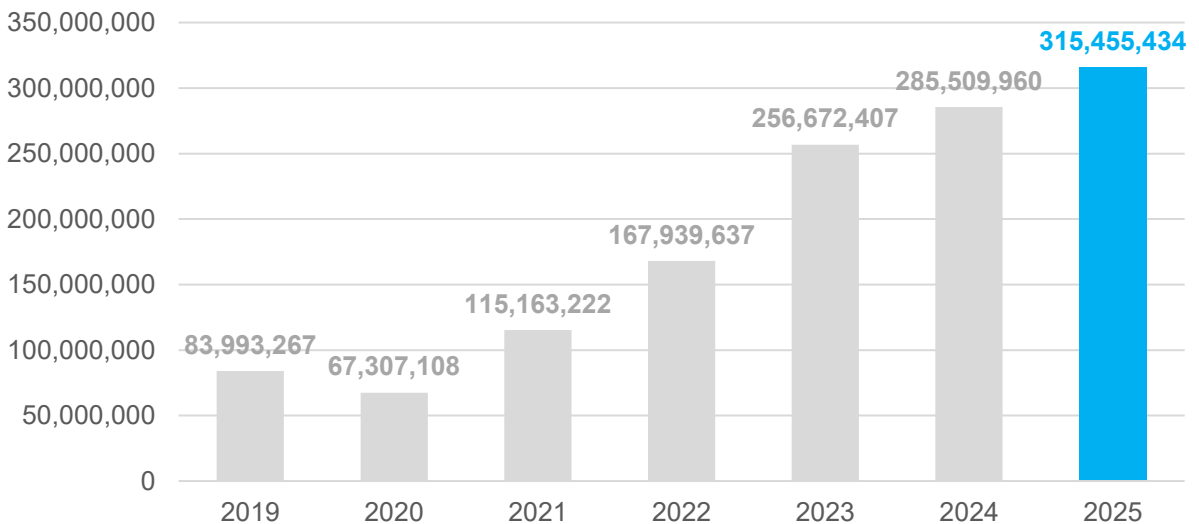
Source: Aruba Hotel & Tourism Association (AHATA)

### Short-term Vacation Rentals (STVR) 2019-2025 | Revenue

**RESULTS 2025**

vs 2024: +10.5%

STVR revenues increased by approximately 10.5% in 2025 compared to 2024, alongside a rise in the share of stay-over guests using alternative accommodations from 33% to 35% and in their share of visitor nights from 37% to 39%, exceeding the combined 35% share of European Plan and All-Inclusive accommodations.



Source: A.T.A.

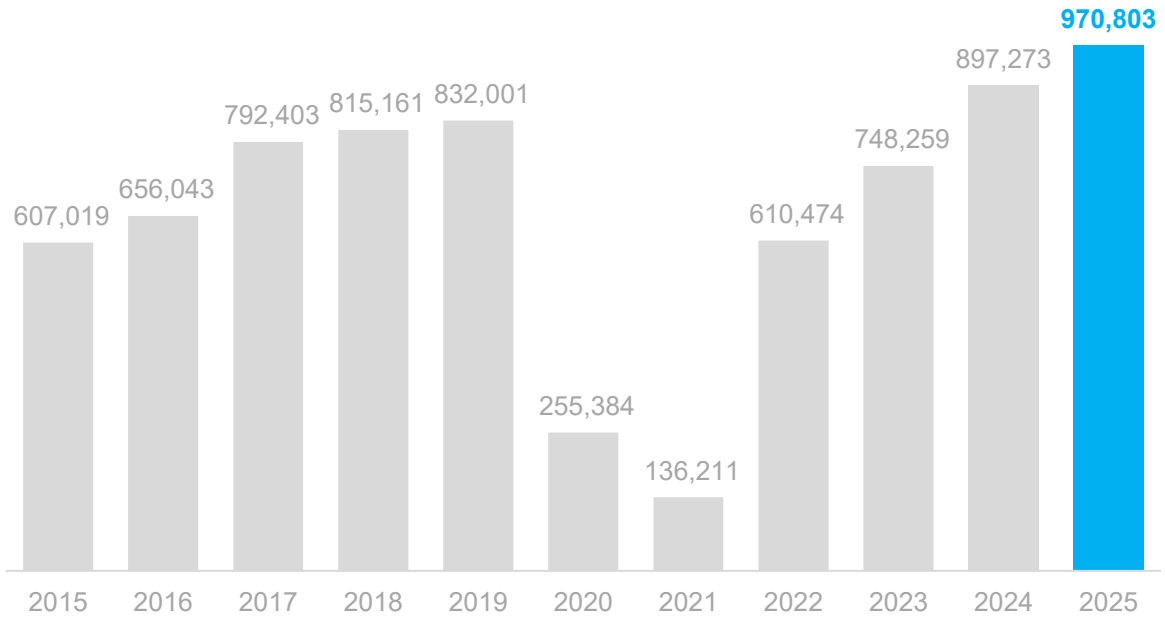
### Cruise Visitors Arrivals 2011-2025

#### RESULTS 2025

vs 2025 Projection: +1%

vs 2024: +8%

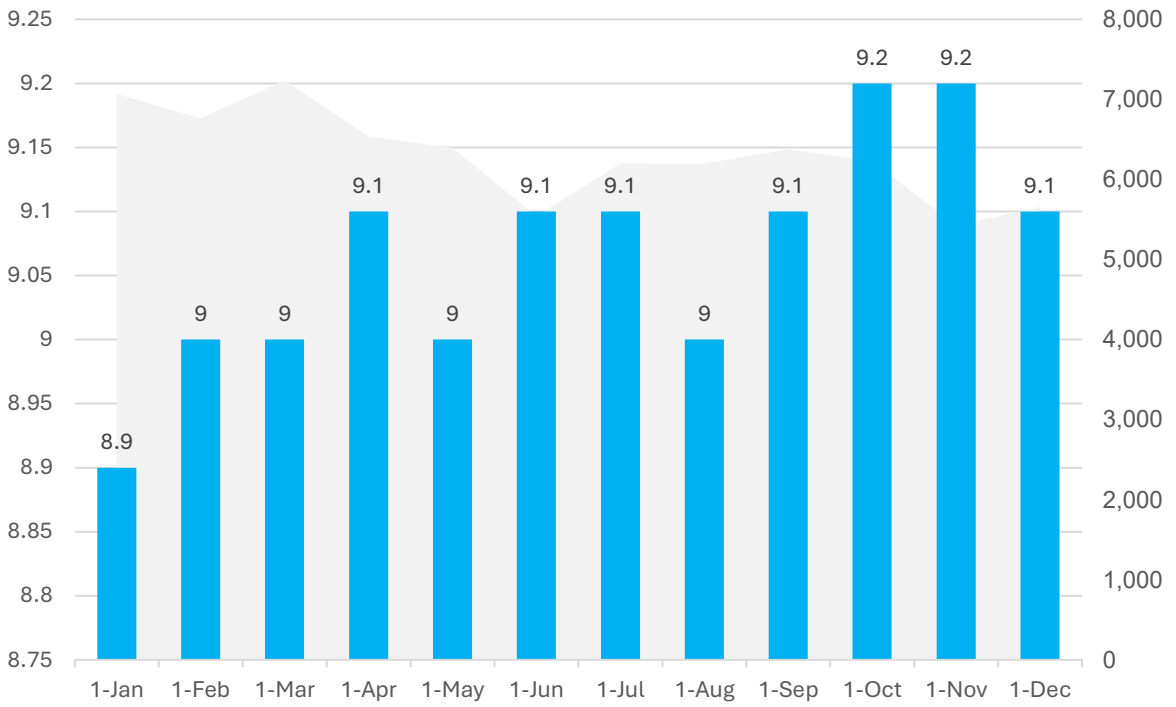
Last year recorded 376 calls versus 347 calls in 2024, and a total of 970,803 cruise visitor arrivals, which is an increase of 8% when compared to 2024.



Source: Aruba Port Authority (APA)

## Visitor Satisfaction

Regarding visitor satisfaction, Aruba maintained an impressive record in 2025, boasting a monthly average satisfaction score of 9 out of 10. This score highlights Aruba's success in providing a overall gratifying experience for its visitors, contributing to the positive trajectory of the tourism industry.



Source: A.T.A.



CHAPTER 5

DESTINATION  
SERVICES &  
EXPERIENCES

# DESTINATION SERVICES & EXPERIENCES



## I. QUALITY OF LIFE & PLACE

In 2025, through A.T.A.'s Product Development efforts, the entity strengthened the quality, safety, and overall usability of Aruba's public recreational spaces through coordinated improvements across trail systems, coastal areas, public amenities, and cultural sites. Maintenance and refurbishment efforts supported environmental protection, accessibility, and visitor comfort, while new cultural and identity-focused enhancements contributed to more meaningful and respectful guest interactions with key locations. These combined actions reinforced the island's long-term stewardship of its natural and recreational assets and supported a balanced, sustainable visitor experience throughout the year.

### Public Spaces, Recreation & Environmental Management

#### Trail Network Maintenance & Equestrian Route Development

Emphasis on Product Development entailed continued structured maintenance of the Aruba Happy Trails mountain-bike network and advanced research for sustainable equestrian trail routes.

