



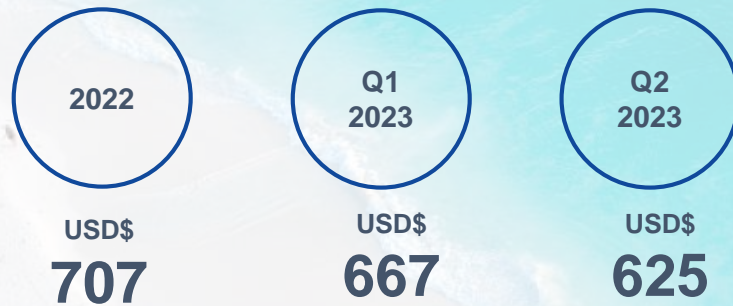
JULY 2023

Monthly Report



SPEND Q2 2023

AVERAGE CREDIT CARD SPENDING PER CARDHOLDER



Note: The Aruba Tourism Authority gains valuable insights into the spending habits of visitors with Visa Credit Cards and MasterCard. Credit card data is important for tourism statistics, providing accurate information on actual transactions and the types of goods and services purchased. However, it's important to note that the preferred payment method of each visitor varies, with Americans having an average of 3.84 credit cards per person. Credit and debit cards are the most popular payment methods, followed by cash.

Source: Credit Card data is sourced from VisaNet and Mastercard, which contains all transactions conducted using the respective credit cards "physically" present in Aruba.



MASTERCARD Q2 2023



AVERAGE CREDIT CARD SPENDING PER CARDHOLDER ARUBA compared to DOMINICAN REPUBLIC

A R U B A		D O M I N I C A N R E P U B L I C	
United States	\$699	United States	\$521
The Netherlands	\$842	The Netherlands	\$545
Canada	\$708	Canada	\$348
UK	\$397	UK	\$388
Colombia	\$347	Colombia	\$324
Germany	\$477	Germany	\$465
Chile	\$803	Chile	\$615
Italy	\$325	Italy	\$464
Brazil	\$492	Brazil	\$390
Argentina	\$411	Argentina	\$261

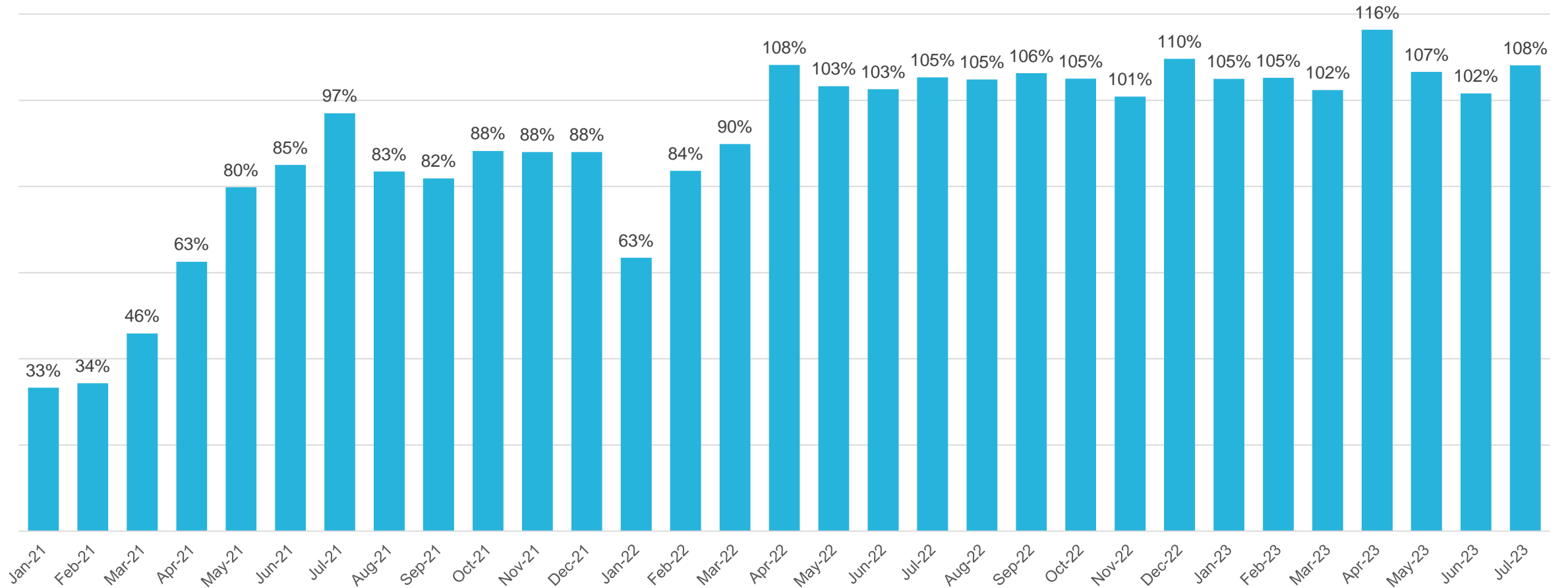
While DR is mainly an All-Inclusive market, DR was chosen as a benchmark for comparison reasons. MasterCard data can present robust data for the same markets for both Aruba and DR.

Note: The Aruba Tourism Authority gains valuable insights into the spending habits of visitors with Visa Credit Cards and MasterCard. Credit card data is important for tourism statistics, providing accurate information on actual transactions and the types of goods and services purchased. However, it's important to note that the preferred payment method of each visitor varies, with Americans having an average of 3.84 credit cards per person. Credit and debit cards are the most popular payment methods, followed by cash.



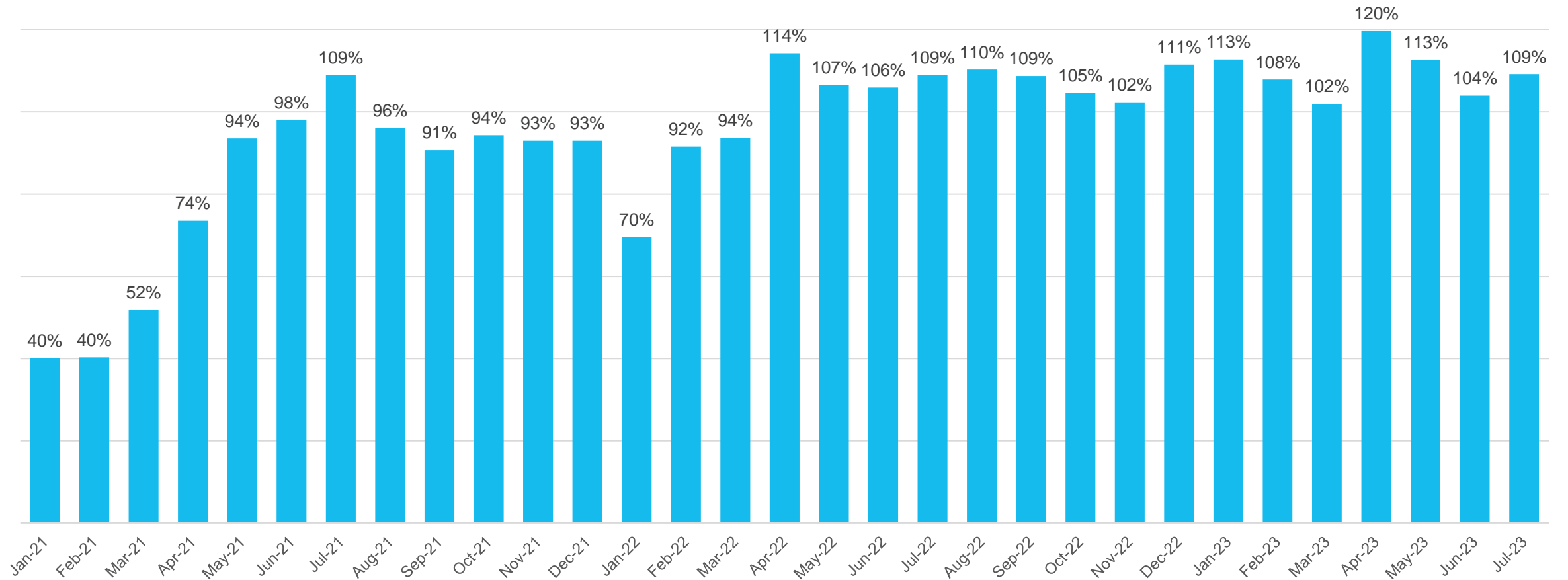
★ STAY-OVER VISITOR ARRIVALS RECOVERY VS 2019

% MONTHLY RECOVERY TOTAL



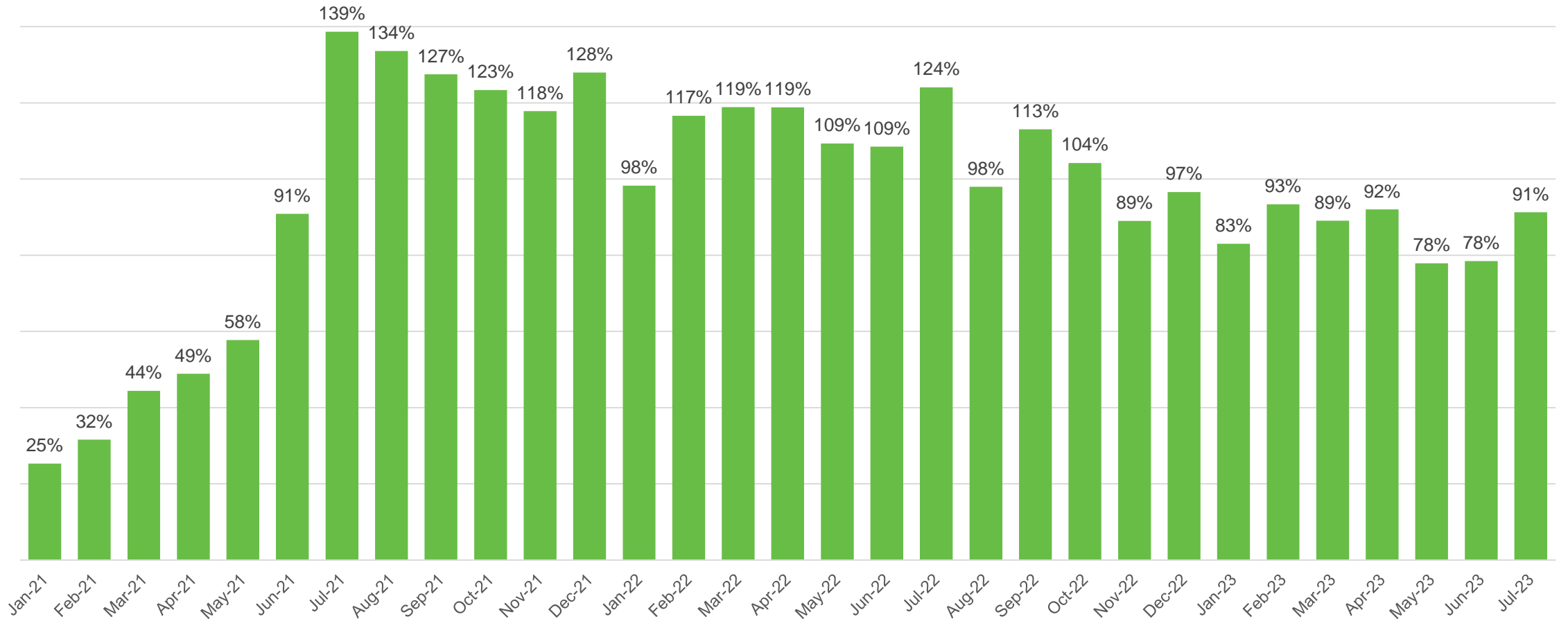
★ STAY-OVER VISITOR ARRIVALS RECOVERY VS 2019

% MONTHLY RECOVERY USA



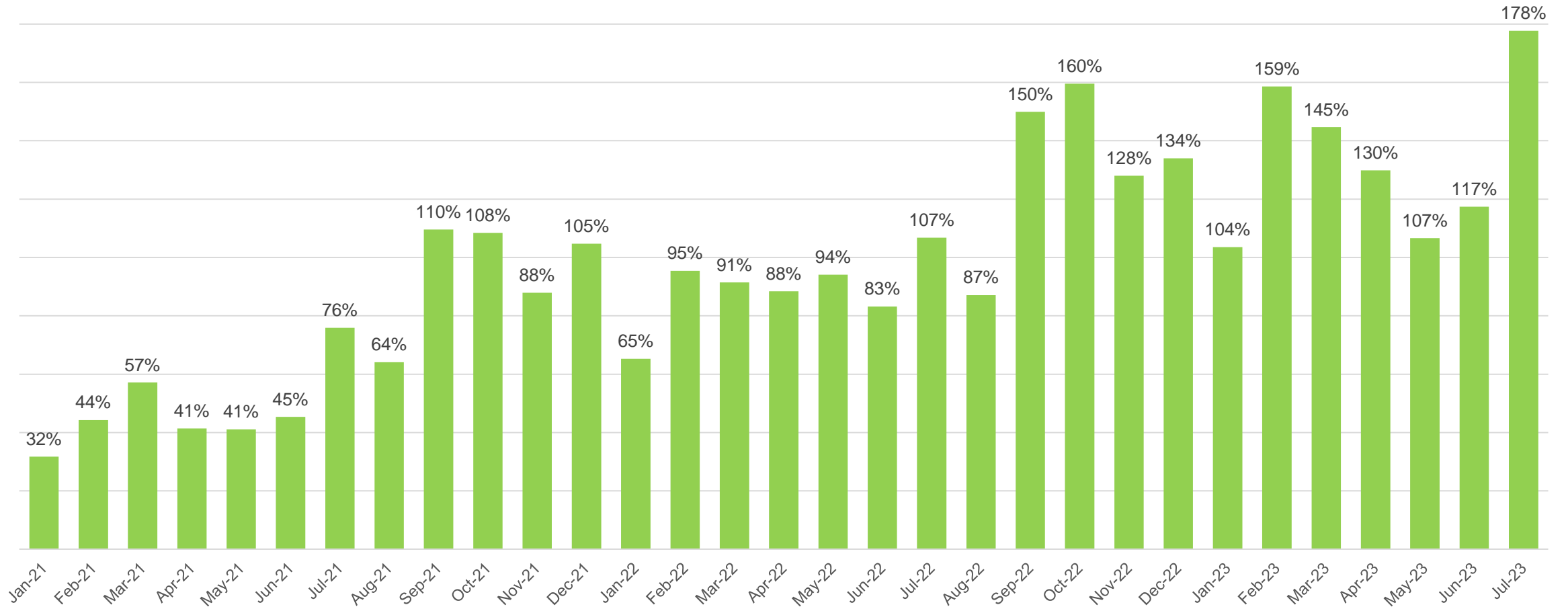
★ STAY-OVER VISITOR ARRIVALS RECOVERY VS 2019

% MONTHLY RECOVERY HOLLAND



★ STAY-OVER VISITOR ARRIVALS RECOVERY VS 2019

% MONTHLY RECOVERY COLOMBIA



A group of people are sitting in a line on a sandy beach, meditating in a lotus position. They are all looking towards the left side of the frame. The background shows a calm body of water and a cloudy sky. The scene is peaceful and serene.

COMPARISON

2023 VERSUS 2022

SNAPSHOT YTD JULY 2023/2022



HOW MANY ARRIVALS?

722,444

13.4%



HOW MANY CRUISE TOURISM?

523,322

8.6%

Compared to 2019



HOW LONG DID THEY STAY?

