



APRIL 2024

Monthly Report



COMPARISON

2024 VERSUS 2023

SNAPSHOT YTD APR 2024/2023



HOW MANY
ARRIVALS?

503,938

19.2%



HOW MANY
CRUISE TOURISM?

465,521

9.37%

Compared to 2023



HOW LONG
DID THEY STAY?

3,961,940

13.6%



WHAT DID THEY SPEND?**
Central Bank Aruba (Q1 2023)

Awg. 3,451.6 min

15%

Q1-Q3 2022: 2,993.70

**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?



857,738

NIGHTS

21.6%

ALL INCLUSIVE



513,402

NIGHTS

13.0%

TIMESHARE



1,109,469

NIGHTS

28.0%

OTHERS



1,481,331

NIGHTS

25.1%



ARRIVALS

YTD APRIL 2024/2023

503,938
ARRIVALS

19.2%
GROWTH

	2023		Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
USA	323,717		57,828	381,545	17.9%	76.6%	75.7%
Canada	28,146		5,279	33,425	18.8%	6.7%	6.6%
NA	351,863		63,107	414,970	17.9%	83.2%	82.3%
Venezuela	554		483	1,037	87.2%	0.1%	0.2%
Colombia	13,050		5,092	18,142	39.0%	3.1%	3.6%
Brazil	3,564		1,584	5,148	44.4%	0.8%	1.0%
Argentina	5,809		3,135	8,944	54.0%	1.4%	1.8%
Chile	2,661		2,161	4,822	81.2%	0.6%	1.0%
Ecuador	1,668		1,902	3,570	114.0%	0.4%	0.7%
Peru	1,494		4,530	6,024	303.2%	0.4%	1.2%
Paraguay	366	-23		343	-6.3%	0.1%	0.1%
Uruguay	471		314	785	66.7%	0.1%	0.2%
Mexico	866		196	1,062	22.6%	0.2%	0.2%
Others	3,669		645	4,314	17.6%	0.9%	0.9%
SA	34,172		20,019	54,191	58.6%	8.1%	10.8%
Netherlands	14,169	-1,331		12,838	-9.4%	3.4%	2.5%
UK	1,592		1,001	2,593	62.9%	0.4%	0.5%
Germany	2,299	-736		1,563	-32.0%	0.5%	0.3%
Italy	1,084		7	1,091	0.6%	0.3%	0.2%
Sweden	1,557	-1,159		398	-74.4%	0.4%	0.1%
Belgium	743	-88		655	-11.8%	0.2%	0.1%
Austria	253	-7		246	-2.8%	0.1%	0.0%
Switzerland	661		80	741	12.1%	0.2%	0.1%
Others	3,662	-68		3,594	-1.9%	0.9%	0.7%
Europe	26,020	-2,301		23,719	-8.8%	6.2%	4.7%
ROW	10,780		278	11,058	2.6%	2.5%	2.2%
Total	422,835		81,103	503,938	19.2%		
W/O Ven.	422,281		80,620	502,901	19.1%		



ARRIVALS USA

YTD APRIL 2024/2023

381,549
ARRIVALS

17.9%
GROWTH

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
New York	61,398	15,244	76,642	24.8%	19.0%	20.1%
Massachusetts	51,860	2,020	53,880	3.9%	16.0%	14.1%
New Jersey	32,823	11,089	43,912	33.8%	10.1%	11.5%
Pennsylvania	18,327	3,620	21,947	19.8%	5.7%	5.8%
Illinois	9,147	534	9,681	5.8%	2.8%	2.5%
Connecticut	12,519	2,820	15,339	22.5%	3.9%	4.0%
Florida	14,609	3,263	17,872	22.3%	4.5%	4.7%
Ohio	9,614	1,796	11,410	18.7%	3.0%	3.0%
Maryland	8,615	1,740	10,355	20.2%	2.7%	2.7%
Michigan	8,377	420	8,797	5.0%	2.6%	2.3%
Virginia	8,521	1,120	9,641	13.1%	2.6%	2.5%
Georgia	6,016	925	6,941	15.4%	1.9%	1.8%
North Carolina	8,319	1,460	9,779	17.6%	2.6%	2.6%
Texas	6,984	851	7,835	12.2%	2.2%	2.1%
California	4,785	902	5,687	18.9%	1.5%	1.5%
Other	61,803	10,028	71,831	16.2%	19.1%	18.8%
Total	323,717	57,832	381,549	17.9%		



NIGHTS YTD APRIL 2024/2023

3,961,940
ARRIVALS

13.6%
GROWTH

	2023		Growth	2024	% Growth	ALOS 2023	ALOS 2024
USA	2,533,187		314,088	2,847,275	12.4%	7.8	7.5
Canada	305,528		46,429	351,957	15.2%	10.9	10.5
NA	2,838,715		360,517	3,199,232	12.7%	8.1	7.7
Venezuela	4,980		6,502	11,482	130.6%	9.0	11.1
Colombia	94,651		26,919	121,570	28.4%	7.3	6.7
Brazil	21,580		11,627	33,207	53.9%	6.1	6.5
Argentina	52,434		29,697	82,131	56.6%	9.0	9.2
Chile	20,419		16,248	36,667	79.6%	7.7	7.6
Ecuador	9,357		6,734	16,091	72.0%	5.6	4.5
Peru	12,159		23,514	35,673	193.4%	8.1	5.9
Paraguay	2,586	-401		2,185	-15.5%	7.1	6.4
Uruguay	3,661		2,477	6,138	67.7%	7.8	7.8
Mexico	5,261		3,409	8,670	64.8%	6.1	8.2
Others	27,127		2,795	29,922	10.3%	7.4	6.9
SA	254,215		129,521	383,736	50.9%	7.4	7.1
Netherlands	211,021	-16,431		194,590	-7.8%	14.9	15.2
UK	13,946		10,348	24,294	74.2%	8.8	9.4
Germany	18,934	-2,930		16,004	-15.5%	8.2	10.2
Italy	10,301	-529		9,772	-5.1%	9.5	9.0
Sweden	19,403	-15,372		4,031	-79.2%	12.5	10.1
Belgium	9,899		1,131	11,030	11.4%	13.3	16.8
Austria	2,701		259	2,960	9.6%	10.7	12.0
Switzerland	6,433		825	7,258	12.8%	9.7	9.8
Others	36,821	-4,856		31,965	-13.2%	10.1	8.9
Europe	329,459	-27,555		301,904	-8.4%	12.7	12.7
ROW	65,029		12,039	77,068	18.5%	6.0	7.0
Total	3,487,418		474,522	3,961,940	13.6%	8.2	7.9



ACCOMMODATIONS

YTD APRIL 2024/2023

503,938
ARRIVALS

19.2%
GROWTH

ARRIVALS BY ACCOMMODATION

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
EP	115,059	22,602	137,661	19.6%	27.2%	27.3%
All Inclusive	72,428	3,718	76,146	5.1%	17.1%	15.1%
Timeshare	110,022	9,509	119,531	8.6%	26.0%	23.7%
Others	125,326	45,274	170,600	36.1%	29.6%	33.9%
Total	422,835	81,103	503,938	19.2%		

NIGHTS BY ACCOMMODATION

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
EP	745,422	112,316	857,738	15.1%	21.4%	21.6%
All Inclusive	506,200	7,202	513,402	1.4%	14.5%	13.0%
Timeshare	1,051,419	58,050	1,109,469	5.5%	30.1%	28.0%
Others	1,184,377	296,954	1,481,331	25.1%	34.0%	37.4%
Total	3,487,418	474,522	3,961,940	13.6%		