At Ayo Rock Formations, new (walking) trail signage was installed to improve safety and highlight the area's cultural history, contributing to a more accessible and environmentally responsible trail system.

#### Maintenance of Designated Coastal and Public Infrastructure

Throughout 2025, maintenance activities included servicing swimming buoys with structured anchoring, supporting coastal sand cleaning, and performing cleaning and upkeep of A.T.A.-managed street and beach signage. Repairs and landscaping were completed at the Plaza Turismo / Ike Cohen Monument area. The recycling program for plastic, metal, and glass continued operating across nine locations, ensuring consistent public access and responsible waste-disposal options.

#### Site Enhancements & Visitor Comfort Improvements

Major upgrades at Rodgers Beach included a redesigned parking area, a dedicated pedestrian walkway, and new disability-accessible parking spaces. These enhancements prevent motorized vehicles from entering the beach zone, protect the shoreline from degradation, and create a safer, more organized environment for visitors.

#### Refurbishment of Visitor Amenities

Visitor comfort improvements took place across several key coastal locations:

- At **Mangel Halto**, palapas and benches were renewed, reduced in number, and relocated to



protect native vegetation, support regeneration, and reduce debris reaching the sea.

- At **Rodgers Beach**, new palapas were placed further inland to preserve beach width and maintain safe visitor use.
- At **Boca Catalina**, existing benches were refurbished to improve safety and comfort for users.

#### Cultural Signage & Site Identity Improvements

A.T.A. installed additional honoree plaques at Plaza Turismo to recognize individuals who have significantly contributed to Aruba's tourism industry. Additionally, a section of beach was formally dedicated to multiple world-champion windsurfer Sarah Quita Offringa, supported by a uniquely designed identification sign. Also, traffic signage improvements at Alto Vista Chapel were supported to encourage respectful visitor entry and better organize movement around this historic site.

#### Destination Enhancement

##### Local Awareness & Community Engagement

Responsible tourism communication and community-aligned engagement remained central to experience quality in 2025. Through the Ban Serio program, A.T.A. delivered more than 25 on-island activations supported by over 50 multimedia and visual assets, fostering destination pride, respectful guest behavior, and resident–visitor harmony.

The program reached an estimated 100,000 residents and regional visitors, with the BanSerio Scavenger Hunt receiving the **People's Choice Award** at the X. Awards by the Digital Tourism Think Tank (DTTT). These efforts helped shape a more informed, respectful, and welcoming on-island environment, alongside A.T.A. Corporate Communication efforts.

##### Stewardship & Community Engagement

Stewardship efforts were supported through data and technological applications. A.T.A. expanded the deployment of smart sensors at key tourist sites to monitor visitor flow and reduce congestion, enabling more informed protection of natural and cultural spaces. These systems provide real-time occupancy insights that will help guide visitor behavior and improve carrying capacity management.

A.T.A. strengthened cross-sector collaboration to support sustainable destination management, including a national Memorandum of Understanding with the Government of Aruba and key sector partners (e.g., AHATA, ACF, APA, AUA Airport Authority, Realtors, and Vacation Rental associations) to advance joint initiatives on Aruba's sustainable tourism pathway.

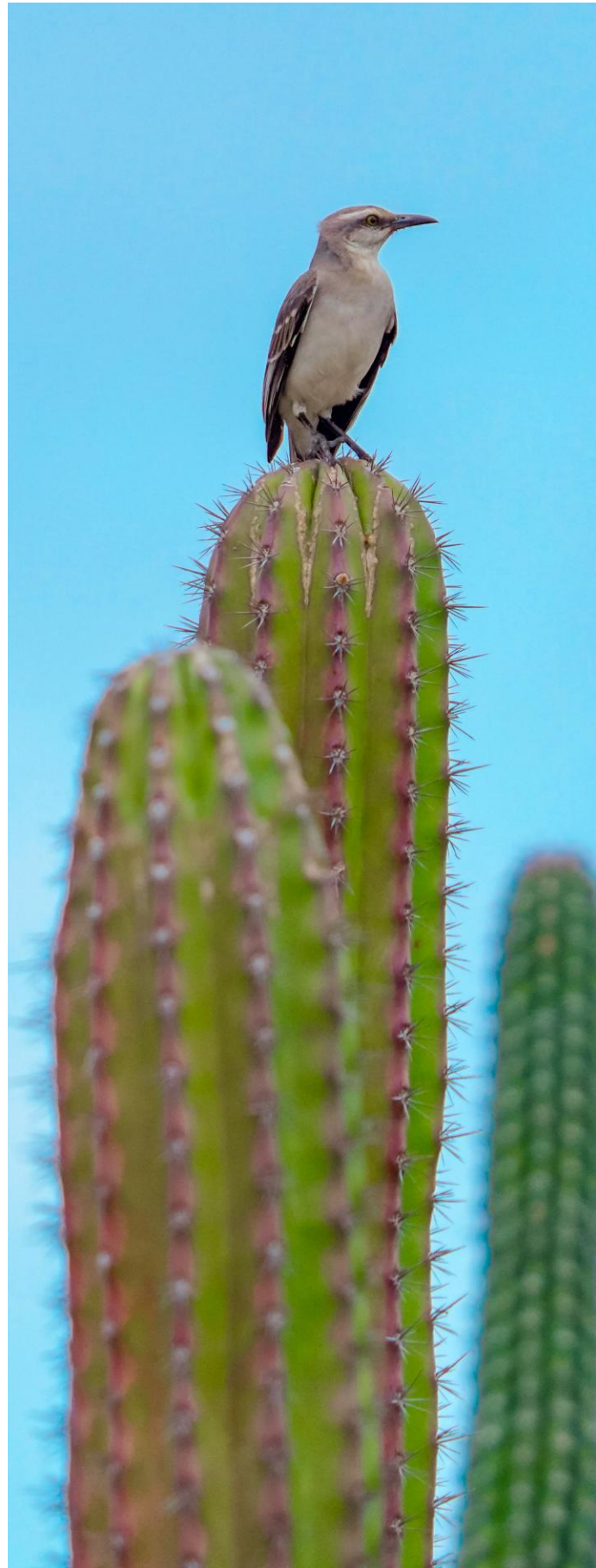
Partnerships with CEDE Aruba, educational institutions, the Aruba Excellence Foundation, GO Cultura Foundation, and other community stakeholders helped maintain focus on culture, youth development, and safety.

A.T.A. also supported community-led initiatives through partnerships with CEDE Aruba, including Vibracion Cultural programming and events such as Celebracion Dia di Brazil, helping preserve and foster local culture for residents and guests. Collaboration with educational institutions (Colegio EPI, EPB Aruba, and the University of Aruba), the Aruba Excellence Foundation, and Comite Olimpico Arubano expanded opportunities for talent readiness and community development. In addition, support for NGOs such as Stimami Sterilisami and its spay-and-neuter campaign helped address stray-pet overpopulation and promote healthier communities.

Together with cruise partners and stakeholders, several community-centered initiatives were organized. Activities included a school visit where children received Christmas gifts, as well as providing a group of youth with a special onboard cruise experience during the school vacation period. Additionally, an onboard sustainability tour was organized to raise awareness of environmental best-practices within the cruise industry. These initiatives reinforced the connection between cruise tourism and community well-being while promoting responsible and inclusive destination development.

### Tourism Impact Model

The A.T.A. leveraged the Tourism Impact Model, which quantifies tourism's economic return alongside its environmental and social costs, such as waste generation, water and energy use, housing needs, and infrastructure stress.





## II. QUALITY OF EXPERIENCE

In 2025, A.T.A. strengthened Aruba’s quality of experience through culinary and cultural programming, events and sponsorship support, on-island visitor services, and responsible-tourism communication.

### Culinary Experience Development

The **Autentico Aruba Culinary Festival** continued to elevate Aruba’s culinary identity as a destination-defining experience, blending gastronomy with local storytelling and skills development. The program brought together a Culinary Pavilion, cooking and mixology classes, a culinary heritage wall, a street-painting installation, live music, and international chef collaborations—creating a high-quality, immersive platform for residents and visitors alike. Supporting initiatives such as Bucket List Experiences and Restaurant Week expanded the festival’s reach and reinforced Aruba’s positioning as an emerging Caribbean culinary destination. Combined with the involvement of international chefs, media coverage, and international content creators, the festival strengthened Aruba’s visibility and reinforced its developing culinary identity in line with A.T.A.’s long-term niche development strategy.

Major updates across Autentico.aw, the myAruba app, the AI assistant, and eCRM were conducted. Additionally, AI Assistance was made available on Autentico.com, further enhancing guest support. Autentico’s digital ecosystem also expanded

significantly in 2025, with sessions up **44%** and page views up **52%** year over year, while newsletter signups increased **241%**, strengthening the festival’s ability to reach and re-engage audiences around Aruba’s culinary experiences; a slight decline in average engagement time per session (–7%) likely reflects broader reach to new audiences and more goal-oriented visits by returning users seeking updated information.

### AUTENTICO 2025 KEY RESULTS

3,351 attendees; 47 vendors; 25 participating restaurants; 82 PR placements; 296 creator posts; and an estimated USD \$3.4M in PR value.



