

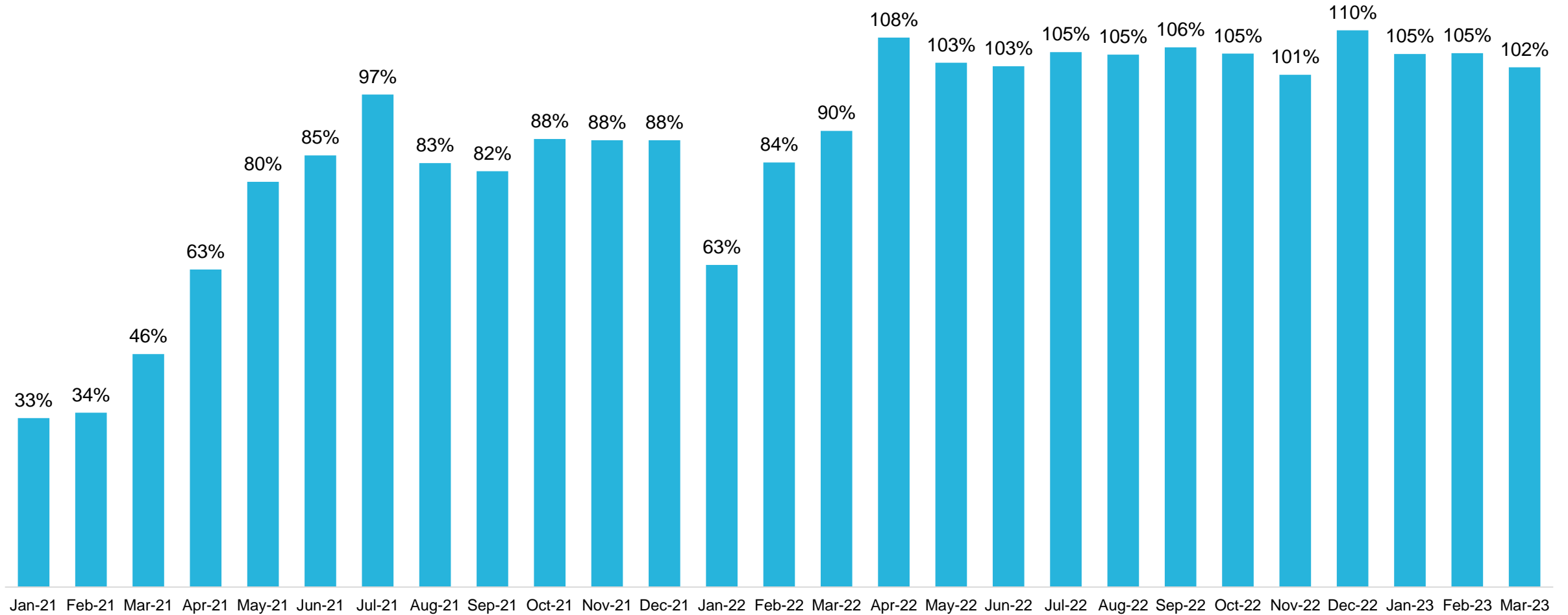


MARCH 2023

Monthly Report

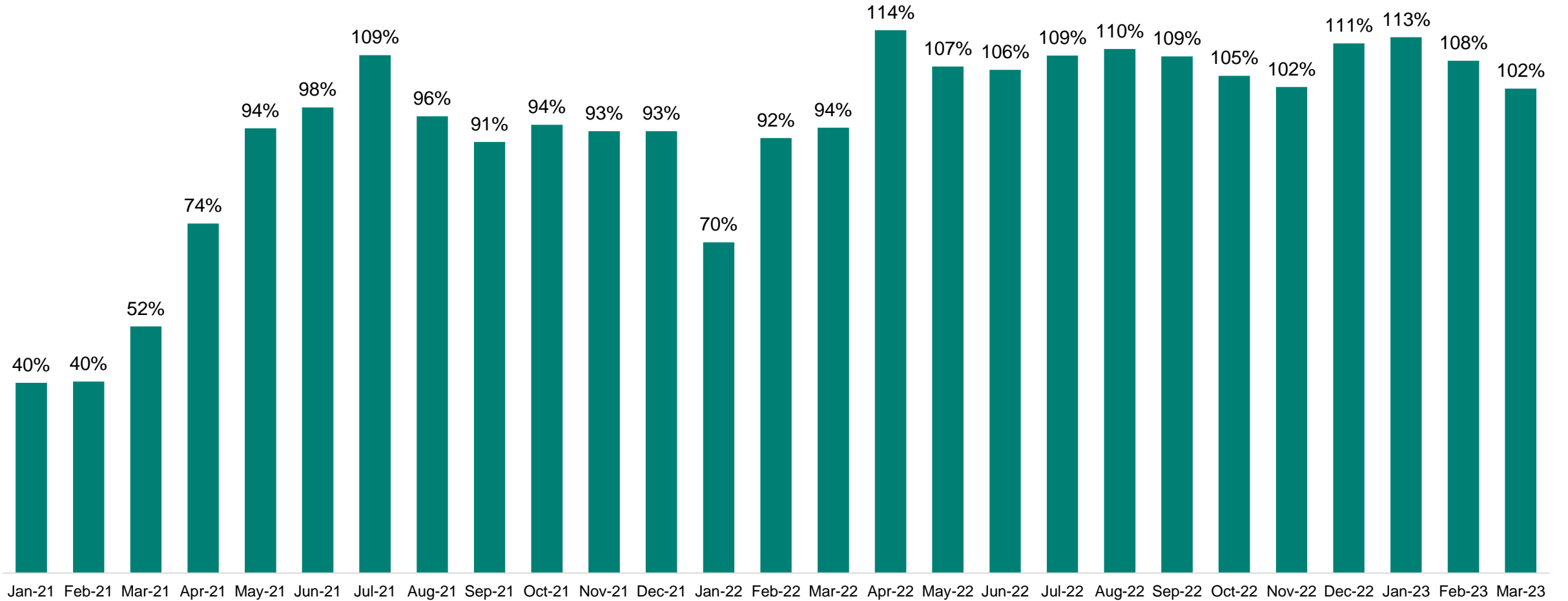
★ STAY-OVER VISITOR ARRIVALS RECOVERY VS 2019

% MONTHLY RECOVERY TOTAL



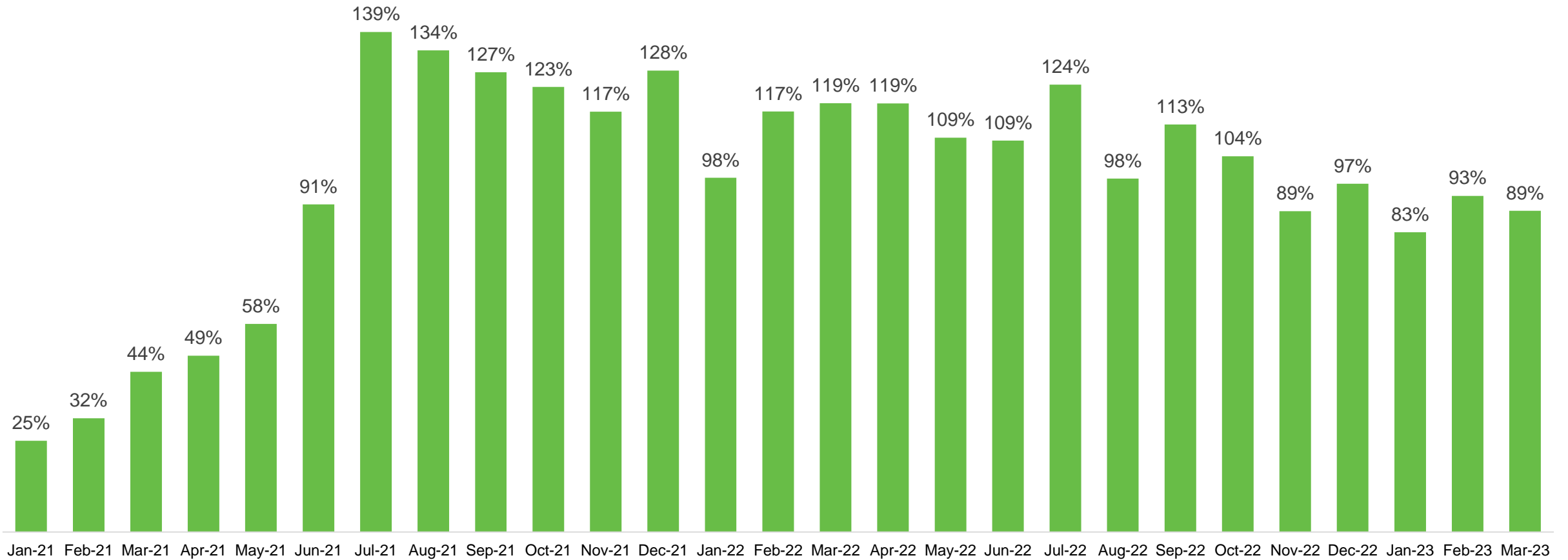
★ STAY-OVER VISITOR ARRIVALS RECOVERY VS 2019

% MONTHLY RECOVERY USA



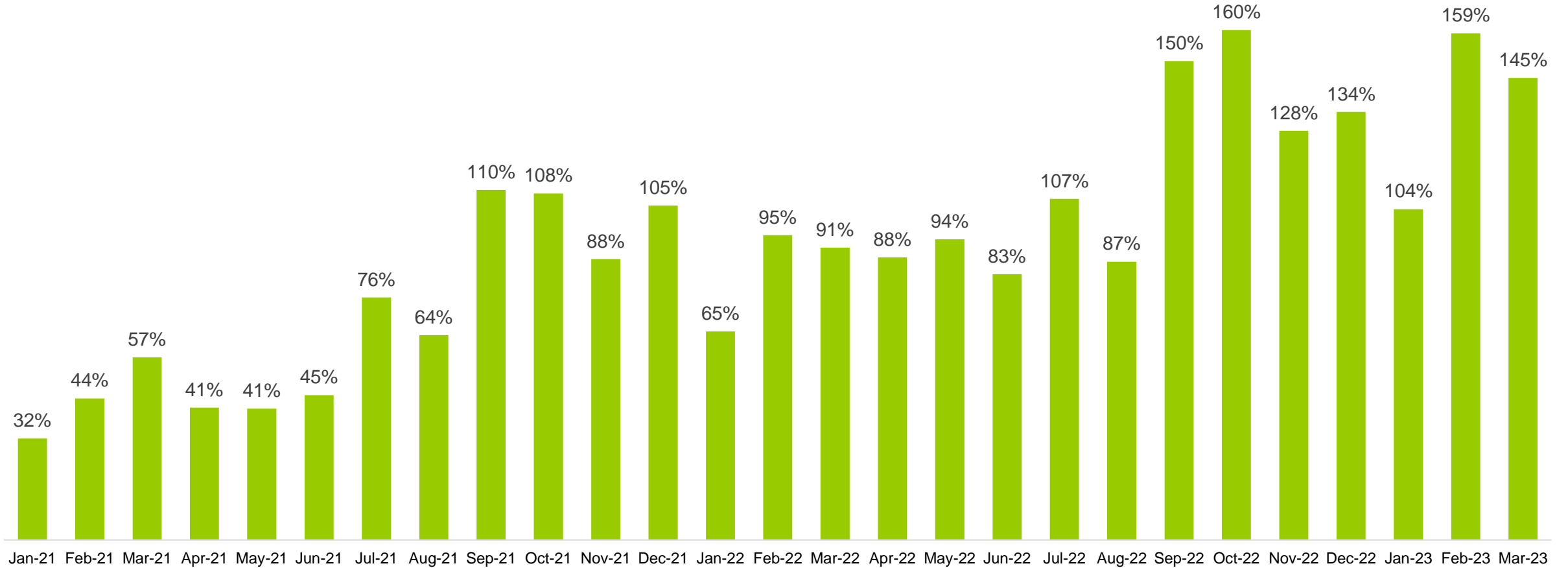
★ STAY-OVER VISITOR ARRIVALS RECOVERY VS 2019

% MONTHLY RECOVERY HOLLAND



★ STAY-OVER VISITOR ARRIVALS RECOVERY VS 2019

% MONTHLY RECOVERY COLOMBIA



A man and a woman are running on a sandy beach towards the ocean. The woman is in the foreground, wearing a light blue bikini, and is carrying a large, colorful inflatable ring with concentric rainbow stripes. The man is behind her, wearing sunglasses and patterned swim trunks, carrying a purple and white floral inflatable ring. The background shows the blue ocean under a clear sky with a few clouds. A white diagonal line cuts across the bottom right corner of the image.

COMPARISON

2023 VERSUS 2022

SNAPSHOT YTD MAR 2023/2022



HOW MANY ARRIVALS?

306,305

31.1%



HOW LONG DID THEY STAY?

2,337,016

27.8%



WHAT DID THEY SPEND? **
Central Bank Aruba (2022)

Awg. 4,410.6 min

38%

2021: 3,187.1

**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?

HIGH RISE



659,423

NIGHTS

46.6%

LOW RISE



170,051

NIGHTS

12.8%

TIMESHARE



708,452

NIGHTS

13.5%

OTHERS



799,090

NIGHTS

32.3%



ARRIVALS YTD MARCH 2023/2022

306,305
ARRIVALS

31.1%
GROWTH

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
USA	187,028	46,348	233,376	24.8%	80.0%	76.2%
Canada	9,200	13,885	23,085	150.9%	3.9%	7.5%
NA	196,228	60,233	256,461	30.7%	84.0%	83.7%
Venezuela	275	82	357	29.8%	0.1%	0.1%
Colombia	5,561	3,362	8,923	60.5%	2.4%	2.9%
Brazil	1,491	1,052	2,543	70.6%	0.6%	0.8%
Argentina	2,321	2,021	4,342	87.1%	1.0%	1.4%
Chile	1,107	1,001	2,108	90.4%	0.5%	0.7%
Ecuador	592	598	1,190	101.0%	0.3%	0.4%
Peru	601	495	1,096	82.4%	0.3%	0.4%
Paraguay	454	-180	274	-39.6%	0.2%	0.1%
Uruguay	318	36	354	11.3%	0.1%	0.1%
Mexico	224	284	508	126.8%	0.1%	0.2%
Others	1,222	1,002	2,224	82.0%	0.5%	0.7%
SA	14,166	9,753	23,919	68.8%	6.1%	7.8%
Netherlands	12,703	-2,569	10,134	-20.2%	5.4%	3.3%
UK	665	352	1,017	52.9%	0.3%	0.3%
Germany	1,009	787	1,796	78.0%	0.4%	0.6%
Italy	764	99	863	13.0%	0.3%	0.3%
Sweden	272	1,183	1,455	434.9%	0.1%	0.5%
Belgium	405	69	474	17.0%	0.2%	0.2%
Austria	148	40	188	27.0%	0.1%	0.1%
Switzerland	356	102	458	28.7%	0.2%	0.1%
Others	2,087	758	2,845	36.3%	0.9%	0.9%
Europe	18,409	821	19,230	4.5%	7.9%	6.3%
ROW	4,863	1,832	6,695	37.7%	2.1%	2.2%
Total	233,666	72,639	306,305	31.1%		
W/O Ven.	233,391	72,557	305,948	31.1%		



ARRIVALS USA

YTD MARCH 2023/2022

233,376
ARRIVALS

24.8%
GROWTH

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
New York	43,631	1,923	45,554	4.4%	23.3%	19.5%
Massachusetts	28,413	8,851	37,264	31.2%	15.2%	16.0%
New Jersey	20,784	1,349	22,133	6.5%	11.1%	9.5%
Pennsylvania	9,937	3,518	13,455	35.4%	5.3%	5.8%
Illinois	5,376	1,946	7,322	36.2%	2.9%	3.1%
Connecticut	6,665	1,637	8,302	24.6%	3.6%	3.6%
Florida	8,910	1,422	10,332	16.0%	4.8%	4.4%
Ohio	5,024	2,438	7,462	48.5%	2.7%	3.2%
Maryland	4,743	1,204	5,947	25.4%	2.5%	2.5%
Michigan	5,274	1,622	6,896	30.8%	2.8%	3.0%
Virginia	3,488	2,580	6,068	74.0%	1.9%	2.6%
Georgia	3,313	618	3,931	18.7%	1.8%	1.7%
North Carolina	3,752	1,776	5,528	47.3%	2.0%	2.4%
Texas	3,775	999	4,774	26.5%	2.0%	2.0%
California	2,577	557	3,134	21.6%	1.4%	1.3%
Other	31,366	13,908	45,274	44.3%	16.8%	19.4%
Total	187,028	46,348	233,376	24.8%		