ACCOMMODATIONS YTD APRIL 2024/2023

503,938
ARRIVALS

19.2%
GROWTH

	EP			All Inclusive			Timeshare			Others		
	2024	2023	% growth	2024	2023	% growth	2024	2023	% growth	2024	2023	% growth
USA	116,903	99,337	17.7%	60,896	57,067	6.7%	108,916	100,490	8.4%	94,834	66,823	41.9%
Venezuela	206	130	58.5%	6	12	-50.0%	108	59	83.1%	718	353	103.4%
Netherlands	1,366	1,560	-12.4%	443	723	-38.7%	443	479	-7.5%	10,576	11,407	-7.3%
Canada	5,467	4,190	30.5%	6,835	6,785	0.7%	4,832	4,565	5.8%	16,294	12,606	29.3%
Brazil	1,551	1,009	53.7%	477	514	-7.2%	418	377	10.9%	2,702	1,664	62.4%
Colombia	1,945	1,361	42.9%	800	927	-13.7%	1,106	1,098	0.7%	14,289	9,664	47.9%
Argentina	1,175	907	29.5%	3,060	2,535	20.7%	1,123	726	54.7%	3,586	1,641	118.5%
Chile	844	343	146.1%	1,070	1,046	2.3%	493	284	73.6%	2,415	988	144.4%
Peru	984	210	368.6%	867	418	107.4%	378	102	270.6%	3,795	764	396.7%
UK	836	532	57.1%	146	106	37.7%	192	134	43.3%	1,414	820	72.4%
Italy	298	186	60.2%	104	120	-13.3%	95	73	30.1%	594	705	-15.7%
Total main mkt	131,575	109,765	19.9%	74,704	70,253	6.3%	118,104	108,387	9.0%	151,217	107,435	40.8%
All visitors	137,661	115,059	19.6%	76,146	72,428	5.1%	119,531	110,022	8.6%	170,600	125,326	36.1%



ACCOMMODATIONS

YTD APRIL 2024/2023

503,938
ARRIVALS

19.2%
GROWTH

	EP			All Inclusive			Timeshare			Others		
	2024	2023	% growth	2024	2023	% growth	2024	2023	% growth	2024	2023	% growth
USA	84.9%	86.3%	-1.6%	80.0%	78.8%	1.5%	91.1%	91.3%	-0.2%	55.6%	53.3%	4.3%
Venezuela	0.1%	0.1%	32.4%	0.0%	0.0%	-52.4%	0.1%	0.1%	68.5%	0.4%	0.3%	49.4%
Netherlands	1.0%	1.4%	-26.8%	0.6%	1.0%	-41.7%	0.4%	0.4%	-14.9%	6.2%	9.1%	-31.9%
Canada	4.0%	3.6%	9.1%	9.0%	9.4%	-4.2%	4.0%	4.1%	-2.6%	9.6%	10.1%	-5.0%
Brazil	1.1%	0.9%	28.5%	0.6%	0.7%	-11.7%	0.3%	0.3%	2.1%	1.6%	1.3%	19.3%
Colombia	1.4%	1.2%	19.4%	1.1%	1.3%	-17.9%	0.9%	1.0%	-7.3%	8.4%	7.7%	8.6%
Argentina	0.9%	0.8%	8.3%	4.0%	3.5%	14.8%	0.9%	0.7%	42.4%	2.1%	1.3%	60.5%
Chile	0.6%	0.3%	105.7%	1.4%	1.4%	-2.7%	0.4%	0.3%	59.8%	1.4%	0.8%	79.6%
Peru	0.7%	0.2%	291.6%	1.1%	0.6%	97.3%	0.3%	0.1%	241.1%	2.2%	0.6%	264.9%
UK	0.6%	0.5%	31.3%	0.2%	0.1%	31.0%	0.2%	0.1%	31.9%	0.8%	0.7%	26.7%
Italy	0.2%	0.2%	33.9%	0.1%	0.2%	-17.6%	0.1%	0.1%	19.8%	0.3%	0.6%	-38.1%
Total main mkt	95.6%	95.4%	0.2%	98.1%	97.0%	1.1%	98.8%	98.5%	0.3%	88.6%	85.7%	3.4%
All visitors	100.0%	100.0%	0.0%	100.0%	100.0%	0.0%	100.0%	100.0%	0.0%	100.0%	100.0%	0.0%



VISITORS BY AGE

YTD APRIL 2024/2023

503,938
ARRIVALS

19.2%
GROWTH

	2023	Growth	2024	% Growth
0 - 11	28,804	7,996	36,800	27.8%
12-19	26,683	7,485	34,168	28.1%
20 - 29	43,090	12,249	55,339	28.4%
30 - 39	62,248	14,794	77,042	23.8%
40 - 49	67,696	13,632	81,328	20.1%
50 - 59	83,285	9,376	92,661	11.3%
60 - 69	72,166	10,599	82,765	14.7%
70 +	38,818	4,996	43,814	12.9%
Not Stated	45	-24	21	-53.3%
Total	422,835	81,103	503,938	19.2%






















GENERATIONS

YTD APRIL 2024/2023

503,938
VISITORS

19.2%
GROWTH

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
Gen A	22,607	 6,321	28,928	28.0%	 5.3%	 5.7%
Gen Z	55,130	 16,080	71,210	29.2%	 13.0%	 14.1%
Millennials	97,472	 22,776	120,248	23.4%	 23.1%	 23.9%
Gen X	111,293	 18,228	129,521	16.4%	 26.3%	 25.7%
Baby Boomers	122,591	 15,679	138,270	12.8%	 29.0%	 27.4%
Silent Generations	13,697	 2,043	15,740	14.9%	 3.2%	 3.1%
Age not specified	45	-24	21	-53.3%	0.0%	0.0%
Total	422,835	 81,103	503,938	19.2%		



PURPOSE OF VISIT YTD APRIL 2024/2023

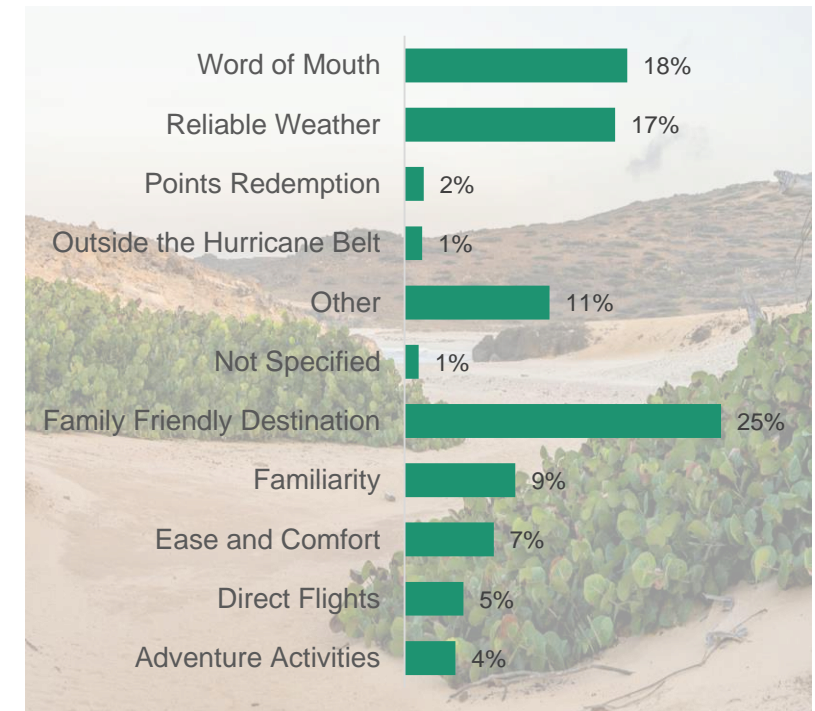
503,938
VISITORS

19.2%
GROWTH

PURPOSE OF VISIT YTD APRIL 2024

	2024	Market share 2024	2023	Market share 2023	% Growth
Sun, Sand, Sea	433,291	86.0%	354,765	83.9%	22.1%
Business	9,279	1.8%	8,820	2.1%	5.2%
Conference	3,828	0.8%	3,977	0.9%	-3.7%
Honeymoon	9,596	1.9%	8,577	2.0%	11.9%
Diving	1,674	0.3%	1,469	0.3%	14.0%
Incentive	4,437	0.9%	4,777	1.1%	-7.1%
Meeting	3,234	0.6%	3,023	0.7%	7.0%
Not specified	27,968	5.5%	27,932	6.6%	0.1%
Shopping	3,112	0.6%	2,625	0.6%	18.6%
Wedding	7,519	1.5%	6,870	1.6%	9.4%
Total	503,938	100.0%	422,835	100.0%	19.2%