### Culinary workshops and seminars

Education remained essential, with more than 175 culinary students participating in a seminar led by industry experts - including executive chefs, bread and wine sommeliers, alumni, and local producers - and assisting with festival operations, giving them practical, event-based experience.

More than 200 students from EPB and EPI participated in curated Culinary Experience Days that included visits to local distilleries, high-end restaurants, bakeries, and producers. These sessions exposed students to production processes, service quality standards, menu creation, and local sourcing, helping strengthen the pipeline of future culinary professionals.

In addition, the A.T.A. supported EPB Oranjestad and EPB San Nicolas in operating student-led culinary booths during the Autentico Food Festival, hereby expanding the experiential learning even further. Both booths sold out on both nights, demonstrating the growing capabilities of Aruba's emerging culinary talent and reinforcing connections between education and industry.

### Experience Standards, Capacity Building & Partner Alignment

#### Aruba Signature Experiences – Collaboration with Qredits Aruba

A three-year agreement was signed with Qredits Aruba to continue the joint development of Aruba Signature Experiences (ASE). This collaboration supports the creation of high-value, low-impact experiences and reinforces our commitment to nurturing small businesses through capacity building - coaching, training, and advisory support - so micro and small businesses can refine, launch, and scale sustainable, niche-aligned, market-ready visitor offerings.

### Events & Sponsorship

The A.T.A. advanced a more curated events and sponsorship portfolio aligned with its high-value, low-impact tourism strategy. Support prioritized cultural, sports/wellness, lifestyle, and knowledge-based initiatives that strengthen the visitor experience and community engagement. Work also progressed on sponsorship governance through clearer guidelines and evaluation criteria, stronger branding expectations, and early integration of sustainability considerations.

#### International sports tourism events

The A.T.A. supported high-profile sports events that drive high-value visitation, repeat travel, and international exposure. In 2025, this included some ongoing multi-year agreements that strengthen continuity and long-term planning.

- Aruba Beach Tennis (2025–2027)
- Aruba KLM Marathon (2026–2028)
- Comite Olimpico Arubano (2026)

#### On-Island Services & Navigation

The Visitor Information Center (VIC) located in San Nicolas, overseen by the A.T.A. served more than 7,450 visitors, providing high-quality visitor services and operational efficiency.

Collectively, these Pillar II initiatives, from culinary and cultural programming to curated events, strengthened the quality of Aruba's visitor experience; additional niche efforts in international source markets are addressed under Strategic Pillar III.



## IV. QUALITY OF NATURAL ENVIRONMENT & CULTURAL HERITAGE

In 2025, A.T.A. advanced Aruba’s natural environment and cultural heritage priorities through cultural programming, industry stewardship engagement, and the integration of responsible tourism practices and messaging across key visitor touchpoints.

### **Aruba.com:** **Shift Towards Responsible Tourism**

Aruba.com communications were aligned with responsible tourism values and long term destination strategy, promoting respectful guest behavior while supporting sustainable growth through consistent, intentional messaging. More than 500 pages were reviewed and updated—refining tone of voice, removing imagery and terminology misaligned with destination values, and consistently referring to visitors as guests to reinforce Aruba as a place to be respected and experienced with care.

The “Protect It” pillar of the Aruba Effect was featured more prominently in 2025. Campaign expressions were deployed internationally and on island, and A.T.A. began working with airline partners to include responsible tourism messaging in pre arrival announcements.

### **Sustainable Practices & Responsible Messaging**

The Aruba Convention Bureau (ACB) embedded sustainability into the island’s MICE approach. The team implemented sustainable event-planning guidelines, strengthened collaboration

with hotels and DMCs to support responsible tourism, and conducted sustainability surveys with partners to inform continuous improvement. Eco conscious practices were integrated into hosted events and familiarization trips (FAMs), supported by training and education for industry partners on sustainability best practices. Responsible-tourism messaging was also incorporated across digital campaigns, reflected in tradeshow branding, and included in on-island FAM materials to reinforce consistent expectations and stewardship minded behavior.

### **Industry Sustainability Training & Engagement**

The Cruise Department delivered targeted training sessions and organized an onboard sustainability tour to strengthen awareness of environmental best-practices across the cruise industry. These initiatives aligned port partners and tourism stakeholders with evolving cruise standards, sustainability expectations, and service excellence, contributing to improved coordination and more consistent guest experience. Approximately 25 industry stakeholders participated in the field visit, and more than 80 front-line staff attended the training sessions.

### **Global Study Responsible Tourism**

All efforts were supplemented by a newly commissioned global study by the A.T.A. on Responsible Tourism (7,000 respondents),

mainstream: 96% of global travelers consider it important, 74% are concerned about climate threats to islands, and 73% want to make a positive impact but lack guidance. These findings strengthened A.T.A.'s resolve to make responsible choices simpler for guests, embedding guidance into storytelling, content, and visitor touchpoints.

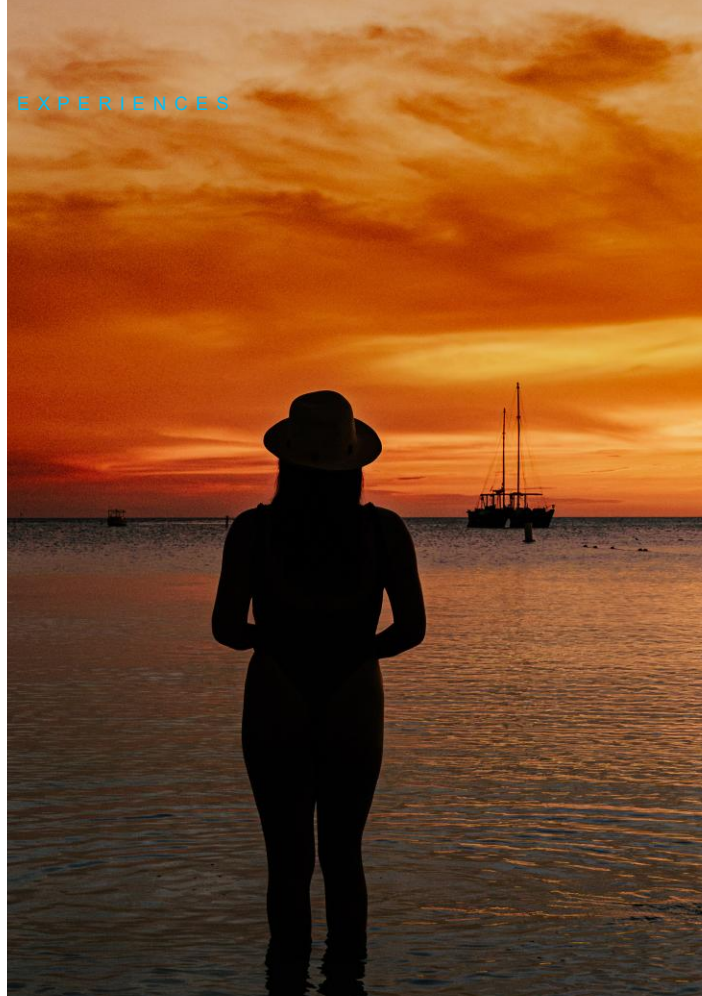
### Cultural & Creative Experience

Cultural and creative programming strengthened Aruba's authenticity and year round vibrancy for residents and guests, supported by a diverse portfolio of initiatives designed to deepen cultural engagement and enrich the destination experience.

Key activations included the revitalization of Asambeho Carnaval, expanded programming for World Tourism Month and year end celebrations, and increased youth participation through the Youth Art Fair component of Aruba Art Week, strengthening intergenerational engagement and creating more opportunities for meaningful cultural immersion.

Internationally, Aruba debuted its first national booth at RedDot Miami, representing ten local artists in collaboration with ArtisA Gallery (PURE Foundation). The booth received the Best Booth Design Award among more than 70 international galleries, elevating Aruba's creative profile and strengthening the cultural dimension of the visitor experience.

Across the year, A.T.A. supported a broad cultural and creative portfolio, including Dia di Brazil, Aruba Art Week, Youth Art Fair, Parada Nacional di Dande, CreActivo Conference, Poetry Nights, and BanKeiro & BanDande cu Zjeitu, hereby engaging more than 150 vendors and partners and contributing to a vibrant, accessible cultural landscape for both residents and guests.



### Cross Pillar Contributions to Stewardship

Destination stewardship also advanced through formalized collaboration with environmental and heritage partners. Through the national MOU and ongoing coordination with organizations such as the Aruba Conservation Foundation and other sector stakeholders, A.T.A. reinforced joint action to protect natural areas and cultural sites, strengthen shared standards, and support long-term conservation outcomes alongside responsible visitor management.

Efforts delivered under Strategic Pillar I- including the recycling program, coastal sand cleaning, native vegetation protection at Mangel Halto, Rodgers Beach access controls, and environmental and heritage wayfinding signage, also support Strategic Pillar IV outcomes by strengthening environmental stewardship, responsible visitor management, and long term conservation results.



CHAPTER 6

MARKETING &  
PROMOTIONS



# MARKETING & PROMOTIONS



## III. QUALITY OF ECONOMIC IMPACT

Aruba advanced the quality of its economic impact by prioritizing higher value visitation, strengthening brand alignment across markets, and deepening responsible tourism storytelling through the unified Aruba Effect platform—grounded in a simple promise: “When you love Aruba, it loves you back.”