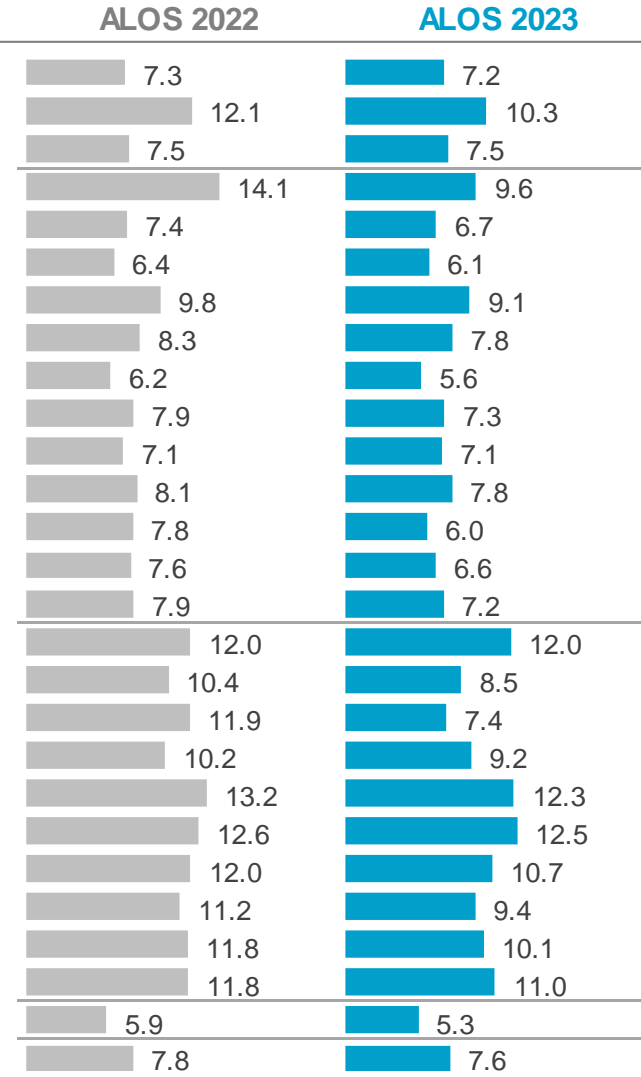


NIGHTS YTD MARCH 2023/2022

2,337,016
NIGHTS

27.8%
GROWTH

	2022		Growth	2023	% Growth
USA	1,358,810		321,991	1,680,801	23.7%
Canada	110,865		127,446	238,311	115.0%
NA	1,469,675		449,437	1,919,112	30.6%
Venezuela	3,867	-451		3,416	-11.7%
Colombia	41,116		18,512	59,628	45.0%
Brazil	9,562		5,993	15,555	62.7%
Argentina	22,689		16,819	39,508	74.1%
Chile	9,206		7,300	16,506	79.3%
Ecuador	3,673		2,943	6,616	80.1%
Peru	4,722		3,258	7,980	69.0%
Paraguay	3,238	-1,298		1,940	-40.1%
Uruguay	2,565		193	2,758	7.5%
Mexico	1,745		1,293	3,038	74.1%
Others	9,294		5,383	14,677	57.9%
SA	111,677		59,945	171,622	53.7%
Netherlands	152,322	-30,261		122,061	-19.9%
UK	6,889		1,720	8,609	25.0%
Germany	12,048		1,197	13,245	9.9%
Italy	7,765		139	7,904	1.8%
Sweden	3,579		14,324	17,903	400.2%
Belgium	5,091		831	5,922	16.3%
Austria	1,779		235	2,014	13.2%
Switzerland	4,002		323	4,325	8.1%
Others	24,615		4,088	28,703	16.6%
Europe	218,090	-7,404		210,686	-3.4%
ROW	28,699		6,897	35,596	24.0%
Total	1,828,141		508,875	2,337,016	27.8%





ACCOMMODATIONS

YTD MARCH 2023/2022

306,305
ARRIVALS

31.1%
GROWTH

ARRIVALS BY ACCOMMODATION

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
High Rise	75,275	35,594	110,869	47.3%	32.2%	36.2%
Low Rise	23,464	2,214	25,678	9.4%	10.0%	8.4%
Timeshare	68,711	9,587	78,298	14.0%	29.4%	25.6%
Others	66,216	25,244	91,460	38.1%	28.3%	29.9%
Total	233,666	72,639	306,305	31.1%		

NIGHTS BY ACCOMMODATION

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
High Rise	449,665	209,758	659,423	46.6%	35.3%	28.2%
Low Rise	150,693	19,358	170,051	12.8%	8.2%	7.3%
Timeshare	623,954	84,498	708,452	13.5%	34.1%	30.3%
Others	603,829	195,261	799,090	32.3%	33.0%	34.2%
Total	1,828,141	508,875	2,337,016	27.8%		



ACCOMMODATIONS MAIN MARKETS

YTD MARCH 2023/2022

306,305
ARRIVALS

31.1%
GROWTH

MARKET SHARE OF THE MARKET BY ACCOMMODATION CATEGORY

	HIGH RISE			LOW RISE			TIME SHARE			OTHERS		
	2022	2023	%Growth	2022	2023	%Growth	2022	2023	%Growth	2022	2023	% Growth
USA	86.8%	84.1%	-2.7%	80.3%	78.5%	-1.8%	92.6%	91.1%	-1.5%	59.2%	53.2%	-6.1%
Venezuela	0.0%	0.1%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.3%	-0.1%
Netherlands	1.8%	0.8%	-1.0%	7.9%	2.9%	-5.0%	1.0%	0.4%	-0.6%	13.2%	8.9%	-4.3%
Canada	3.7%	7.1%	3.3%	2.5%	6.1%	3.6%	2.8%	4.8%	2.0%	5.9%	10.9%	5.0%
Brazil	0.7%	0.8%	0.1%	1.5%	0.9%	-0.6%	0.3%	0.3%	0.0%	0.6%	1.3%	0.7%
Colombia	1.4%	1.1%	-0.3%	1.7%	1.7%	0.0%	0.8%	0.8%	0.1%	5.4%	7.3%	1.9%
Argentina	1.6%	2.1%	0.5%	0.6%	0.9%	0.3%	0.6%	0.7%	0.1%	0.9%	1.4%	0.5%
Chile	0.8%	0.8%	0.0%	0.4%	0.7%	0.3%	0.2%	0.3%	0.1%	0.4%	0.9%	0.5%
Peru	0.4%	0.4%	0.0%	0.1%	0.3%	0.2%	0.1%	0.1%	0.0%	0.4%	0.6%	0.2%
UK	0.1%	0.3%	0.1%	0.3%	0.5%	0.2%	0.1%	0.1%	0.0%	0.6%	0.5%	-0.1%
Italy	0.2%	0.1%	-0.1%	0.5%	0.5%	0.0%	0.1%	0.1%	0.0%	0.6%	0.6%	0.1%
Total mainmkt	97.7%	97.7%	0.0%	96.0%	93.0%	-3.0%	98.6%	98.7%	0.1%	87.5%	85.7%	-1.7%



ACCOMMODATIONS MAIN MARKETS

YTD MARCH 2023/2022

306,305
ARRIVALS

31.1%
GROWTH

VISITOR ARRIVALS AT THE ACCOMMODATION TYPE FOR THE MARKET

	HIGH RISE			LOW RISE			TIME SHARE			OTHERS		
	2022	2023	Growth	2022	2023	Growth	2022	2023	Growth	2022	2023	Growth
USA	65,346	93,235	27,889	18,850	20,169	1,319	63,604	71,336	7,732	39,228	48,636	9,408
Venezuela	27	71	44	17	11	-6	16	32	16	215	243	28
Netherlands	1,380	941	-439	1,863	756	-1,107	710	309	-401	8,750	8,128	-622
Canada	2,821	7,835	5,014	590	1,571	981	1,896	3,738	1,842	3,893	9,941	6,048
Brazil	544	929	385	354	230	-124	224	239	15	369	1,145	776
Colombia	1,063	1,187	124	392	429	37	519	642	123	3,587	6,665	3,078
Argentina	1,194	2,325	1,131	144	223	79	405	559	154	578	1,235	657
Chile	619	930	311	86	169	83	140	230	90	262	779	517
Peru	270	413	143	23	67	44	55	49	-6	253	567	314
UK	100	307	207	73	130	57	90	77	-13	402	503	101
Italy	188	114	-74	125	127	2	82	56	-26	369	566	197
Total mainmkt	73,552	108,287	34,735	22,517	23,882	1,365	67,741	77,267	9,526	57,906	78,408	20,502



VISITORS BY AGE YTD MARCH 2023/2022

306,305
ARRIVALS

31.1%
GROWTH

	2022	Growth	2023	% Growth
0 - 11	15,559	3,704	19,263	23.8%
12-19	14,902	2,676	17,578	18.0%
20 - 29	31,720	496	32,216	1.6%
30 - 39	39,625	4,643	44,268	11.7%
40 - 49	36,129	10,566	46,695	29.2%
50 - 59	44,921	16,574	61,495	36.9%
60 - 69	34,421	20,765	55,186	60.3%
70 +	16,382	13,188	29,570	80.5%
Not Stated	7	27	34	385.7%
Total	233,666	72,639	306,305	31.1%

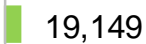
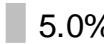
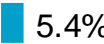
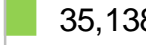

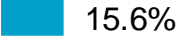







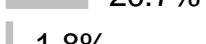

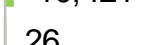
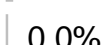
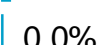






GENERATIONS

YTD MARCH 2023/2022

306,305
VISITORS

31.1%
GROWTH

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
Gen A	12,409	 19,149	15,407	24.2%	 5.0%	 5.4%
Gen Z	34,668	 35,138	38,624	11.4%	 16.9%	 15.6%
Millennials	62,370	 57,299	69,315	11.1%	 29.3%	 26.6%
Gen X	60,193	 79,566	79,052	31.3%	 26.4%	 26.5%
Baby Boomers	58,563	 92,843	93,404	59.5%	 20.7%	 23.6%
Silent Generations	5,456	 10,421	10,469	91.9%	 1.8%	 2.2%
Age not specified	7	 26	34	385.7%	 0.0%	 0.0%
Total	233,666	 294,442	306,305	31.1%		



CARRIERS YTD MARCH 2023/2022

306,305
VISITORS

31.1%
GROWTH

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
AMERICAN AIRLINES	46,747	23,872	70,619	51.1%	20.0%	23.1%
JETBLUE	70,349	-2,006	68,343	-2.9%	30.1%	22.3%
DELTA AIRLINE	27,956	15,708	43,664	56.2%	12.0%	14.3%
UNITED AIRLINES	33,156	-51	33,105	-0.2%	14.2%	10.8%
SOUTHWEST AIRLINES	9,403	4,217	13,620	44.8%	4.0%	4.4%
AVIANCA	6,164	4,475	10,639	72.6%	2.6%	3.5%
klm	10,800	-487	10,313	-4.5%	4.6%	3.4%
COPA AIRLINE	6,149	3,335	9,484	54.2%	2.6%	3.1%
AIR CANADA	944	6,712	7,656	711.0%	0.4%	2.5%
WESTJET AIRLINES	3,309	3,609	6,918	109.1%	1.4%	2.3%
SUNWING AIRLINES	2,146	3,568	5,714	166.3%	0.9%	1.9%
DIVI DIVI AIR	2,730	1,308	4,038	47.9%	1.2%	1.3%
AERO REPUBLICA/ WINGO	1,233	2,738	3,971	222.1%	0.5%	1.3%
TUI NL	5,163	-1,292	3,871	-25.0%	2.2%	1.3%
SPIRIT AIRLINES	1,330	1,818	3,148	136.7%	0.6%	1.0%
EZ AIR	999	1,451	2,450	145.2%	0.4%	0.8%
SUN COUNTRY	1,979	17	2,450	145.2%	0.8%	0.7%
PRIVATE	940	1,003	1,943	106.7%	0.4%	0.6%
SUNCLASS AIRLINES	0	1,158	1,158	-	0.0%	0.4%
CHARTER	547	609	1,156	111.3%	0.2%	0.4%
SURINAM AIRWAYS	433	509	1,156	111.3%	0.2%	0.3%
JETAIR CARIBBEAN	0	573	573	-	0.0%	0.2%
WINAIR	506	-249	257	-49.2%	0.2%	0.1%
ARAJET	0	236	236	-	0.0%	0.1%
SKY HIGH AVIATION	77	70	236	-	0.0%	0.0%
SKY HIGH AVIATION	77	-20	147	90.9%	0.1%	0.0%
AIR CENTURY	124	-242	104	-16.1%	0.2%	0.1%
Others	482	72,639	240	-50.2%		
Total	233,666		306,305	31.1%		

MARCH RESULT 2023

NORTH AMERICA



92,709

84.8%

SOUTH AMERICA



7,868

7.2%

EUROPE



6,177

5.7%

OTHERS



2,541

2.3%

TOTAL ARRIVALS

109,295

100%



ARRIVALS MARCH 2023/2022

109,295
ARRIVALS

14.0%
GROWTH

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
USA	78,358	6,881	85,239	8.8%	81.7%	78.0%
Canada	4,078	3,392	7,470	83.2%	4.3%	6.8%
NA	82,436	10,273	92,709	12.5%	85.9%	84.8%
Venezuela	79	30	109	38.0%	0.1%	0.1%
Colombia	1,932	1,123	3,055	58.1%	2.0%	2.8%
Brazil	707	-5	702	-0.7%	0.7%	0.6%
Argentina	751	510	1,261	67.9%	0.8%	1.2%
Chile	378	172	550	45.5%	0.4%	0.5%
Ecuador	225	306	531	136.0%	0.2%	0.5%
Peru	233	214	447	91.8%	0.2%	0.4%
Paraguay	65	-5	60	-7.7%	0.1%	0.1%
Uruguay	113	17	130	15.0%	0.1%	0.1%
Mexico	94	124	218	131.9%	0.1%	0.2%
Others	450	355	805	78.9%	0.5%	0.7%
SA	5,027	2,841	7,868	56.5%	5.2%	7.2%
Netherlands	4,229	-1,061	3,168	-25.1%	4.4%	2.9%
UK	267	192	459	71.9%	0.3%	0.4%
Germany	499	562	1,061	112.6%	0.5%	1.0%
Italy	213	-40	173	-18.8%	0.2%	0.2%
Sweden	73	25	98	34.2%	0.1%	0.1%
Belgium	136	25	161	18.4%	0.1%	0.1%
Austria	43	28	71	65.1%	0.0%	0.1%
Switzerland	112	76	188	67.9%	0.1%	0.2%
Others	697	101	798	14.5%	0.7%	0.7%
Europe	6,269	-92	6,177	-1.5%	6.5%	5.7%
ROW	2,180	361	2,541	16.6%	2.3%	2.3%
Total	95,912	13,383	109,295	14.0%		
W/O Ven.	95,833	13,353	109,186	13.9%		



ARRIVALS USA

MARCH 2023/2022

85,239
ARRIVALS

8.8%
GROWTH

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
New York	14,664	-1,242	13,422	-8.5%	18.7%	15.7%
Massachusetts	12,634	2,246	14,880	17.8%	16.1%	17.5%
New Jersey	8,709	-857	7,852	-9.8%	11.1%	9.2%
Pennsylvania	4,062	615	4,677	15.1%	5.2%	5.5%
Illinois	2,490	218	2,708	8.8%	3.2%	3.2%
Connecticut	3,021	133	3,154	4.4%	3.9%	3.7%
Florida	4,454	-255	4,199	-5.7%	5.7%	4.9%
Ohio	2,281	763	3,044	33.5%	2.9%	3.6%
Maryland	2,181	-52	2,129	-2.4%	2.8%	2.5%
Michigan	2,374	626	3,000	26.4%	3.0%	3.5%
Virginia	1,543	567	2,110	36.7%	2.0%	2.5%
Georgia	1,505	171	1,676	11.4%	1.9%	2.0%
North Carolina	1,753	367	2,120	20.9%	2.2%	2.5%
Texas	1,919	215	2,134	11.2%	2.4%	2.5%
California	1,083	66	1,149	6.1%	1.4%	1.3%
Other	13,685	3,300	16,985	24.1%	17.5%	19.9%
Total	78,358	6,881	85,239	8.8%		