5,146,362

11.5%



WHAT DID THEY SPEND?*

Central Bank Aruba (Q1 2023)

Avg. 1,347.3 min

37%

Q1 2022: 986.7

**Tourism Credits: In the new presentation of the Balance of Payments, the Central Bank of Aruba reclassified maintenance fee arising from Timeshare arrangement from "Other Services" to "Travel Services" (Tourism). With this reclassification it should be noted that the term Tourism Receipts has changed to Tourism Credits in the new presentation of Balance of Payments. This reclassification resulted in an upward adjustment of the previously used term Tourism Receipts.

WHERE DID THEY STAY?



1,133,734

NIGHTS

14.4%



792,625

NIGHTS

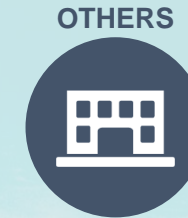
10.1%



1,602,790

NIGHTS

4.2%



1,617,213

NIGHTS

18.5%



ARRIVALS YTD JULY 2023/2022

722,444
ARRIVALS

13.4%
GROWTH

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
USA	510,625	53,058	563,683	10.4%	80.1%	78.0%
Canada	19,097	16,367	35,464	85.7%	3.0%	4.9%
NA	529,722	69,425	599,147	13.1%	83.1%	82.9%
Venezuela	943	160	1,103	17.0%	0.1%	0.2%
Colombia	17,431	8,429	25,860	48.4%	2.7%	3.6%
Brazil	4,566	2,714	7,280	59.4%	0.7%	1.0%
Argentina	6,584	3,808	10,392	57.8%	1.0%	1.4%
Chile	3,543	1,145	4,688	32.3%	0.6%	0.6%
Ecuador	1,373	1,732	3,105	126.1%	0.2%	0.4%
Peru	2,094	1,026	3,120	49.0%	0.3%	0.4%
Paraguay	862	-359	503	-41.6%	0.1%	0.1%
Uruguay	1,010	-45	965	-4.5%	0.2%	0.1%
Mexico	818	842	1,660	102.9%	0.1%	0.2%
Others	4,452	2,207	6,659	49.6%	0.7%	0.9%
SA	43,676	21,659	65,335	49.6%	6.9%	9.0%
Netherlands	28,794	-6,790	22,004	-23.6%	4.5%	3.0%
UK	5,994	-2,737	3,257	-45.7%	0.9%	0.5%
Germany	2,894	315	3,209	10.9%	0.5%	0.4%
Italy	2,889	-550	2,339	-19.0%	0.5%	0.3%
Sweden	525	1,132	1,657	215.6%	0.1%	0.2%
Belgium	1,512	-344	1,168	-22.8%	0.2%	0.2%
Austria	370	12	382	3.2%	0.1%	0.1%
Switzerland	1,080	-47	1,033	-4.4%	0.2%	0.1%
Others	5,211	127	5,338	2.4%	0.8%	0.7%
Europe	49,269	-8,882	40,387	-18.0%	7.7%	5.6%
ROW	14,664	2,911	17,575	19.9%	2.3%	2.4%
Total	637,331	85,113	722,444	13.4%		
W/O Ven.	636,388	84,953	721,341	13.3%		



ARRIVALS USA YTD JULY 2023/2022

563,683
ARRIVALS

10.4%
GROWTH

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
New York	109,773	-2,427	107,346	-2.2%	21.5%	19.0%
Massachusetts	65,062	10,998	76,060	16.9%	12.7%	13.5%
New Jersey	66,522	-3,026	63,496	-4.5%	13.0%	11.3%
Pennsylvania	29,768	4,288	34,056	14.4%	5.8%	6.0%
Illinois	12,066	2,838	14,904	23.5%	2.4%	2.6%
Connecticut	19,784	1,713	21,497	8.7%	3.9%	3.8%
Florida	28,388	599	28,987	2.1%	5.6%	5.1%
Ohio	12,593	3,845	16,438	30.5%	2.5%	2.9%
Maryland	16,540	762	17,302	4.6%	3.2%	3.1%
Michigan	9,620	1,708	11,328	17.8%	1.9%	2.0%
Virginia	12,319	3,621	15,940	29.4%	2.4%	2.8%
Georgia	13,746	55	13,801	0.4%	2.7%	2.4%
North Carolina	13,113	3,153	16,266	24.0%	2.6%	2.9%
Texas	14,591	2,733	17,324	18.7%	2.9%	3.1%
California	9,639	704	10,343	7.3%	1.9%	1.8%
Other	77,101	21,494	98,595	27.9%	15.1%	17.5%
Total	510,625	53,058	563,683	10.4%		



NIGHTS YTD JULY 2023/2022

5,146,362
NIGHTS

11.5%
GROWTH

	2022	Growth	2023	% Growth	ALOS 2022	ALOS 2023
USA	3,443,116	361,375	3,804,491	10.5%	6.7	6.7
Canada	197,440	145,013	342,453	73.4%	10.3	9.7
NA	3,640,556	506,388	4,146,944	13.9%	6.9	6.9
Venezuela	12,196	-232	11,964	-1.9%	12.9	10.8
Colombia	128,452	45,574	174,026	35.5%	7.4	6.7
Brazil	28,418	17,270	45,688	60.8%	6.2	6.3
Argentina	61,927	32,290	94,217	52.1%	9.4	9.1
Chile	28,086	8,835	36,921	31.5%	7.9	7.9
Ecuador	8,680	7,363	16,043	84.8%	6.3	5.2
Peru	15,409	5,600	21,009	36.3%	7.4	6.7
Paraguay	6,047	-2,583	3,464	-42.7%	7.0	6.9
Uruguay	7,978	-242	7,736	-3.0%	7.9	8.0
Mexico	6,050	3,709	9,759	61.3%	7.4	5.9
Others	31,380	11,927	43,307	38.0%	7.0	6.5
SA	334,623	129,511	464,134	38.7%	7.7	7.1
Netherlands	341,140	-74,947	266,193	-22.0%	11.8	12.1
UK	64,709	-34,786	29,923	-53.8%	10.8	9.2
Germany	31,450	-4,500	26,950	-14.3%	10.9	8.4
Italy	24,575	-4,810	19,765	-19.6%	8.5	8.5
Sweden	6,115	13,562	19,677	221.8%	11.6	11.9
Belgium	16,786	-3,616	13,170	-21.5%	11.1	11.3
Austria	3,823	-114	3,709	-3.0%	10.3	9.7
Switzerland	11,331	-1,645	9,686	-14.5%	10.5	9.4
Others	55,930	-3,025	52,905	-5.4%	10.7	9.9
Europe	555,859	-113,881	441,978	-20.5%	11.3	10.9
ROW	82,847	10,459	93,306	12.6%	5.6	5.3
Total	4,613,885	532,477	5,146,362	11.5%	7.2	7.1
















ACCOMMODATIONS YTD JULY 2023/2022














722,444
ARRIVALS

13.4%
GROWTH

ARRIVALS BY ACCOMMODATION

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
EP	172,204	 26,804	199,008	15.6%	 27.0%	 27.5%
All Inclusive	115,763	 13,491	129,254	11.7%	 18.2%	 17.9%
Timeshare	189,766	 7,155	196,921	3.8%	 29.8%	 27.3%
Others	159,598	 37,663	197,261	23.6%	 25.0%	 27.3%
Total	637,331	 85,113	722,444	13.4%		

NIGHTS BY ACCOMMODATION

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
EP	991,024	 142,710	1,133,734	14.4%	 21.5%	 22.0%
All Inclusive	719,836	 72,789	792,625	10.1%	 15.6%	 15.4%
Timeshare	1,538,485	 64,305	1,602,790	4.2%	 33.3%	 31.1%
Others	1,364,540	 252,673	1,617,213	18.5%	 29.6%	 31.4%
Total	4,613,885	 532,477	5,146,362	11.5%		



VISITORS BY AGE YTD JULY 2023/2022

722,444
ARRIVALS

13.4%
GROWTH

	2022	Growth	2023	% Growth
0 - 11	45,447	3,954	49,401	8.7%
12-19	51,543	2,796	54,339	5.4%
20 - 29	87,482	-3,195	84,287	-3.7%
30 - 39	106,290	2,484	108,774	2.3%
40 - 49	106,761	12,725	119,486	11.9%
50 - 59	119,182	21,476	140,658	18.0%
60 - 69	81,718	27,448	109,166	33.6%
70 +	38,892	17,392	56,284	44.7%
Not Stated	16	33	49	206.3%
Total	637,331	85,113	722,444	13.4%



GENERATIONS

YTD JULY 2023/2022

722,444
VISITORS

13.4%
GROWTH

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
Gen A	35,368	3,191	38,559	9.0%	5.5%	5.3%
Gen Z	108,965	2,324	111,289	2.1%	17.1%	15.4%
Millennials	168,646	3,153	171,799	1.9%	26.5%	23.8%
Gen X	170,833	24,023	194,856	14.1%	26.8%	27.0%
Baby Boomers	140,775	45,339	186,114	32.2%	22.1%	25.8%
Silent Generations	12,728	7,050	19,778	55.4%	2.0%	2.7%
Age not specified	16	33	49	206.3%	0.0%	0.0%
Total	637,331	85,113	722,444	13.4%		



CARRIERS YTD JULY 2023/2022

722,444
VISITORS

13.4%
GROWTH

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
JETBLUE	190,451	-21,124	169,327	-11.1%	29.9%	23.4%
AMERICAN AIRLINES	133,274	32,246	165,520	24.2%	20.9%	22.9%
UNITED AIRLINES	90,552	4,171	94,723	4.6%	14.2%	13.1%
DELTA AIRLINE	71,566	17,965	89,531	25.1%	11.2%	12.4%
SOUTH WEST	28,585	6,930	35,515	24.2%	4.5%	4.9%
AEROGAL/AVIANCA	18,331	11,578	29,909	63.2%	2.9%	4.1%
COPA AIRLINE	17,605	6,406	24,011	36.4%	2.8%	3.3%
KLM	25,939	-6,040	19,899	-23.3%	4.1%	2.8%
AERO REPUBLICA/WINGO	5,744	5,892	11,636	102.6%	0.9%	1.6%
WESTJET AIRLINES	6,348	5,026	11,374	79.2%	1.0%	1.6%
AIR CANADA	944	9,256	10,200	980.5%	0.1%	1.4%
DIVI DIVI AIR	8,136	1,651	9,787	20.3%	1.3%	1.4%
SUNWING AIRLINES	5,037	4,123	9,160	81.9%	0.8%	1.3%
TUI NL	11,070	-2,312	8,758	-20.9%	1.7%	1.2%
SPIRIT AIRLINES	4,434	4,233	8,667	95.5%	0.7%	1.2%
EZ AIRLINE	4,107	1,835	5,942	44.7%	0.6%	0.8%
PRIVATE	1,927	1,835	3,762	95.2%	0.3%	0.5%
SURINAM AIRWAYS	2,345	609	2,954	26.0%	0.4%	0.4%
SUN COUNTRY	2,124	131	2,255	6.2%	0.3%	0.3%
CHARTER	992	1,146	2,138	115.5%	0.2%	0.3%
BRITISH AIRWAYS	0	1,831	1,831	-	0.0%	0.3%
JET AIR CARIBBEAN	563	802	1,365	142.5%	0.1%	0.2%
SUNCLASS AIRLINES	0	1,158	1,158	-	0.0%	0.2%
WINAIR	1,067	-234	833	-21.9%	0.2%	0.1%
ARAJET	0	614	614	-	0.0%	0.1%
SKY HIGH AVIATION	271	143	414	52.8%	0.0%	0.1%
Others	5,919	-4,758	1,161	-80.4%	0.9%	0.2%
Total	637,331	85,113	722,444	13.4%		



CARRIERS BY EMBARKATION POINT

YTD JULY 2023/2022

722,444
ARRIVALS

13.4%
GROWTH

City	APO Code	July '23	Market Share	July'22	Market Share	23 vs 22
JFK NY	JFK	126,557	17.5%	110,996	17.4%	14.0%
Newark	EWR	95,327	13.2%	72,276	11.3%	31.9%
Boston	BOS	62,852	8.7%	89,569	14.1%	-29.8%
Charlotte	CLT	60,185	8.3%	40,348	6.3%	49.2%
Miami	MIA	57,543	8.0%	53,775	8.4%	7.0%
Bogota	BOG	37,999	5.3%	32,285	5.1%	17.7%
Philadelphia	PHL	36,267	5.0%	24,100	3.8%	50.5%
Atlanta	ATL	35,821	5.0%	33,237	5.2%	7.8%
Panama City	PTY	30,759	4.3%	12,340	1.9%	149.3%
Orlando	MCO	28,099	3.9%	37,009	5.8%	-24.1%
Amsterdam	AMS	28,081	3.9%	6,982	1.1%	302.2%
Curacao	CUR	24,025	3.3%	17,616	2.8%	36.4%
G.Bush DC	IAD	19,272	2.7%	14,679	2.3%	31.3%
Toronto	YYZ	18,727	2.6%	13,980	2.2%	34.0%
Chicago	ORD	10,266	1.4%	7,154	1.1%	43.5%
Houston International	IAH	8,995	1.2%	25,884	4.1%	-65.2%
Baltimore	BWI	7,473	1.0%	21,623	3.4%	-65.4%
Fort Lauderdale	FLL	5,888	0.8%	5,257	0.8%	12.0%
Cali	CLO	4,467	0.6%	601	0.1%	643.3%
Dallas Forth Worth	DFW	4,292	0.6%	2,816	0.4%	52.4%
La Guardi, NY	LGA	3,897	0.5%	2,471	0.4%	57.7%
Gatwick, UK	LGW	2,966	0.4%	2,286	0.4%	29.7%
Paramaribo	PBM	2,255	0.3%	1,800	0.3%	25.3%
Medellin	MDE	1,831	0.3%	3,814	0.6%	-52.0%
Santo Domingo	SDQ	1,385	0.2%	589	0.1%	135.1%
	Others	7,215	1.0%	3,844	0.6%	87.7%
Grand Total		722,444	100.0%	637,331	100.0%	13.4%



CRUISE COMPARISON



One happy island ✦ [ARUBA.COM](https://www.aruba.com)



CRUISE YTD JULY 2023/2022



2022



CRUISE PAX
297,582

CRUISE CALLS
174



2023



CRUISE PAX
523,322

79.5%

CRUISE CALLS
198

13.8%

ABSOLUTE GROWTH PAX YTD JULY

225,740
75.9%

ABSOLUTE GROWTH CALLS YTD JULY

24
13.8%

JULY RESULT 2023

NORTH AMERICA



89,684

80.4%

SOUTH AMERICA



12,583

11.2%

EUROPE



6,099

5.5%

OTHERS



3,196

2.9%

TOTAL ARRIVALS

111,862

100%



ARRIVALS JULY 2023/2022

111,862
ARRIVALS

2.6%
GROWTH

	2022		Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
USA	86,835		183	87,018	0.2%	79.7%	77.8%
Canada	2,561		405	2,966	15.8%	2.3%	2.7%
NA	89,396		588	89,984	0.7%	82.0%	80.4%
Venezuela	224		16	240	7.1%	0.2%	0.2%
Colombia	2,971		1,975	4,946	66.5%	2.7%	4.4%
Brazil	605		1,085	1,690	179.3%	0.6%	1.5%
Argentina	1,489		504	1,993	33.8%	1.4%	1.8%
Chile	703		121	824	17.2%	0.6%	0.7%
Ecuador	173		390	563	225.4%	0.2%	0.5%
Peru	490		226	716	46.1%	0.4%	0.6%
Paraguay	75	-43		32	-57.3%	0.1%	0.0%
Uruguay	215		17	232	7.9%	0.2%	0.2%
Mexico	120		197	317	164.2%	0.1%	0.3%
Others	503		527	1,030	104.8%	0.5%	0.9%
SA	7,568		5,015	12,583	66.3%	6.9%	11.2%
Netherlands	4,555	-1,205		3,350	-26.5%	4.2%	3.0%
UK	1,640	-1,017		623	-62.0%	1.5%	0.6%
Germany	390	-76		314	-19.5%	0.4%	0.3%
Italy	900	-261		639	-29.0%	0.8%	0.6%
Sweden	47		4	51	8.5%	0.0%	0.0%
Belgium	250	-34		216	-13.6%	0.2%	0.2%
Austria	62		11	73	17.7%	0.1%	0.1%
Switzerland	256	-108		148	-42.2%	0.2%	0.1%
Others	796	-111		685	-13.9%	0.7%	0.6%
Europe	8,896	-2,797		6,099	-31.4%	8.2%	5.5%
ROW	3,146		50	3,196	1.6%	2.9%	2.9%
Total	109,006		2,856	111,862	2.6%		
W/O Ven.	108,782		2,840	111,622	2.6%		