Complementing leisure markets, the MICE and cruise sectors added meaningful economic contribution through high value group business, strengthened industry partnerships, and improved service readiness across the visitor economy.

### Leisure Market Performance

In 2025, A.T.A. focused on strengthening Aruba’s position among high-value leisure travelers through a globally aligned brand and communications framework. Central to this approach was the evolution of the Aruba Effect into a unified platform across all regions, emphasizing emotional connection, reciprocity, and responsible tourism.

The Aruba Effect was operationalized across Aruba.com and activated across other owned channels such as e-mail marketing, myAruba assist and and blogs, translating the global brand platform into a consistent and scalable digital experience that reinforced storytelling, engagement, and responsible tourism principles.

This structure provided clear strategic direction while allowing regional teams to adapt execution to local market dynamics.

Digital channels served as the primary execution layer across the full funnel, with increased emphasis on traffic quality, engagement, and economic value rather than pure volume.

Market performance was influenced by differing macroeconomic conditions, consumer behavior trends, and access constraints across regions. Stable or improving economic indicators supported demand in priority markets, while airline capacity, competitive dynamics, and socio-political factors shaped conversion potential.

In 2025 acquisition costs varied by market: North America averaged Afl. 36.67 per stay-over visitor (4.2% reduction compared to the 2025 budget), Europe Afl. 105.38 (7.4% above budget due to higher marketing and promotional expenditures to maintain and grow the region post British Airways exit a.o.), and Latin America Afl. 38.72 outperforming the budgeted Afl. 46.97. On a per visitor-night basis, Latin America remained the most cost-efficient, followed by North America and Europe.



## NORTH AMERICA

### Situational Overview

In 2025, the U.S. market delivered 1,092,842 arrivals (+2.8% YoY), reinforcing its 77.4% market share and Aruba's continued reliance on high value U.S. travelers. Growth was driven by affluent segments - stay-over guest arrivals with a household income of USD 150K+ increased by 6%, surpassing the target of 5%. This was supported by stable airlift and high load factors across key gateways. These conditions enabled Aruba to sustain demand expansion while maintaining strong performance among high value visitors.

Canada contributed to North America's overall performance, through year-round sales and PR efforts, supported by a targeted paid media campaign that was extended into Q4 to capitalize on peak booking demand.

Visa data showed that average on-island spend per Visa cardholder was approximately US\$700 for visitors from the United States and US\$764 for visitors from Canada, both above the overall average spend of US\$677 across all Visa cardholders.

### Airlift

Despite selective capacity adjustments during the year, airlift from the region remained stable, with demand continuing to outpace available seats and resulting in consistently high load factors, averaging around 90%. Targeted airline marketing

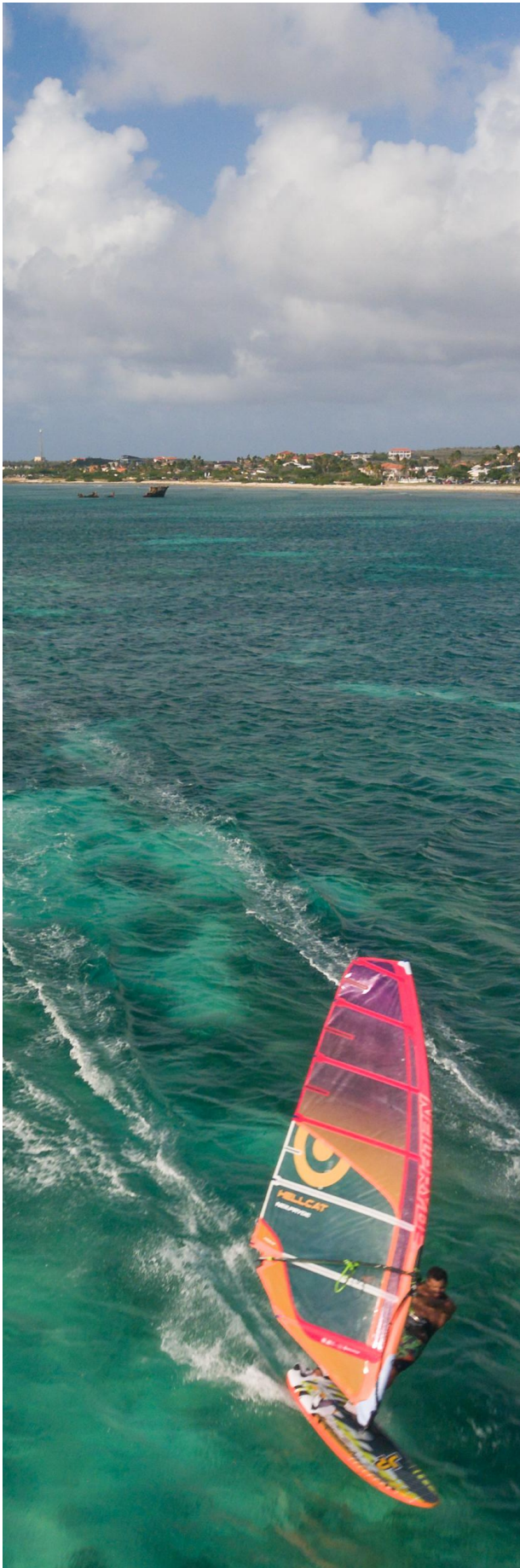
initiatives focused on high-producing U.S. gateway cities supported demand generation and route performance throughout the year, with retargeting and route-specific campaigns playing a key role in optimizing load factors and sustaining connectivity across the network.

### Branding, Advertising & Paid Media

The Aruba Effect platform continued to evolve, further emphasizing responsible tourism and the reciprocal relationship between visitors and the island ("Rejuvenation goes both ways"). Messaging was tailored to high value traveler segments and supported through expanded programmatic video, connected TV, and cross device strategies.

The paid media strategy was guided by the Communications Framework and its "Feel It – Want It – Get It" funnel structure. In 2025, execution placed added emphasis on "Want It" consideration, building desire while also communicating mutual expectations for visitors, supported by sequential video storytelling and cross device remarketing.

Paid social investment increased, delivering stronger reach and CTR performance despite reduced budgets. Cross platform brand storytelling across major U.S. and Canadian channels reinforced destination positioning, supported by premium partnerships.



Overall, The Aruba Effect 2025 advanced Aruba’s responsible-tourism positioning by framing the guest–destination relationship as reciprocal—captured in the line “When you love Aruba, it loves you back.” Delivered through a values-led creative platform and integrated media, the campaign drove strong post-launch gains: Q2 total website traffic reached 1.4M (+10% YoY) and the Aruba Effect page generated 424K sessions (+331% QoQ), alongside improved media performance (Meta CTR +17% vs Q1; cost per video completion ~70% better; video completion rate ~90% higher; YouTube video completion rate ~90% higher; display CTR ~100% higher vs Q1).

### Digital Performance

Digital performance reflected strong demand and sustained upper funnel activation. Aruba.com sessions increased 17% YoY, while engagement declined by 8%, consistent with an influx of new visitors entering the decision journey.

Aruba.com U.S. traffic reached 6.1M sessions (+17% YoY), driven by Paid Search, Paid Social, and video partnerships with Netflix, Disney/Hulu, and airport WiFi provider Boingo. Canada extended its 2025 campaign through Q4, generating 37MM impressions and 192K link clicks among high value audiences in the Toronto region.

Paid media, video, and performance channels strengthened reach across high value audience segments while reinforcing responsible tourism messaging and the evolving Aruba Effect creative framework.

## Public Relations & Communications

North America generated 11.1B+ earned media impressions and \$105.7M in PR value, with an Earned Media Score (EMS ) of 8.4. Key messages appeared in 88% of articles, and “Aruba” was in headlines in 36% of placements. Strategic PR initiatives, including the Responsible Tourism Impact Report, launched at Climate Week NYC, and the global EMS measurement pilot, positioned A.T.A. as a credible voice in destination stewardship.

Culinary positioning was strengthened through support of the Autentico Culinary Festival, securing coverage across Food & Wine, Forbes, MAXIM, and other U.S. media outlets.

In total, these Strategic campaigns, including multiple press trips, secured 198 placements and 37.3M+ impressions.

Canada contributed additional visibility through a targeted media tour, generating 143K impressions linked to responsible tourism messaging.

A more selective creator strategy emphasized fewer, higher impact creators and delivered 19.1M+ organic impressions, 9M paid impressions, and strong website referral performance.

## Partnership Marketing

Partnership marketing with a broad portfolio of distribution partners, including Expedia, Pleasant Holidays, and Classic Vacations continued to deliver strong growth. Stable performance was recorded among partners such as Costco Travel, Travel Impressions, and Delta Vacations, while more price-sensitive operators experienced softer results, requiring selective tactical support. In parallel, new partnerships with Travel Leaders and Capital One expanded access to high-value audiences across North America. Collectively, partnership marketing efforts sustained strong room night production and ADR growth,

ending the year with a 9.7% in room nights production increase compared to the prior year.

## Sales & Trade Engagement

The sales team executed 80+ trade shows and events, strengthened presence across key gateways, reinstated webinars, and hosted eight FAM trips supporting advisor product knowledge. Salesforce utilization increased by 16% YoY.