NIGHTS MARCH 2023/2022

750,407
NIGHTS

12.4%
GROWTH

	2022		Growth	2023	% Growth	ALOS 2022	ALOS 2023
USA	509,769		52,013	561,782	10.2%	6.5	6.6
Canada	39,560		25,008	64,568	63.2%	9.7	8.6
NA	549,329		77,021	626,350	14.0%	6.7	6.8
Venezuela	951		244	1,195	25.7%	12.0	11.0
Colombia	12,802		5,858	18,660	45.8%	6.6	6.1
Brazil	3,959		137	4,096	3.5%	5.6	5.8
Argentina	6,927		4,096	11,023	59.1%	9.2	8.7
Chile	2,905		1,155	4,060	39.8%	7.7	7.4
Ecuador	1,407		1,562	2,969	111.0%	6.3	5.6
Peru	1,621		1,037	2,658	64.0%	7.0	5.9
Paraguay	385		5	390	1.3%	5.9	6.5
Uruguay	865		149	1,014	17.2%	7.7	7.8
Mexico	736		482	1,218	65.5%	7.8	5.6
Others	3,181		2,092	5,273	65.8%	7.1	6.6
SA	35,739		16,817	52,556	47.1%	7.1	6.7
Netherlands	47,555	-11,392		36,163	-24.0%	11.2	11.4
UK	2,708		900	3,608	33.2%	10.1	7.9
Germany	5,515	-85		5,430	-1.5%	11.1	5.1
Italy	2,146	-561		1,585	-26.1%	10.1	9.2
Sweden	795	-17		778	-2.1%	10.9	7.9
Belgium	1,514		124	1,638	8.2%	11.1	10.2
Austria	624		85	709	13.6%	14.5	10.0
Switzerland	1,144		456	1,600	39.9%	10.2	8.5
Others	8,391	-1,258		7,133	-15.0%	12.0	8.9
Europe	70,392	-11,748		58,644	-16.7%	11.2	9.5
ROW	12,182		675	12,857	5.5%	5.6	5.1
Total	667,642		82,765	750,407	12.4%	7.0	6.9



ACCOMMODATIONS

MARCH 2023/2022

109,295
ARRIVALS

14.0%
GROWTH

ARRIVALS BY ACCOMMODATION

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
High Rise	33,081	6,958	40,039	21.0%	34.5%	36.6%
Low Rise	10,015	-306	9,709	-3.1%	10.4%	8.9%
Timeshare	26,343	1,229	27,572	4.7%	27.5%	25.2%
Others	26,473	5,502	31,975	20.8%	27.6%	29.3%
Total	95,912	13,383	109,295	14.0%		

NIGHTS BY ACCOMMODATION

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
High Rise	184,744	42,396	227,140	22.9%	27.7%	30.3%
Low Rise	61,318	-3,088	58,230	-5.0%	9.2%	7.8%
Timeshare	212,954	13,044	225,998	6.1%	31.9%	30.1%
Others	208,626	30,413	239,039	14.6%	31.2%	31.9%
Total	667,642	82,765	750,407	12.4%		



ACCOMMODATIONS MAIN MARKETS

MARCH 2023/2022

109,295
ARRIVALS

14.0%
GROWTH

MARKET SHARE OF THE MARKET BY ACCOMMODATION CATEGORY

	HIGH RISE			LOW RISE			TIME SHARE			OTHERS		
	2022	2023	%Growth	2022	2023	%Growth	2022	2023	%Growth	2022	2023	% Growth
USA	88.6%	86.2%	-2.3%	82.4%	82.7%	0.3%	92.4%	91.4%	-1.0%	62.2%	54.7%	-7.6%
Venezuela	0.0%	0.0%	0.0%	0.1%	0.0%	-0.1%	0.0%	0.1%	0.0%	0.2%	0.3%	0.0%
Netherlands	1.2%	0.7%	-0.5%	6.0%	2.7%	-3.3%	0.9%	0.3%	-0.7%	11.3%	8.0%	-3.3%
Canada	4.3%	5.9%	1.6%	3.0%	5.7%	2.6%	3.3%	5.2%	1.9%	5.6%	9.8%	4.2%
Brazil	0.5%	0.6%	0.0%	2.7%	0.7%	-2.0%	0.5%	0.2%	-0.3%	0.5%	1.1%	0.6%
Colombia	1.3%	1.0%	-0.2%	1.2%	1.4%	0.2%	0.7%	0.9%	0.2%	4.6%	7.1%	2.5%
Argentina	1.2%	1.5%	0.3%	0.4%	0.6%	0.2%	0.3%	0.5%	0.2%	0.8%	1.4%	0.6%
Chile	0.6%	0.5%	0.0%	0.2%	0.6%	0.3%	0.2%	0.2%	0.0%	0.4%	0.7%	0.3%
Peru	0.4%	0.4%	0.1%	0.1%	0.2%	0.1%	0.1%	0.1%	0.0%	0.3%	0.7%	0.4%
UK	0.2%	0.4%	0.2%	0.2%	0.8%	0.6%	0.2%	0.1%	0.0%	0.6%	0.6%	0.1%
Italy	0.1%	0.0%	-0.1%	0.4%	0.3%	0.0%	0.1%	0.1%	0.0%	0.4%	0.4%	-0.1%
Total mainmkt	98.3%	97.4%	-1.0%	96.8%	95.7%	-1.1%	98.6%	98.9%	0.3%	87.0%	84.7%	-2.3%



ACCOMMODATIONS

MARCH 2023/2022

109,295
ARRIVALS

14.0%
GROWTH

VISITOR ARRIVALS AT THE ACCOMMODATION TYPE FOR THE MARKET

	HIGH RISE			LOW RISE			TIME SHARE			OTHERS		
	2022	2023	Growth	2022	2023	Growth	2022	2023	Growth	2022	2023	Growth
USA	29,296	34,532	5,236	8,256	8,034	-222	24,329	25,194	865	16,477	17,479	1,002
Venezuela	6	13	7	9	1	-8	4	15	11	60	80	20
Netherlands	394	283	-111	599	259	-340	246	78	-168	2,990	2,548	-442
Canada	1,419	2,361	942	303	550	247	869	1,424	555	1,487	3,135	1,648
Brazil	174	225	51	271	70	-201	140	61	-79	122	346	224
Colombia	417	405	-12	121	140	19	188	245	57	1,206	2,265	1,059
Argentina	413	610	197	44	58	14	77	139	62	217	454	237
Chile	190	213	23	25	58	33	45	56	11	118	223	105
Peru	119	177	58	11	19	8	20	19	-1	83	232	149
UK	55	151	96	19	75	56	40	29	-11	153	204	51
Italy	43	11	-32	37	32	-5	17	16	-1	116	114	-2
Total mainmkt	32,526	38,981	6,455	9,695	9,296	-399	25,975	27,276	1,301	23,029	27,080	4,051



VISITORS BY AGE

MARCH 2023/2022

109,295
ARRIVALS

14.0%
GROWTH

	2022		Growth	2023	% Growth
0 - 11	5,685		1,259	6,944	22.1%
12-19	6,400		875	7,275	13.7%
20 - 29	13,667	-1,496		12,171	-10.9%
30 - 39	16,058		237	16,295	1.5%
40 - 49	14,944		2,062	17,006	13.8%
50 - 59	18,878		2,929	21,807	15.5%
60 - 69	13,976		4,369	18,345	31.3%
70 +	6,304		3,138	9,442	49.8%
Not Stated	0		10	10	#DIV/0!
Total	95,912		13,383	109,295	14.0%



GENERATIONS

MARCH 2023/2022

109,295
ARRIVALS

14.0%
GROWTH

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
Gen A	4,496	1,444	5,457	21.4%	6.3%	6.5%
Gen Z	15,090	4,261	15,468	2.5%	19.1%	19.3%
Millennials	25,343	2,722	25,305	-0.1%	26.6%	24.1%
Gen X	25,272	5,604	28,871	14.2%	25.4%	25.7%
Baby Boomers	23,668	5,809	30,866	30.4%	20.5%	21.9%
Silent Generations	2,043	1,045	3,318	62.4%	2.0%	2.6%
Age not specified	0	9	10	#DIV/0!	0.0%	0.0%
Total	95,912	20,894	109,295	14.0%		



CARRIERS MARCH 2023/2022

109,295 ARRIVALS

14.0% GROWTH

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
JETBLUE	28,892	-2,594	26,298	-9.0%	30.1%	24.1%
AMERICAN AIRLINES	20,858	4,106	24,964	19.7%	21.7%	22.8%
DELTA AIRLINE	11,483	3,551	15,034	30.9%	12.0%	13.8%
UNITED AIRLINES	13,607	-1,723	11,884	-12.7%	14.2%	10.9%
SOUTHWEST AIRLINES	4,235	700	4,935	16.5%	4.4%	4.5%
AVIANCA	2,274	1,390	3,664	61.1%	2.4%	3.4%
COPA AIRLINE	2,380	1,061	3,441	44.6%	2.5%	3.1%
KLM	3,580	-346	3,234	-9.7%	3.7%	3.0%
AIR CANADA	0	2,753	2,753	-	0.0%	2.5%
WESTJET AIRLINES	1,443	792	2,235	54.9%	1.5%	2.0%
TUI NL	1,829	-127	1,702	-6.9%	1.9%	1.6%
SUNWING AIRLINES	1,098	402	1,500	36.6%	1.1%	1.4%
SPIRIT AIRLINES	435	1,029	1,464	236.6%	0.5%	1.3%
DIVI DIVI AIR	1,257	134	1,391	10.7%	1.3%	1.3%
AERO REPUBLICA/ WINGO	208	978	1,186	470.2%	0.2%	1.1%
EZ AIR	536	484	1,020	90.3%	0.6%	0.9%
PRIVATE	306	500	806	163.4%	0.3%	0.7%
SUN COUNTRY	634	26	660	4.1%	0.7%	0.6%
SURINAM AIRWAYS	195	114	309	58.5%	0.2%	0.3%
CHARTER	92	203	295	220.7%	0.1%	0.3%
JETAIR CARIBBEAN	0	155	155	-	0.0%	0.1%
WINAIR	215	-130	85	-60.5%	0.2%	0.1%
BRITISH AIRWAYS	0	72	72	-	0.0%	0.1%
SKY HIGH AVIATION	32	29	61	90.6%	0.0%	0.1%
ARAJET	0	56	56	-	0.0%	0.1%
AIR CENTURY	51	-9	42	-17.6%	0.1%	0.0%
OTHERS	272	-223	49	-82.0%	0.3%	0.0%
Total	95,912	13,383	109,295	14.0%		

A photograph of two men running on a sandy beach towards the camera. The man on the left is older, with grey hair and a beard, wearing red shorts and carrying a yellow and red surfboard. The man on the right is younger, wearing blue patterned shorts and carrying a yellow and green surfboard. The background is a clear blue ocean under a bright sky. The text 'COMPARISON 2023 VERSUS 2019' is overlaid in white, bold, sans-serif font.

COMPARISON

2023 VERSUS 2019

SNAPSHOT YTD MAR 2023/2019



HOW MANY ARRIVALS?

306,305

4.1%



HOW LONG DID THEY STAY?

2,337,016

3.9%



WHAT DID THEY SPEND? **
Central Bank Aruba (2022)

Avg. 4,410.6 min

118%

2019: 3,741.5

**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?

HIGH RISE



659,423

NIGHTS

-10.4%

LOW RISE



170,051

NIGHTS

-1.8%

TIMESHARE



708,452

NIGHTS

8.0%

OTHERS



799,090

NIGHTS

16.8%



ARRIVALS YTD MARCH 2023/2019

306,305
ARRIVALS

4.1%
GROWTH

	2019		Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
USA	217,942		15,434	233,376	7.1%	74.1%	76.2%
Canada	19,680		3,405	23,085	17.3%	6.7%	7.5%
NA	237,622		18,839	256,461	7.9%	80.8%	83.7%
Venezuela	6,212	-5,855		357	-94.3%	2.1%	0.1%
Colombia	6,967		1,956	8,923	28.1%	2.4%	2.9%
Brazil	2,651	-108		2,543	-4.1%	0.9%	0.8%
Argentina	4,486	-144		4,342	-3.2%	1.5%	1.4%
Chile	2,888	-780		2,108	-27.0%	1.0%	0.7%
Ecuador	421		769	1,190	182.7%	0.1%	0.4%
Peru	1,118	-22		1,096	-2.0%	0.4%	0.4%
Paraguay	894	-620		274	-69.4%	0.3%	0.1%
Uruguay	524	-170		354	-32.4%	0.2%	0.1%
Mexico	345		163	508	47.2%	0.1%	0.2%
Others	1,929		295	2,224	15.3%	0.7%	0.7%
SA	28,435	-4,516		23,919	-15.9%	9.7%	7.8%
Netherlands	11,478	-1,344		10,134	-11.7%	3.9%	3.3%
UK	869		148	1,017	17.0%	0.3%	0.3%
Germany	1,516		280	1,796	18.5%	0.5%	0.6%
Italy	1,341	-478		863	-35.6%	0.5%	0.3%
Sweden	2,176	-721		1,455	-33.1%	0.7%	0.5%
Belgium	505	-31		474	-6.1%	0.2%	0.2%
Austria	251	-63		188	-25.1%	0.1%	0.1%
Switzerland	459	-1		458	-0.2%	0.2%	0.1%
Others	3,201	-356		2,845	-11.1%	1.1%	0.9%
Europe	21,796	-2,566		19,230	-11.8%	7.4%	6.3%
ROW	6,330		365	6,695	5.8%	2.2%	2.2%
Total	294,183		12,122	306,305	4.1%		
W/O Ven.	287,971		17,977	305,948	6.2%		



ARRIVALS USA YTD MARCH 2023/2019

233,376
ARRIVALS

7.1%
GROWTH

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
New York	44,978	576	45,554	1.3%	20.6%	19.5%
Massachusetts	30,695	6,569	37,264	21.4%	14.1%	16.0%
New Jersey	20,582	1,551	22,133	7.5%	9.4%	9.5%
Pennsylvania	11,926	1,529	13,455	12.8%	5.5%	5.8%
Illinois	7,176	146	7,322	2.0%	3.3%	3.1%
Connecticut	7,393	909	8,302	12.3%	3.4%	3.6%
Florida	10,445	-113	10,332	-1.1%	4.8%	4.4%
Ohio	7,199	263	7,462	3.7%	3.3%	3.2%
Maryland	5,479	468	5,947	8.5%	2.5%	2.5%
Michigan	6,476	420	6,896	6.5%	3.0%	3.0%
Virginia	4,366	1,702	6,068	39.0%	2.0%	2.6%
Georgia	3,740	191	3,931	5.1%	1.7%	1.7%
North Carolina	3,960	1,568	5,528	39.6%	1.8%	2.4%
Texas	4,323	451	4,774	10.4%	2.0%	2.0%
California	3,113	21	3,134	0.7%	1.4%	1.3%
Other	46,091	-817	45,274	-1.8%	21.1%	19.4%
Total	217,942	15,434	233,376	7.1%		

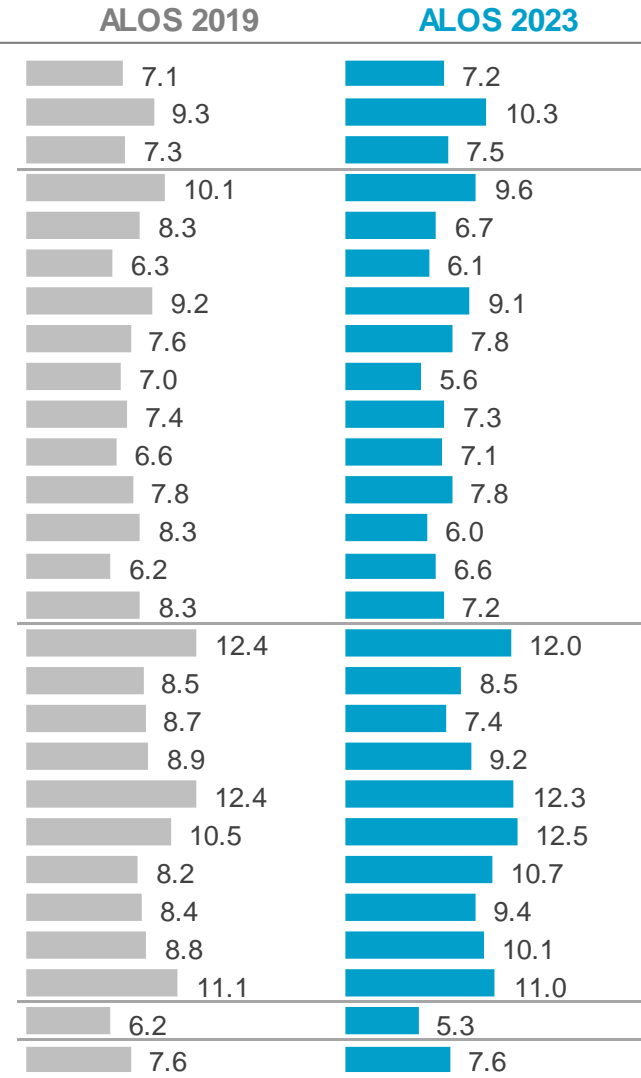


NIGHTS YTD MARCH 2023/2019

2,337,016
NIGHTS

3.9%
GROWTH

	2019		Growth	2023	% Growth
USA	1,548,792		132,009	1,680,801	8.5%
Canada	182,723		55,588	238,311	30.4%
NA	1,731,515		187,597	1,919,112	10.8%
Venezuela	62,962	-59,546		3,416	-94.6%
Colombia	58,008		1,620	59,628	2.8%
Brazil	16,791	-1,236		15,555	-7.4%
Argentina	41,337	-1,829		39,508	-4.4%
Chile	21,959	-5,453		16,506	-24.8%
Ecuador	2,928		3,688	6,616	126.0%
Peru	8,257	-277		7,980	-3.4%
Paraguay	5,901	-3,961		1,940	-67.1%
Uruguay	4,082	-1,324		2,758	-32.4%
Mexico	2,877		161	3,038	5.6%
Others	11,985		2,692	14,677	22.5%
SA	237,087	-65,465		171,622	-27.6%
Netherlands	142,849	-20,788		122,061	-14.6%
UK	7,408		1,201	8,609	16.2%
Germany	13,155		90	13,245	0.7%
Italy	11,997	-4,093		7,904	-34.1%
Sweden	26,953	-9,050		17,903	-33.6%
Belgium	5,324		598	5,922	11.2%
Austria	2,054	-40		2,014	-1.9%
Switzerland	3,875		450	4,325	11.6%
Others	28,193		510	28,703	1.8%
Europe	241,808	-31,122		210,686	-12.9%
ROW	39,033	-3,437		35,596	-8.8%
Total	2,249,443		87,573	2,337,016	3.9%