ARRIVALS USA JULY 2023/2022

87,018
ARRIVALS

40.2%
GROWTH

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
New York	20,551	-1,165	19,386	-5.7%	23.7%	22.3%
Massachusetts	7,817	516	8,333	6.6%	9.0%	9.6%
New Jersey	13,839	-1,620	12,219	-11.7%	15.9%	14.0%
Pennsylvania	5,146	277	5,423	5.4%	5.9%	6.2%
Illinois	1,773	206	1,979	11.6%	2.0%	2.3%
Connecticut	3,272	-149	3,123	-4.6%	3.8%	3.6%
Florida	5,516	-892	4,624	-16.2%	6.4%	5.3%
Ohio	1,880	323	2,203	17.2%	2.2%	2.5%
Maryland	2,770	181	2,951	6.5%	3.2%	3.4%
Michigan	625	125	750	20.0%	0.7%	0.9%
Virginia	2,472	210	2,682	8.5%	2.8%	3.1%
Georgia	2,867	-448	2,419	-15.6%	3.3%	2.8%
North Carolina	2,446	151	2,597	6.2%	2.8%	3.0%
Texas	3,731	256	3,987	6.9%	4.3%	4.6%
California	1,917	46	1,963	2.4%	2.2%	2.3%
Other	10,213	2,166	12,379	21.2%	11.8%	14.2%
Total	86,835	183	87,018	0.2%		



NIGHT JULY 2023/2022

790,966
NIGHTS

0.4%
GROWTH

	2022	Growth	2023	% Growth	ALOS 2022	ALOS 2023
USA	574,868	1,624	576,492	0.3%	6.6	6.6
Canada	24,168	2,584	26,752	10.7%	9.4	9.0
NA	599,036	4,208	603,244	0.7%	6.7	6.7
Venezuela	2,818	292	3,110	10.4%	12.6	13.0
Colombia	23,680	12,013	35,693	50.7%	8.0	7.2
Brazil	4,396	7,044	11,440	160.2%	7.3	6.8
Argentina	14,101	5,018	19,119	35.6%	9.5	9.6
Chile	5,452	1,421	6,873	26.1%	7.8	8.3
Ecuador	1,379	1,638	3,017	118.8%	8.0	5.4
Peru	4,070	922	4,992	22.7%	8.3	7.0
Paraguay	491	-293	198	-59.7%	6.5	6.2
Uruguay	1,865	179	2,044	9.6%	8.7	8.8
Mexico	1,151	879	2,030	76.4%	9.6	6.4
Others	4,213	3,361	7,574	79.8%	8.4	7.4
SA	63,616	32,474	96,090	51.0%	8.4	7.6
Netherlands	61,894	-16,994	44,900	-27.5%	13.6	13.4
UK	18,802	-12,247	6,555	-65.1%	11.5	10.5
Germany	3,863	-782	3,081	-20.2%	9.9	9.8
Italy	6,667	-1,973	4,694	-29.6%	7.4	7.3
Sweden	730	-184	546	-25.2%	15.5	10.7
Belgium	2,715	-509	2,206	-18.7%	10.9	10.2
Austria	624	96	720	15.4%	10.1	9.9
Switzerland	2,622	-1,266	1,356	-48.3%	10.2	9.2
Others	8,326	-853	7,473	-10.2%	10.5	10.9
Europe	106,243	-34,712	71,531	-32.7%	11.9	11.7
ROW	19,066	1,035	20,101	5.4%	6.1	6.3
Total	787,961	3,005	790,966	0.4%	7.2	7.1



ACCOMMODATIONS

JULY 2023/2022

111,862
ARRIVALS

2.6%
GROWTH

ARRIVALS BY ACCOMMODATION

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
EP	29,549	1,215	30,764	4.1%	27.1%	27.5%
All Inclusive	19,730	124	19,854	0.6%	18.1%	17.7%
Timeshare	33,974	-960	33,014	-2.8%	31.2%	29.5%
Others	25,753	2,477	28,230	9.6%	23.6%	25.2%
Total	109,006	2,856	111,862	2.6%		

NIGHTS BY ACCOMMODATION

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
EP	176,171	4,601	180,772	2.6%	22.4%	22.9%
All Inclusive	124,812	-4,238	120,574	-3.4%	15.8%	15.2%
Timeshare	262,420	-8,834	253,586	-3.4%	33.3%	32.1%
Others	224,558	11,476	236,034	5.1%	28.5%	29.8%
Total	787,961	3,005	790,966	0.4%		



VISITORS BY AGE JULY 2023/2022

111,862
ARRIVALS

2.6%
GROWTH

	2022		Growth	2023	% Growth
0 - 11	9,624		361	9,985	3.8%
12-19	14,481		278	14,759	1.9%
20 - 29	14,922	-917		14,005	-6.1%
30 - 39	16,055	-445		15,610	-2.8%
40 - 49	20,313		441	20,754	2.2%
50 - 59	18,946		1,028	19,974	5.4%
60 - 69	9,483		1,495	10,978	15.8%
70 +	5,181		613	5,794	11.8%
Not Stated	1		2	3	200.0%
Total	109,006		2,856	111,862	2.6%



GENERATIONS

JULY 2023/2022

111,862
ARRIVALS

2.6%
GROWTH

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
Gen A	7,186	286	7,472	4.0%	6.6%	6.7%
Gen Z	25,902	4	25,906	0.0%	23.8%	23.2%
Millennials	25,949	-1,011	24,938	-3.9%	23.8%	22.3%
Gen X	30,928	1,141	32,069	3.7%	28.4%	28.7%
Baby Boomers	17,260	2,035	19,295	11.8%	15.8%	17.2%
Silent Generations	1,780	399	2,179	22.4%	1.6%	1.9%
Age not specified	1	2	3	200.0%	0.0%	0.0%
Total	109,006	2,856	111,862	2.6%		



CARRIERS

JULY 2023/2022

111,862
ARRIVALS

2.6%
GROWTH

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
JETBLUE	33,488	-4,969	28,519	-14.8%	30.7%	25.5%
AMERICAN AIRLINES	24,040	1,481	25,521	6.2%	22.1%	22.8%
UNITED AIRLINES	15,491	1,404	16,895	9.1%	14.2%	15.1%
DELTA AIRLINE	10,921	-376	10,545	-3.4%	10.0%	9.4%
AEROGAL/AVIANCA	3,409	2,018	5,427	59.2%	3.1%	4.9%
SOUTH WEST	4,320	1,045	5,365	24.2%	4.0%	4.8%
COPA AIRLINE	2,862	1,514	4,376	52.9%	2.6%	3.9%
AERO REPUBLICA/WINGO	1,084	1,578	2,662	145.6%	1.0%	2.4%
KLM	4,036	-1,473	2,563	-36.5%	3.7%	2.3%
DIVI DIVI AIR	1,419	95	1,514	6.7%	1.3%	1.4%
SPIRIT AIRLINES	844	493	1,337	58.4%	0.8%	1.2%
WESTJET AIRLINES	790	485	1,275	61.4%	0.7%	1.1%
TUI NL	1,528	-293	1,235	-19.2%	1.4%	1.1%
EZ AIRLINE	1,101	-93	1,008	-8.4%	1.0%	0.9%
SUNWING AIRLINES	722	177	899	24.5%	0.7%	0.8%
BRITISH AIRWAYS	0	605	605	-	0.0%	0.5%
PRIVATE	325	223	548	68.6%	0.3%	0.5%
SURINAM AIRWAYS	167	332	499	198.8%	0.2%	0.4%
JET AIR CARIBBEAN	473	-145	328	-30.7%	0.4%	0.3%
WINAIR	135	139	274	103.0%	0.1%	0.2%
CHARTER	175	35	210	20.0%	0.2%	0.2%
SKY HIGH AVIATION	89	34	123	38.2%	0.1%	0.1%
ARAJET	0	90	90	-	0.0%	0.1%
AIR CENTURY	45	-2	43	-4.4%	0.0%	0.0%
VENSECAR INTERNACIONAL	1		1	0.0%	0.0%	0.0%
AEROCARIBE	0		0	-	0.0%	0.0%
Others	1,541	-1,541	0	-100.0%	1.4%	0.0%
Total	109,006	2,856	111,862	2.6%		



CARRIERS BY EMBARKATION POINT

JULY 2023/2022

111,862
ARRIVALS

2.6%
GROWTH

City	APO Code	July '23	Market Share	July'22	Market Share	23 vs 22
JFK NY	JFK	22,540	20.1%	21,776	20.0%	3.5%
Newark	EWR	11,431	10.2%	15,373	14.1%	-25.6%
Boston	BOS	10,478	9.4%	9,069	8.3%	15.5%
Charlotte	CLT	9,470	8.5%	8,377	7.7%	13.0%
Miami	MIA	9,036	8.1%	8,643	7.9%	4.5%
Bogota	BOG	6,694	6.0%	4,495	4.1%	48.9%
Philadelphia	PHL	5,406	4.8%	5,531	5.1%	-2.3%
Atlanta	ATL	5,306	4.7%	5,151	4.7%	3.0%
Panama City	PTY	4,376	3.9%	2,865	2.6%	52.7%
Orlando	MCO	3,994	3.6%	3,661	3.4%	9.1%
Amsterdam	AMS	3,802	3.4%	5,564	5.1%	-31.7%
Curacao	CUR	3,257	2.9%	3,196	2.9%	1.9%
G.Bush DC	IAD	3,002	2.7%	2,436	2.2%	23.2%
Toronto	YYZ	2,176	1.9%	1,512	1.4%	43.9%
Chicago	ORD	1,629	1.5%	815	0.7%	99.9%
Houston International	IAH	1,607	1.4%	1,579	1.4%	1.8%
Baltimore	BWI	1,376	1.2%	664	0.6%	107.2%
Fort Lauderdale	FLL	1,365	1.2%	4,567	4.2%	-70.1%
Cali	CLO	901	0.8%	0	0.0%	0
Dallas Forth Worth	DFW	826	0.7%	793	0.7%	4.2%
La Guardi, NY	LGA	801	0.7%	698	0.6%	14.8%
Gatwick, UK	LGW	605	0.5%	1,318	1.2%	-54.1%
Paramaribo	PBM	500	0.4%	167	0.2%	199.4%
Medellin	MDE	495	0.4%	124	0.1%	299.2%
Santo Domingo	SDQ	236	0.2%	106	0.1%	122.6%
	Others	553	0.5%	526	0.5%	5.1%
Grand Total		111,862	100.0%	109,006	100.00%	2.6%



CRUISE COMPARISON



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CRUISE JULY 2023/2022



2022



CRUISE PAX
34,110

CRUISE CALLS
12



2023



CRUISE PAX
23,880

-30.0%

CRUISE CALLS
8

-33.3%

ABSOLUTE GROWTH PAX YTD JULY

-10,230
-30.0%

ABSOLUTE GROWTH CALLS YTD JULY

-4
-33.3%



COMPARISON

2023 VERSUS 2019

SNAPSHOT YTD JULY 2023/2019



HOW MANY
ARRIVALS?

722,444

6.4%



HOW MANY
CRUISE TOURISM?

523,322

8.6%

Compared to 2019



HOW LONG
DID THEY STAY?

5,146,362

3.5%



WHAT DID THEY SPEND?*

Central Bank Aruba (Q1 2023)

Avg. 1,347.3 min

22%

Q1 2019: 1,100.8 min

**Tourism Credits: In the new presentation of the Balance of Payments, the Central Bank of Aruba reclassified maintenance fee arising from Timeshare arrangement from "Other Services" to "Travel Services" (Tourism). With this reclassification it should be noted that the term Tourism Receipts has changed to Tourism Credits in the new presentation of Balance of Payments. This reclassification resulted in an upward adjustment of the previously used term Tourism Receipts.

WHERE DID THEY STAY?



1,133,734

NIGHTS

-17.8%



792,625

NIGHTS

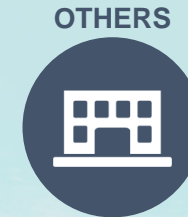
4.5%



1,602,790

NIGHTS

9.2%



1,617,213

NIGHTS

18.1%



ARRIVALS YTD JULY 2023/2019

722,444
ARRIVALS

6.4%
GROWTH

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
USA	515,068	48,615	563,683	9.4%	75.8%	78.0%
Canada	31,211	4,253	35,464	13.6%	4.6%	4.9%
NA	546,279	52,868	599,147	9.7%	80.4%	82.9%
Venezuela	9,357	-8,254	1,103	-88.2%	1.4%	0.2%
Colombia	19,909	5,951	25,860	29.9%	2.9%	3.6%
Brazil	6,270	1,010	7,280	16.1%	0.9%	1.0%
Argentina	9,523	869	10,392	9.1%	1.4%	1.4%
Chile	6,571	-1,883	4,688	-28.7%	1.0%	0.6%
Ecuador	968	2,137	3,105	220.8%	0.1%	0.4%
Peru	3,507	-387	3,120	-11.0%	0.5%	0.4%
Paraguay	1,701	-1,198	503	-70.4%	0.3%	0.1%
Uruguay	1,275	-310	965	-24.3%	0.2%	0.1%
Mexico	1,031	629	1,660	61.0%	0.2%	0.2%
Others	5,492	1,167	6,659	21.2%	0.8%	0.9%
SA	65,604	-269	65,335	-0.4%	9.7%	9.0%
Netherlands	25,402	-3,398	22,004	-13.4%	3.7%	3.0%
UK	6,011	-2,754	3,257	-45.8%	0.9%	0.5%
Germany	3,863	-654	3,209	-16.9%	0.6%	0.4%
Italy	3,945	-1,606	2,339	-40.7%	0.6%	0.3%
Sweden	2,608	-951	1,657	-36.5%	0.4%	0.2%
Belgium	1,440	-272	1,168	-18.9%	0.2%	0.2%
Austria	497	-115	382	-23.1%	0.1%	0.1%
Switzerland	1,207	-174	1,033	-14.4%	0.2%	0.1%
Others	6,359	-1,021	5,338	-16.1%	0.9%	0.7%
Europe	51,332	-10,945	40,387	-21.3%	7.6%	5.6%
ROW	15,898	1,677	17,575	10.5%	2.3%	2.4%
Total	679,113	43,331	722,444	6.4%		
W/O Ven.	669,756	51,585	721,341	7.7%		