The ACE Program added 1,608 new specialists in the U.S. and 241 graduates in Canada, supported through webinars and trade education platforms such as Spoiled Agent.

## Brand Experiences & Events

Experiential initiatives in 2025 focused on high value audiences, supported by premium partnerships:

- U.S. Open: Aruba executed a surround strategy and secured on court visibility across 15 key matches reaching 86M+ cumulative viewers across broadcast and in stadium audiences, supported by added creator and player amplification.
- NYC Subway (Outfront): Interactive out of home activation across four major stops along NYC’s 7 line, delivering 45M impressions and driving measurable engagement via QR and sweepstakes participation.
- The New York Times: “Love, Aruba” custom content partnership (three short documentary style episodes) generating 80,000+ views and outperforming CTR benchmarks among exploration oriented audiences (0.92% vs 0.52%).
- Boingo: Airport WiFi video partnership (new in 2025) offering travelers free WiFi in exchange for watching Aruba’s :30 video, reaching audiences already in the travel mindset.



## LATIN AMERICA

### Situational Overview

Despite moderate and uneven macroeconomic growth across Latin America, A.T.A. LATAM delivered strong and diversified results in 2025. The region targeted 9% growth and ultimately achieved 27% growth, increasing market share from 12% to 15% and reaching 231,939 guests, the highest regional growth rate in a decade. Performance was led by Argentina (69,743 guests) and Brazil (28,761), which grew 154% and 66% respectively and significantly exceeded the 2025 plans, while Colombia (60,856 guests) and a consolidated base in Peru, Ecuador, and Chile provided stability despite political and economic headwinds in parts of the region.

Visa data confirmed the economic quality of these markets: average on island spend per Visa cardholder reached approximately US\$745 from Chile, US\$540 from Brazil, and US\$504 from Argentina (+15% vs 2024), positioning these markets as attractive priorities within the high value visitor strategy.

### Airlift

Airlift expanded significantly in 2025, with total regional seat capacity reaching 369,903 seats (+25% YoY). Avianca and Copa remained the leading carriers, jointly capturing 63% of passenger share and growing 15% and 9% respectively. LATAM Airlines recorded one of the

fastest growth rates (+64%), driven by increased frequencies from Lima and the launch of a Bogotá–Aruba route in late 2025.

GOL consolidated its position as a key driver of Brazilian growth, offering around 19,530 seats from São Paulo and supporting the strong performance of the Brazilian market. Despite a slight decline in Wingo passengers due to reduced Cali frequencies, overall connectivity improvements and the entry of new strategic airlines laid a solid foundation for continued diversification and growth, Aerolíneas Argentinas was also secured in 2025.

### Branding, Advertising & Paid Media

In 2025, A.T.A. LATAM executed a full funnel, integrated media strategy aimed at strengthening leadership in priority long-haul markets while maintaining performance in mature markets. Brand visibility increased by 70%, reaching more than 145 million people, and drove over 13 million sessions to Aruba.com, reinforcing Aruba's consideration in the decision journey.

The paid media strategy followed the “Feel it – Want it – Get it” funnel framework, with a deliberate emphasis on the “Want it” consideration phase, where Aruba could most effectively influence destination choice among higher income travelers before final shortlist decisions.

A data led, audience first approach prioritized high value segments, including approximately 49 million “Relaxers”, 35 million “Explorers”, and 17 million “Indulgiers”, enabling more precise targeting of affluent, experience seeking guests. Aruba’s communication emphasized responsible tourism, premium experiences, and niche positioning across culinary, romance, wellness, and culture, resulting in more than 81,000 outbound clicks to partners and strong alignment with the high value guest strategy.

### Digital Performance

Aruba.com ES and BR generated approximately 13.5 million sessions and accounted for 54% of global traffic, with a deliberate shift from volume to session quality and value. Average session duration increased by 85% (to more than four minutes), pageviews grew 8.3%, and bounce rate improved to 46%, indicating deeper engagement and more intentional navigation.

From a KPI perspective, LATAM’s Aruba.com sessions increased by 2% YoY, while engagement declined by 5%, reflecting broader reach with stable quality among core in-market audiences. Brazil alone generated 379,238 sessions (+17% YoY) with higher pages per session and longer duration, supported by improved connectivity and coordinated activations.

ECRM remained a strong channel, with 866,805 emails sent (+85%), a 98.7% delivery rate, and a 31.4% open rate, supporting campaign amplification, responsible tourism messaging, and sustained audience engagement. On social media, Instagram, Facebook, and TikTok maintained solid engagement, with TikTok engagement for @aruba\_br reaching 11.6% and Instagram performance aligned with global tourism benchmarks.

### Public Relations & Communications

PR efforts focused on responsible tourism, culinary positioning, and niche storytelling.

Key highlights included:

- Participation in MasterChef Celebrity Colombia, featuring Chef Ever de Peña and generating 44M impacts across TV, social, and digital.
- A joint press and influencer activation at FIT Argentina supporting the Aerolíneas Argentinas launch, resulting in 200+ significant media placements.
- A 22 page feature in Marie Claire Brazil and editorial collaborations with Elle Argentina and Forbes, advancing Aruba’s premium image.
- The Playas Vivas sustainability initiative in Peru, driving 10M impressions and engaging media, influencers, and partners around coral conservation and recycling.
- On island influencer support for the KLM Marathon and Aruba Fashion Week, with E! host Eugenia Lemus generating 148.1M impressions.

PR KPIs showed strong year-over-year growth: media impressions increased 19% to 2.29B, PR value grew 40% to US\$92.3M, social impressions rose 18% to 30.4M, and social iValue increased 238% to US\$30.4M. EMS tracking began in 2025, establishing a first year score of 11.0 and confirming robust key message inclusion (93%) and headline presence (73%)

### Partnership Marketing

Partnership marketing in Latin America combined media, airline, and trade collaborations to scale impact efficiently. Partnerships delivered 111K passenger sales, representing 49% of total guests, via 66 COOP initiatives, supported by an average customer acquisition cost of US\$4.

Strategic partnerships with platforms such as Despegar and HotelBeds, as well as leading retail networks, enhanced Aruba’s distribution, visibility,

and conversion potential across core markets, while airline partnerships (e.g., GOL, LATAM Airlines, Avianca, Copa) aligned marketing support with expanded capacity and new routes.

The ACE platform facilitated 447 organic certifications, strengthening professional knowledge and destination advocacy. Participation in major trade fairs, including Vitrina Turística ANATO and a dedicated booth at FIT Argentina, enhanced Aruba's profile among key buyers, while regional roadshows allowed more than 20 island partners to connect directly with priority markets.

### Brand Experiences & Events

Experiential initiatives in 2025 focused on high value audiences and niche development:

- MasterChef Colombia amplified Aruba's gastronomy positioning among a national TV audience.
- Taste São Paulo Festival and Formula 1 São Paulo extended Aruba's reach among affluent, experience oriented Brazilian consumers, with F1 alone impacting more than 300,000 individuals.
- In Colombia, Copa Colsanitas (wellness) and Bogotá Eats (culinary) strengthened Aruba's presence in wellness and food niches, reaching tens of thousands of participants.
- In Chile and Ecuador, events such as Cine Wiken and Eurofest provided access to high-income audiences and reinforced Aruba's premium and cultural positioning.

These activations complemented core media and trade efforts, reinforcing Aruba's emotional relevance and niche credentials across the region.





## EUROPE

### Situational Overview

Following a difficult 2024, European travel demand stabilized and returned to modest growth in 2025. The region registered 71,231 arrivals (+2.7% YoY) and 803,898 guest nights (–2.3% YoY), with average length of stay declining slightly from 11.9 to 11.3 nights, while Europe remained the leader in length of stay among all source regions.

Macroeconomic conditions improved versus 2024. Eurozone inflation moderated to around 2.1%; wage growth averaged 3.3%, and total EU tourism expenditure was estimated at €952.4 billion, with approximately 58% of spending allocated to trips abroad. Long-haul destinations such as Aruba typically capture higher per trip spend, but the broader European market remained value driven, underscoring the need for clear positioning and efficient conversion in a competitive environment.

Overall, 2025 performance from Europe was supported primarily by the Dutch, Italian, and German markets, against a backdrop of constrained airlift and cautious, price sensitive consumers.

Visa data indicated variation across European markets. Average on-island spend per Visa cardholder reached approximately US\$817 from the Netherlands (vs US\$677 overall), while Italy (US\$459), the United Kingdom (US\$361), and Germany (US\$283) fell below average.

As European travelers tend to be less credit-card reliant than U.S. travelers, Visa credit-card spend may represent a smaller share of their total spending.

### Airlift

Airlift remained a defining factor for Europe's 2025 performance. Compared to 2024, the European airlift structure became more concentrated, with fewer direct leisure routes and greater reliance on KLM's hub and spoke network via Amsterdam.

#### Key developments included:

- British Airways: cessation of services after Q1 2025, with operations limited to one weekly flight from January–March, representing 8,632 seats shared with Antigua and resulting in 1,370 arrivals for Aruba. No BA service operated for the remainder of the year.
- TUI Netherlands: reduction from a three-weekly to a two-weekly program, with seats decreasing from 47,580 (shared with Curaçao/Bonaire) to 31,720 (shared with Curaçao). TUI indicated a higher proportion of seats allocated to Aruba on the remaining flights but remained a smaller airlift contributor than in 2024.
- KLM: maintained annual capacity at 102,232 seats shared with Bonaire, but its relative importance grew significantly as British

Airways exited and TUI reduced frequencies. A.T.A. negotiated additional KLM capacity starting December 2025, increasing winter seats to approximately 109,200 (shared with Bonaire) through double daily services on Fridays and Sundays through March 2026.