CONVINCING REASONS FOR VISIT YTD APRIL 2024





CARRIERS YTD APRIL 2024/2023

503,938
VISITORS

19.2%
GROWTH

	2023		Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
JETBLUE	96,042		22,281	118,323	23.2%	22.7%	23.5%
AMERICAN AIRLINES	94,878	-1,716		93,162	-1.8%	22.4%	18.5%
DELTA AIRLINE	57,621		14,682	72,303	25.5%	13.6%	14.3%
UNITED AIRLINES	48,366		12,855	61,221	26.6%	11.4%	12.1%
SOUTHWEST AIRLINES	19,395		3,028	22,423	15.6%	4.6%	4.4%
COPA AIRLINES	13,078		7,224	20,302	55.2%	3.1%	4.0%
AVIANCA	15,806		2,580	18,386	16.3%	3.7%	3.6%
WESTJET AIRLINES	8,801		4,502	13,303	51.2%	2.1%	2.6%
SPIRIT AIRLINES	4,421		8,725	13,146	197.4%	1.0%	2.6%
KLM ROYAL DUTCH	13,234	-3,085		10,149	-23.3%	3.1%	2.0%
AIR CANADA	9,201		684	9,885	7.4%	2.2%	2.0%
WINGO	5,227		3,768	8,995	72.1%	1.2%	1.8%
LATAM AIRLINES	0		6,468	6,468	-	0.0%	1.3%
SUNWING AIRLINES	6,636	-446		6,190	-6.7%	1.6%	1.2%
DIVI DIVI AIR	6,386	-386		6,000	-6.0%	1.5%	1.2%
TUI FLY NL	5,391	-561		4,830	-10.4%	1.3%	1.0%
PRIVATE	4,488	-712		3,776	-15.9%	1.1%	0.7%
EZ AIR	3,821	-280		3,541	-7.3%	0.9%	0.7%
SUN COUNTRY AIRLINES	2,256		632	2,888	28.0%	0.5%	0.6%
WINAIR	411		1,465	1,876	356.4%	0.1%	0.4%
BRITISH AIRWAYS	417		1,407	1,824	337.4%	0.1%	0.4%
SURINAM AIRWAYS	1,737		69	1,806	4.0%	0.4%	0.4%
CHARTER	1,725	-586		1,139	-34.0%	0.4%	0.2%
ARAJET	353		343	696	97.2%	0.1%	0.1%
JET AIR CARIBBEAN	822	-355		467	-43.2%	0.2%	0.1%
SKY HIGH AVIATION	202		153	355	75.7%	0.0%	0.1%
Others	2,120	-1,636		484	-77.2%	0.5%	0.1%
Total	422,835		81,103	503,938	19.2%		



CARRIERS YTD APRIL 2024/2023

503,938
VISITORS

19.2%
GROWTH

City	APO Code	YTD March '24	Market share 2024	YTD March '23	Market share 2023	2024 vs 2023
JFK NY	JFK	73,305	14.5%	65,709	15.5%	11.6%
Boston	BOS	69,100	13.7%	68,042	16.1%	1.6%
Newark	EWB	56,941	11.3%	30,792	7.3%	84.9%
Miami	MIA	34,145	6.8%	32,470	7.7%	5.2%
Charlotte	CLT	32,422	6.4%	33,502	7.9%	-3.2%
Atlanta	ATL	32,151	6.4%	19,673	4.7%	63.4%
Toronto	YYZ	29,411	5.8%	24,658	5.8%	19.3%
Bogota	BOG	21,672	4.3%	18,822	4.5%	15.1%
Philadelphia	PHL	21,578	4.3%	23,035	5.4%	-6.3%
Panama City	PTY	20,370	4.0%	13,093	3.1%	55.6%
Orlando	MCO	17,008	3.4%	15,520	3.7%	9.6%
Amsterdam	AMS	14,984	3.0%	18,019	4.3%	-16.8%
Fort Lauderdale	FLL	13,464	2.7%	4,711	1.1%	185.8%
G.Bush DC	IAD	11,711	2.3%	10,991	2.6%	6.6%
Curacao	CUR	10,895	2.2%	12,277	2.9%	-11.3%
Chicago	ORD	9,012	1.8%	6,685	1.6%	34.8%
Lima, Peru	LIM	6,468	1.3%	0	0.0%	—
Baltimore	BWI	5,431	1.1%	3,903	0.9%	39.1%
Medellin	MDE	3,770	0.7%	2,284	0.5%	65.1%
Minneapolis St. Paul Inter Airp	MSP	2,544	0.5%	2,256	0.5%	12.8%
Cali, Alfonso Bonilla Aragon	CLO	2,057	0.4%	4	0.0%	51325.0%
Sint Maarten	SXM	1873	0.4%	458	0.1%	—
Houston International	IAH	1,860	0.4%	2,350	0.6%	—
Gatwick Airport , UK	LGW	1,825	0.4%	417	0.1%	337.6%
LaGuardia Airport, NY	LGA	1,726	0.3%	2,066	0.5%	-16.5%
	Others	8,215	1.6%	11,098	2.6%	-26.0%
Total		503,938	100.0%	422,835	100.0%	19.2%



CRUISE COMPARISON



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



CRUISE YTD APRIL



2023



CRUISE PAX

425,620

CRUISE CALLS

165



2024



CRUISE PAX

465,521

9.37%

CRUISE CALLS

173

4.85%

ABSOLUTE GROWTH PAX YTD APRIL

39,901

9.37%

ABSOLUTE GROWTH CALLS YTD APRIL

8

4.85%

APRIL RESULT 2024

NORTH AMERICA



100,140

82.6%

SOUTH AMERICA



12,705

10.5%

EUROPE



5,573

4.6%

OTHERS



2,797

2.3%

TOTAL ARRIVALS

121,215

100%



ARRIVALS

APRIL 2024/2023

121,215
ARRIVALS

9.7%
GROWTH

	2023		Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
USA	87,365		<div></div> 6,818	94,183	7.8%	<div></div> 79.1%	<div></div> 77.7%
Canada	4,607		<div></div> 1,350	5,957	29.3%	<div></div> 4.2%	<div></div> 4.9%
NA	91,972		<div></div> 8,168	100,140	8.9%	<div></div> 83.3%	<div></div> 82.6%
Venezuela	179		<div></div> 13	192	7.3%	<div></div> 0.2%	<div></div> 0.2%
Colombia	3,928	-175	<div></div>	3,753	-4.5%	<div></div> 3.6%	<div></div> 3.1%
Brazil	955		<div></div> 321	1,276	33.6%	<div></div> 0.9%	<div></div> 1.1%
Argentina	1,418		<div></div> 464	1,882	32.7%	<div></div> 1.3%	<div></div> 1.6%
Chile	540		<div></div> 660	1,200	122.2%	<div></div> 0.5%	<div></div> 1.0%
Ecuador	472		<div></div> 768	1,240	162.7%	<div></div> 0.4%	<div></div> 1.0%
Peru	381		<div></div> 978	1,359	256.7%	<div></div> 0.3%	<div></div> 1.1%
Paraguay	91	-21	<div></div>	70	-23.1%	<div></div> 0.1%	<div></div> 0.1%
Uruguay	113		<div></div> 158	271	139.8%	<div></div> 0.1%	<div></div> 0.2%
Mexico	335		<div></div> 31	366	9.3%	<div></div> 0.3%	<div></div> 0.3%
Others	1,360	-264	<div></div>	1,096	-19.4%	<div></div> 1.2%	<div></div> 0.9%
SA	9,772		<div></div> 2,933	12,705	30.0%	<div></div> 8.8%	<div></div> 10.5%
Netherlands	3,450	-147	<div></div>	3,303	-4.3%	<div></div> 3.1%	<div></div> 2.7%
UK	503		<div></div> 117	620	23.3%	<div></div> 0.5%	<div></div> 0.5%
Germany	416	-102	<div></div>	314	-24.5%	<div></div> 0.4%	<div></div> 0.3%
Italy	190		<div></div> 21	211	11.1%	<div></div> 0.2%	<div></div> 0.2%
Sweden	68		<div></div> 13	81	19.1%	<div></div> 0.1%	<div></div> 0.1%
Belgium	237	-79	<div></div>	158	-33.3%	<div></div> 0.2%	<div></div> 0.1%
Austria	52	-16	<div></div>	36	-30.8%	<div></div> 0.0%	<div></div> 0.0%
Switzerland	187	-14	<div></div>	173	-7.5%	<div></div> 0.2%	<div></div> 0.1%
Others	662		<div></div> 15	677	2.3%	<div></div> 0.6%	<div></div> 0.6%
Europe	5,765	-192	<div></div>	5,573	-3.3%	<div></div> 5.2%	<div></div> 4.6%
ROW	2,967	-170	<div></div>	2,797	-5.7%	<div></div> 2.7%	<div></div> 2.3%
Total	110,476		<div></div> 10,739	121,215	9.7%		
W/O Ven.	110,297		<div></div> 10,726	121,023	9.7%		