ARRIVALS USA YTD JULY 2023/2019

563,683
ARRIVALS

9.4%
GROWTH

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
New York	99,370	7,976	107,346	8.0%	19.3%	19.0%
Massachusetts	61,080	14,980	76,060	24.5%	11.9%	13.5%
New Jersey	56,994	6,502	63,496	11.4%	11.1%	11.3%
Pennsylvania	30,009	4,047	34,056	13.5%	5.8%	6.0%
Illinois	13,866	1,038	14,904	7.5%	2.7%	2.6%
Connecticut	17,557	3,940	21,497	22.4%	3.4%	3.8%
Florida	29,341	-354	28,987	-1.2%	5.7%	5.1%
Ohio	15,409	1,029	16,438	6.7%	3.0%	2.9%
Maryland	16,378	924	17,302	5.6%	3.2%	3.1%
Michigan	10,708	620	11,328	5.8%	2.1%	2.0%
Virginia	12,256	3,684	15,940	30.1%	2.4%	2.8%
Georgia	12,799	1,002	13,801	7.8%	2.5%	2.4%
North Carolina	11,799	4,467	16,266	37.9%	2.3%	2.9%
Texas	15,591	1,733	17,324	11.1%	3.0%	3.1%
California	10,803	-460	10,343	-4.3%	2.1%	1.8%
Other	101,108	-2,513	98,595	-2.5%	19.6%	17.5%
Total	515,068	48,615	563,683	9.4%		



NIGHTS YTD JULY 2023/2019

5,146,362
NIGHTS

3.5%
GROWTH

	2019	Growth	2023	% Growth	ALOS 2019	ALOS 2023
USA	3,463,009		3,804,491	9.9%	6.7	6.7
Canada	275,438	67,015	342,453	24.3%	8.8	9.7
NA	3,738,447		4,146,944	10.9%	6.8	6.9
Venezuela	116,258	-104,294	11,964	-89.7%	12.4	10.8
Colombia	163,423	10,603	174,026	6.5%	8.2	6.7
Brazil	40,783	4,905	45,688	12.0%	6.5	6.3
Argentina	86,807	7,410	94,217	8.5%	9.1	9.1
Chile	49,542	-12,621	36,921	-25.5%	7.5	7.9
Ecuador	7,265	8,778	16,043	120.8%	7.5	5.2
Peru	23,699	-2,690	21,009	-11.4%	6.8	6.7
Paraguay	11,135	-7,671	3,464	-68.9%	6.5	6.9
Uruguay	9,951	-2,215	7,736	-22.3%	7.8	8.0
Mexico	7,832	1,927	9,759	24.6%	7.6	5.9
Others	36,849	6,458	43,307	17.5%	6.7	6.5
SA	553,544	-89,410	464,134	-16.2%	8.4	7.1
Netherlands	329,277	-63,084	266,193	-19.2%	13.0	12.1
UK	63,688	-33,765	29,923	-53.0%	10.6	9.2
Germany	35,358	-8,408	26,950	-23.8%	9.2	8.4
Italy	32,098	-12,333	19,765	-38.4%	8.1	8.5
Sweden	31,017	-11,340	19,677	-36.6%	11.9	11.9
Belgium	15,004	-1,834	13,170	-12.2%	10.4	11.3
Austria	4,523	-814	3,709	-18.0%	9.1	9.7
Switzerland	10,509	-823	9,686	-7.8%	8.7	9.4
Others	59,285	-6,380	52,905	-10.8%	9.3	9.9
Europe	580,759	-138,781	441,978	-23.9%	11.3	10.9
ROW	101,015	-7,709	93,306	-7.6%	6.4	5.3
Total	4,973,765	172,597	5,146,362	3.5%	7.3	7.1



ACCOMMODATIONS YTD JULY 2023/2019

722,444
ARRIVALS

6.4%
GROWTH

ARRIVALS BY ACCOMMODATION

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
EP	233,444	-34,436	199,008	-14.8%	34.4%	27.5%
All Inclusive	117,448	11,806	129,254	10.1%	17.3%	17.9%
Timeshare	180,579	16,342	196,921	9.0%	26.6%	27.3%
Others	147,642	49,619	197,261	33.6%	21.7%	27.3%
Total	679,113	43,331	722,444	6.4%		

NIGHTS BY ACCOMMODATION

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
EP	1,379,214	-245,480	1,133,734	-17.8%	27.7%	22.0%
All Inclusive	758,486	34,139	792,625	4.5%	15.2%	15.4%
Timeshare	1,467,197	135,593	1,602,790	9.2%	29.5%	31.1%
Others	1,368,868	248,345	1,617,213	18.1%	27.5%	31.4%
Total	4,973,765	172,597	5,146,362	3.5%		



VISITORS BY AGE YTD JULY 2023/2019

722,444
ARRIVALS

6.4%
GROWTH

	2019	Growth	2023	% Growth
0 - 11	48,504	897	49,401	1.8%
12-19	51,686	2,653	54,339	5.1%
20 - 29	82,449	1,838	84,287	2.2%
30 - 39	101,947	6,827	108,774	6.7%
40 - 49	116,556	2,930	119,486	2.5%
50 - 59	135,548	5,110	140,658	3.8%
60 - 69	95,909	13,257	109,166	13.8%
70 +	46,398	9,886	56,284	21.3%
Not Stated	116	-67	49	-57.8%
Total	679,113	43,331	722,444	6.4%



GENERATIONS

YTD JULY 2023/2019

722,444
VISITORS

6.4%
GROWTH

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
Gen A	37,690	869	38,559	2.3%	5.5%	5.3%
Gen Z	105,892	5,397	111,289	5.1%	15.6%	15.4%
Millennials	163,613	8,186	171,799	5.0%	24.1%	23.8%
Gen X	191,461	3,395	194,856	1.8%	28.2%	27.0%
Baby Boomers	165,173	20,941	186,114	12.7%	24.3%	25.8%
Silent Generations	15,168	4,610	19,778	30.4%	2.2%	2.7%
Age not specified	116	-67	49	-57.8%	0.0%	0.0%
Total	679,113	43,331	722,444	6.4%		



CARRIERS YTD JULY 2023/2019

722,444
VISITORS

6.4%
GROWTH

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
JETBLUE	154,138	15,189	169,327	9.9%	22.7%	23.4%
AMERICAN AIRLINES	130,381	35,139	165,520	27.0%	19.2%	22.9%
UNITED AIRLINES	94,550	173	94,723	0.2%	13.9%	13.1%
DELTA AIRLINE	83,077	6,454	89,531	7.8%	12.2%	12.4%
SOUTH WEST	49,473	-13,958	35,515	-28.2%	7.3%	4.9%
AEROGAL/AVIANCA	30,710	-801	29,909	-2.6%	4.5%	4.1%
COPA AIRLINE	21,134	2,877	24,011	13.6%	3.1%	3.3%
KLM	19,295	604	19,899	3.1%	2.8%	2.8%
AERO REPUBLICA/WINGO	1,790	9,846	11,636	550.1%	0.3%	1.6%
WESTJET AIRLINES	6,003	5,371	11,374	89.5%	0.9%	1.6%
AIR CANADA	10,134	66	10,200	0.7%	1.5%	1.4%
DIVI DIVI AIR	5,311	4,476	9,787	84.3%	0.8%	1.4%
SUNWING AIRLINES	9,868	-708	9,160	-7.2%	1.5%	1.3%
TUI NL	0	8,758	8,758	-	0.0%	1.2%
SPIRIT AIRLINES	6,623	2,044	8,667	30.9%	1.0%	1.2%
EZ AIRLINE	1,757	4,185	5,942	238.2%	0.3%	0.8%
PRIVATE	2,447	1,315	3,762	53.7%	0.4%	0.5%
SURINAM AIRWAYS	2,967	-13	2,954	-0.4%	0.4%	0.4%
SUN COUNTRY	2,399	-144	2,255	-6.0%	0.4%	0.3%
CHARTER	10,282	-8,144	2,138	-79.2%	1.5%	0.3%
BRITISH AIRWAYS	0	1,831	1,831	-	0.0%	0.3%
JET AIR CARIBBEAN	0	1,365	1,365	-	0.0%	0.2%
SUNCLASS AIRLINES	0	1,158	1,158	-	0.0%	0.2%
WINAIR	3,517	-2,684	833	-76.3%	0.5%	0.1%
ARAJET	0	614	614	-	0.0%	0.1%
SKY HIGH AVIATION	276	138	414	50.0%	0.0%	0.1%
Others	32,981	-31,820	1,161	-96.5%	4.9%	0.2%
Total	679,113	43,331	722,444	6.4%		



CARRIERS BY EMBARKATION POINT

YTD JULY 2023/2019

722,444
ARRIVALS

13.4%
GROWTH

City	APO Code	July '23	Market Share	July '19	Market Share	23 vs 19
JFK NY	JFK	126,557	17.5%	98,603	14.5%	28.4%
Newark	EWR	95,327	13.2%	70,845	10.4%	34.6%
Boston	BOS	62,852	8.7%	73,600	10.8%	-14.6%
Charlotte	CLT	60,185	8.3%	48,927	7.2%	23.0%
Miami	MIA	57,543	8.0%	54,026	8.0%	6.5%
Bogota	BOG	37,999	5.3%	22,376	3.3%	69.8%
Philadelphia	PHL	36,267	5.0%	36,236	5.3%	0.1%
Atlanta	ATL	35,821	5.0%	42,599	6.3%	-15.9%
Panama City	PTY	30,759	4.3%	25,122	3.7%	22.4%
Orlando	MCO	28,099	3.9%	28,521	4.2%	-1.5%
Amsterdam	AMS	28,081	3.9%	54	0.0%	51901.9%
Curacao	CUR	24,025	3.3%	21,252	3.1%	13.0%
G.Bush DC	IAD	19,272	2.7%	6,403	0.9%	201.0%
Toronto	YYZ	18,727	2.6%	15,692	2.3%	19.3%
Chicago	ORD	10,266	1.4%	11,113	1.6%	-7.6%
Houston International	IAH	8,995	1.2%	50,026	7.4%	-82.0%
Baltimore	BWI	7,473	1.0%	28,196	4.2%	-73.5%
Fort Lauderdale	FLL	5,888	0.8%	5,238	0.8%	12.4%
Cali	CLO	4,467	0.6%	2	0.0%	223250.0%
Dallas Forth Worth	DFW	4,292	0.6%	3,536	0.5%	21.4%
La Guardi, NY	LGA	3,897	0.5%	1,080	0.2%	260.8%
Gatwick, UK	LGW	2,966	0.4%	2,652	0.4%	11.8%
Paramaribo	PBM	2,255	0.3%	5,048	0.7%	-55.3%
Medellin	MDE	1,831	0.3%	3,641	0.5%	-49.7%
Santo Domingo	SDQ	1,385	0.2%	3,678	0.5%	-62.3%
	Others	7,215	1.0%	20,647	3.0%	-65.1%
Grand Total		722,444	100.0%	679,113	100.0%	6.4%



CRUISE COMPARISON



One happy island ✦ [ARUBA.COM](https://www.aruba.com)



CRUISE YTD JULY 2023/2019



2019



CRUISE PAX

482,064

CRUISE CALLS

182



2023



CRUISE PAX

523,322

8.6%

CRUISE CALLS

198

8.8%

ABSOLUTE GROWTH PAX YTD JULY

41,258

8.6%

ABSOLUTE GROWTH CALLS YTD JULY

16

8.8%

JULY RESULT 2023

NORTH AMERICA



89,984

80.4%

SOUTH AMERICA



12,583

11.2%

EUROPE



6,099

5.5%

OTHERS



3,196

2.9%

TOTAL ARRIVALS

111,862

100%



ARRIVALS JULY 2023/2019

111,862
ARRIVALS

8.1%
GROWTH

	2019		Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
USA	79,725		7,293	87,018	9.1%	77.1%	77.8%
Canada	2,692		274	2,966	10.2%	2.6%	2.7%
NA	82,417		7,567	89,984	9.2%	79.7%	80.4%
Venezuela	829	-589		240	-71.0%	0.8%	0.2%
Colombia	2,783		2,163	4,946	77.7%	2.7%	4.4%
Brazil	1,085		605	1,690	55.8%	1.0%	1.5%
Argentina	1,972		21	1,993	1.1%	1.9%	1.8%
Chile	1,077	-253		824	-23.5%	1.0%	0.7%
Ecuador	146		417	563	285.6%	0.1%	0.5%
Peru	844	-128		716	-15.2%	0.8%	0.6%
Paraguay	137	-105		32	-76.6%	0.1%	0.0%
Uruguay	215		17	232	7.9%	0.2%	0.2%
Mexico	205		112	317	54.6%	0.2%	0.3%
Others	828		202	1,030	24.4%	0.8%	0.9%
SA	10,121		2,462	12,583	24.3%	9.8%	11.2%
Netherlands	3,671	-321		3,350	-8.7%	3.5%	3.0%
UK	1,465	-842		623	-57.5%	1.4%	0.6%
Germany	483	-169		314	-35.0%	0.5%	0.3%
Italy	1,098	-459		639	-41.8%	1.1%	0.6%
Sweden	124	-73		51	-58.9%	0.1%	0.0%
Belgium	218	-2		216	-0.9%	0.2%	0.2%
Austria	94	-21		73	-22.3%	0.1%	0.1%
Switzerland	217	-69		148	-31.8%	0.2%	0.1%
Others	966	-281		685	-29.1%	0.9%	0.6%
Europe	8,336	-2,237		6,099	-26.8%	8.1%	5.5%
ROW	2,590		606	3,196	23.4%	2.5%	2.9%
Total	103,464		8,398	111,862	8.1%		
W/O Ven.	102,635		8,987	111,622	8.8%		



ARRIVALS USA JULY 2023/2019

87,018
ARRIVALS

9.1%
GROWTH

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
New York	17,570	1,816	19,386	10.3%	22.0%	22.3%
Massachusetts	5,828	2,505	8,333	43.0%	7.3%	9.6%
New Jersey	11,170	1,049	12,219	9.4%	14.0%	14.0%
Pennsylvania	5,060	363	5,423	7.2%	6.3%	6.2%
Illinois	1,784	195	1,979	10.9%	2.2%	2.3%
Connecticut	2,284	839	3,123	36.7%	2.9%	3.6%
Florida	4,944	-320	4,624	-6.5%	6.2%	5.3%
Ohio	2,212	-9	2,203	-0.4%	2.8%	2.5%
Maryland	3,448	-497	2,951	-14.4%	4.3%	3.4%
Michigan	698	52	750	7.4%	0.9%	0.9%
Virginia	2,063	619	2,682	30.0%	2.6%	3.1%
Georgia	2,487	-68	2,419	-2.7%	3.1%	2.8%
North Carolina	1,961	636	2,597	32.4%	2.5%	3.0%
Texas	3,538	449	3,987	12.7%	4.4%	4.6%
California	2,089	-126	1,963	-6.0%	2.6%	2.3%
Other	12,597	-218	12,379	-1.7%	15.8%	14.2%
Total	79,733	7,285	87,018	9.1%		



NIGHTS YTD JULY 2023/2019

790,966
NIGHTS

3.0%
GROWTH

	2019		Growth	2023	% Growth	ALOS 2019	ALOS 2023
USA	530,555		45,937	576,492	8.7%	6.7	6.6
Canada	23,216		3,536	26,752	15.2%	8.6	9.0
NA	553,771		49,473	603,244	8.9%	6.7	6.7
Venezuela	15,101	-11,991		3,110	-79.4%	18.2	13.0
Colombia	25,932		9,761	35,693	37.6%	9.3	7.2
Brazil	8,049		3,391	11,440	42.1%	7.4	6.8
Argentina	18,368		751	19,119	4.1%	9.3	9.6
Chile	8,214	-1,341		6,873	-16.3%	7.6	8.3
Ecuador	1,389		1,628	3,017	117.2%	9.5	5.4
Peru	6,010	-1,018		4,992	-16.9%	7.1	7.0
Paraguay	915	-717		198	-78.4%	6.7	6.2
Uruguay	1,746		298	2,044	17.1%	8.1	8.8
Mexico	1,754		276	2,030	15.7%	8.6	6.4
Others	5,941		1,633	7,574	27.5%	7.2	7.4
SA	93,419		2,671	96,090	2.9%	9.2	7.6
Netherlands	54,940	-10,040		44,900	-18.3%	15.0	13.4
UK	16,551	-9,996		6,555	-60.4%	11.3	10.5
Germany	4,641	-1,560		3,081	-33.6%	9.6	9.8
Italy	7,978	-3,284		4,694	-41.2%	7.3	7.3
Sweden	1,269	-723		546	-57.0%	10.2	10.7
Belgium	2,297	-91		2,206	-4.0%	10.5	10.2
Austria	814	-94		720	-11.5%	8.7	9.9
Switzerland	2,015	-659		1,356	-32.7%	9.3	9.2
Others	10,465	-2,992		7,473	-28.6%	10.8	10.9
Europe	100,970	-29,439		71,531	-29.2%	12.1	11.7
ROW	19,820		281	20,101	1.4%	7.7	6.3
Total	767,980		22,986	790,966	3.0%	7.4	7.1