In addition, approximately 39% of European arrivals traveled on “other carriers” (U.S., Latin American, and Caribbean airlines), with top contributors including American Airlines, Divi Divi Air, Avianca, Delta Airlines, and Winair, underlining the importance of multi-regional connectivity beyond direct European flights.

Taken together, these developments created a more concentrated network in which Aruba’s European performance depended heavily on protecting hub connectivity and optimizing seat share on a limited set of long-haul carriers.

### Branding, Advertising & Paid Media

In 2025, A.T.A. Europe continued to work with DEPT® as its media agency, following a competitive pitch process that confirmed the agency and introduced an updated team structure and refreshed strategic thinking.

The paid media strategy followed the “Feel it – Want it – Get it” funnel framework, with a deliberate emphasis on the “Want it” consideration phase, where Aruba could most effectively influence destination choice among higher income travelers before final shortlist decisions. Media investments were deployed selectively across YouTube, Meta, Display, and Search, with clearly defined channel roles by funnel stage and market.

Activity was adapted to seasonal behavior. During peak summer, efforts were moderated and focused primarily on Search to capture active intent, while the second half of the year saw the phased introduction of the new Aruba Effect creative platform. Launched in late August, the refreshed creative reintroduced a strong emotional layer, emphasizing Aruba’s distinct positioning rather than price driven messaging and generating

clear improvements in upper funnel performance, including stronger video completion rates and brand lift outcomes above regional benchmarks.

### Digital Performance

Digital performance in Europe reflected regional constraints, with several markets declining in sessions and engagement. Aruba.com sessions declined 17% YoY, with engagement down 1.3%, driven primarily by selective media investment and value driven traveler behavior.

Deployment of refreshed Aruba Effect creatives in Q3–Q4 contributed to a 244% increase in global page views across markets where the updated experiences were implemented, improving upper funnel engagement and brand storytelling. Aruba’s visibility in AI driven search ecosystems improved significantly, with a 516% increase in AI indexed keywords, strengthening discoverability among European long-haul travelers who rely heavily on search-based planning.

Despite these improvements, reduced long-haul capacity and heightened price sensitivity continued to limit digital demand growth in the region.

### Public Relations & Communications

Europe’s PR efforts in 2025 centered on strengthening Aruba’s visibility through culinary positioning, responsible-tourism narratives, and premium lifestyle storytelling. Targeted pitching and country-specific press trips reinforced Aruba’s brand across Italy, the UK, the Netherlands/Belgium, and German-speaking markets, with stories aligned to culture, wellness, culinary discovery, and responsible travel.

#### Major achievements included:

- Strong culinary features tied to Autentico and chef driven experiences in Italy, the Netherlands/Belgium, and DACH markets.
- High reach UK partnerships with The Telegraph and The Sunday Times, supported by niche storytelling and press trip content.

The region established EMS baselines of 9.0–9.3 and delivered notable year-over-year gains, including +291% media impressions in the UK, +44% PR value, +116% social iValue growth in Italy, and increased editorial visibility across NL/BE and GS markets

Despite airlift constraints and value driven traveler behavior, Europe’s PR program delivered higher efficiency and stronger multimarket resonance, demonstrating clear progress toward elevating Aruba’s premium, sustainable travel positioning.

### Marketing Partnerships

Marketing partnerships remained a cornerstone of Europe’s distribution strategy, reflecting the continued importance of tour operators and travel agencies for many European consumers.

#### Major cooperative campaigns included:

- A KLM multi market program covering the Netherlands, Germany, Switzerland, and Italy.
- A TUI Benelux year-round program, combining digital, radio, TV, print, and trade facing activities, with TUI remaining one of Aruba’s largest European producers.
- A broad portfolio of tour operator collaborations, notably 11 Italian partnerships, 6 UK partnerships, and 5 German partnerships, reflecting the role of B2B investment in

These collaborations helped stretch each marketing Euro through partner media buying power and preserved distribution strength at a time when reduced direct capacity and increased reliance on hub connectivity put further pressure on long-haul routes

### Sales & Trade Engagement

Trade engagement remained critical in 2025, as post pandemic booking behavior continued to favor travel agents for safety and buyer protection reasons. A.T.A. Europe executed a mix of self-organized workshops, cohosted events, and



collaborations with larger travel organizations to reach agents across core markets.

Efforts emphasized higher quality, often more intimate events for luxury-oriented agents in the Netherlands and Italy, while Germany and the UK required broader reach to strengthen baseline awareness and knowledge of Aruba.

In total, A.T.A. Europe reached 4,725 agents in 2025, a 9% increase versus 2024 (4,337 agents). Country level trends included higher reach in Germany and Belgium and a more focused, quality driven approach in the Netherlands and Italy

### Brand Experiences & Events

Europe’s experiential activities complemented PR and partnerships by supporting niche positioning in target markets. In the UK, for example, Aruba’s Chef’s Table with Chef Urvin Croes highlighted the island’s culinary scene and Autentico Festival, engaging top tier media such as The Telegraph and Condé Nast Traveler and reinforcing Aruba’s food and culture proposition within a high value audience.

# MICE

In 2025, the Business Events (MICE) sector continued to strengthen Aruba's economic impact by generating high value room nights, expanding pipeline opportunities, and deepening engagement with premium planners across priority markets. Aruba's presence at major global tradeshows, targeted sales missions, and curated familiarization experiences supported strong lead

generation and reinforced the island's positioning as a competitive destination for meetings and incentives. Performance was led by North America, complemented by steady production in Latin America and early stage demand from Europe, contributing materially to Aruba's value driven visitor strategy.

## Key Terms



## Methodology (MICE Performance)

- **RFP / Lead:** reflects formal client interest and outlines group requirements.
- **Leads:** are classified as Unique (generated by ACB) or Lead Assist (supported by third parties).
- **Turned Definite:** refers to confirmed bookings, regardless of the year of travel.
- **Definites on Island & Room Nights (RN):** capture groups that actualized in Aruba within the reporting year (2025),
- **Room Nights (RN):** represent the total hotel room nights associated with a lead or booking and serve as the base unit for volume and economic impact.

**North America** was a strong contributor to overall performance and reinforced Aruba's high value growth strategy. The market generated 695 MICE leads, producing 327,868 lead room nights, with 123 groups converting into 56,970 confirmed room nights and delivering an estimated US\$76 million in economic impact. Results reflected a deliberate shift toward fewer, larger, and higher value groups, aligned with broader U.S. market priorities focused on premium experiences and affluent audiences, and complementing leisure driven demand throughout the year.

**Latin America** contributed to both near-term production and longer-term pipeline development. The region generated 102 leads representing 26,266 lead room nights and converted 24 groups into 2,893 confirmed room nights. Demand was concentrated in Colombia, Brazil, and Argentina, supported by rising average daily rates and a growing preference for premium hotel inventory, reinforcing the shift toward higher-value group business and establishing a stronger platform for future MICE growth.

**Europe** remained an exploratory MICE market, generating seven leads across Germany, Ireland, Italy, and Portugal. Lead room nights increased from 1,126 in 2024 to 4,290 during the reporting year; however, none of these leads converted into confirmed groups. Continued engagement sustained Aruba's visibility among European planners and supports longer-term positioning as airlift access and market conditions evolve.

### MICE Tradeshows & Events

Recent SITE studies and partner insights confirm that MICE tradeshows and events are the most effective platforms for securing final business agreements. The Aruba Convention Bureau (ACB) successfully executed participation in approximately 20 major MICE tradeshows across North America, Europe, and Latin America. Key engagements included IMEX Frankfurt and America (Las Vegas), IBTM World (Barcelona) and Americas (Mexico City), SITE Global (Tulum Mexico), Site Classic (Hawaii), FICP Annual

(Washington, DC), and specialized forums like Luxe M&I Forum (Canada), Incentive Live (Puerto Rico), Incentive Research Foundation (Cancun Mexico) and Luxury & Wellness Meetings (Clearwater, FL).

### Sales Calls and Roadshows

Eight strategic sales trips were conducted across North America and LATAM. Trips to Miami, Tampa, Orlando, New York, New Jersey, Michigan, Illinois, Iowa and Canada focused on high value planners, while visits to Colombia, Brazil, Peru, Chile and Argentina reinforced and maintained relationships with our top markets.

### In House FAMs (Familiarization Trips)

Six strategic in-house FAM trips were hosted to showcase Aruba's three newest properties. JOIA by Iberostar led with three FAMs, including two IHG groups and HPN Global. Secrets Baby Beach hosted Brightspot and iCentivize, while thea Hilton Aruba hosted the Site Midwest Fam. These immersive experiences were vital, allowing top-tiered planners to personally experience the island.

### On Island MICE Events

ACB in partnership with Northstar and the Hilton Hotel, hosted the Destination Caribbean North Star event in Aruba, which was a remarkable success, showcasing the island as a premier choice for high-value meetings, incentives, and group events. The program attracted a strong mix of North America buyers and planners, resulting in highly engaged participation and meaningful networking opportunities.