ACCOMMODATIONS

YTD MARCH 2023/2019

306,305
ARRIVALS

4.1%
GROWTH

ARRIVALS BY ACCOMMODATION

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
High Rise	120,627	-9,758	110,869	-8.1%	41.0%	36.2%
Low Rise	24,954	724	25,678	2.9%	8.5%	8.4%
Timeshare	73,159	5,139	78,298	7.0%	24.9%	25.6%
Others	75,443	16,017	91,460	21.2%	25.6%	29.9%
Total	294,183	12,122	306,305	4.1%		

NIGHTS BY ACCOMMODATION

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
High Rise	736,253	-76,830	659,423	-10.4%	35.3%	28.2%
Low Rise	173,201	-3,150	170,051	-1.8%	7.7%	7.3%
Timeshare	655,737	52,715	708,452	8.0%	29.2%	30.3%
Others	684,252	114,838	799,090	16.8%	30.4%	34.2%
Total	2,249,443	87,573	2,337,016	3.9%		



ACCOMMODATIONS MAIN MARKETS

YTD MARCH 2023/2019

306,305
ARRIVALS

4.1%
GROWTH

MARKET SHARE OF THE MARKET BY ACCOMMODATION CATEGORY

	HIGH RISE			LOW RISE			TIME SHARE			OTHERS		
	2019	2023	%Growth	2019	2023	%Growth	2019	2023	%Growth	2019	2023	% Growth
USA	81.8%	84.1%	2.3%	71.1%	78.5%	7.4%	87.8%	91.1%	3.4%	49.5%	53.2%	3.7%
Venezuela	0.7%	0.1%	-0.6%	2.4%	0.0%	-2.3%	0.8%	0.0%	-0.7%	5.6%	0.3%	-5.3%
Netherlands	0.9%	0.8%	-0.1%	4.5%	2.9%	-1.6%	0.5%	0.4%	-0.1%	11.7%	8.9%	-2.8%
Canada	6.5%	7.1%	0.5%	6.8%	6.1%	-0.7%	4.8%	4.8%	0.0%	8.8%	10.9%	2.1%
Brazil	1.2%	0.8%	-0.3%	0.9%	0.9%	0.0%	0.3%	0.3%	0.0%	1.1%	1.3%	0.1%
Colombia	1.4%	1.1%	-0.4%	2.4%	1.7%	-0.7%	0.9%	0.8%	0.0%	5.3%	7.3%	2.0%
Argentina	1.9%	2.1%	0.2%	1.4%	0.9%	-0.5%	0.9%	0.7%	-0.2%	1.7%	1.4%	-0.3%
Chile	1.2%	0.8%	-0.4%	1.1%	0.7%	-0.4%	0.3%	0.3%	0.0%	1.2%	0.9%	-0.4%
Peru	0.4%	0.4%	-0.1%	0.3%	0.3%	0.0%	0.1%	0.1%	-0.1%	0.6%	0.6%	0.0%
UK	0.2%	0.3%	0.1%	0.6%	0.5%	-0.1%	0.1%	0.1%	0.0%	0.5%	0.5%	0.0%
Italy	0.2%	0.1%	-0.1%	0.7%	0.5%	-0.2%	0.1%	0.1%	0.0%	1.1%	0.6%	-0.5%
Total mainmkt	96.5%	97.7%	1.2%	92.2%	93.0%	0.9%	96.5%	98.7%	2.2%	87.1%	85.7%	-1.3%



ACCOMMODATIONS MAIN MARKETS

YTD MARCH 2023/2019

306,305
ARRIVALS

4.1%
GROWTH

VISITOR ARRIVALS AT THE ACCOMMODATION TYPE FOR THE MARKET

	HIGH RISE			LOW RISE			TIME SHARE			OTHERS		
	2019	2023	Growth	2019	2023	Growth	2019	2023	Growth	2019	2023	Growth
USA	98,648	93,235	-5,413	17,751	20,169	2,418	64,201	71,336	7,135	37,342	48,636	11,294
Venezuela	822	71	-751	587	11	-576	572	32	-540	4,231	243	-3,988
Netherlands	1,121	941	-180	1,128	756	-372	385	309	-76	8,844	8,128	-716
Canada	7,877	7,835	-42	1,697	1,571	-126	3,479	3,738	259	6,627	9,941	3,314
Brazil	1,389	929	-460	217	230	13	213	239	26	832	1,145	313
Colombia	1,735	1,187	-548	593	429	-164	636	642	6	4,003	6,665	2,662
Argentina	2,240	2,325	85	352	223	-129	639	559	-80	1,255	1,235	-20
Chile	1,476	930	-546	271	169	-102	219	230	11	922	779	-143
Peru	519	413	-106	75	67	-8	88	49	-39	436	567	131
UK	268	307	39	143	130	-13	74	77	3	384	503	119
Italy	264	114	-150	182	127	-55	83	56	-27	812	566	-246
Total mainmkt	116,359	108,287	-8,072	22,996	23,882	886	70,589	77,267	6,678	65,688	78,408	12,720



VISITORS BY AGE YTD MARCH 2023/2019

306,305
ARRIVALS

4.1%
GROWTH

	2019	Growth	2023	% Growth
0 - 11	19,248	15	19,263	0.1%
12-19	17,528	50	17,578	0.3%
20 - 29	32,750	-534	32,216	-1.6%
30 - 39	41,205	3,063	44,268	7.4%
40 - 49	46,902	-207	46,695	-0.4%
50 - 59	62,159	-664	61,495	-1.1%
60 - 69	49,176	6,010	55,186	12.2%
70 +	25,153	4,417	29,570	17.6%
Not Stated	62	-28	34	-45.2%
Total	294,183	12,122	306,305	4.1%



GENERATIONS

YTD MARCH 2023/2019

306,305
VISITORS

4.1%
GROWTH

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
Gen A		19,149	15,407	#DIV/0!	5.0%	5.4%
Gen Z	41,889	35,138	38,624	-7.8%	16.9%	15.6%
Millennials	60,722	57,299	69,315	14.2%	29.3%	26.6%
Gen X	73,064	79,566	79,052	8.2%	26.4%	26.5%
Baby Boomers	100,765	92,843	93,404	-7.3%	20.7%	23.6%
Silent Generations	17,681	10,421	10,469	-40.8%	1.8%	2.2%
Age not specified	62	26	34	-45.2%	0.0%	0.0%
Total	294,183	294,442	306,305	4.1%		



CARRIERS YTD MARCH 2023/2019

306,305
VISITORS

4.1%
GROWTH

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
AMERICAN AIRLINES	51,733	18,886	70,619	36.5%	17.6%	23.1%
JETBLUE	68,907	-564	68,343	-0.8%	23.4%	22.3%
DELTA AIRLINE	34,489	9,175	43,664	26.6%	11.7%	14.3%
UNITED AIRLINES	40,476	-7,371	33,105	-18.2%	13.8%	10.8%
SOUTHWEST AIRLINES	20,991	-873	13,620	-35.1%	7.1%	4.4%
AVIANCA	11,512	2,312	10,639	-7.6%	3.9%	3.5%
KLM	8,001	943	10,313	28.9%	2.7%	3.4%
COPA AIRLINE	8,541	7,656	9,484	11.0%	2.9%	3.1%
AIR CANADA	0	5,943	7,656	-	0.0%	2.5%
WESTJET AIRLINES	975	-620	6,918	609.5%	0.3%	2.3%
SUNWING AIRLINES	6,334	1,688	5,714	-9.8%	2.2%	1.9%
DIVI DIVI AIR	2,350	3,668	4,038	71.8%	0.8%	1.3%
AERO REPUBLICA/ WINGO	303	3,871	3,971	1210.6%	0.1%	1.3%
TUI NL	0	1,858	3,871	-	0.0%	1.3%
SPIRIT AIRLINES	1,290	2,033	3,148	144.0%	0.4%	1.0%
EZ AIR	417	-283	2,450	487.5%	0.1%	0.8%
SUN COUNTRY	2,279	504	1,996	-12.4%	0.8%	0.7%
PRIVATE	1,439	1,158	1,943	35.0%	0.5%	0.6%
SUNCLASS AIRLINES	0	-8,110	1,158	-	0.0%	0.4%
CHARTER	9,266	-34	1,156	-87.5%	3.1%	0.4%
SURINAM AIRWAYS	976	573	942	-3.5%	0.3%	0.3%
JETAIR CARIBBEAN	0	-1,013	573	-	0.0%	0.2%
WINAIR	1,270	236	257	-79.8%	0.4%	0.1%
ARAJET	0	53	236	-	0.0%	0.1%
SKY HIGH AVIATION	94	-28	147	56.4%	0.0%	0.0%
AIR CENTURY	132	-22,168	104	-21.2%	0.0%	0.0%
Others	22,408	12,122	240	-98.9%	7.6%	0.1%
Total	294,183		306,305	4.1%		



ARRIVALS MARCH 2023/2019

109,295
ARRIVALS

2.4%
GROWTH

	2019	Growth	2023	% Growth
USA	83,586	1,653	85,239	2.0%
Canada	6,719	751	7,470	11.2%
NA	90,305	2,404	92,709	2.7%
Venezuela	742	-633	109	-85.3%
Colombia	2,112	943	3,055	44.6%
Brazil	934	-232	702	-24.8%
Argentina	1,071	190	1,261	17.7%
Chile	779	-229	550	-29.4%
Ecuador	166	365	531	219.9%
Peru	322	125	447	38.8%
Paraguay	398	-338	60	-84.9%
Uruguay	138	-8	130	-5.8%
Mexico	136	82	218	60.3%
Others	737	68	805	9.2%
SA	7,535	333	7,868	4.4%
Netherlands	3,557	-389	3,168	-10.9%
UK	270	189	459	70.0%
Germany	577	484	1,061	83.9%
Italy	369	-196	173	-53.1%
Sweden	491	-393	98	-80.0%
Belgium	230	-69	161	-30.0%
Austria	82	-11	71	-13.4%
Switzerland	156	32	188	20.5%
Others	818	-20	798	-2.4%
Europe	6,550	-373	6,177	-5.7%
ROW	2,340	201	2,541	8.6%
Total	106,730	2,565	109,295	2.4%
W/O Ven.	105,988	3,198	109,186	3.0%

Marketshare 2019	Marketshare 2023
78.3%	78.0%
6.3%	6.8%
84.6%	84.8%
0.7%	0.1%
2.0%	2.8%
0.9%	0.6%
1.0%	1.2%
0.7%	0.5%
0.2%	0.5%
0.3%	0.4%
0.4%	0.1%
0.1%	0.1%
0.1%	0.2%
0.7%	0.7%
7.1%	7.2%
3.3%	2.9%
0.3%	0.4%
0.5%	1.0%
0.3%	0.2%
0.5%	0.1%
0.2%	0.1%
0.1%	0.1%
0.1%	0.2%
0.8%	0.7%
6.1%	5.7%
2.2%	2.3%



ARRIVALS USA

MARCH 2023/2019

85,239
ARRIVALS

2.0%
GROWTH

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
New York	13,796	-374	13,422	-2.7%	16.5%	15.7%
Massachusetts	11,722	3,158	14,880	26.9%	14.0%	17.5%
New Jersey	7,403	449	7,852	6.1%	8.9%	9.2%
Pennsylvania	4,461	216	4,677	4.8%	5.3%	5.5%
Illinois	3,052	-344	2,708	-11.3%	3.7%	3.2%
Connecticut	2,895	259	3,154	8.9%	3.5%	3.7%
Florida	4,490	-291	4,199	-6.5%	5.4%	4.9%
Ohio	3,281	-237	3,044	-7.2%	3.9%	3.6%
Maryland	2,045	84	2,129	4.1%	2.4%	2.5%
Michigan	2,967	33	3,000	1.1%	3.5%	3.5%
Virginia	1,696	414	2,110	24.4%	2.0%	2.5%
Georgia	1,773	-97	1,676	-5.5%	2.1%	2.0%
North Carolina	1,542	578	2,120	37.5%	1.8%	2.5%
Texas	2,050	84	2,134	4.1%	2.5%	2.5%
California	1,181	-32	1,149	-2.7%	1.4%	1.3%
Other	19,232	-2,247	16,985	-11.7%	23.0%	19.9%
Total	83,586	1,653	85,239	2.0%		



NIGHTS MARCH 2023/2019

750,407
NIGHTS

-0.6%
GROWTH

	2019	Growth	2023	% Growth	ALOS 2019	ALOS 2023
USA	550,435	11,347	561,782	2.1%	6.6	6.6
Canada	56,848	7,720	64,568	13.6%	8.5	8.6
NA	607,283	19,067	626,350	3.1%	6.7	6.8
Venezuela	13,278	-12,083	1,195	-91.0%	17.9	11.0
Colombia	17,166	1,494	18,660	8.7%	8.1	6.1
Brazil	5,611	-1,515	4,096	-27.0%	6.0	5.8
Argentina	9,184	1,839	11,023	20.0%	8.6	8.7
Chile	5,914	-1,854	4,060	-31.3%	7.6	7.4
Ecuador	1,218	1,751	2,969	143.8%	7.3	5.6
Peru	2,306	352	2,658	15.3%	7.2	5.9
Paraguay	2,525	-2,135	390	-84.6%	6.3	6.5
Uruguay	1,039	-25	1,014	-2.4%	7.5	7.8
Mexico	1,343	-125	1,218	-9.3%	9.9	5.6
Others	4,187	1,086	5,273	25.9%	5.7	6.6
SA	63,771	-11,215	52,556	-17.6%	8.5	6.7
Netherlands	44,154	-7,991	36,163	-18.1%	12.4	11.4
UK	2,508	1,100	3,608	43.9%	9.3	7.9
Germany	4,882	548	5,430	11.2%	8.5	5.1
Italy	3,395	-1,810	1,585	-53.3%	9.2	9.2
Sweden	5,789	-5,011	778	-86.6%	11.8	7.9
Belgium	2,072	-434	1,638	-20.9%	9.0	10.2
Austria	743	-34	709	-4.6%	9.1	10.0
Switzerland	1,098	502	1,600	45.7%	7.0	8.5
Others	6,724	409	7,133	6.1%	8.2	8.9
Europe	71,365	-12,721	58,644	-17.8%	10.9	9.5
ROW	12,651	206	12,857	1.6%	5.4	5.1
Total	755,070	-4,663	750,407	-0.6%	7.1	6.9



ACCOMMODATIONS

MARCH 2023/2019

109,295
ARRIVALS

2.4%
GROWTH

ARRIVALS BY ACCOMMODATION

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
High Rise	44,756	-4,717	40,039	-10.5%	41.9%	36.6%
Low Rise	9,037	672	9,709	7.4%	8.5%	8.9%
Timeshare	27,749	-177	27,572	-0.6%	26.0%	25.2%
Others	25,188	6,787	31,975	26.9%	23.6%	29.3%
Total	106,730	2,565 	109,295	2.4%		

NIGHTS BY ACCOMMODATION

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
High Rise	258,458	-31,318	227,140	-12.1%	34.2%	30.3%
Low Rise	59,237	-1,007	58,230	-1.7%	7.8%	7.8%
Timeshare	227,518	-1,520	225,998	-0.7%	30.1%	30.1%
Others	209,857	29,182	239,039	13.9%	27.8%	31.9%
Total	755,070	-4,663 	750,407	-0.6%		