ACCOMMODATIONS

JULY 2023/2019

111,862
ARRIVALS

8.1%
GROWTH

ARRIVALS BY ACCOMMODATION

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
EP	36,952	-6,188	30,764	-16.7%	35.7%	27.5%
All Inclusive	18,964	890	19,854	4.7%	18.3%	17.7%
Timeshare	28,325	4,689	33,014	16.6%	27.4%	29.5%
Others	19,223	9,007	28,230	46.9%	18.6%	25.2%
Total	103,464	8,398	111,862	8.1%		

NIGHTS BY ACCOMMODATION

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
EP	227,493	-46,721	180,772	-20.5%	29.6%	22.9%
All Inclusive	122,139	-1,565	120,574	-1.3%	15.9%	15.2%
Timeshare	221,665	31,921	253,586	14.4%	28.9%	32.1%
Others	196,683	39,351	236,034	20.0%	25.6%	29.8%
Total	767,980	22,986	790,966	3.0%		



VISITORS BY AGE JULY 2023/2019

111,862
ARRIVALS

8.1%
GROWTH

	2019	Growth	2023	% Growth
0 - 11	9,750	235	9,985	2.4%
12-19	13,817	942	14,759	6.8%
20 - 29	13,668	337	14,005	2.5%
30 - 39	15,146	464	15,610	3.1%
40 - 49	19,631	1,123	20,754	5.7%
50 - 59	17,597	2,377	19,974	13.5%
60 - 69	9,242	1,736	10,978	18.8%
70 +	4,598	1,196	5,794	26.0%
Not Stated	15	-12	3	-80.0%
Total	103,464	8,398	111,862	8.1%



GENERATIONS

JULY 2023/2019

111,862
ARRIVALS

8.1%
GROWTH

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
Gen A	7,201	271	7,472	3.8%	7.0%	6.7%
Gen Z	24,247	1,659	25,906	6.8%	23.4%	23.2%
Millennials	24,598	340	24,938	1.4%	23.8%	22.3%
Gen X	29,526	2,543	32,069	8.6%	28.5%	28.7%
Baby Boomers	16,299	2,996	19,295	18.4%	15.8%	17.2%
Silent Generations	1,578	601	2,179	38.1%	1.5%	1.9%
Age not specified	15	-12	3	-80.0%	0.0%	0.0%
Total	103,464	8,398	111,862	8.1%		



CARRIERS JULY 2023/2019

111,862
ARRIVALS

8.1%
GROWTH

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
JETBLUE	22,627	5,892	28,519	26.0%	21.9%	25.5%
AMERICAN AIRLINES	22,397	3,124	25,521	13.9%	21.6%	22.8%
UNITED AIRLINES	13,840	3,055	16,895	22.1%	13.4%	15.1%
DELTA AIRLINE	12,771	-2,226	10,545	-17.4%	12.3%	9.4%
AEROGAL/AVIANCA	4,745	682	5,427	14.4%	4.6%	4.9%
SOUTH WEST	8,773	-3,408	5,365	-38.8%	8.5%	4.8%
COPA AIRLINE	4,021	355	4,376	8.8%	3.9%	3.9%
AERO REPUBLICA/WINGO	575	2,087	2,662	363.0%	0.6%	2.4%
KLM	2,727	-164	2,563	-6.0%	2.6%	2.3%
DIVI DIVI AIR	700	814	1,514	116.3%	0.7%	1.4%
SPIRIT AIRLINES	1,512	-175	1,337	-11.6%	1.5%	1.2%
WESTJET AIRLINES	483	792	1,275	164.0%	0.5%	1.1%
TUI NL	0	1,235	1,235	-	0.0%	1.1%
EZ AIRLINE	367	641	1,008	174.7%	0.4%	0.9%
SUNWING AIRLINES	934	-35	899	-3.7%	0.9%	0.8%
BRITISH AIRWAYS	0	605	605	-	0.0%	0.5%
PRIVATE	234	314	548	134.2%	0.2%	0.5%
SURINAM AIRWAYS	470	29	499	6.2%	0.5%	0.4%
JET AIR CARIBBEAN	0	328	328	-	0.0%	0.3%
WINAIR	749	-475	274	-63.4%	0.7%	0.2%
CHARTER	611	-401	210	-65.6%	0.6%	0.2%
SKY HIGH AVIATION	45	78	123	173.3%	0.0%	0.1%
ARAJET	0	90	90	-	0.0%	0.1%
AIR CENTURY	60	-17	43	-28.3%	0.1%	0.0%
VENSECAR INTERNACIONAL	0	1	1	-	0.0%	0.0%
AEROCARIBE	0		0	-	0.0%	0.0%
Others	4,823	-4,823	0	-100.0%	4.7%	0.0%
Total	103,464	8,398	111,862	8.1%		



CARRIERS BY EMBARKATION POINT

JULY 2023/2022

111,862
ARRIVALS

2.6%
GROWTH

City	APO Code	July '23	Market Share	July'19	Market Share	23 vs 22
JFK NY	JFK	22,540	20.1%	18,131	17.5%	24.3%
Newark	EWR	11,431	10.2%	11,227	10.9%	1.8%
Boston	BOS	10,478	9.4%	7,218	7.0%	45.2%
Charlotte	CLT	9,470	8.5%	9,872	9.5%	-4.1%
Miami	MIA	9,036	8.1%	7,548	7.3%	19.7%
Bogota	BOG	6,694	6.0%	5,351	5.2%	25.1%
Philadelphia	PHL	5,406	4.8%	3,849	3.7%	40.5%
Atlanta	ATL	5,306	4.7%	6,416	6.2%	-17.3%
Panama City	PTY	4,376	3.9%	4,036	3.9%	8.4%
Orlando	MCO	3,994	3.6%	5	0.0%	79780.0%
Amsterdam	AMS	3,802	3.4%	4,026	3.9%	-5.6%
Curacao	CUR	3,257	2.9%	2,154	2.1%	51.2%
G.Bush DC	IAD	3,002	2.7%	640	0.6%	369.1%
Toronto	YYZ	2,176	1.9%	2,433	2.4%	-10.6%
Chicago	ORD	1,629	1.5%	674	0.7%	141.7%
Houston International	IAH	1,607	1.4%	1,295	1.3%	24.1%
Baltimore	BWI	1,376	1.2%	5,181	5.0%	-73.4%
Fort Lauderdale	FLL	1,365	1.2%	8,250	8.0%	-83.5%
Cali	CLO	901	0.8%	0	0.0%	0
Dallas Forth Worth	DFW	826	0.7%	590	0.6%	40.0%
La Guardi, NY	LGA	801	0.7%	569	0.5%	40.8%
Gatwick, UK	LGW	605	0.5%	1,141	1.1%	-47.0%
Paramaribo	PBM	500	0.4%	419	0.4%	19.3%
Medellin	MDE	495	0.4%	0	0.0%	#DIV/0!
Santo Domingo	SDQ	236	0.2%	110	0.1%	114.5%
	Others	553	0.5%	2,329	2.3%	-76.3%
Grand Total		111,862	100.0%	103,464	100.0%	8.1%



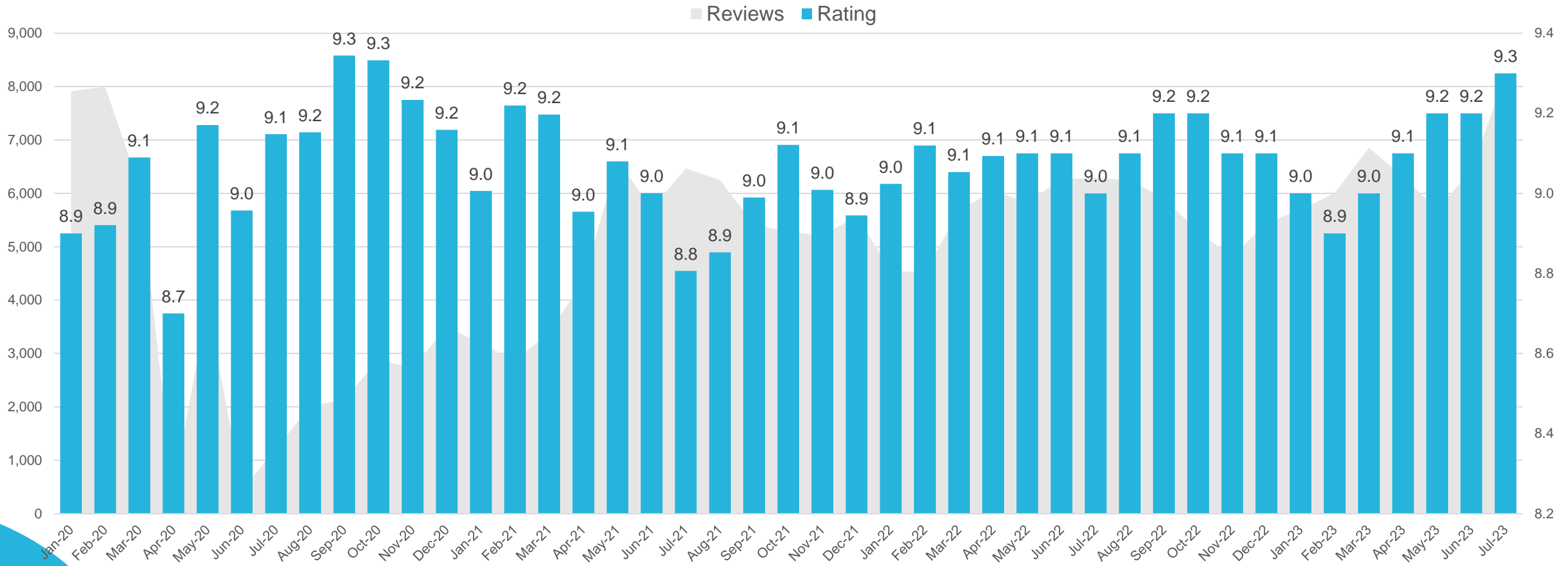
GUEST SATISFACTION





GUEST EXPERIENCE INDEX (GEI)

Reviews and Ratings



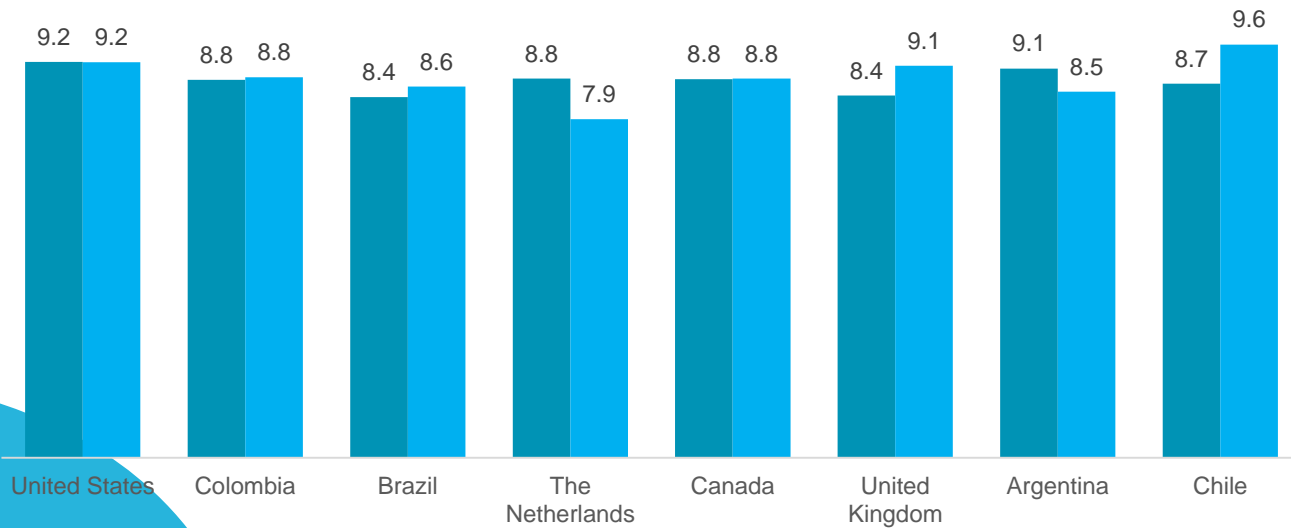


GEI July 2023

Markets

Compared to Previous Month

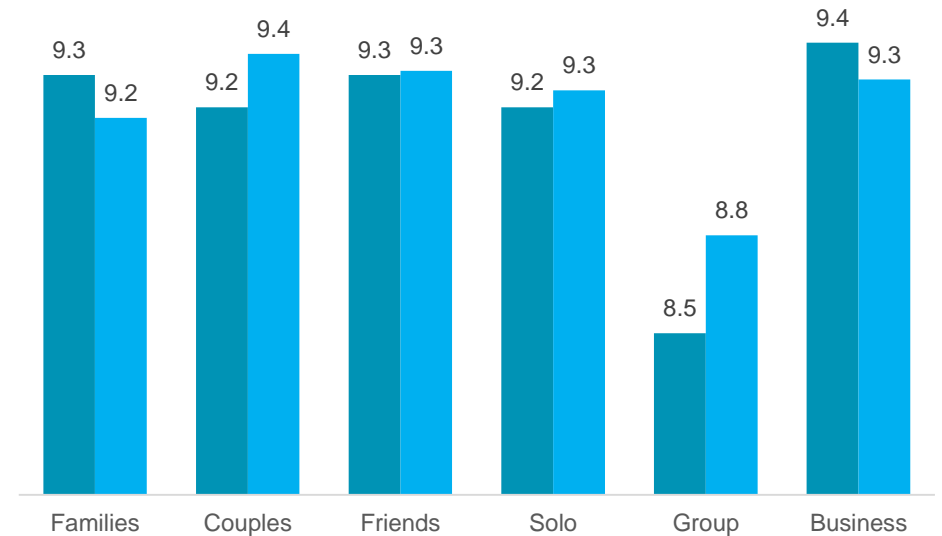
■ Jun-23 ■ Jul-23



Travel Party

Compared to Previous Month

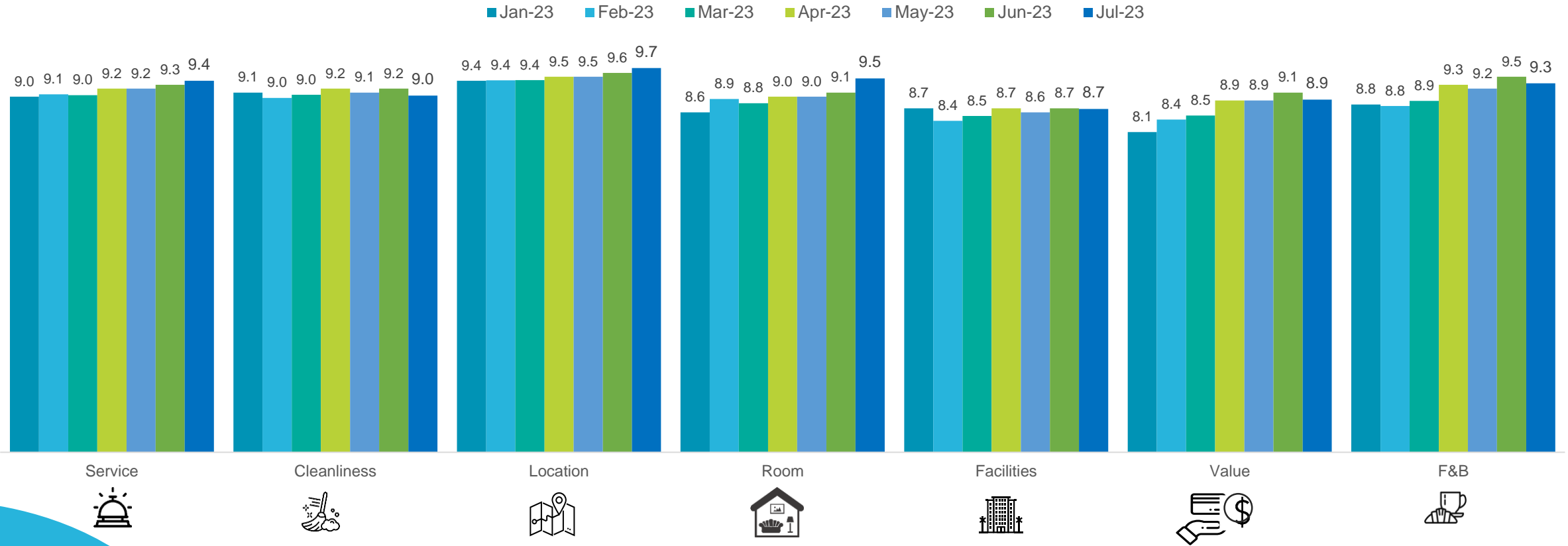
■ Jun-23 ■ Jul-23



Note: in the month of July, the number of family reviews is typically higher compared to previous months indicating more families traveling.