ARRIVALS USA

APRIL 2024/2023

94,183
ARRIVALS

7.8%
GROWTH

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
New York	15,579	<div></div> 2,902	18,481	18.6%	<div></div> 17.8%	<div></div> 19.6%
Massachusetts	14,414	<div></div> 335	14,749	2.3%	<div></div> 16.5%	<div></div> 15.7%
New Jersey	10,556	<div></div> 1,229	11,785	11.6%	<div></div> 12.1%	<div></div> 12.5%
Pennsylvania	4,735	-235 <div></div>	4,500	-5.0%	<div></div> 5.4%	<div></div> 4.8%
Illinois	1,765	-87 <div></div>	1,678	-4.9%	<div></div> 2.0%	<div></div> 1.8%
Connecticut	4,161	<div></div> 1,900	6,061	45.7%	<div></div> 4.8%	<div></div> 6.4%
Florida	3,891	<div></div> 586	4,477	15.1%	<div></div> 4.5%	<div></div> 4.8%
Ohio	2,068	-68 <div></div>	2,000	-3.3%	<div></div> 2.4%	<div></div> 2.1%
Maryland	2,600	-130 <div></div>	2,470	-5.0%	<div></div> 3.0%	<div></div> 2.6%
Michigan	1,424	-50 <div></div>	1,374	-3.5%	<div></div> 1.6%	<div></div> 1.5%
Virginia	2,352	24 <div></div>	2,376	1.0%	<div></div> 2.7%	<div></div> 2.5%
Georgia	1,951	96 <div></div>	2,047	4.9%	<div></div> 2.2%	<div></div> 2.2%
North Carolina	2,666	-310 <div></div>	2,356	-11.6%	<div></div> 3.1%	<div></div> 2.5%
Texas	2,038	20 <div></div>	2,058	1.0%	<div></div> 2.3%	<div></div> 2.2%
California	1,428	174 <div></div>	1,602	12.2%	<div></div> 1.6%	<div></div> 1.7%
Other	15,737	432 <div></div>	16,169	2.7%	<div></div> 18.0%	<div></div> 17.2%
Total	87,365	<div></div> 6,818	94,183	7.8%		



NIGHTS

APRIL 2024/2023

876,997
NIGHTS

5.9%
GROWTH

	2023		Growth	2024	% Growth	ALOS 2023	ALOS 2024
USA	623,690		<div></div> 38,271	661,961	6.1%	<div></div> 7.1	<div></div> 7.0
Canada	41,087		<div></div> 10,767	51,854	26.2%	<div></div> 8.9	<div></div> 8.7
NA	664,777		<div></div> 49,038	713,815	7.4%	<div></div> 7.2	<div></div> 7.1
Venezuela	1,562		<div></div> 617	2,179	39.5%	<div></div> 8.7	<div></div> 11.3
Colombia	27,055	-1,484	<div></div>	25,571	-5.5%	<div></div> 6.9	<div></div> 6.8
Brazil	5,914		<div></div> 1,513	7,427	25.6%	<div></div> 6.2	<div></div> 5.8
Argentina	12,351		<div></div> 4,410	16,761	35.7%	<div></div> 8.7	<div></div> 8.9
Chile	3,913		<div></div> 5,009	8,922	128.0%	<div></div> 7.2	<div></div> 7.4
Ecuador	2,368		<div></div> 2,688	5,056	113.5%	<div></div> 5.0	<div></div> 4.1
Peru	2,515		<div></div> 4,712	7,227	187.4%	<div></div> 6.6	<div></div> 5.3
Paraguay	646	-230	<div></div>	416	-35.6%	<div></div> 7.1	<div></div> 5.9
Uruguay	883		<div></div> 1,078	1,961	122.1%	<div></div> 7.8	<div></div> 7.2
Mexico	1,826		<div></div> 943	2,769	51.6%	<div></div> 5.5	<div></div> 7.6
Others	9,086	-1,428	<div></div>	7,658	-15.7%	<div></div> 6.7	<div></div> 7.0
SA	68,119		<div></div> 17,828	85,947	26.2%	<div></div> 7.0	<div></div> 6.8
Netherlands	53,066	-9,942	<div></div>	43,124	-18.7%	<div></div> 15.4	<div></div> 13.1
UK	4,804		<div></div> 357	5,161	7.4%	<div></div> 9.6	<div></div> 8.3
Germany	4,187	-1,519	<div></div>	2,668	-36.3%	<div></div> 10.1	<div></div> 8.5
Italy	1,610		<div></div> 262	1,872	16.3%	<div></div> 8.5	<div></div> 8.9
Sweden	500		<div></div> 63	563	12.6%	<div></div> 7.4	<div></div> 7.0
Belgium	2,334	-479	<div></div>	1,855	-20.5%	<div></div> 9.8	<div></div> 11.7
Austria	418	-121	<div></div>	297	-28.9%	<div></div> 8.0	<div></div> 8.3
Switzerland	1,875	-250	<div></div>	1,625	-13.3%	<div></div> 10.0	<div></div> 9.4
Others	5,970	-714	<div></div>	5,256	-12.0%	<div></div> 9.0	<div></div> 7.8
Europe	74,764	-12,343	<div></div>	62,421	-16.5%	<div></div> 13.0	<div></div> 11.2
ROW	20,405	-5,591	<div></div>	14,814	-27.4%	<div></div> 6.9	<div></div> 5.3
Total	828,065		<div></div> 48,932	876,997	5.9%	<div></div> 7.5	<div></div> 7.2















ACCOMMODATIONS

APRIL 2024/2023













121,215
ARRIVALS

9.7%
GROWTH

ARRIVALS BY ACCOMMODATION

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
EP	30,491	 2,836	33,327	9.3%	 27.6%	 27.5%
All Inclusive	19,963	 172	20,135	0.9%	 18.1%	 16.6%
Timeshare	31,482	-99	31,383	-0.3%	 28.5%	 25.9%
Others	28,540	 7,830	36,370	27.4%	 25.8%	 30.0%
Total	110,476	 10,739	121,215	9.7%		

NIGHTS BY ACCOMMODATION

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
EP	189,516	 11,889	201,405	6.3%	 22.9%	 23.0%
All Inclusive	130,004	 3,770	133,774	2.9%	 15.7%	 15.3%
Timeshare	264,602	-2,835	261,767	-1.1%	 32.0%	 29.8%
Others	243,943	 36,108	280,051	14.8%	 29.5%	 31.9%
Total	828,065	 48,932	876,997	5.9%		