In August 2025, ACB hosted its biennial VIP LATAM Fam Trip, welcoming top-tier planners from Peru, Argentina, Colombia, Brazil, and Chile for an immersive, first-hand experience of the island. The objective was to drive destination interest and showcase new hotel inventory, specifically targeting increased RFP volume and higher conversion rates from these markets.



### Destination Reviews

ACB continued to host on-island events, including its bi-annual Destination Review in April and October. This exclusive familiarization trip featured a curated itinerary that consistently integrated local culture, partnered with outside vendors to support local businesses, and delivered a unique, memorable experience for the One Happy Planners. The program received outstanding survey scores. Additionally, the ACB collaborated with local partners to create opportunities for island businesses.

### Industry Recognitions

The ACB was named Best International CVB/DMO at the Smart Stars 2025 Awards, as voted by meeting and incentive planners worldwide. This achievement was promoted across ACB's social media channels and featured in the Q3 newsletter, further enhancing the bureau's visibility and reputation.

Aruba was recognized as one of the top meeting destinations in Latin America and the Caribbean on the Cvent Supplier Network. The Cvent marketing team successfully launched a custom downloadable asset spotlighting our destination's premier status. This high-value resource was strategically promoted to a global network of professional planners to maximize international visibility and drive engagement.

Overall, 2025 marked a year of meaningful progress for Aruba's Business Events sector, with increased high value lead generation, stronger regional diversification, and deeper engagement with planners through targeted tradeshows, sales missions, and immersive on island activations.



# CRUISE PERFORMANCE

Aruba advanced its leadership position in the Southern Caribbean cruise sector, strengthening relationships with key cruise line partners. Hosting the PAMAC Destination Summit, expanding industry engagement through global trade events, and delivering targeted stakeholder training enhanced Aruba’s visibility, service readiness, and sustainability commitment. These combined efforts contributed to 2025’s performance, higher passenger volumes, reinforced the island’s competitive standing, and supported long term economic value across the cruise ecosystem

Total cruise passengers reached 970,803, up from 897,273 in 2024—an increase of 73,530 passengers (8.2%).

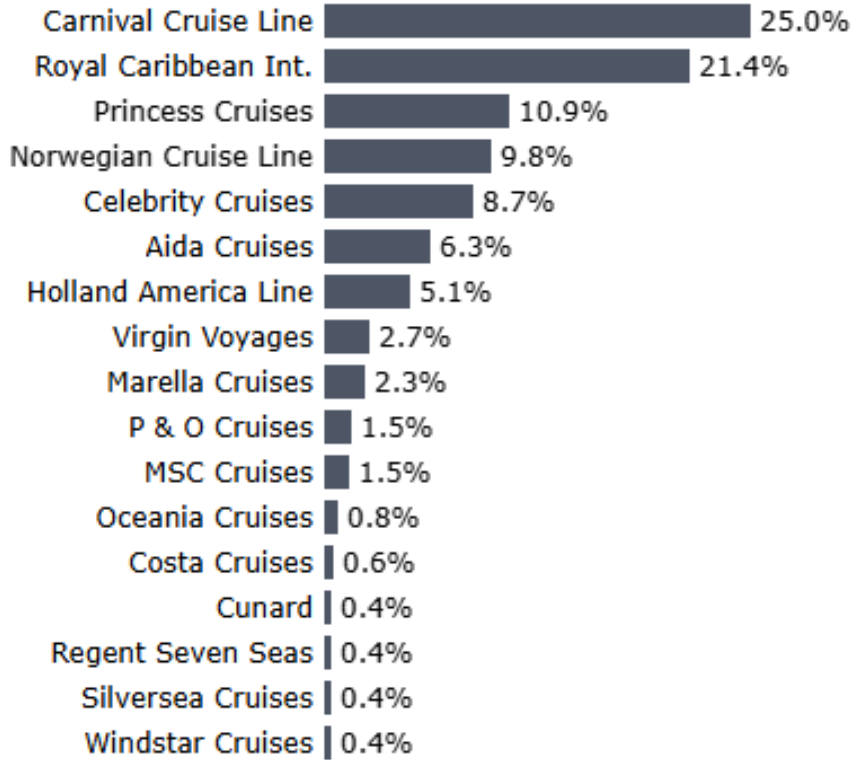
Aruba led the Southern Caribbean region in passenger traffic and accounted for 35% of total regional passenger share, followed by Curaçao (32%) and Bonaire (16.5%).

Carnival Cruise Line and Royal Caribbean generated the majority of passenger arrivals, with Princess Cruises making a notable comeback after several years of reduced activity. Norwegian Cruise Line and Celebrity Cruises also performed strongly. Notably, Carnival Horizon contributed with 102,960 passengers over 26 port days, followed by Oasis of the Seas with 89,600 passengers over 16 port days.



Top Cruise Lines

## Top Cruise Lines



### PAMAC Destination Summit Hosting

In 2025, Aruba hosted the Platinum Associate Membership Advisory Council (PAMAC) Destination Summit, welcoming a record number of nearly 40 cruise executives and 160 Platinum FCCA members. The program featured curated site visits, strategic meetings, and immersive on-island experiences highlighting port operations, tourism infrastructure, and cultural assets. A key theme throughout the summit was Aruba’s transition toward a regenerative tourism model, emphasizing destination stewardship, shared responsibility, and long-term community benefit. The summit created direct engagement between cruise leadership and local stakeholders, reinforced Aruba’s competitive positioning within the Caribbean, and generated valuable opportunities for future itinerary planning and strategic cruise partnerships.

### International Trade Shows, Conferences and Industry Representation

The Cruise Department represented Aruba at the following major cruise trade shows and conferences, conducting targeted meetings with cruise lines, port partners, and industry stakeholders: PAMAC Cruise Summit, Seatrade Cruise Global, CLIA Cruise 360, PAMAC Destination Summit, Seatrade Europe and the FCCA Cruise Conference.

This consistent presence reinforced Aruba’s brand positioning, maintained strong relationships with industry partners, and supported diversification of cruise calls.

### Familiarization (FAM) Trips & Shore Excursions Development

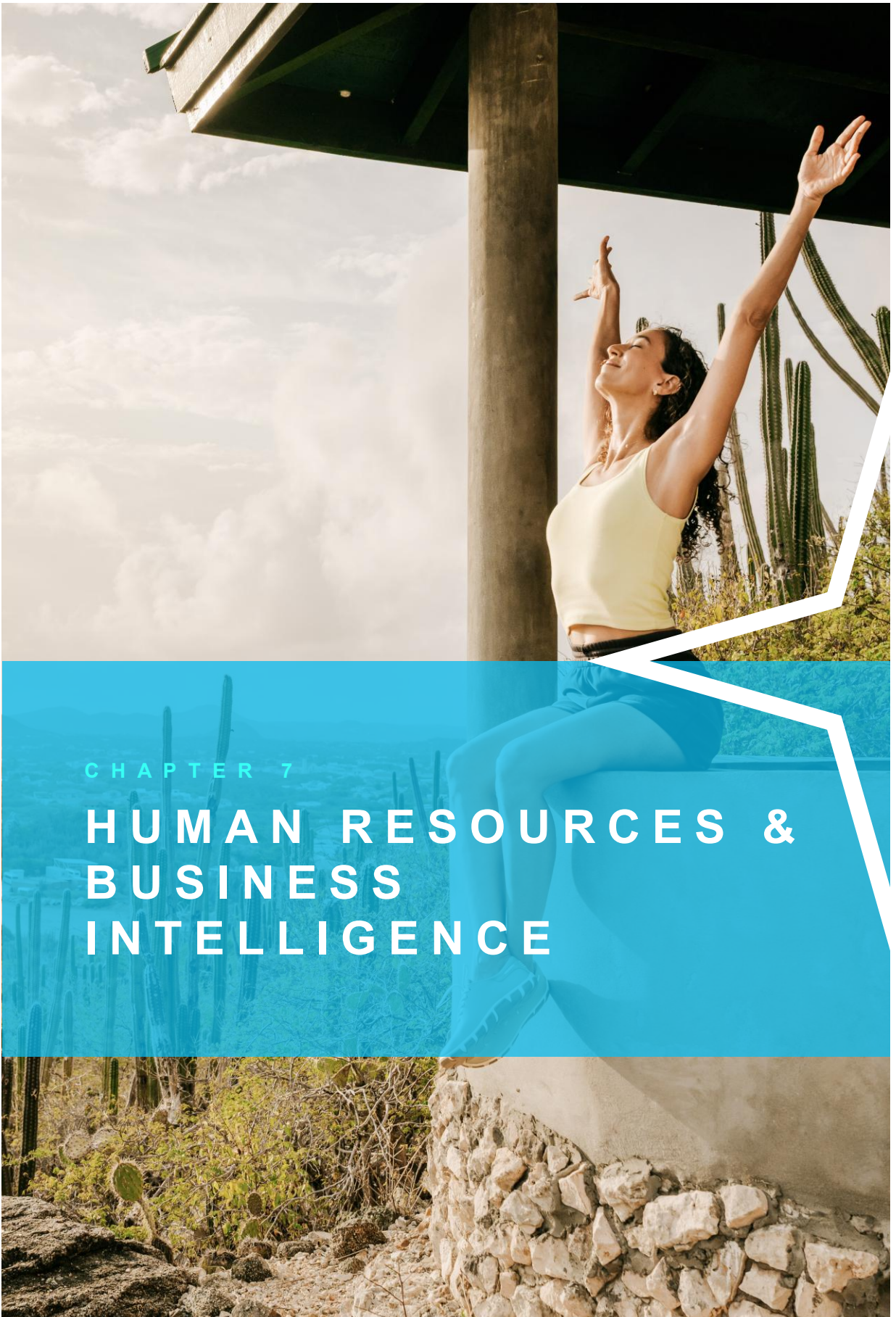
Ten familiarization (FAM) visits were organized in collaboration with cruise line shore excursion teams, providing firsthand exposure to Aruba’s attractions, tours, and cultural offerings. Through site visits and product briefings, onboard teams gained a deeper understanding of the island’s diverse experiences. These initiatives enhanced product knowledge, strengthened collaboration with local operators, and supported more effective onboard promotion and sales of Aruba’s shore excursions.