GEI July 2023



Note:

- 'Value' saw a drop in its rating from 9.1 in June to 8.9 in July
- Facilities had the lowest average rating in both June (8.7) and July (8.7)
- The 'Room' KPI saw a considerable increase in its rating from 9.1 in June to 9.5 in July



VACATIONS RENTALS

 **Transparent**
an OTA INSIGHT company

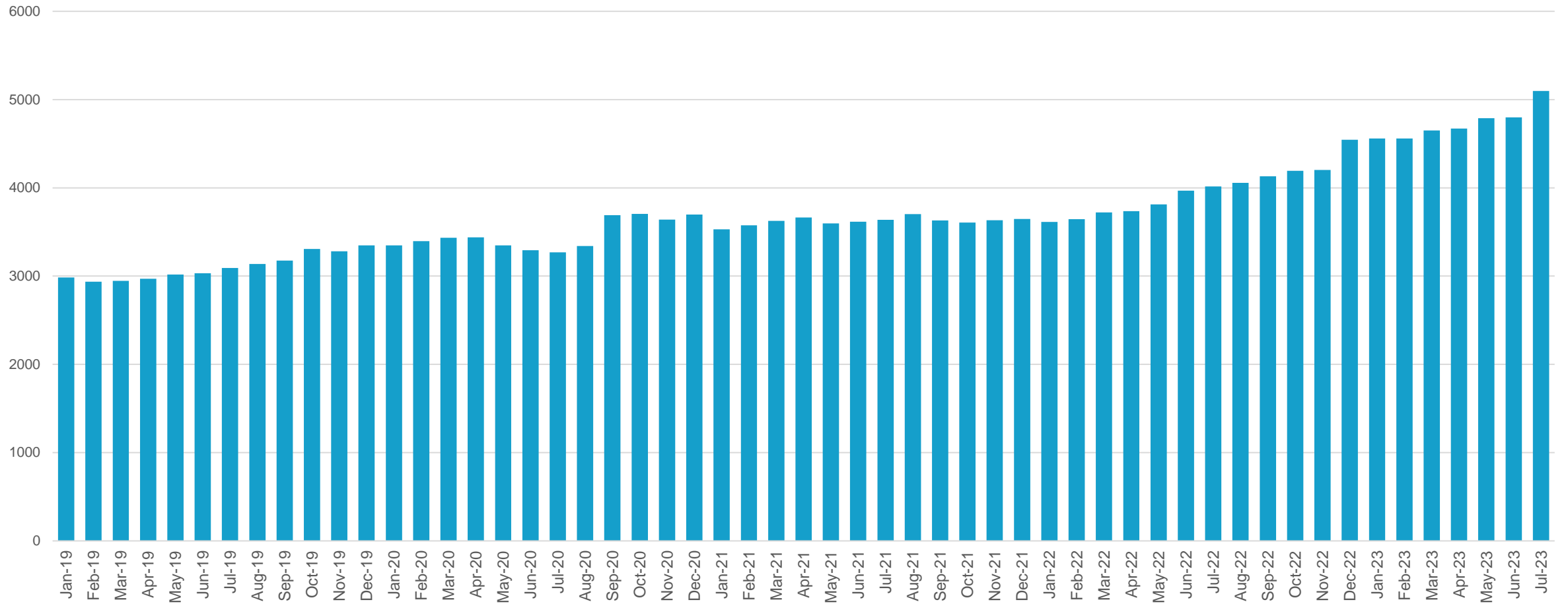
INTRODUCTION

- ▶ In 2023, A.T.A. started working with Transparent Insights. Transparent tracks short-term rentals at the property level through their dashboard.
- ▶ With Transparent, A.T.A. is able to do the following:
 - Measure the economic impact of short-term rental, track (ADR) and occupancy and analyse the booking window.
 - The above data points are also forward-looking making it possible to make demand and revenue predictions based on the current status of property calendars and advertised rates.
 - Track visitors' origin and accommodation size.
 - The dashboard also provides the ability to make a direct comparison with similar, contrasting, or competing markets to compare data on occupancy rates, ADR, and booking window.



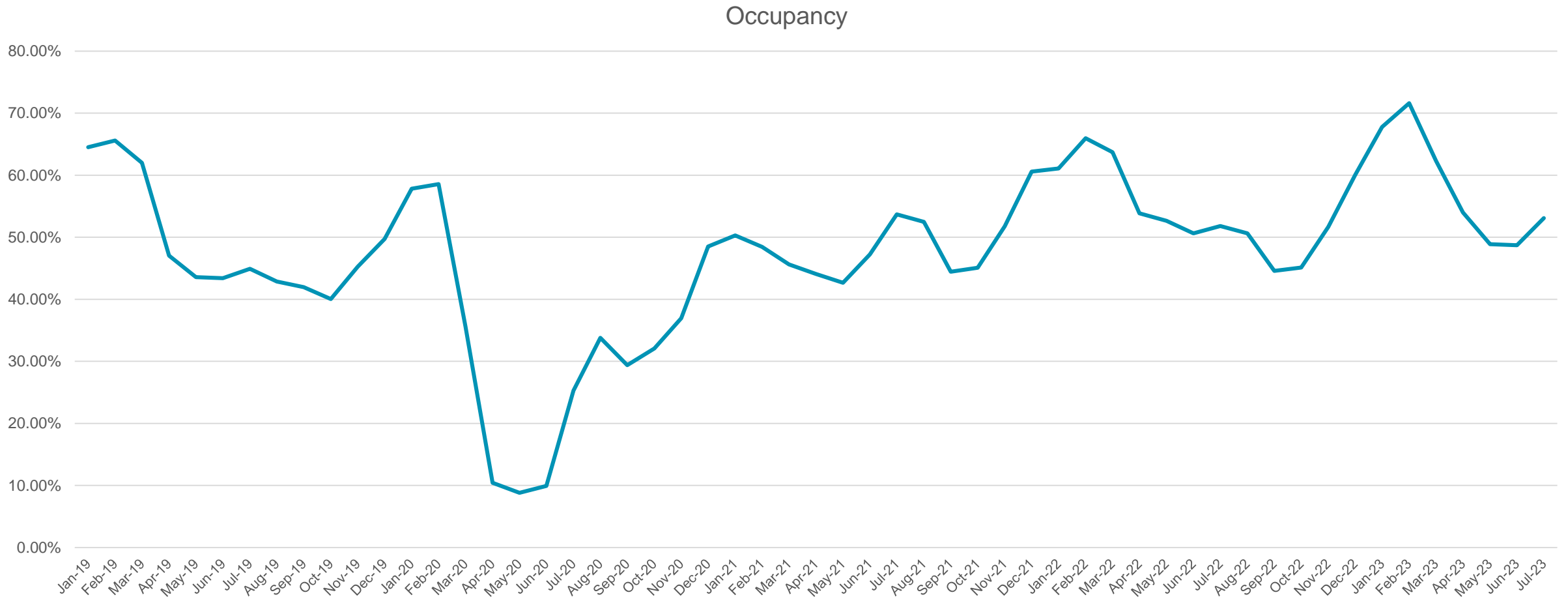
AMOUNT OF PROPERTIES

Number of properties listed in the month



OCCUPANCY

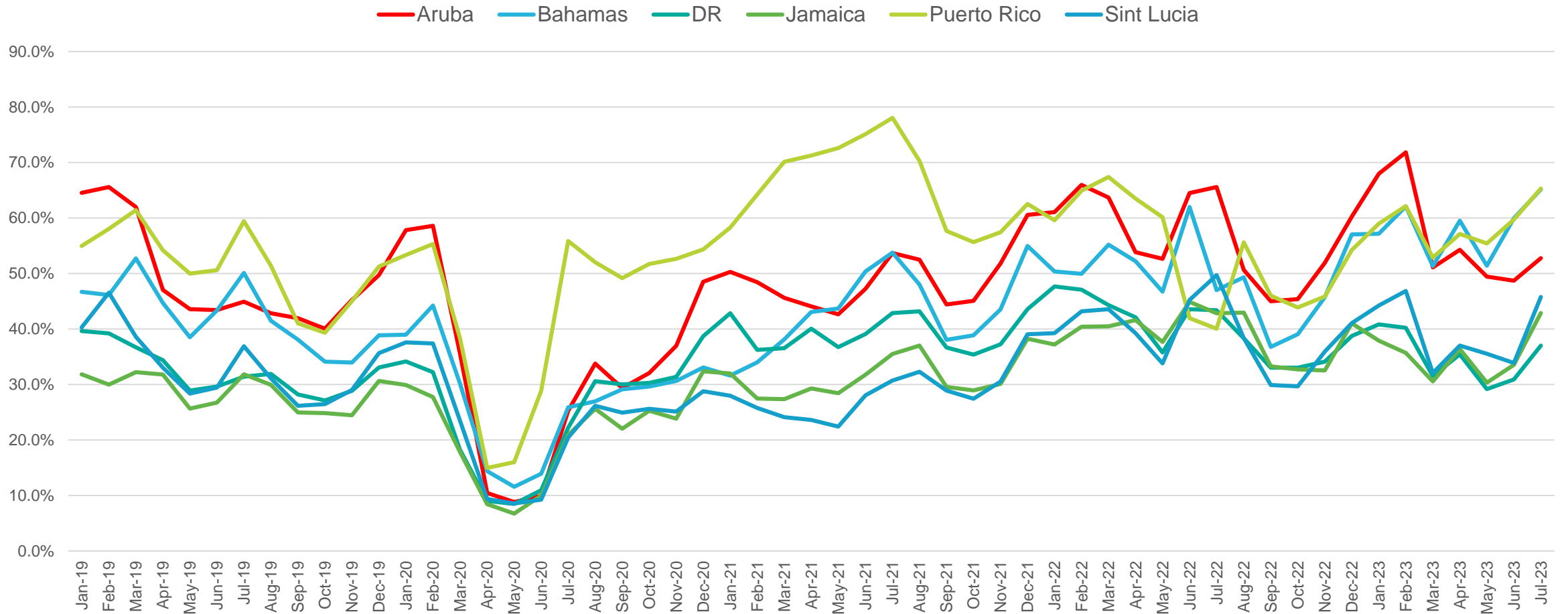
July 2023 Occupancy: 53.1% | June 2022 Occupancy: 51.8%



CARIBBEAN OCCUPANCY

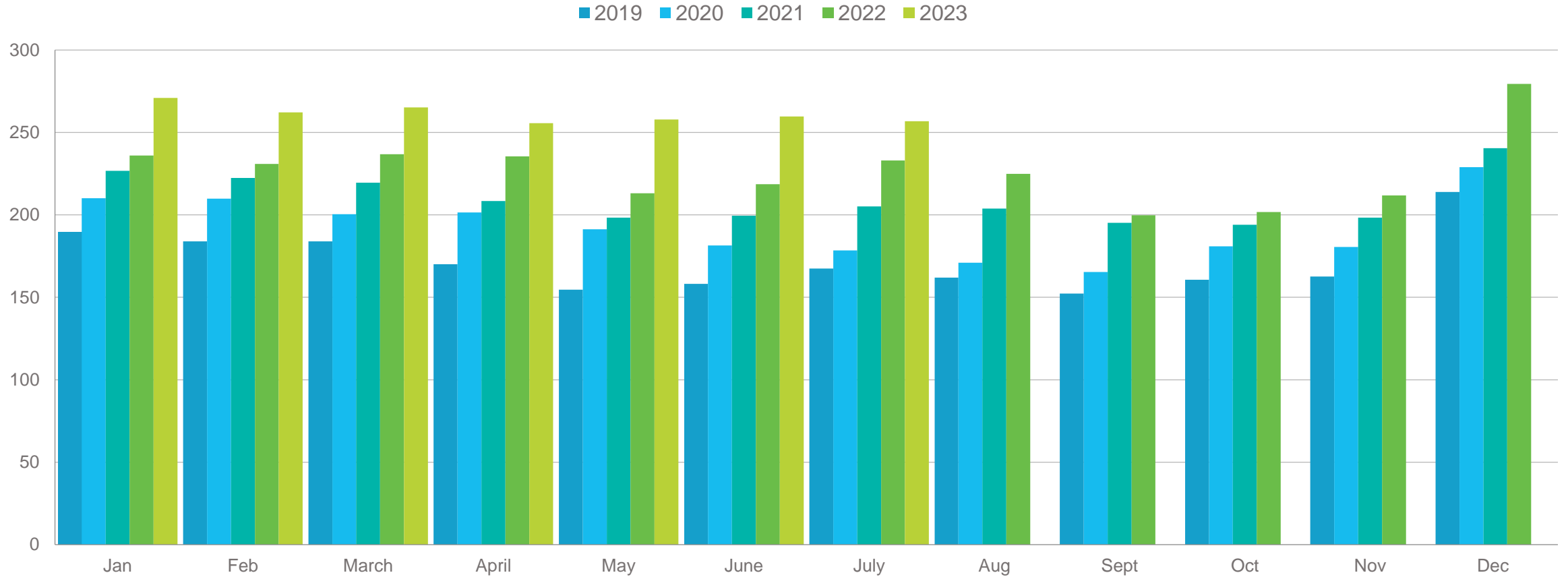
July

AUA: 52.8% | Bahamas: 65.2% | DR: 37% | Jamaica: 42.9% | PR: 65.3% | Sint Lucia: 45.8%



AVERAGE DAILY RATE (ADR)