ACCOMMODATIONS

APRIL 2024/2023

121,215
ARRIVALS

9.7%
GROWTH

	EP			All Inclusive			Timeshare			Others		
	2024	2023	% growth	2024	2023	% growth	2024	2023	% growth	2024	2023	% growth
USA	28,386	26,429	7.4%	17,053	17,073	-0.1%	28,750	28,953	-0.7%	19,994	14,910	34.1%
Venezuela	43	50	-14.0%	1	10	-90.0%	9	27	-66.7%	139	92	51.1%
Netherlands	485	400	21.3%	107	223	-52.0%	202	169	19.5%	2,509	2,658	-5.6%
Canada	1,033	790	30.8%	1,186	907	30.8%	935	814	14.9%	2,803	2,096	33.7%
Brazil	369	269	37.2%	100	99	1.0%	120	137	-12.4%	687	450	52.7%
Colombia	362	460	-21.3%	130	259	-49.8%	291	455	-36.0%	2,970	2,754	7.8%
Argentina	219	383	-42.8%	618	535	15.5%	221	165	33.9%	824	335	146.0%
Chile	183	87	110.3%	290	215	34.9%	141	54	161.1%	586	184	218.5%
Peru	270	63	328.6%	298	99	201.0%	93	53	75.5%	698	166	320.5%
UK	264	166	59.0%	44	42	4.8%	66	57	15.8%	246	238	3.4%
Italy	64	48	33.3%	18	23	-21.7%	28	17	64.7%	101	102	-1.0%
Total main mkt	31,678	29,145	8.7%	19,845	19,485	1.8%	30,856	30,901	-0.1%	31,557	23,985	31.6%
All visitors	33,327	30,491	9.3%	20,135	19,963	0.9%	31,383	31,482	-0.3%	36,370	28,540	27.4%



ACCOMMODATIONS

APRIL 2024/2023

121,215
ARRIVALS

9.7%
GROWTH

	EP			All Inclusive			Timeshare			Others		
	2024	2023	% growth	2024	2023	% growth	2024	2023	% growth	2024	2023	% growth
USA	85.2%	86.7%	-1.7%	84.7%	85.5%	-1.0%	91.6%	92.0%	-0.4%	55.0%	52.2%	5.2%
Venezuela	0.1%	0.2%	-21.3%	0.0%	0.1%	-90.1%	0.0%	0.1%	-66.6%	0.4%	0.3%	18.6%
Netherlands	1.5%	1.3%	10.9%	0.5%	1.1%	-52.4%	0.6%	0.5%	19.9%	6.9%	9.3%	-25.9%
Canada	3.1%	2.6%	19.6%	5.9%	4.5%	29.6%	3.0%	2.6%	15.2%	7.7%	7.3%	4.9%
Brazil	1.1%	0.9%	25.5%	0.5%	0.5%	0.1%	0.4%	0.4%	-12.1%	1.9%	1.6%	19.8%
Colombia	1.1%	1.5%	-28.0%	0.6%	1.3%	-50.2%	0.9%	1.4%	-35.8%	8.2%	9.6%	-15.4%
Argentina	0.7%	1.3%	-47.7%	3.1%	2.7%	14.5%	0.7%	0.5%	34.4%	2.3%	1.2%	93.0%
Chile	0.5%	0.3%	92.4%	1.4%	1.1%	33.7%	0.4%	0.2%	161.9%	1.6%	0.6%	149.9%
Peru	0.8%	0.2%	292.1%	1.5%	0.5%	198.4%	0.3%	0.2%	76.0%	1.9%	0.6%	230.0%
UK	0.8%	0.5%	45.5%	0.2%	0.2%	3.9%	0.2%	0.2%	16.2%	0.7%	0.8%	-18.9%
Italy	0.2%	0.2%	22.0%	0.1%	0.1%	-22.4%	0.1%	0.1%	65.2%	0.3%	0.4%	-22.3%
Total main mkt	95.1%	95.6%	-0.6%	98.6%	97.6%	1.0%	98.3%	98.2%	0.2%	86.8%	84.0%	3.2%
All visitors	100.0%	100.0%	0.0%	100.0%	100.0%	0.0%	100.0%	100.0%	0.0%	100.0%	100.0%	0.0%



VISITORS BY AGE

APRIL 2024/2023

121,215
ARRIVALS

9.7%
GROWTH

	2023		Growth	2024	% Growth
0 - 11	9,436		297	9,733	3.1%
12-19	8,946	-1,379		7,567	-15.4%
20 - 29	10,228		2,047	12,275	20.0%
30 - 39	17,081		3,220	20,301	18.9%
40 - 49	20,189		901	21,090	4.5%
50 - 59	20,851		1,031	21,882	4.9%
60 - 69	15,860		3,264	19,124	20.6%
70 +	7,878		1,363	9,241	17.3%
Not Stated	7	-5		2	-71.4%
Total	110,476		10,739	121,215	9.7%



GENERATIONS

APRIL 2024/2023

121,215
ARRIVALS

9.7%
GROWTH

	2023		Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
Gen A	7,111		475	7,586	6.7%	6.4%	6.3%
Gen Z	15,996	-620		15,376	-3.9%	14.5%	12.7%
Millennials	26,758		4,808	31,566	18.0%	24.2%	26.0%
Gen X	30,984		1,020	32,004	3.3%	28.0%	26.4%
Baby Boomers	27,027		4,491	31,518	16.6%	24.5%	26.0%
Silent Generations	2,593		570	3,163	22.0%	2.3%	2.6%
Age not specified	7	-5		2	-71.4%	0.0%	0.0%
Total	110,476		10,739	121,215	9.7%		



PURPOSE OF VISIT

APRIL 2024/2023

121,215
ARRIVALS

9.7%
GROWTH

	2024	Market share 2024	2023	Market share 2023	% Growth
Sun, Sand, Sea	101,568	83.8%	93,150	84.3%	9.0%
Business	2,507	2.1%	2,122	1.9%	18.1%
Conference	940	0.8%	585	0.5%	60.7%
Honeymoon	2,773	2.3%	2,427	2.2%	14.3%
Diving	360	0.3%	411	0.4%	-12.4%
Incentive	1,499	1.2%	1,603	1.5%	-6.5%
Meeting	866	0.7%	631	0.6%	37.2%
Not specified	6,459	5.3%	6,181	5.6%	4.5%
Shopping	715	0.6%	709	0.6%	0.8%
Wedding	3,528	2.9%	2,657	2.4%	32.8%
Total	121,215	100.0%	110,476	100.0%	9.7%