ACCOMMODATIONS MAIN MARKETS

MARCH 2023/2019

109,295
ARRIVALS

2.4%
GROWTH

MARKET SHARE OF THE MARKET BY ACCOMMODATION CATEGORY

	HIGH RISE			LOW RISE			TIME SHARE			OTHERS		
	2019	2023	%Growth	2019	2023	%Growth	2019	2023	%Growth	2019	2023	% Growth
USA	85.1%	86.2%	1.2%	80.2%	82.7%	2.5%	88.2%	91.4%	3.1%	54.7%	54.7%	0.0%
Venezuela	0.2%	0.0%	-0.2%	0.6%	0.0%	-0.5%	0.1%	0.1%	-0.1%	2.3%	0.3%	-2.0%
Netherlands	0.8%	0.7%	-0.1%	4.6%	2.7%	-1.9%	0.4%	0.3%	-0.1%	10.7%	8.0%	-2.7%
Canada	5.6%	5.9%	0.3%	6.9%	5.7%	-1.3%	5.0%	5.2%	0.2%	8.7%	9.8%	1.1%
Brazil	1.1%	0.6%	-0.5%	1.1%	0.7%	-0.3%	0.3%	0.2%	-0.1%	1.1%	1.1%	0.0%
Colombia	1.3%	1.0%	-0.3%	2.2%	1.4%	-0.8%	0.5%	0.9%	0.4%	4.6%	7.1%	2.5%
Argentina	1.1%	1.5%	0.4%	1.1%	0.6%	-0.5%	0.3%	0.5%	0.2%	1.5%	1.4%	-0.1%
Chile	0.7%	0.5%	-0.1%	0.5%	0.6%	0.1%	0.2%	0.2%	0.0%	1.5%	0.7%	-0.8%
Peru	0.4%	0.4%	0.0%	0.2%	0.2%	0.0%	0.1%	0.1%	0.0%	0.4%	0.7%	0.3%
UK	0.2%	0.4%	0.2%	0.5%	0.8%	0.3%	0.1%	0.1%	0.0%	0.4%	0.6%	0.2%
Italy	0.2%	0.0%	-0.1%	0.7%	0.3%	-0.3%	0.0%	0.1%	0.0%	0.9%	0.4%	-0.6%
Total mainmkt	96.6%	97.4%	0.8%	98.5%	95.7%	-2.8%	95.3%	98.9%	3.6%	86.9%	84.7%	-2.2%



ACCOMMODATIONS

MARCH 2023/2019

109,295
ARRIVALS

2.4%
GROWTH

VISITOR ARRIVALS AT THE ACCOMMODATION TYPE FOR THE MARKET

	HIGH RISE			LOW RISE			TIME SHARE			OTHERS		
	2019	2023	Growth	2019	2023	Growth	2019	2023	Growth	2019	2023	Growth
USA	38,084	34,532	-3,552	7,251	8,034	783	24,484	25,194	710	13,767	17,479	3,712
Venezuela	88	13	-75	50	1	-49	31	15	-16	573	80	-493
Netherlands	342	283	-59	412	259	-153	114	78	-36	2,689	2,548	-141
Canada	2,503	2,361	-142	627	550	-77	1,390	1,424	34	2,199	3,135	936
Brazil	482	225	-257	95	70	-25	80	61	-19	277	346	69
Colombia	598	405	-193	202	140	-62	145	245	100	1,167	2,265	1,098
Argentina	498	610	112	95	58	-37	89	139	50	389	454	65
Chile	293	213	-80	48	58	10	50	56	6	388	223	-165
Peru	181	177	-4	17	19	2	28	19	-9	96	232	136
UK	82	151	69	47	75	28	30	29	-1	111	204	93
Italy	73	11	-62	59	32	-27	6	16	10	231	114	-117
Total mainmkt	43,224	38,981	-4,243	8,903	9,296	393	26,447	27,276	829	21,887	27,080	5,193



VISITORS BY AGE MARCH 2023/2019

109,295
ARRIVALS

2.4%
GROWTH

	2019	Growth	2023	% Growth
0 - 11	7,010	-66	6,944	-0.9%
12-19	7,838	-563	7,275	-7.2%
20 - 29	12,784	-613	12,171	-4.8%
30 - 39	15,174	1,121	16,295	7.4%
40 - 49	17,673	-667	17,006	-3.8%
50 - 59	22,429	-622	21,807	-2.8%
60 - 69	16,288	2,057	18,345	12.6%
70 +	7,514	1,928	9,442	25.7%
Not Stated	20	-10	10	-50.0%
Total	106,730	2,565	109,295	2.4%



GENERATIONS

MARCH 2023/2019

109,295
ARRIVALS

2.4%
GROWTH

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
Gen A		1,444	5,457	#DIV/0!	6.3%	6.5%
Gen Z	17,140	4,261	15,468	-9.8%	19.1%	19.3%
Millennials	22,634	2,722	25,305	11.8%	26.6%	24.1%
Gen X	27,408	5,604	28,871	5.3%	25.4%	25.7%
Baby Boomers	34,342	5,809	30,866	-10.1%	20.5%	21.9%
Silent Generations	5,186	1,045	3,318	-36.0%	2.0%	2.6%
Age not specified	20	9	10	-50.0%	0.0%	0.0%
Total	106,730	20,894	109,295	2.4%		



CARRIERS MARCH 2023/2019

109,295 ARRIVALS

2.4% GROWTH

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
JETBLUE	26,855	-557	26,298	-2.1%	25.2%	24.1%
AMERICAN AIRLINES	19,928		24,964	25.3%	18.7%	22.8%
DELTA AIRLINE	12,841		15,034	17.1%	12.0%	13.8%
UNITED AIRLINES	15,419	-3,535	11,884	-22.9%	14.4%	10.9%
SOUTHWEST AIRLINES	7,793	-2,858	4,935	-36.7%	7.3%	4.5%
AVIANCA	3,859	-195	3,664	-5.1%	3.6%	3.4%
COPA AIRLINE	2,851	590	3,441	20.7%	2.7%	3.1%
KLM	2,564	670	3,234	26.1%	2.4%	3.0%
AIR CANADA	2,269	484	2,753	21.3%	2.1%	2.5%
WESTJET AIRLINES	0	2,235	2,235	-	0.0%	2.0%
TUI NL / ARKEFLIGHT	1,425	277	1,702	19.4%	1.3%	1.6%
SUNWING AIRLINES	1,954	-454	1,500	-23.2%	1.8%	1.4%
SPIRIT AIRLINES	517	947	1,464	183.2%	0.5%	1.3%
DIVI DIVI AIR	906	485	1,391	53.5%	0.8%	1.3%
AERO REPUBLICA/ WINGO	0	1,186	1,186	-	0.0%	1.1%
EZ AIR	305	715	1,020	234.4%	0.3%	0.9%
PRIVATE	336	470	806	139.9%	0.3%	0.7%
SUN COUNTRY	1,082	-422	660	-39.0%	1.0%	0.6%
SURINAM AIRWAYS	358	-49	309	-13.7%	0.3%	0.3%
CHARTER	2,524	-2,229	295	-88.3%	2.4%	0.3%
JETAIR CARIBBEAN	0	155	155	-	0.0%	0.1%
WINAIR	456	-371	85	-81.4%	0.4%	0.1%
BRITISH AIRWAYS	0	72	72	-	0.0%	0.1%
SKY HIGH AVIATION	43	18	61	41.9%	0.0%	0.1%
ARAJET	0	56	56	-	0.0%	0.1%
AIR CENTURY	50	-8	42	-16.0%	0.0%	0.0%
OTHERS	2,395	-2,346	49	-98.0%	2.2%	0.0%
Total	106,730		109,295	2.4%		

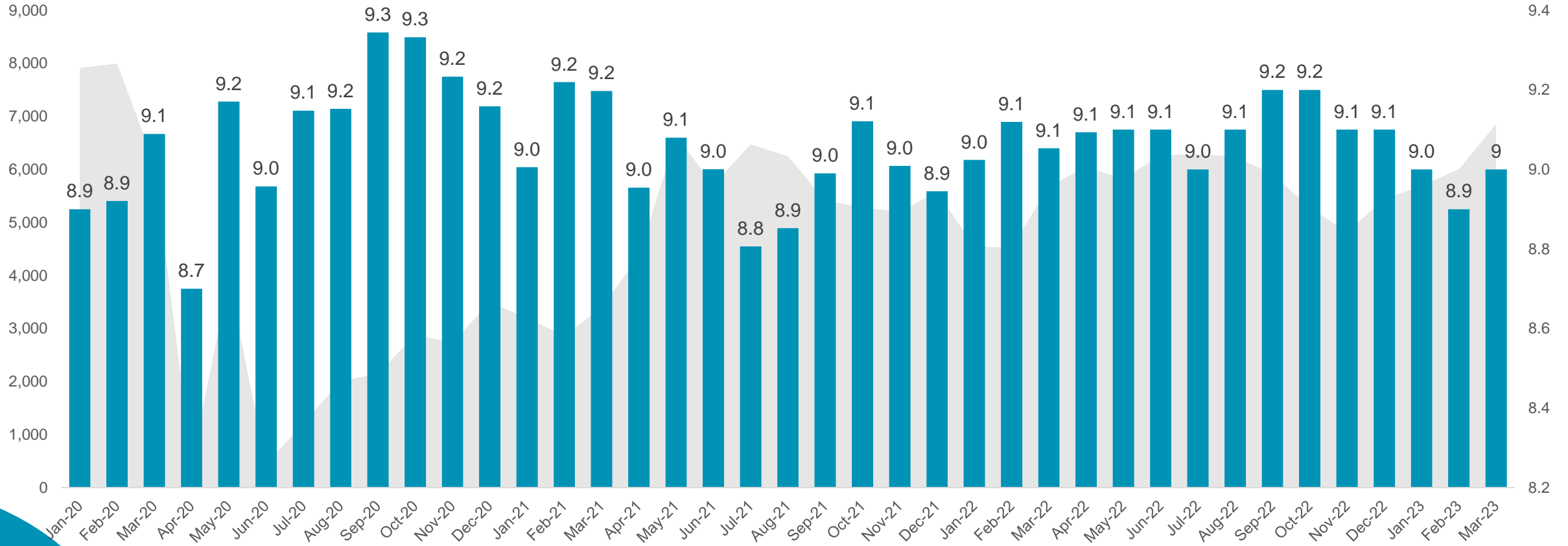


GUEST SATISFACTION



GUEST EXPERIENCE INDEX (GEI)

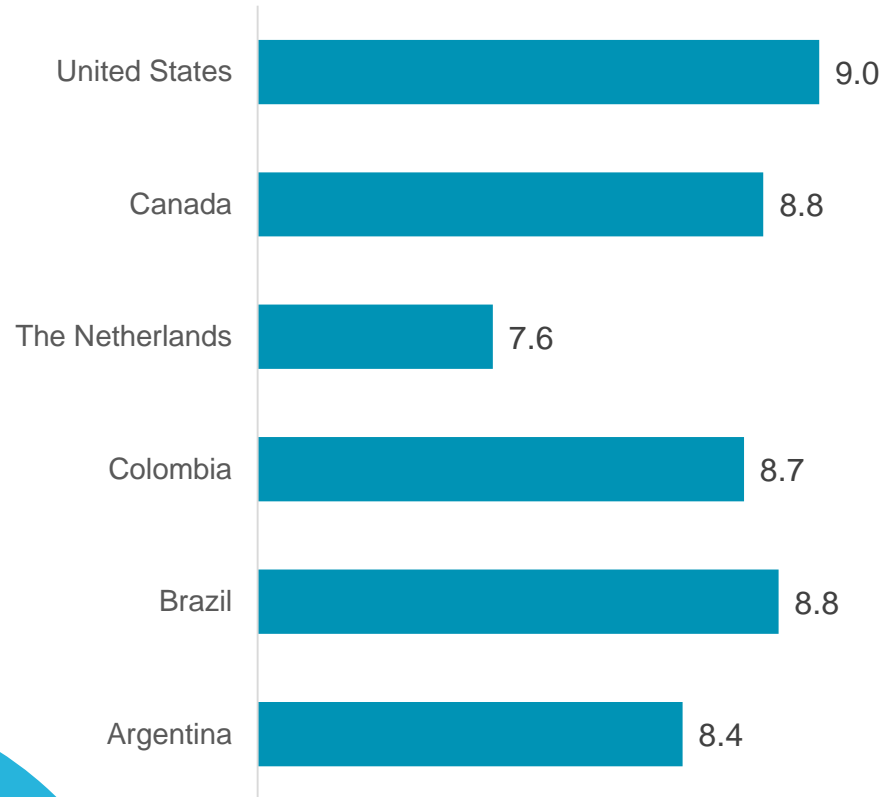
■ Reviews ■ Rating



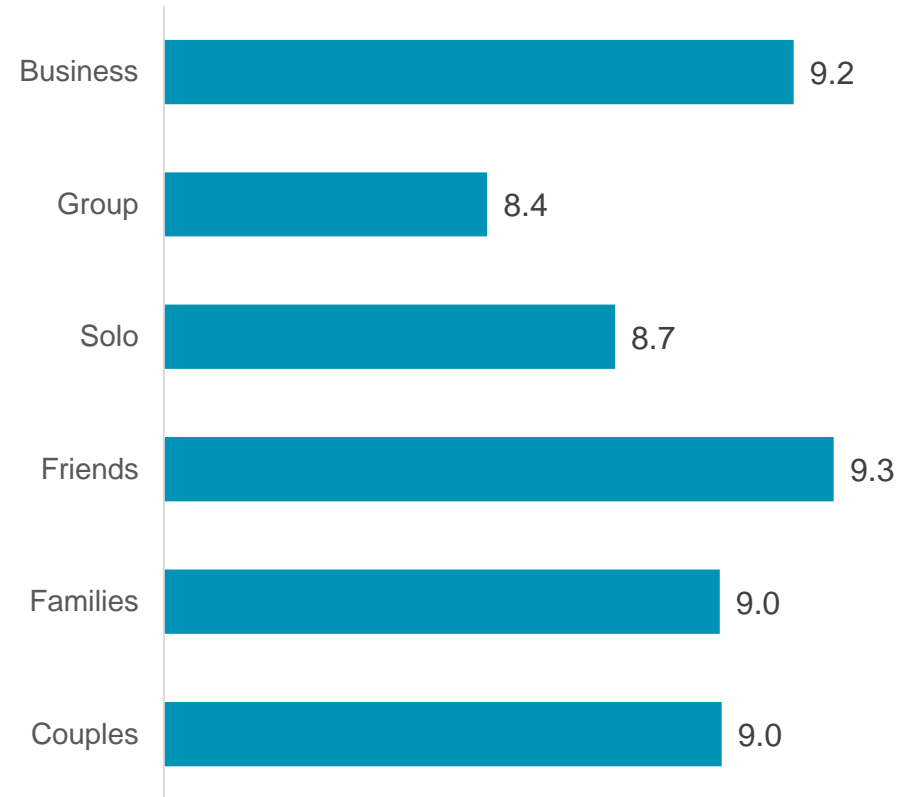


GUEST EXPERIENCE INDEX (GEI)

GEI Top 5 Markets



GEI by Travel Party

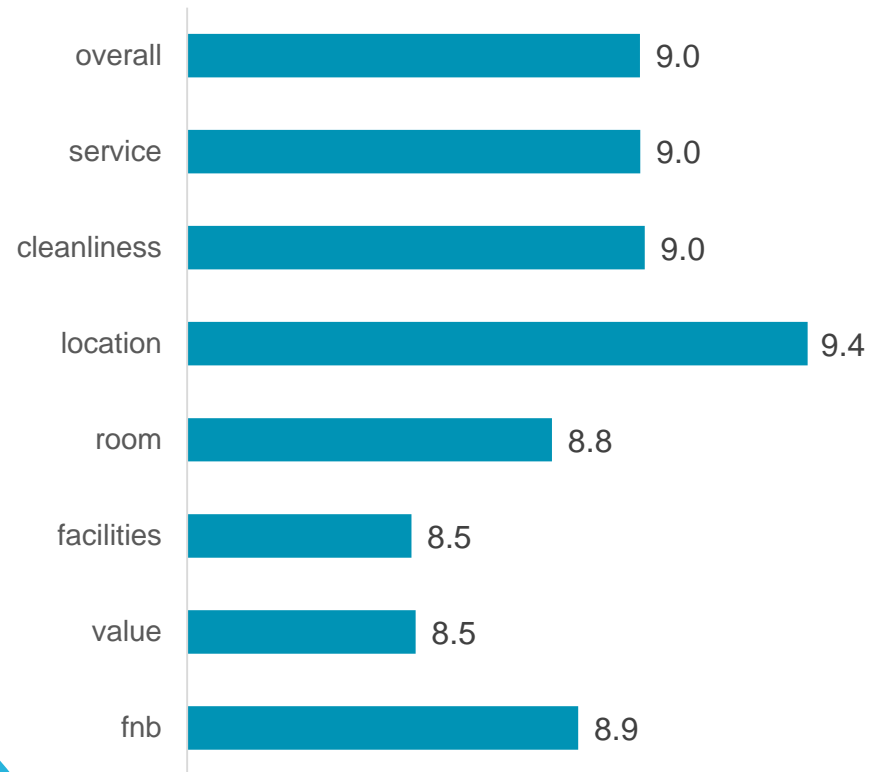




GUEST EXPERIENCE INDEX (GEI)

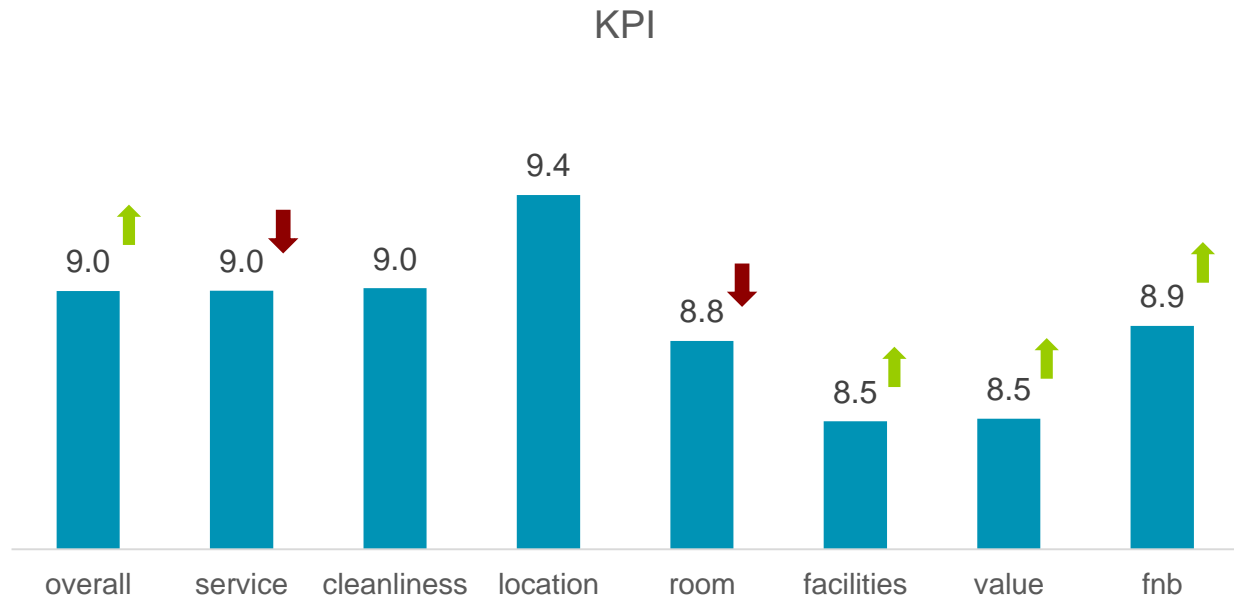
March

KPI with overall



KPI Breakdown:

Increase/Decrease vs February 2023 numbers





VACATIONS RENTALS

 **Transparent**

an OTA INSIGHT company

INTRODUCTION

- ▶ In 2022, 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.