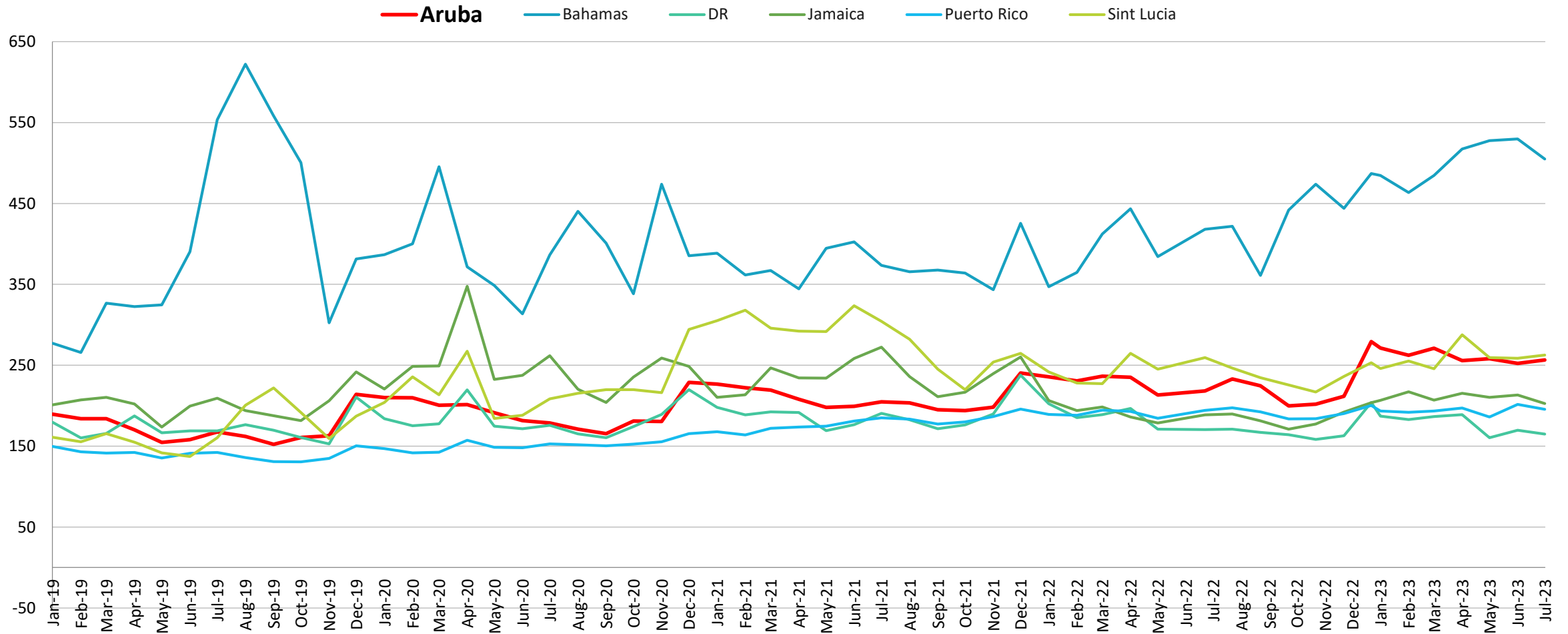
July 2023 ADR: USD\$257 | July 2019 ADR: USD\$168



CARIBBEAN ADR

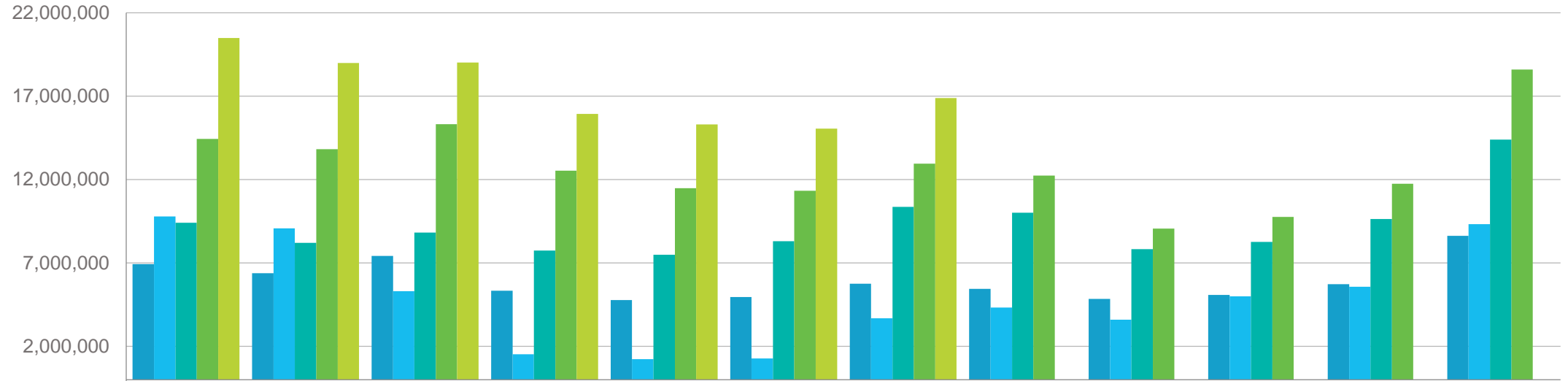
July

AUA: USD\$256 | Bahamas: USD\$505 | DR: USD\$165 | Jamaica: USD\$203 | PR: USD\$195 | Sint Lucia: USD\$263



REVENUE

■ 2019 ■ 2020 ■ 2021 ■ 2022 ■ 2023



	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
■ 2019	6,926,208	6,384,772	7,427,712	5,330,549	4,781,643	4,958,531	5,756,371	5,453,224	4,850,537	5,081,217	5,727,636	8,631,668
■ 2020	9,781,718	9,077,597	5,312,008	1,526,430	1,240,814	1,275,444	3,686,205	4,330,085	3,594,936	5,004,916	5,571,908	9,320,740
■ 2021	9,413,881	8,202,622	8,819,847	7,741,092	7,491,387	8,306,310	10,369,074	10,007,020	7,828,333	8,259,023	9,638,576	14,399,825
■ 2022	14,436,364	13,824,906	15,317,752	12,536,276	11,477,648	11,328,161	12,947,651	12,243,175	9,056,541	9,758,780	11,748,558	18,593,032
■ 2023	20,491,344	18,993,510	19,009,749	15,929,215	15,298,652	15,050,742	16,886,480					

T I D B I T S

VISA SPENDING

Q2 - 2023 REPORT

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Key Spending Patterns – TOP 10 Markets



Note to readers : this report is confidential. TCI Research is not liable to inappropriate usage or communication of data by the Aruba Tourism Authority or any other third parts.

Methodology

Metrics Definition & Scope



- The Visa Destination Insights reports **sales volume for international Visa Cardholders visiting Aruba.**
- The data is sourced from VisaNet, which contains **all transactions conducted using Visa-branded cards and settled through Visa's network “physically” present on Aruba.** Visa Destination Insights data is empirical, based on verified transaction data from VisaNet, includes all Visa credit, debit, prepaid, commercial and small business transactions, as well as ATM cash transactions processed through Visa’s PLUS ATM Network on Aruba.
- Data are selected with **the following criteria:**
 - ✓ The Visa card was issued by a **foreign bank.**
 - ✓ The transaction was conducted **in Aruba during Q2 2023.**
 - ✓ The transaction was **conducted face-to-face, not through the Internet** or as a telephone transaction. *Online booking* of accommodations, travel packages and attractions are not included in the data.
 - ✓ The transaction **excluded the following merchant categories:** *Direct Marketing, Catalog Marketing, Telemarketing, Airlines, Schools, colleges and universities.*
- Any cardholder whose purchase history indicates that they are a **long-term resident** rather than a tourist will have all their transactions excluded (based on consecutive spending on the last 3 months and/or in specific categories such as electrical, phone, water, self storage or insurance...).
- No individual cardholder or merchant data is ever displayed or analyzed.

Glossary

Metrics Definition & Scope



- **Consumer/Commercial:** based on the type of Visa card used in the transaction. All business/purchasing cards are aggregated as "Commercial"; all personal cards are aggregated as "Consumer".
- **Originating Country:** the home of the cardholder of the Visa card used in the transaction.
- **Quarter:** the calendar quarter. based on the date of the transaction.
- **Cardholder Count:** the number of distinct Visa cards used. *Note that this is a count of cards. not persons. One person using multiple cards will be counted for each different card used. If there were fewer than 10 distinct cardholders from a given Country. the value for that Country is shown as "< 10".*
- **Sales Amount/Total Spend Amount:** the value (\$US) of purchases at the point of sale.
- **Transaction Count:** the number of Visa transactions.
- **Avg Ticket:** the average dollar value of each transaction (Total Spend Amt / Transaction Count).
- **Cash withdrawal:** the total value (\$US) of cash withdrawn using a Visa card at an ATM or bank (spend categories with cash are not tracked).

Glossary

Metrics Definition & Scope



Merchant and Category Definition

Spend areas are reported at two levels:

- Spend Categories
- Spend Sub-Categories (MCC. Merchant Category Codes. 100+)

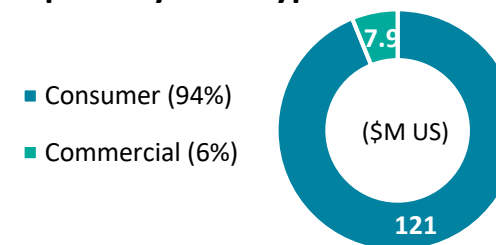
For detailed information about categories definition. please refer to the ***Visa Merchant Data Standards Manual***.

SPEND CATEGORIES	TYPES OF MERCHANTS / SUB-CATEGORIES INCLUDED
AUTOMOTIVE	Auto service/repair shops. Car & Truck dealers. Motorcycle dealers. Carwash...
DRUG STORES & PHARMACIES	Drugstores & Pharmacies. Drugs/Druggists Sundries
ENTERTAINMENT	Amusement parks. Tourist Attractions. Golf. Sporting activities. Theater. Recreation. Casino...
FOOD & GROCERY	Supermarket. Grocery stores. Food stores. Bakeries. Wine/liquors. Meat lockers...
FUEL	Service Stations. fuel dealers
HOME IMPROVEMENT & SUPPLY	Furniture. Appliance. Decoration. Equipment stores...
HOTELS & LODGING	Lodging
PROFESSIONAL SERVICES	Casinos. Legal services. Financial inst.. Consulting. Architectural...
CASH WITHDRAWAL	Financial Inst/Auto Cash
RESTAURANTS & DINING	Restaurants. Fast Food. Taverns. Bars. Disco...
RETAIL	Clothing and Wear stores. Sport apparels. Jewelry stores
TRANSPORTATION	Bus lines. Parking. Airport/Fields/Terminals. Taxi/Limousines
TRAVEL SERVICES	Travel Agencies
WAREHOUSE RETAILS	Club Stores. Discount Goods . Warehouse Retail

Overall Spending & Y/Y Evolutions

<i>Sales transactions</i>	# of Issuer Countries	Total Spend Amount	Y/Y Growth	Average Ticket / transaction	Spend / Cardholder
Q2 2023	119	\$128 886 346	2.4%	\$112	\$625

Spend by Card Type



Cash withdrawal



Q1 2023 – Card transactions

Y/Y Growth

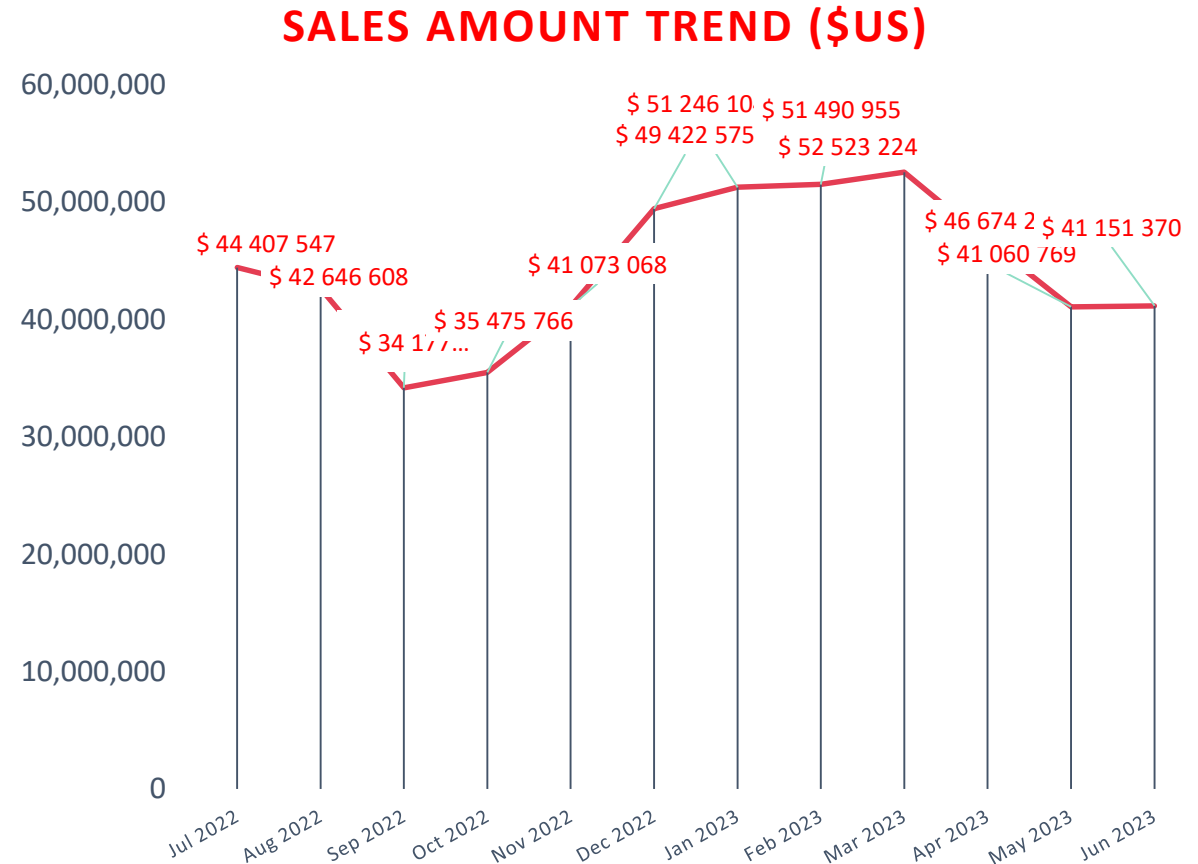
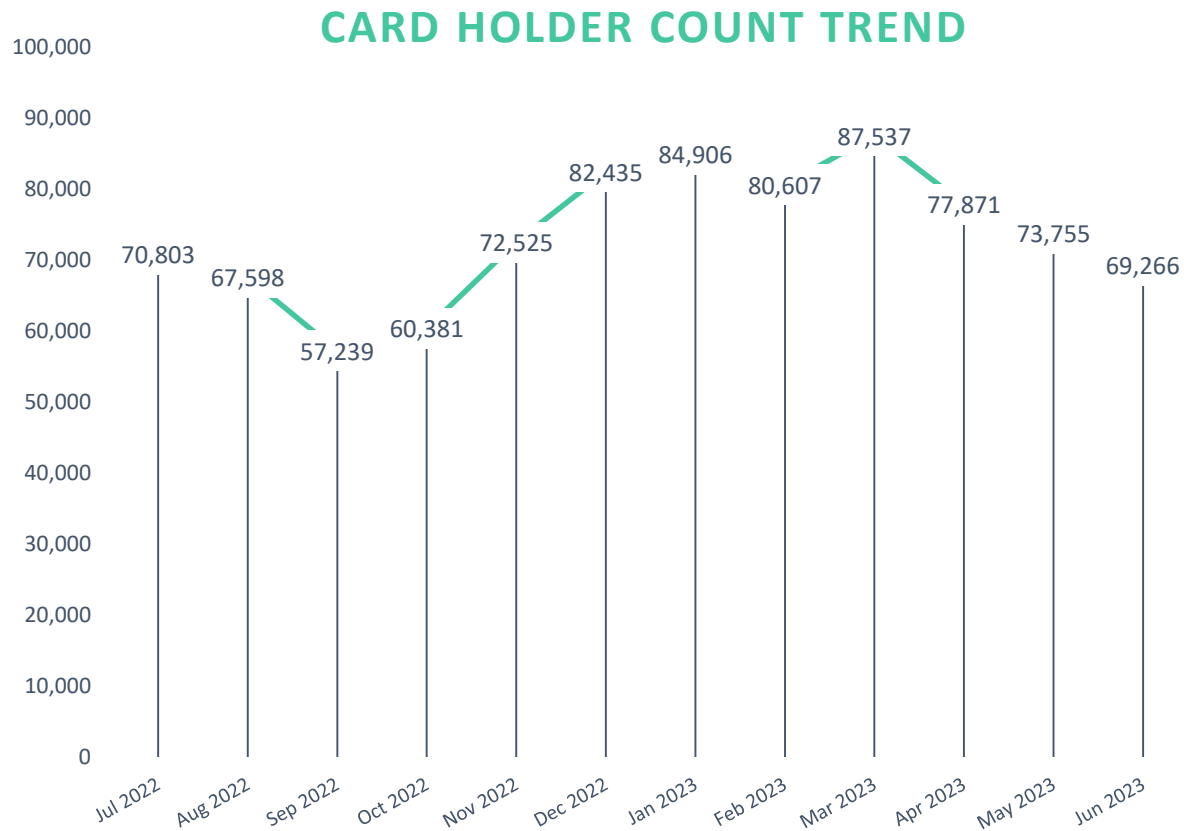
	Cardholder Count (Net)	Total Spend Amount	Spend per Cardholder	Trans Count	Avg Ticket	Cardholder Count (Net)	Total Spend Amount	Spend per Cardholder	Trans Count	Avg Ticket
Consumer	198 075	\$121 023 906	\$611	1 107 105	\$109	6.2%	2.2%	-3.7%	6.6%	-4.1%
Commercial	8 187	\$7 862 440	\$960	41 642	\$189	5.2%	5.9%	0.6%	5.7%	0.2%
Total	206 262	\$128 886 346	\$625	1 148 747	\$112	6.2%	2.4%	-3.5%	6.5%	-3.8%