CARRIERS

APRIL 2024/2023

121,215
ARRIVALS

9.7%
GROWTH

	2023		Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
JETBLUE	27,457		<div></div> 4,658	32,115	17.0%	<div></div> 24.9%	<div></div> 26.5%
AMERICAN AIRLINES	23,469	-2,314	<div></div>	21,155	-9.9%	<div></div> 21.2%	<div></div> 17.5%
DELTA AIRLINE	13,707		<div></div> 3,243	16,950	23.7%	<div></div> 12.4%	<div></div> 14.0%
UNITED AIRLINES	15,106		<div></div> 1,578	16,684	10.4%	<div></div> 13.7%	<div></div> 13.8%
SOUTHWEST AIRLINES	5,686	-368	<div></div>	5,318	-6.5%	<div></div> 5.1%	<div></div> 4.4%
COPA AIRLINES	3,430		<div></div> 1,829	5,259	53.3%	<div></div> 3.1%	<div></div> 4.3%
AVIANCA	4,934	-539	<div></div>	4,395	-10.9%	<div></div> 4.5%	<div></div> 3.6%
WESTJET AIRLINES	1,808		<div></div> 748	2,556	41.4%	<div></div> 1.6%	<div></div> 2.1%
KLM ROYAL DUTCH	2,698	-288	<div></div>	2,410	-10.7%	<div></div> 2.4%	<div></div> 2.0%
SPIRIT AIRLINES	1,248		<div></div> 835	2,083	66.9%	<div></div> 1.1%	<div></div> 1.7%
WINGO	1,206		<div></div> 800	2,006	66.3%	<div></div> 1.1%	<div></div> 1.7%
AIR CANADA	1,486		<div></div> 374	1,860	25.2%	<div></div> 1.3%	<div></div> 1.5%
TUI FLY NL	1,396	-35	<div></div>	1,361	-2.5%	<div></div> 1.3%	<div></div> 1.1%
LATAM AIRLINES	0		<div></div> 1,342	1,342	-	<div></div> 0.0%	<div></div> 1.1%
DIVI DIVI AIR	1,601	-356	<div></div>	1,245	-22.2%	<div></div> 1.4%	<div></div> 1.0%
SUNWING AIRLINES	913		<div></div> 59	972	6.5%	<div></div> 0.8%	<div></div> 0.8%
EZ AIR	952	-226	<div></div>	726	-23.7%	<div></div> 0.9%	<div></div> 0.6%
SURINAM AIRWAYS	715	-227	<div></div>	488	-31.7%	<div></div> 0.6%	<div></div> 0.4%
WINAIR	97		<div></div> 321	418	330.9%	<div></div> 0.1%	<div></div> 0.3%
PRIVATE	590	-175	<div></div>	415	-29.7%	<div></div> 0.5%	<div></div> 0.3%
BRITISH AIRWAYS	345		<div></div> 30	375	8.7%	<div></div> 0.3%	<div></div> 0.3%
JET AIR CARIBBEAN	218		<div></div> 101	319	46.3%	<div></div> 0.2%	<div></div> 0.3%
SUN COUNTRY AIRLINES	259	-38	<div></div>	221	-14.7%	<div></div> 0.2%	<div></div> 0.2%
CHARTER	328	-117	<div></div>	211	-35.7%	<div></div> 0.3%	<div></div> 0.2%
ARAJET	112		<div></div> 62	174	55.4%	<div></div> 0.1%	<div></div> 0.1%
AIR CENTURY	55		<div></div> 24	79	43.6%	<div></div> 0.0%	<div></div> 0.1%
OTHERS	660	-582	<div></div>	78	-88.2%	<div></div> 0.6%	<div></div> 0.1%
Total	110,476		<div></div> 10,739	121,215	9.7%		



CARRIERS

APRIL 2024/2023

121,215
ARRIVALS

9.7%
GROWTH

City	APO Code	April '24	Market share 2024	April'23	Market share 2023	2024 vs 2023
JFK NY	JFK	18,408	15.2%	16,054	14.5%	14.7%
Boston	BOS	18,298	15.1%	20,175	18.3%	-9.3%
Newark	EWR	15,016	12.4%	10,321	9.3%	45.5%
Atlanta	ATL	8,280	6.8%	4,958	4.5%	67.0%
Charlotte	CLT	8,082	6.7%	9,144	8.3%	-11.6%
Miami	MIA	6,981	5.8%	7,419	6.7%	-5.9%
Toronto	YYZ	5,406	4.5%	4,214	3.8%	28.3%
Panama City	PTY	5,296	4.4%	3,437	3.1%	54.1%
Philadelphia	PHL	5,045	4.2%	5,326	4.8%	-5.3%
Bogota	BOG	4,953	4.1%	5,721	5.2%	-13.4%
Orlando	MCO	4,201	3.5%	4,095	3.7%	2.6%
G.Bush DC	IAD	4,034	3.3%	2,727	2.5%	47.9%
Amsterdam	AMS	3,771	3.1%	4,097	3.7%	-8.0%
Curacao	CUR	2,360	1.9%	2,925	2.6%	-19.3%
Fort Lauderdale	FLL	2,158	1.8%	1,283	1.2%	68.2%
Chicago	ORD	1,429	1.2%	1,566	1.4%	-8.7%
Lima, Peru	LIM	1,342	1.1%	0	0.0%	—
Baltimore	BWI	1,120	0.9%	1,599	1.4%	-30.0%
Cali, Alfonso Bonilla Aragon	CLO	742	0.6%	0	0.0%	—
Medellin	MDE	708	0.6%	425	0.4%	66.6%
LaGuardia Airport, NY	LGA	580	0.5%	732	0.7%	-20.8%
Dallas Fort Worth Int Airport	DFW	546	0.5%	756	0.7%	-27.8%
Johan A. Pengel Int Airport, Suriname	PBM	461	0.4%	716	0.6%	-35.6%
Sint Maarten	SXM	421	0.3%	97	0.1%	334.0%
Gatwick Airport , UK	LGW	375	0.3%	345	0.3%	8.7%
	Others	1,202	1.0%	2,344	2.1%	-48.7%
Total		121,215	100.0%	110,476	100.0%	9.7%



CRUISE COMPARISON



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



CRUISE APRIL



2023



CRUISE PAX
68,548

CRUISE CALLS
26



2024



CRUISE PAX
96,060

40.1%

CRUISE CALLS
30

15.38%

ABSOLUTE GROWTH PAX **APRIL**

27,512
40.1%

ABSOLUTE GROWTH CALLS **APRIL**

4
15.38%

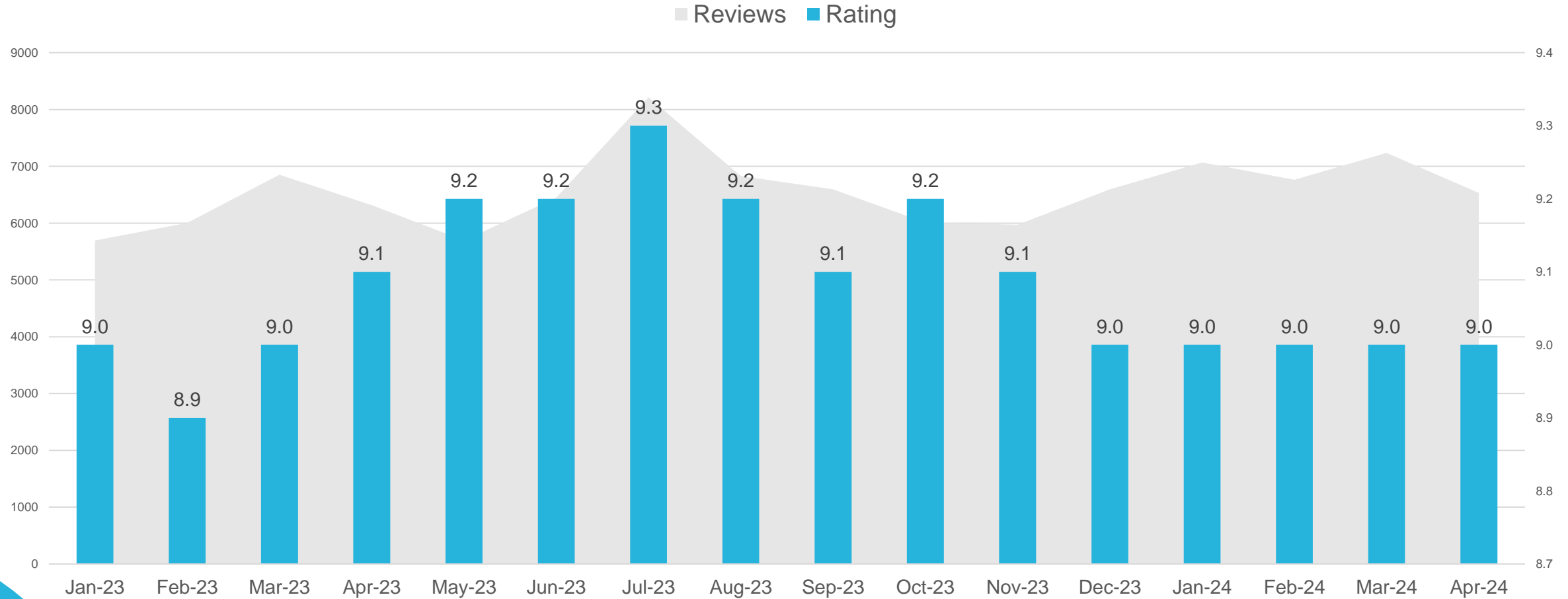


GUEST SATISFACTION



GUEST EXPERIENCE INDEX (GEI)