NUMBER OF PROPERTIES

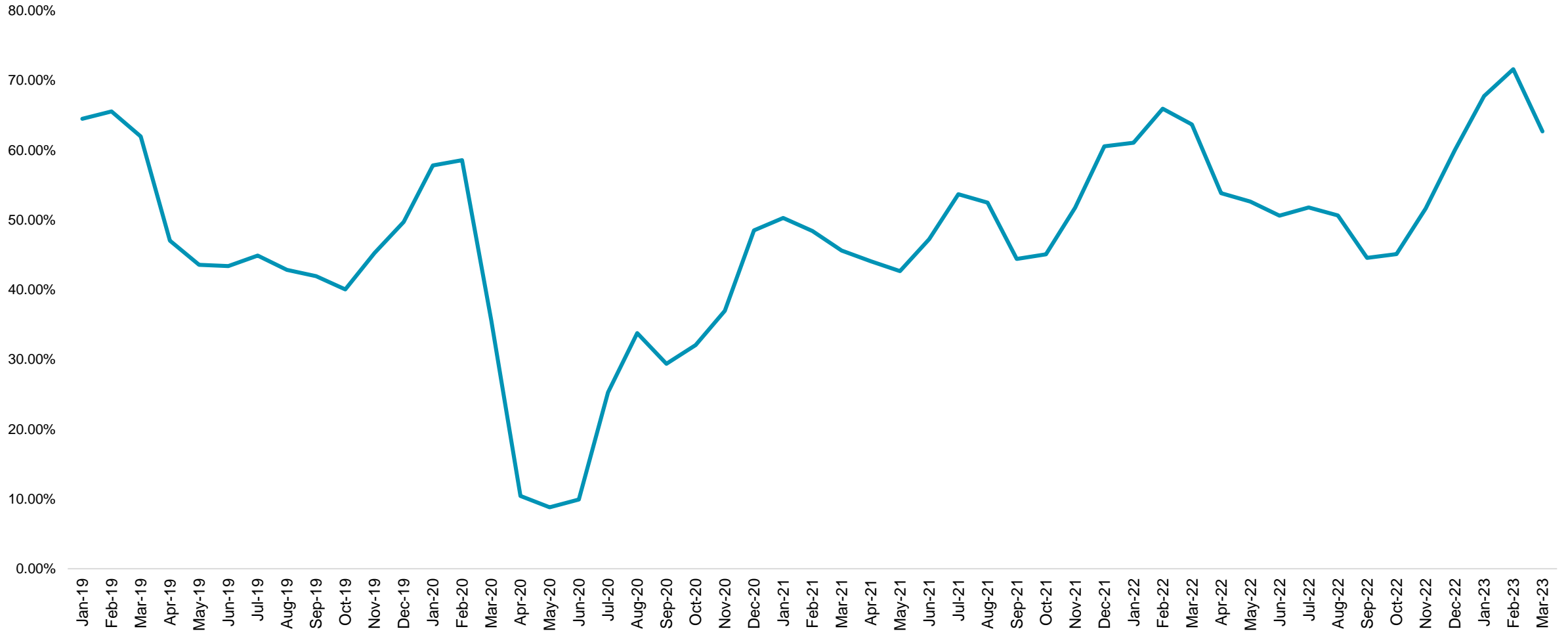
AVAILABLE IN A SPECIFIC MONTH



	Jan	% Growth vs. 2019	Feb	% Growth vs. 2019	Mar	% Growth vs. 2019
2019	2,985		2,937		2,947	
2022	3,615	21%	3,646	24%	3,721	26%
2023	4,560	53%	4,560	55%	4,651	58%

OCCUPANCY

March 2023 Occupancy: 62.7% | March 2022 Occupancy: 63.7%

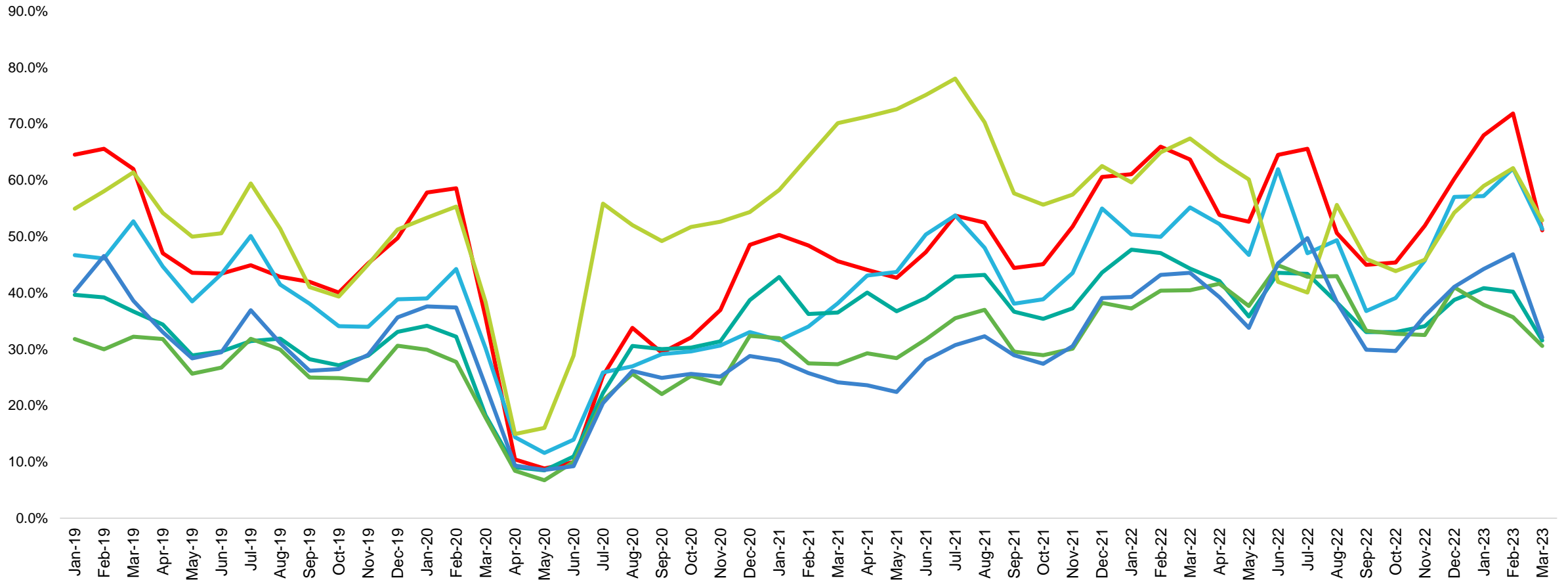


CARIBBEAN OCCUPANCY

March

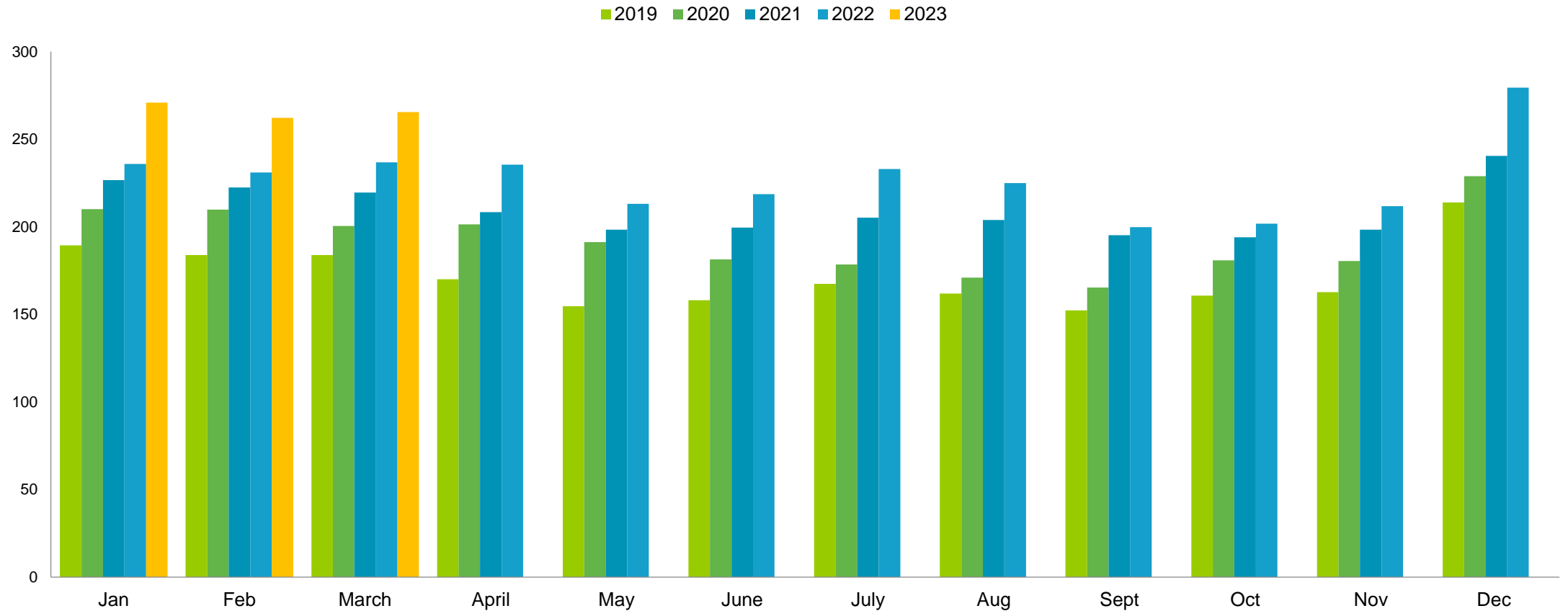
AUA: 51.1% | Bahamas: 51.4% | DR: 31.5% | Jamaica: 30.6% | PR: 52.9% | Sint Lucia: 32.1%

— Aruba — Bahamas — DR — Jamaica — Puerto Rico — Sint Lucia



AVERAGE DAILY RATE (ADR)

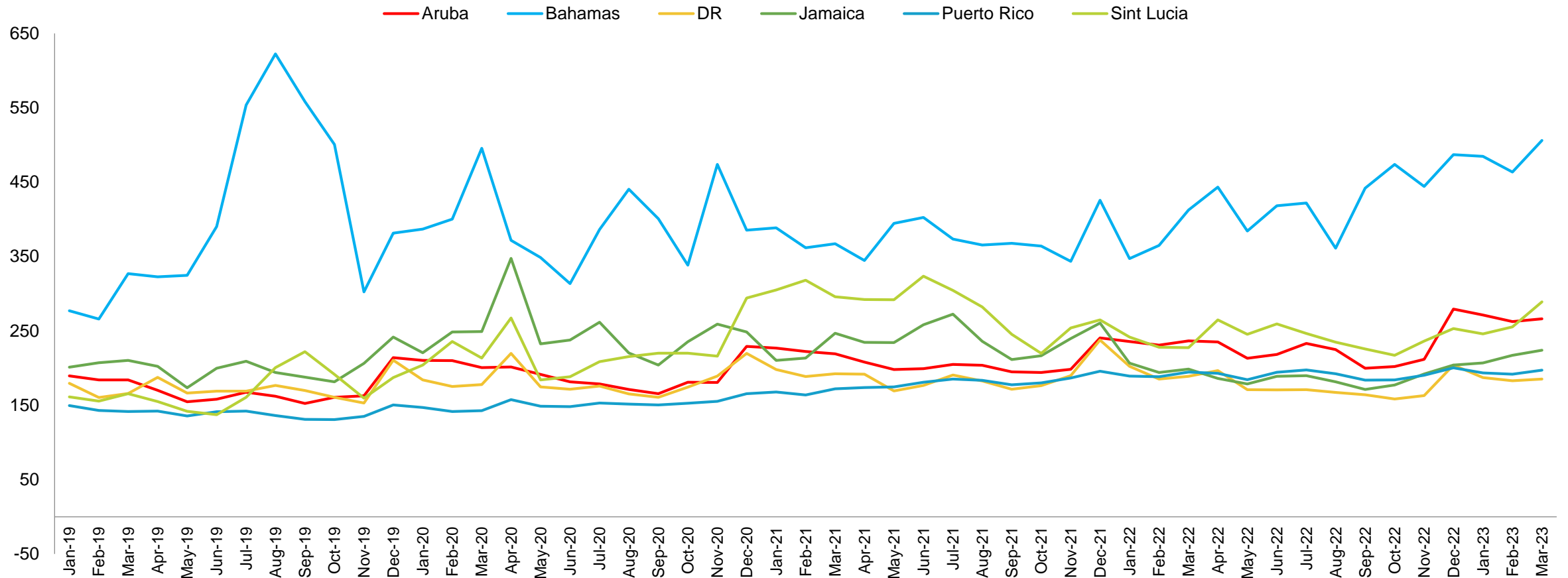
March 2023 ADR: USD\$266 | March 2022 ADR: USD\$237



CARIBBEAN ADR

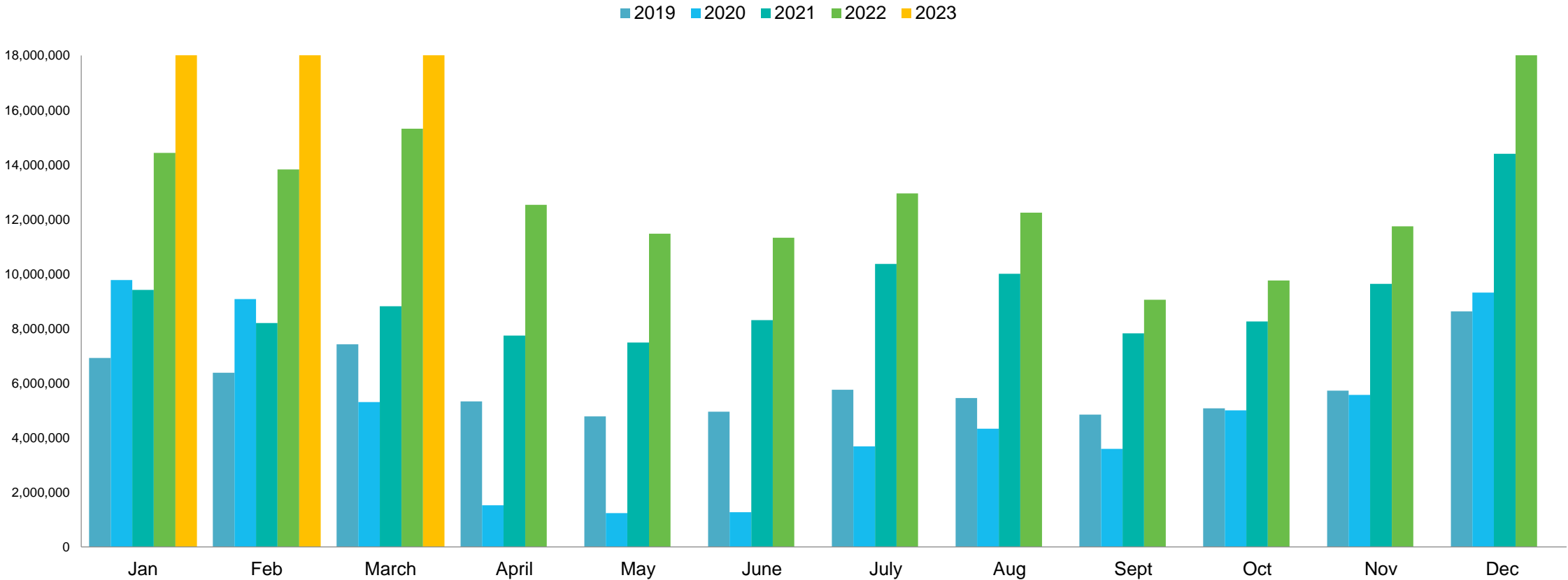
March

AUA: USD\$266 | Bahamas: USD\$506 | DR: USD\$185 | Jamaica: USD\$224 | PR: USD\$197 | Sint Lucia: USD\$289



REVENUE

March 2023 Revenue: USD\$ 18,982,857 | March 2022 Revenue: USD\$ 15,317,752
YTD March Total Revenue 2023: USD\$ 58,467,271 (YTD March 2022: USD\$ 43,579,022)





T I D B I T S

2022 Visa Cardholders' Spending on Aruba

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 2022.**
 - ✓ 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



Merchant and Category Definition

Spend areas are reported at two levels:

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

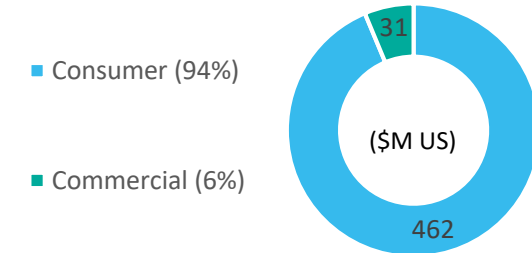
For detailed information about categories definition, please refer to the **Visa Merchant Data Standards Manual**.