### Stakeholder Training and Sustainability Engagement

The A.T.A. implemented targeted training sessions for stakeholders and partners. Sessions focused on service standards, destination storytelling, tour product development and diversification, sustainability awareness, and evolving cruise industry expectations. The initiative improved coordination and strengthened Aruba’s reputation for hospitality.

Together, these efforts enhanced the island’s competitive position within the Southern Caribbean, improved the quality of the guest experience, and contributed to a more resilient and higher value cruise economy.





CHAPTER 7

HUMAN RESOURCES &  
BUSINESS  
INTELLIGENCE

# HUMAN RESOURCES

The mission of Human Resources (HR) at A.T.A. is to enhance the organization's success by implementing effective HR practices aimed at retaining, engaging, and empowering high-performing individuals. We strive to foster innovation and attract top talent, recognizing that our team members are among the most valuable assets of the organization. They play a crucial role in developing and executing plans and strategies that are integral to our tourism offerings.

## Staff Statistics & Recruitment Efforts

As per December 31, 2025, a total of 73 team members worked at the A.T.A. of which 33% were employed overseas. The A.T.A. recruited sixteen new team members. Five employees resigned, two employees retired, and the employment agreement of one employee was terminated upon mutual agreement. The A.T.A. had nine open FTE positions as per December 31, 2025, including open positions at the overseas offices.

## Cultural Scan

In Q4 of 2025, A.T.A. conducted an organizational Culture Scan to establish a baseline understanding of how employees experience the organization and the culture. The findings were presented to leadership early 2026 and will inform the development of a targeted culture roadmap in 2026. This initiative supports A.T.A.'s commitment to continuous improvement, responsible leadership, and long-term organizational effectiveness.

## HR Projects

The HR department updated the employee handbook to reflect revised policies and benefits, including clearer guidance, updated anti-harassment procedures, flexible working arrangements, and streamlined processes; the handbook was distributed to all staff via AFAS with mandatory acknowledgment to ensure company-wide compliance. In parallel, an AI HR assistant, "Jonas," was launched on the AFAS platform to help A.T.A. employees quickly access information from the employee handbook, from the Collective Labor Agreement, and on secondary benefits, as well as providing links to relevant records and documents, improving response times and reducing HR's administrative workload. Additionally, AFAS onboarding for overseas offices was enhanced with custom, market-specific onboarding paths that automate tasks, documentation checks, and compliance steps, streamlining the process, reducing manual effort, and accelerating new-hire readiness.

## Learning & Development

In 2025, A.T.A. continued to prioritize learning and development as a key enabler of innovation and operational effectiveness. Employees participated in in-house AI training designed to upskill staff in the practical use of AI tools, promote responsible application, and support integration into daily workflows. The program combined hands-on workshops with guided learning modules, enhancing productivity while ensuring ethical and compliant use of AI across teams.

In addition, employees received advanced Microsoft 365 training to further strengthen digital capabilities. Team members across all offices also participated in a variety of external courses and industry conferences, such as: Phocus Wright Conference, PRSA, Digital Tourism Think Tank, and SKIFT Data & AI Summit 2025, supporting continuous professional growth and knowledge sharing throughout the organization.

## Landsverordening Normering Top Inkomens (LNT)

The Landsverordening normering top inkomens (LNT), which entered into force on August 1, 2022, introduced remuneration caps for top officials in the public and semipublic sectors as part of post-COVID fiscal measures. Given the strategic importance of tourism and the A.T.A.'s status as an independent public legal entity with international operations, the A.T.A. requested an exemption under Article 12(1), arguing that strict application of the cap undermines its competitiveness as an employer, distorts internal pay structures, and conflicts with its founding rationale. The request, submitted on February 29,

2024, was rejected on August 7, 2024, after which an administrative objection was filed. This remains undecided upon despite a completed hearing. The A.T.A. has repeatedly raised broader concerns regarding the LNT; with Parliament, the formateurs, and other affected organizations. Separately, in January 2025, the A.T.A. requested an adjustment of the statutory cap to reflect public sector salary indexations implemented in 2024 and 2025; follow ups have been submitted and a response is still pending, although similar requests by other entities have reportedly been approved.

# BUSINESS INTELLIGENCE



## V. QUALITY OF ORGANIZATION

### Strengthened Organizational Outreach

In addition to A.T.A.'s advocacy agenda, the A.T.A also strengthened organizational outreach and communications. Through Corporate Communication, the organization delivered information to press and media, and produced inclusive content across Papiamentu, Spanish, and English to strengthen local connection. Proactive engagement with media—including regular touchpoints and Press Day—helped reinforce A.T.A.'s role as a trusted authority. Digital presence was enhanced through optimization of ata.aw and active engagement across social media channels.

### Business Intelligence: 2025 Highlights

Through Strategy, Planning & Research (SPR), A.T.A. expanded its monitoring and analytics capabilities, strengthening the evidence base for integrated destination management, policy coordination, and performance tracking across the pillars.

### Airport Exit Survey

Continued monthly, face-to-face surveying of departing visitors, exceeding the annual target (8,589 responses vs. 6,600 planned) and tracking core indicators such as spend, NPS, likelihood to return, length of stay, accommodations, travel party, and demographics to inform performance monitoring and segmentation.

### Cruise Visitor Survey

Maintained monthly data collection (2,414 respondents) to profile cruise visitor motivations, on-island activities, spend, satisfaction, and likelihood to return as a stayover guest—supporting cruise strategy and economic-impact understanding.

### Aligning Visitor Experience with Tourism Funding

Aligning Visitor Experience with Tourism Funding Assessed visitor evaluations across key experience domains and tested willingness to pay hypothetical sustainability fees to identify which funding priorities, such as environmental protection, infrastructure, and community development, most influence satisfaction and revisit intent when linked to visitor priorities.

### Research & Impact Studies

In 2025, the SPR department spearheaded and completed a series of economic and strategic studies to inform Aruba's tourism development. With Skift Research, it finalized Aruba's first comprehensive Destination Wedding Economic Impact Study, quantifying spending patterns, producing a five-year projection model, and estimating the wedding-and-honeymoon market at over \$300M, with recommendations to strengthen competitiveness. The MICE Economic Impact Study with ACB was updated to quantify MICE visitor value and develop an impact-calculation tool covering spending, travel characteristics, and selected non-economic benefits (e.g., volunteer and community engagement). The department also initiated the Strategic Wellness Tourism Roadmap, conducting market and economic analysis, stakeholder engagement, and field visits—with the final roadmap, segmentation framework, and supporting tools scheduled for completion in 2026. The department also supported the University of Aruba and the Aruba Timeshare Association in implementing a member survey to capture ownership and travel behavior, sector spend, and satisfaction to inform the Timeshare Economic Impact Study and future policy discussions.

### Tourism Product Inventory Development

Completed the Tourism Product Inventory, combining AI-assisted desk research, administrative sources, and a large-scale field survey to produce a consolidated database of 5,400+ tourism business records and insights from 696 active establishments—creating a baseline for gap analysis, sustainability monitoring, and value-based planning.

### Tourism Impact Model (TIM & TCM)

Expanded TIM and TCM with additional indicators (e.g., tourism employment and productivity, SME growth, wage and revenue distribution, plus a new cruise component) to better track tourism's structural and economic footprint and inform long-term policy decisions.

### Tourism Data & Market Intelligence Platforms

Strengthened analytics by leveraging platforms such as GEI (review analysis), Visa/Mastercard spend datasets, Cruise Intelligence, and consumer-data tools (Resonate/Acxion) to monitor behavior, identify experience trends, and support audience segmentation and strategic planning.





### **Building a Safer and More Resilient Aruba (Foresight Baseline)**

Established a foresight baseline by capturing stakeholder perspectives on vulnerabilities, threats, and emerging risks to identify gaps and inform future-ready resilience planning.

### **Artificial Intelligence (AI) Strategy & Governance**

A.T.A. initiated a structured approach to responsible AI to enable safe, consistent adoption across the organization. Work in 2025 focused on defining direction and principles and establishing the need for governance, data protection, transparency, and human oversight, creating the foundation for formal frameworks, training, and oversight in subsequent phases.



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