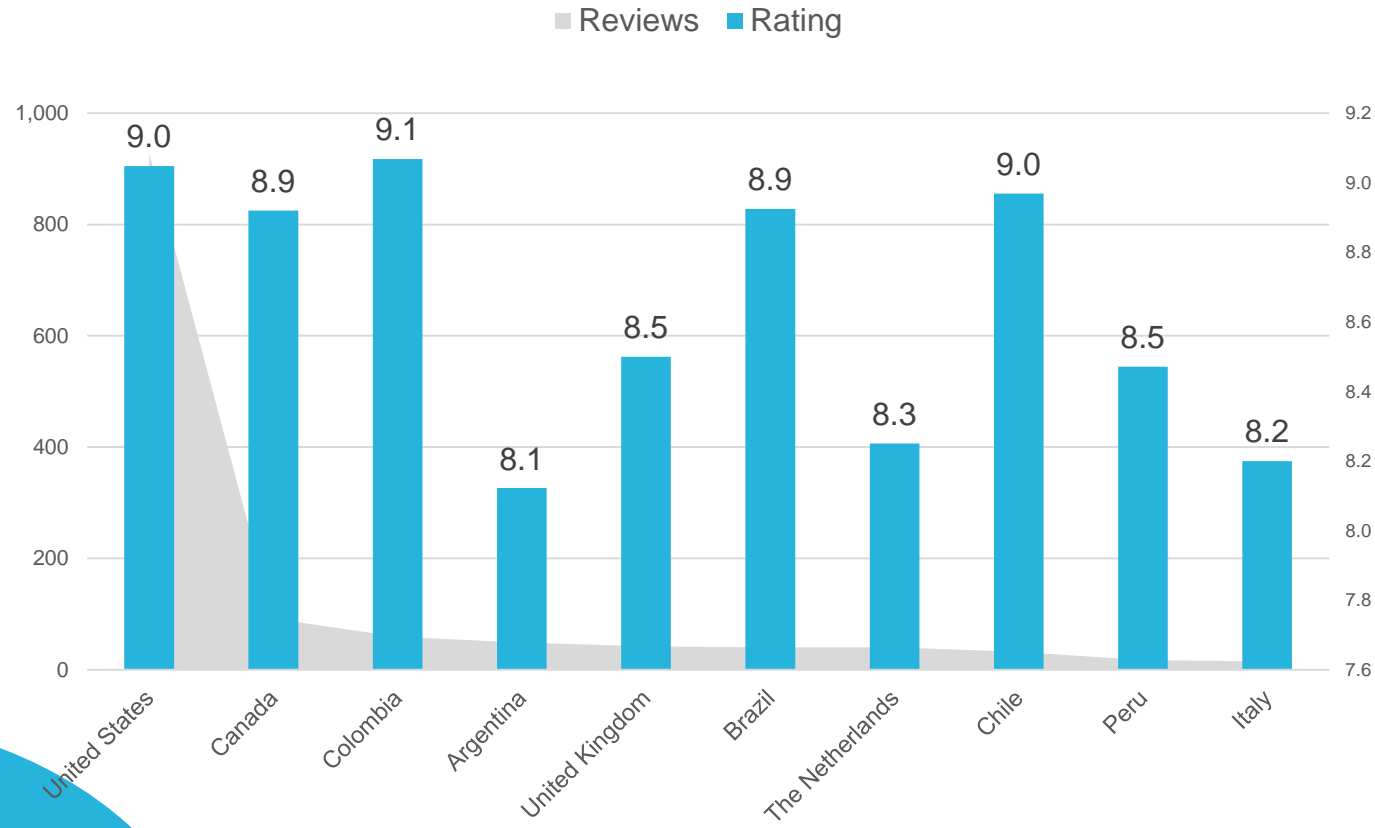
Reviews and Ratings





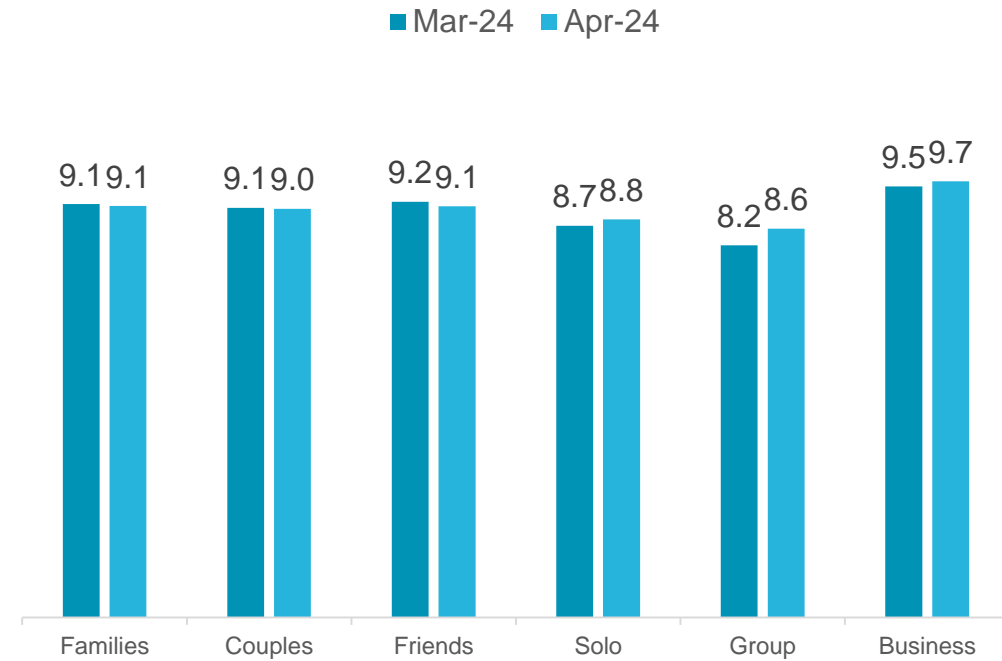
GEI April 2024

MARKETS



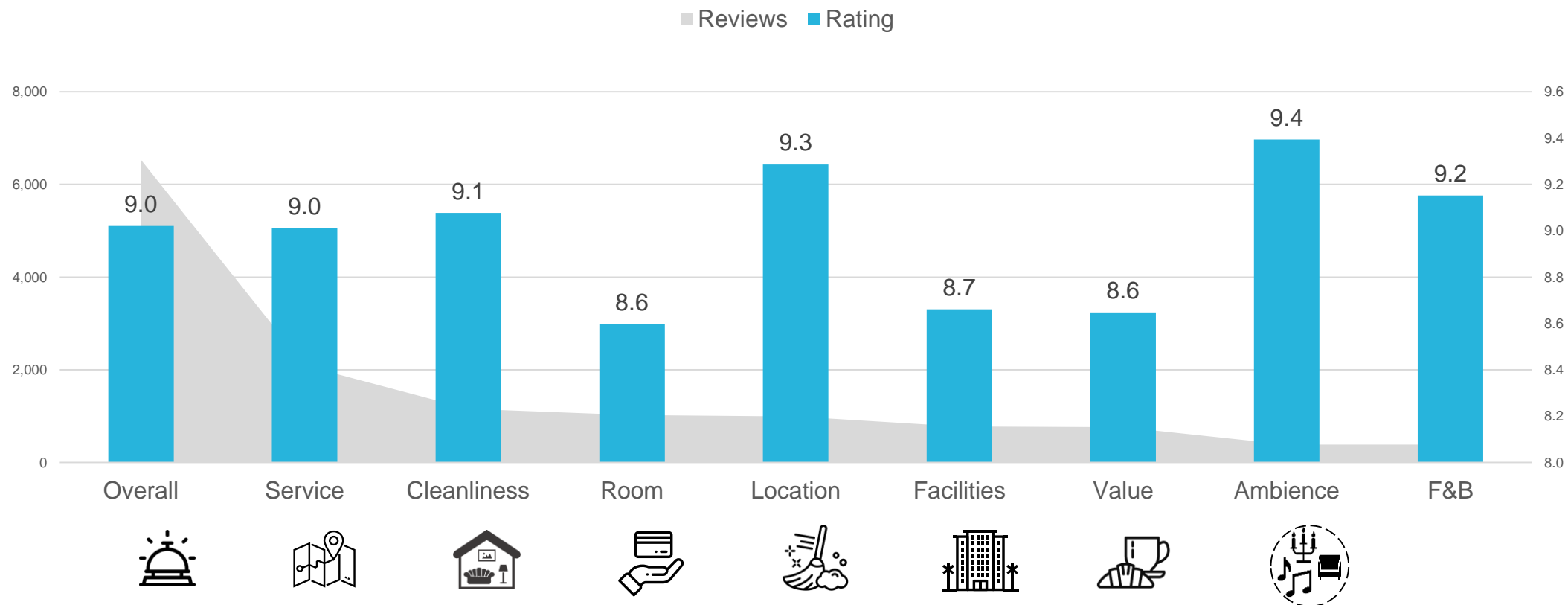
TRAVEL PARTY

Compared to Previous Month