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
2022	147	\$493 305 443	34.6%	\$120	\$707

Spend by Card Type



Cash withdrawal

\$ 54 417 369

2022 – Card transactions

Comparison 2022 vs. 2021

Comparison with 2019 (growth)

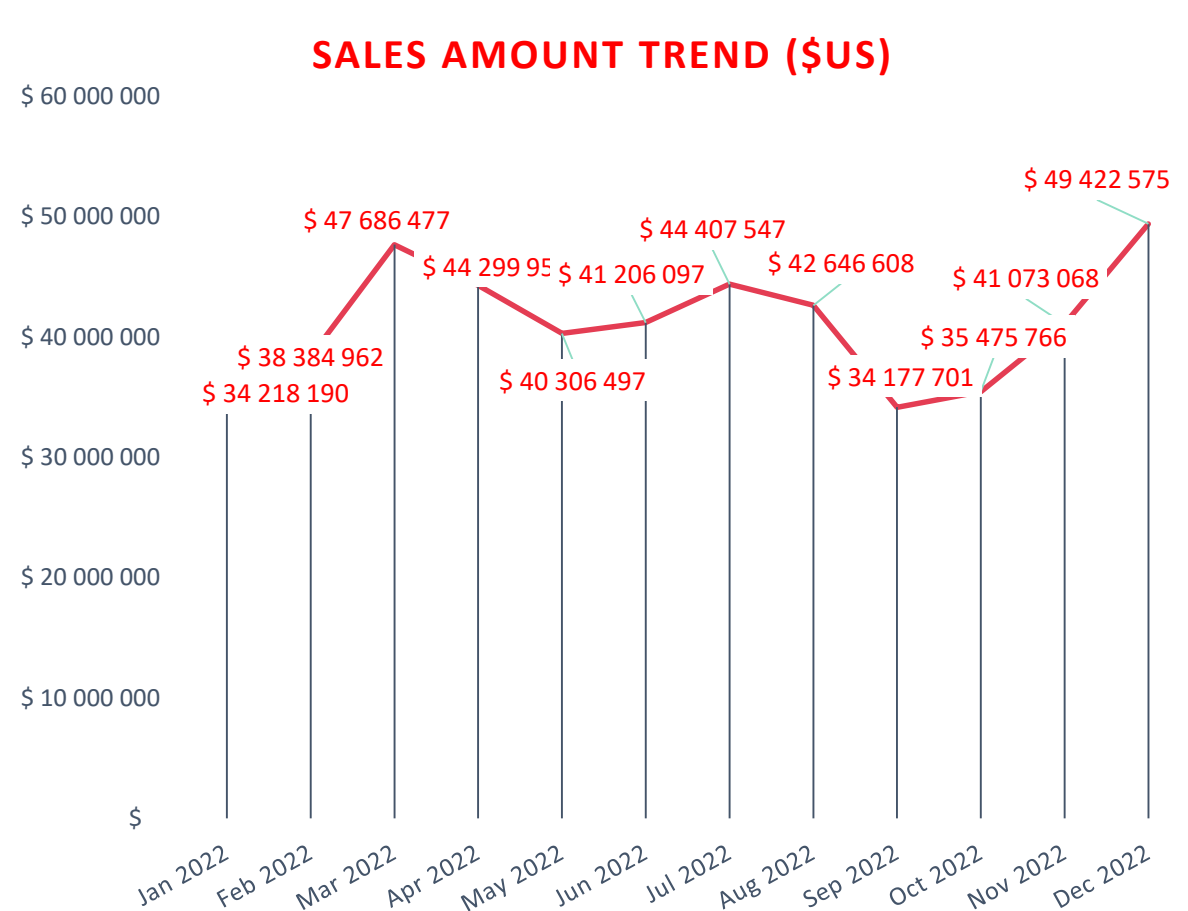
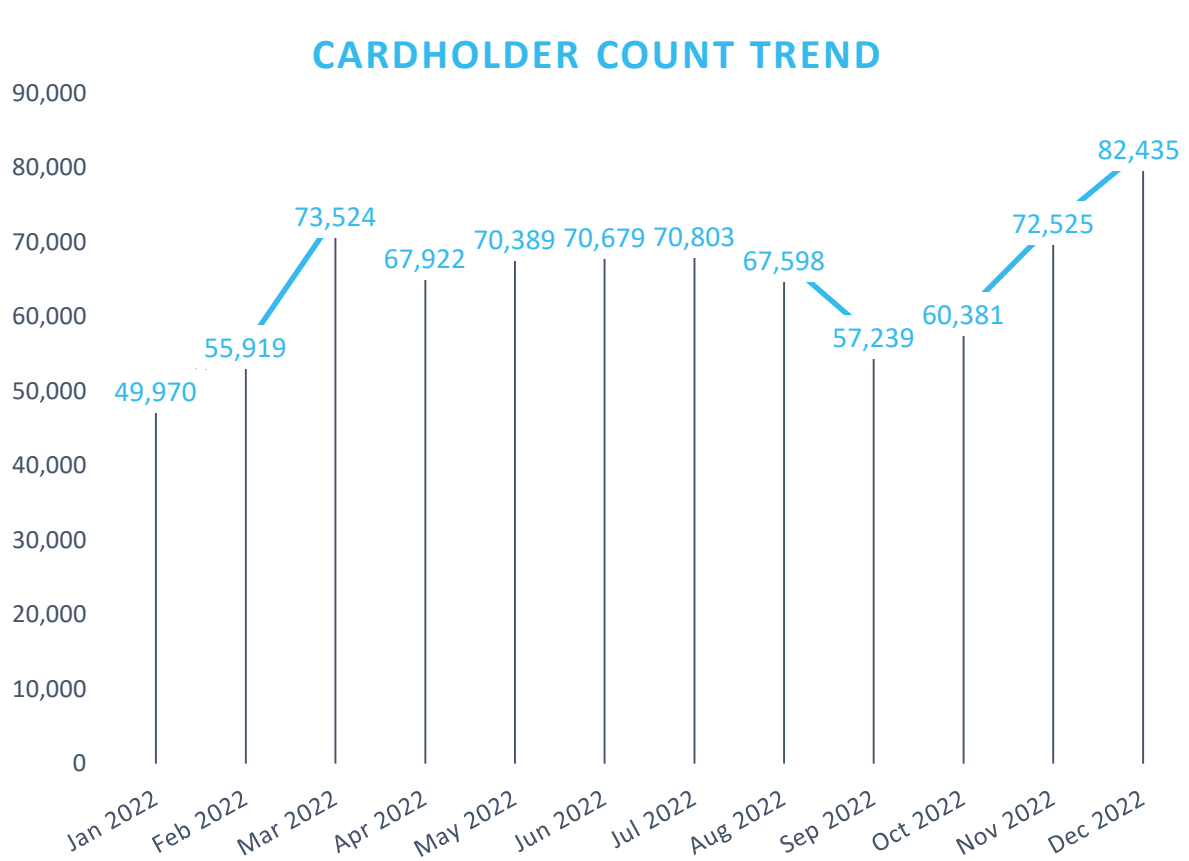
	Cardholder Count (Net)	Total Spend Amount	Spend per Cardholder	Trans Count	Avg Ticket	Cardholder Count (Net)	Total Spend Amount	Spend per Cardholder	Trans Count	Avg Ticket	Cardholder Count (Net)	Total Spend Amount	Spend per Cardholder	Trans Count	Avg Ticket
Consumer	669 017	\$462 357 587	\$691	3 947 645	\$117	45.8%	34.3%	-7.9%	36.7%	-1.8%	11,5%	23,5%	10,8%	27,8%	-3,2%
Commercial	29 102	\$30 947 856	\$1 063	157 924	\$196	44.3%	39.2%	-3.6%	38.8%	0.2%	3,6%	23,0%	18,7%	14,5%	7,1%
Total	698 118	\$493 305 443	\$707	4 105 569	\$120	45.7%	34.6%	-7.7%	36.8%	-1.6%	11,2%	23,5%	11,1%	27,3%	-2,8%

During 2022, **698,118 VISA cardholders** from 147 issuer countries have spent **US\$ 493 million in Aruba**, generating a **Y/Y growth of 35% in total sales**, supported by an increase in cardholder count (46%) and transactions count (37%); **however, spend per cardholder declined by 8%**. \$54 Million in cash was withdrawn on the island during the year. Compared to the same period in **2019**, the spend per cardholder and total spend amount is higher in 2022 (respectively 11% and 24%).

Data include card spend and withdrawal.

Monthly Trends

Cardholder Count and Sales Amount



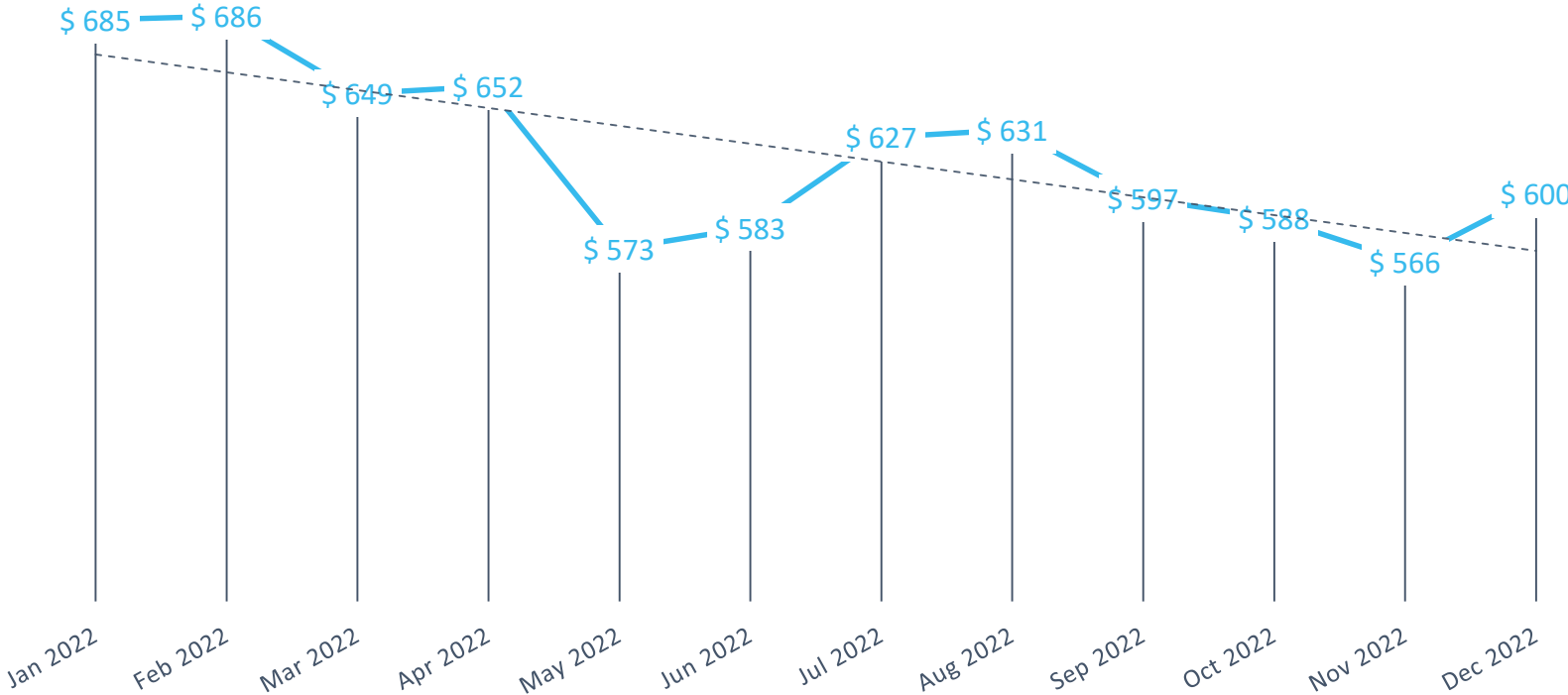
Both **cardholder** and **sales** counts showed an overall upward trend throughout the year, although they were slightly lower at the beginning of the year and showed a decrease in September.

Data include card spend and withdrawal.

Monthly Trends

Spend per Cardholder

AVG SPEND PER CARDHOLDER TREND (US\$)



Monthly spending per cardholder declined gradually from Aug to Nov but recovered on a visible growth in Dec. The trend line for the past 12 months indicates a downward trend in average spending per cardholder.

Data include card spend and withdrawal.

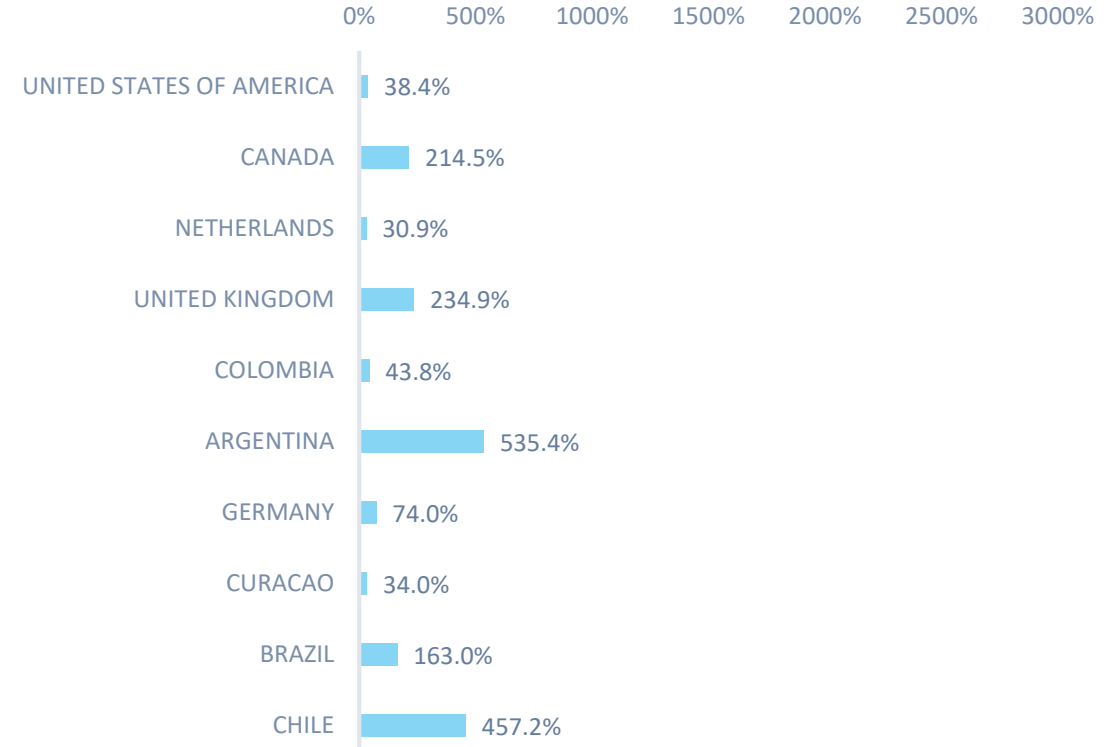
TOP Spenders by Markets

By Cardholder Count

Top Originating Countries by Cardholder Count



TOP CARDHOLDER COUNTRIES Y/Y GROWTH



During 2022, the **US remained the largest sourcing country** on the island, with a growth of 38% in yearly comparison. In other source markets the number of cardholders **has also increased** in yearly comparison, especially Argentina (535,4%) and Chile (457%).