During Q2 2023, **206 262 VISA cardholders** from 119 issuer countries have spent **US\$ 129 million in Aruba**, generating a **Y/Y growth of 2.4 % in total sales**, supported by an increase in cardholder count (6,2%) and transactions count (6.5%). \$13 million cash was withdrawn on the island during the quarter. **The average spend per cardholder was 3.5% lower than Q2 2022.**

Data include card spend and withdrawal.

Monthly Trends

Cardholder Count and Sales Amount



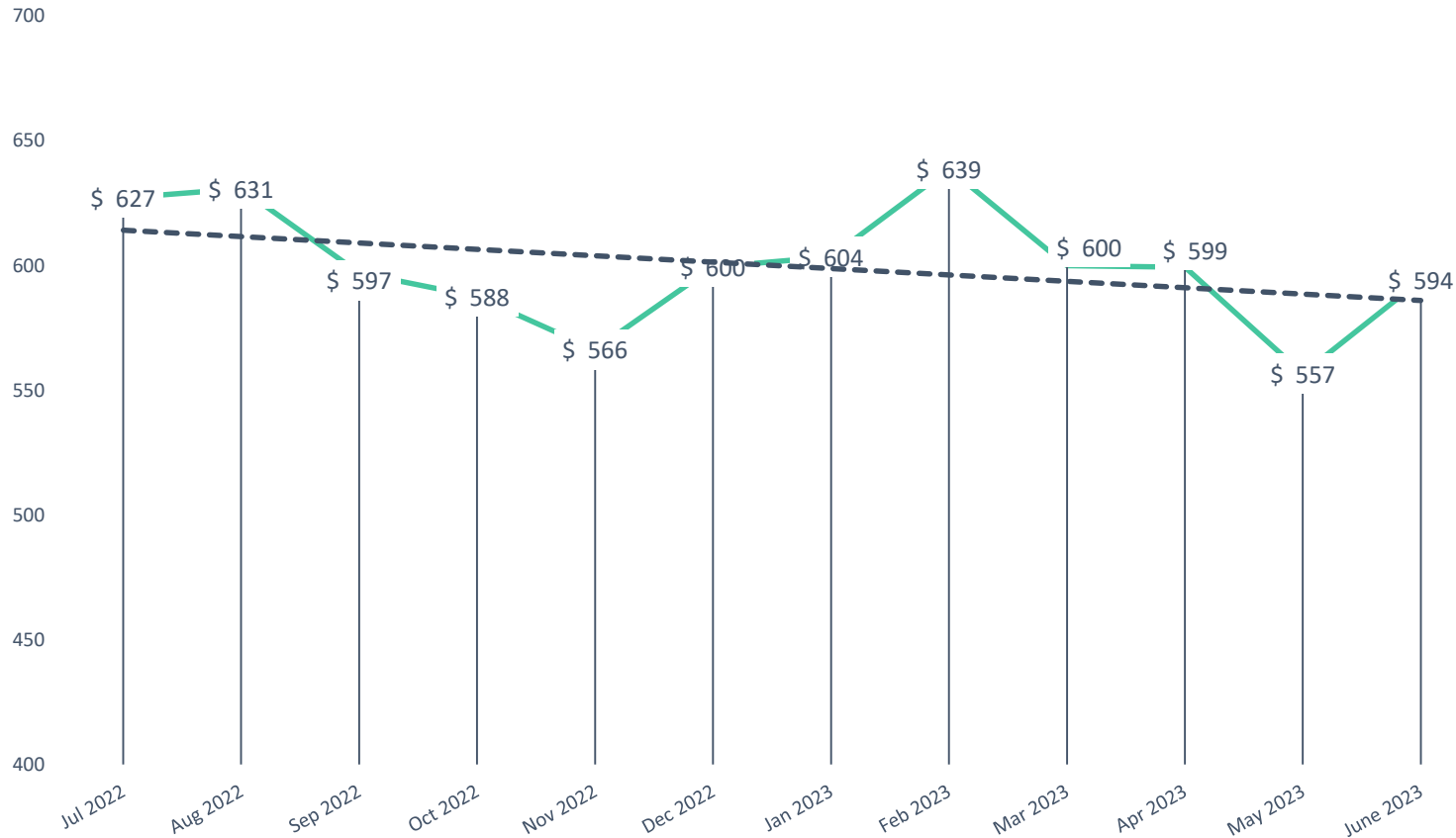
The number of cardholders has exhibited a downward trend, reaching 69 266 in June 2023. Similarly, sales amounts have followed a comparable pattern, stabilizing by the end of the quarter.

Data include card spend and withdrawal.

Monthly Trends

Spend per Cardholder

AVG SPEND PER CARDHOLDER TREND (US\$)

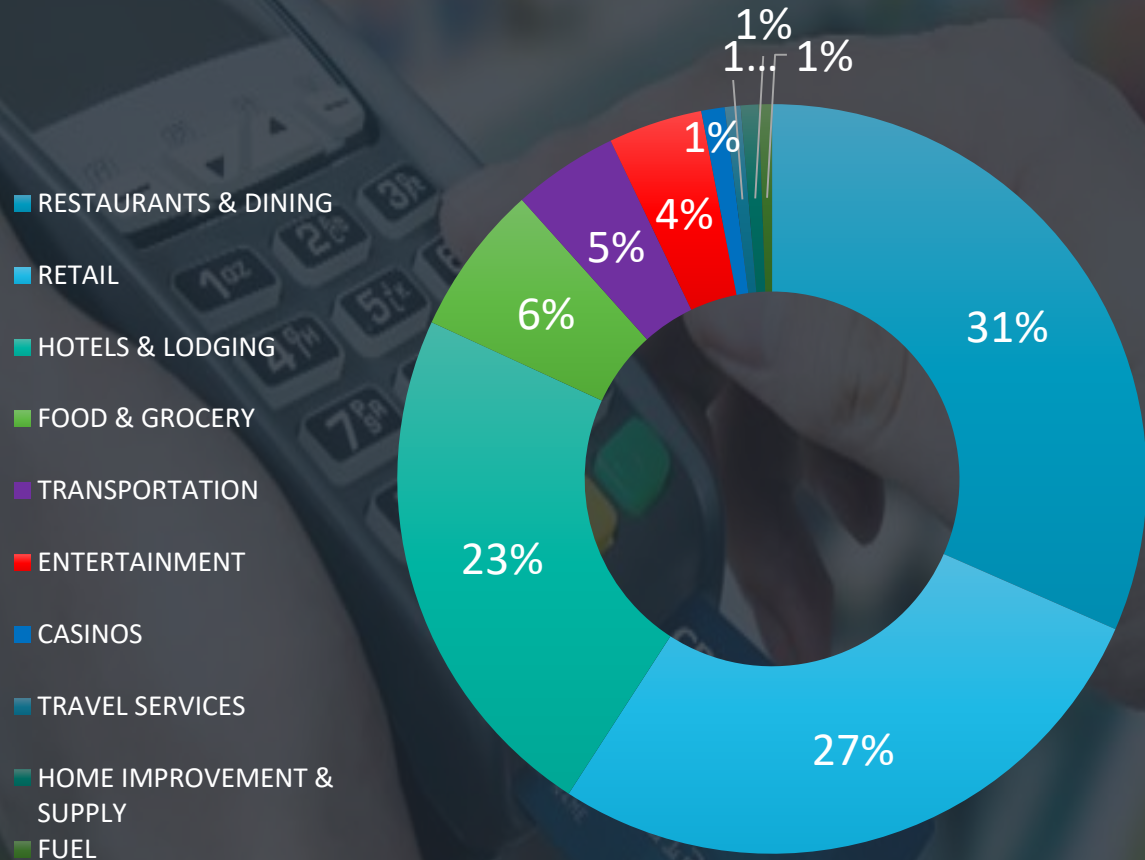


After the peak observed in February 2023, the monthly spending per cardholder kept declining, landing at \$557 by May but bounced back towards the end of the second quarter of 2023. The trend line for the past 12 months indicates a subtle downward trend in average spend per cardholder.

Data include card spend and withdrawal.

Top Spend Categories

(% of Total Spend Amount)



In Q2 2023, **Restaurant & Dining** remains at the top of the TOP 10 categories in terms of spend amount in Aruba. Following closely, **the Retail** sector claimed the second spot, while **Hotels & Lodging** secured the third highest position. The highest yearly increase in spend is observed in **Entertainment** and **Home improvement & supply**, both experiencing a growth of 11%.

TOP10 Categories	Spend Amount (US \$)	\$ Y/Y Growth	Cardholder Count	Spend per Cardholder
RESTAURANTS & DINING	\$ 36 386 233	10%	132 905	\$ 274
RETAIL	\$ 31 775 331	4%	120 840	\$ 263
HOTELS & LODGING	\$ 26 203 363	-9%	32 001	\$ 819
FOOD & GROCERY	\$ 7 498 407	10%	64 028	\$ 117
TRANSPORTATION	\$ 5 236 077	8%	23 242	\$ 225
ENTERTAINMENT	\$ 4 679 946	11%	23 720	\$ 197
CASINOS	\$ 1 162 250	-8%	818	\$ 1 421
HOME IMPROVEMENT & SUPPLY	\$ 886 431	11%	1 446	\$ 613
TRAVEL SERVICES	\$ 786 566	-21%	971	\$ 810
FUEL	\$ 656 494	0%	16 391	\$ 40

Focus on Accommodation

Quarterly Trends

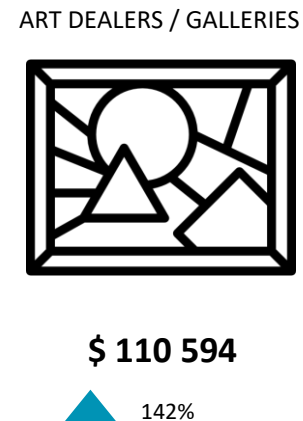
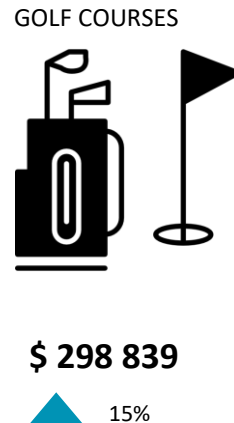
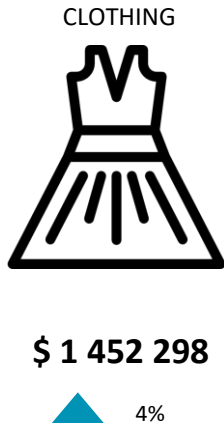
PERIOD		Spend Amount (US \$)	% of Total Spend		Cardholder Count		Spend per Cardholder
Q1-2022	▲	\$26 241 439	26%	▲	35 829	▲	\$732
Q2-2022	▲	\$28 825 686	24%	▲	44 425	▲	\$649
Q3-2022	▲	\$26 154 379	23%	▲	39 079	▼	\$669
Q4-2022	▼	\$22 762 445	22%	▼	34 640	▲	\$657
Q1-2023	▲	\$30 988 585	18%	▼	33 106	▼	\$936
Q2-2023	▼	\$26 203 363	23%	▼	32 001	▼	\$819



In Q2 2023, the **Lodging sector witnessed a downturn** in both spending amount and cardholder count when compared to the previous quarter. Additionally, **the spend per cardholder also experienced a decrease**, reaching \$819, although it remains relatively high.

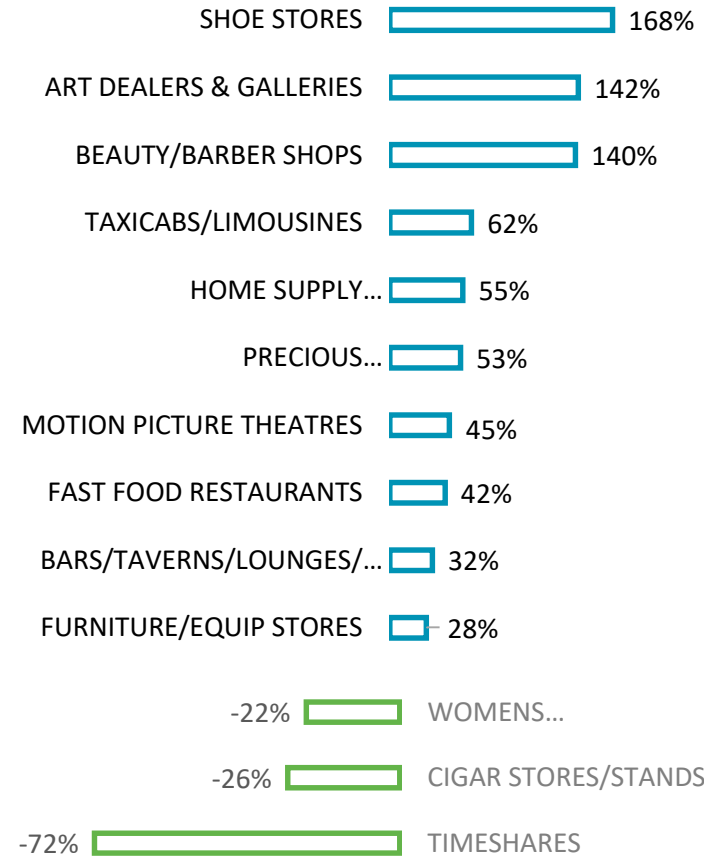
Focus on Sub-Categories

Specific Merchant Categories (selection)



Top Sub-Categories \$ Y/Y Growth

(based on all individual Visa Merchant Codes with min. \$ 100k spend)





MASHA DANKI

Thank You

For any questions related to the report and/or additional information requests please contact
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Or

Visit our website www.arubainsight.com