Data include card spend and withdrawal.

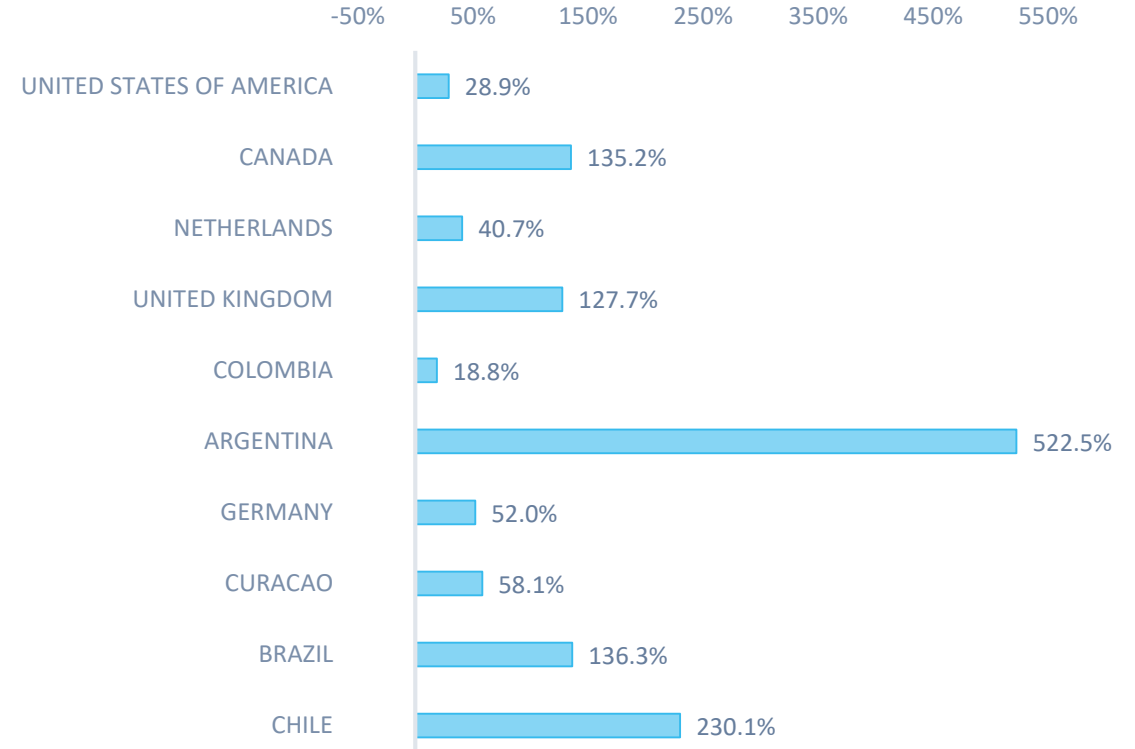
TOP Spenders by Markets

By Spend (US \$)

Top Originating Countries by Spend (\$US)



TOP \$ COUNTRIES - Y/Y GROWTH



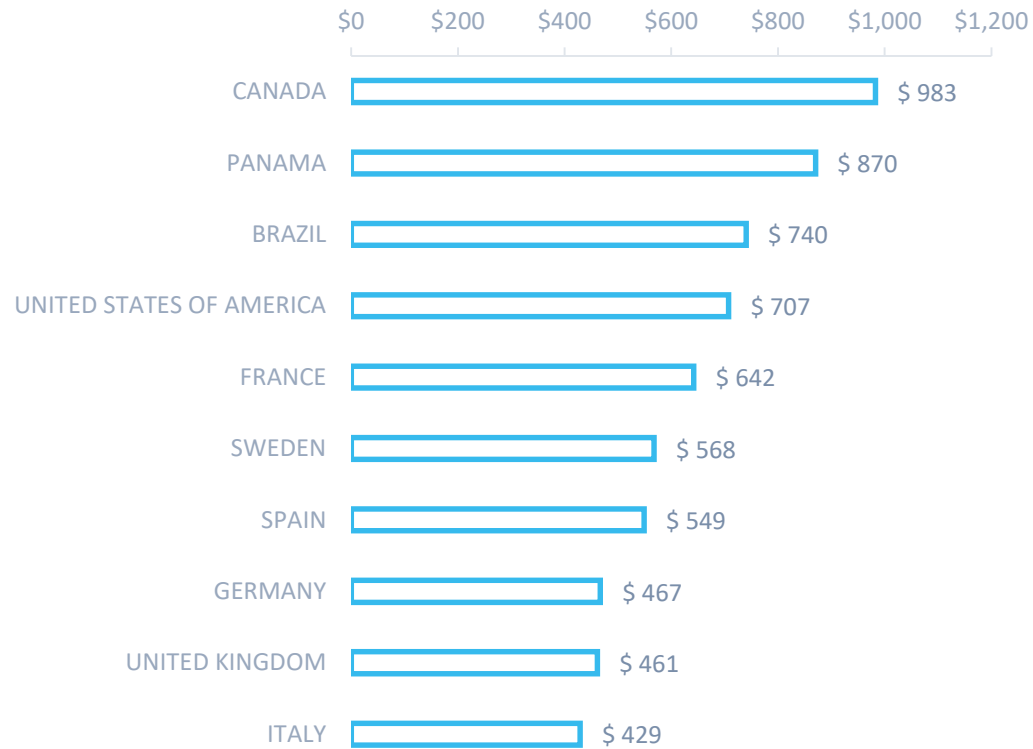
The **TOP spending market** in 2022 was the **USA**, with a Y/Y increase of 29%. However, spending from **other high-spending markets increased** considerably for cardholders from **Argentina and Chile**.

Data include card spend and withdrawal.

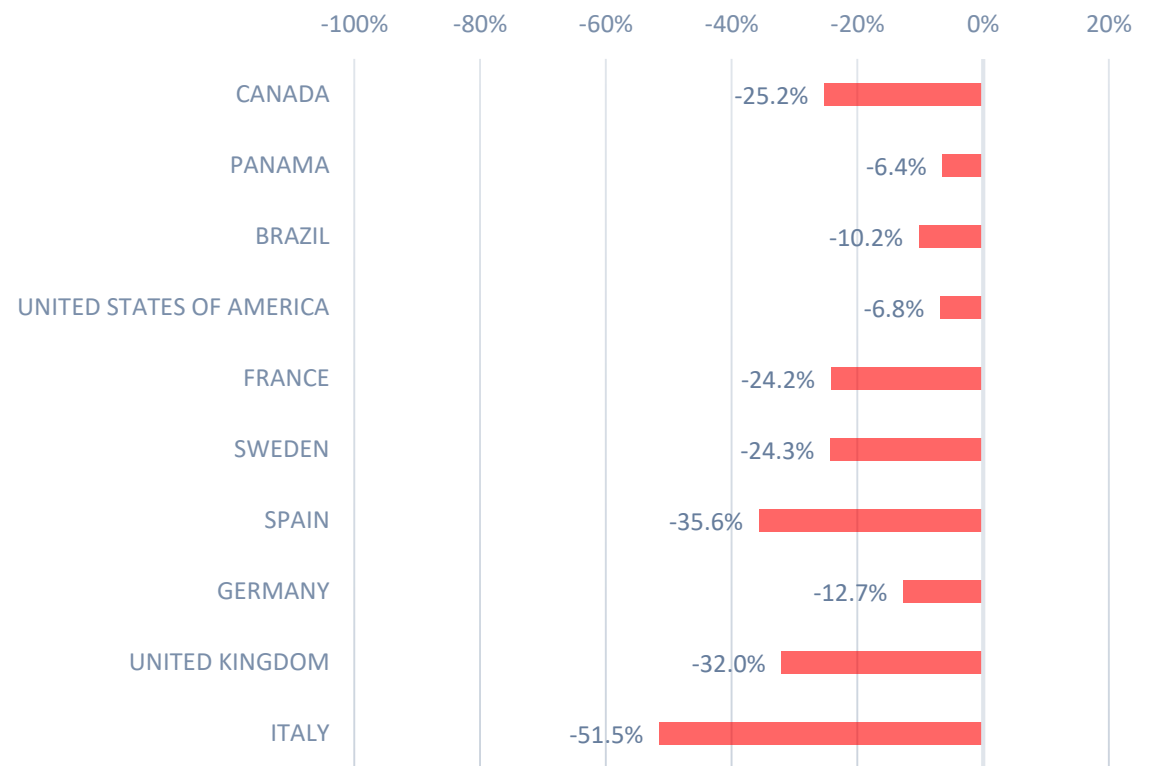
Focus on TOP Markets visiting Aruba

Spend per Cardholder (US\$)

SPEND PER CARDHOLDER BY COUNTRY (US\$)



SPEND PER CARDHOLDER – COUNTRY Y/Y GROWTH

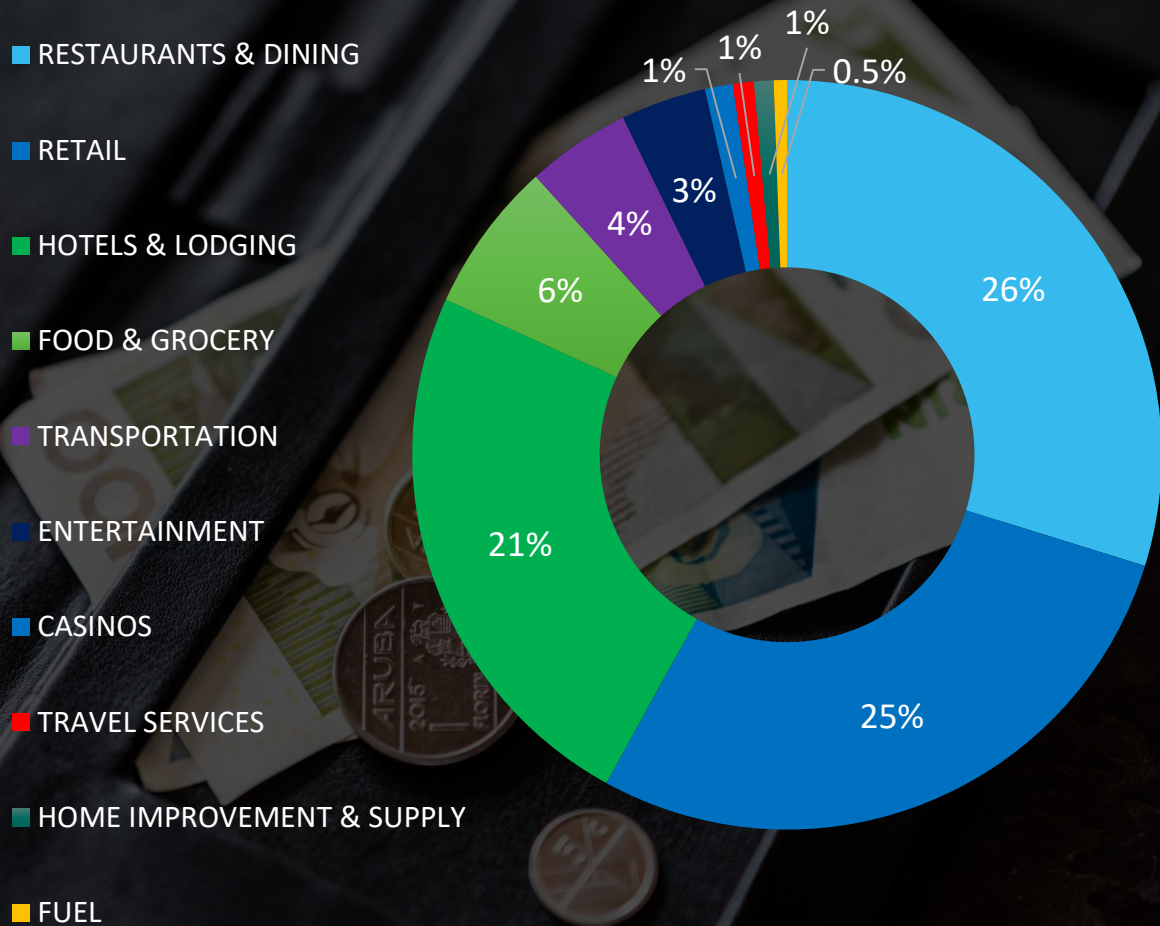


In 2022, the spending per cardholder has declined in all markets in yearly comparison, in which Italy saw the strongest degrowth by 52%.

Data include card spend and withdrawal.

Top Spend Categories

(% of Total Spend Amount)

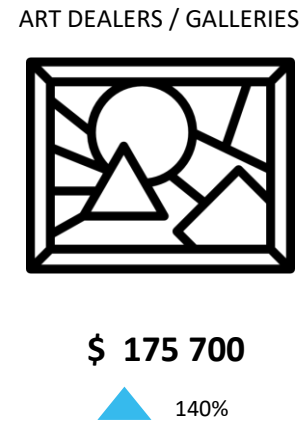
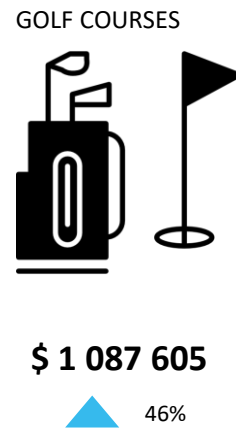


In 2022, the **two main hospitality sectors** (Restaurants, lodging) and Retail remain in the TOP 3 categories in terms of spend amount in Aruba. The highest yearly increase in spend is seen in **professional services (58%)**, followed by **fuel (57%)**.

TOP10 Categories	Spend Amount (US \$)	\$ Y/Y Growth	Cardholder Count	Spend per Cardholder
RESTAURANTS & DINING	\$ 130 257 277	36%	434 262	\$ 300
RETAIL	\$ 123 353 221	45%	410 723	\$ 300
HOTELS & LODGING	\$ 103 983 948	26%	149 985	\$ 693
FOOD & GROCERY	\$ 28 490 187	29%	218 989	\$ 130
TRANSPORTATION	\$ 19 592 835	23%	70 042	\$ 280
ENTERTAINMENT	\$ 16 151 230	31%	83 522	\$ 193
CASINOS	\$ 5 221 147	58%	2 959	\$ 1 764
TRAVEL SERVICES	\$ 3 962 952	48%	3 503	\$ 1 131
HOME IMPROVEMENT & SUPPLY	\$ 3 678 720	25%	5 110	\$ 720
FUEL	\$ 2 499 861	57%	56 091	\$ 45

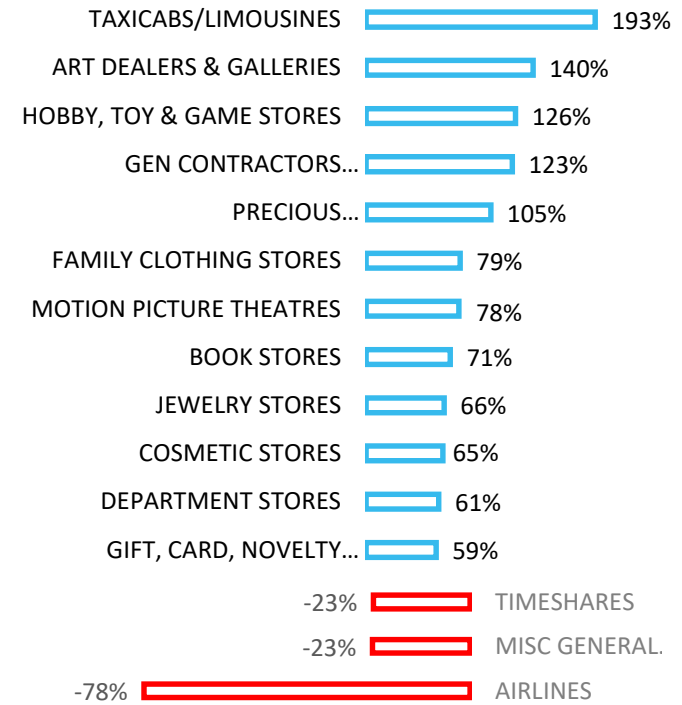
Focus on Sub-Categories

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
Melanie Evans Kelly, Manager Strategy, Research, and Planning at m.kelly@aruba.com

Or

Visit our website www.arubainsight.com