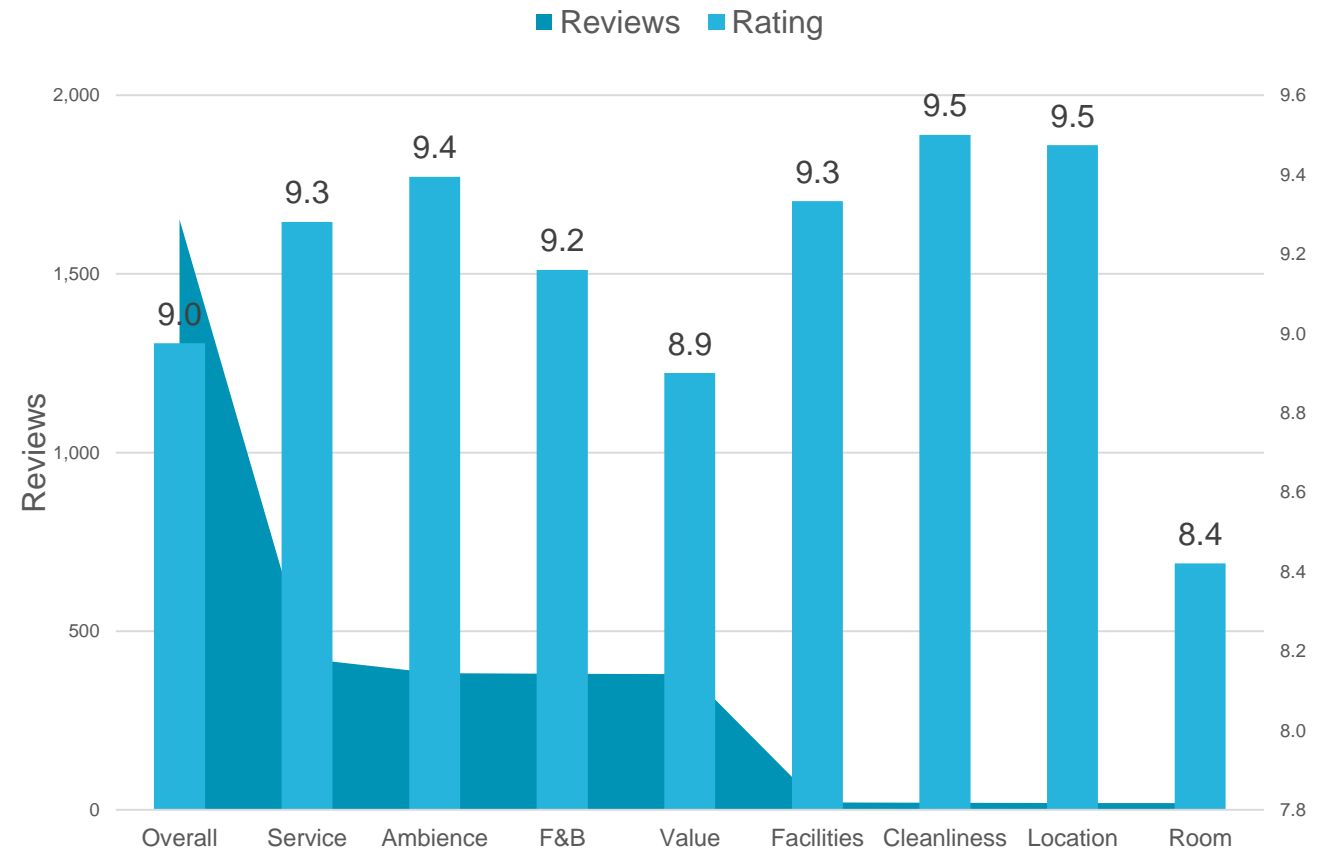
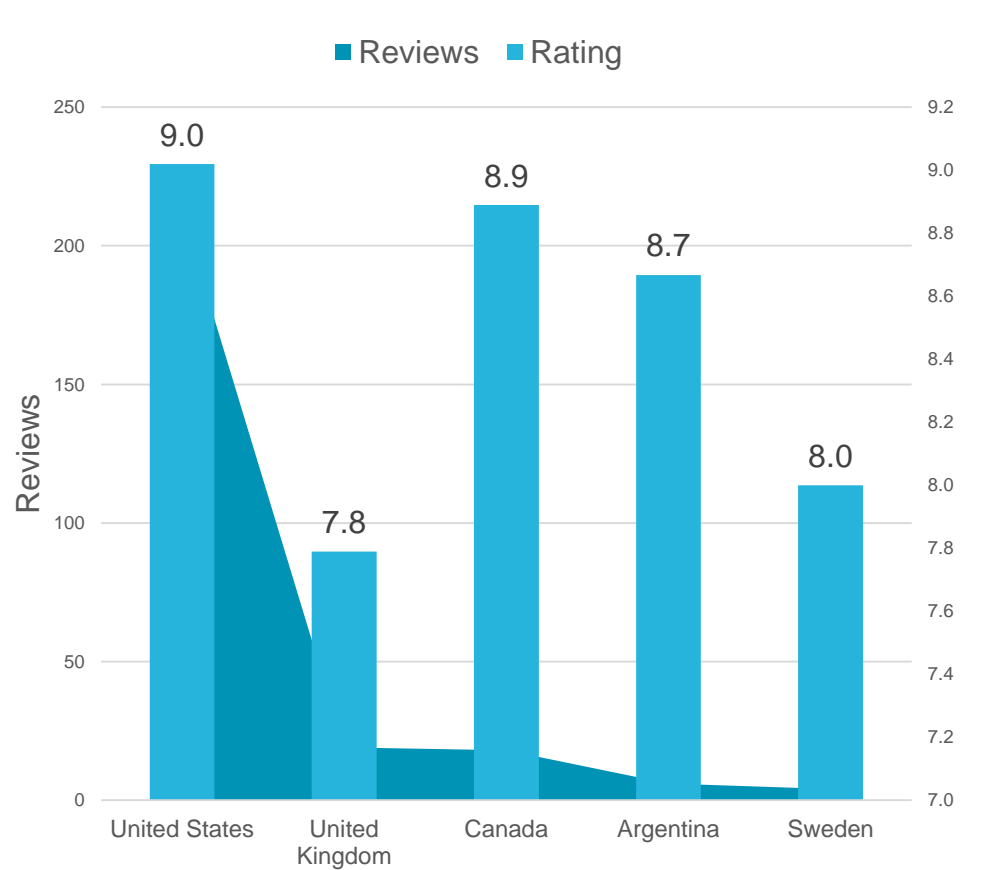
GEI April 2024





RESTAURANT GEI April 2024

MARKETS



VACATIONS RENTALS

 **Transparent**
an OTA INSIGHT company

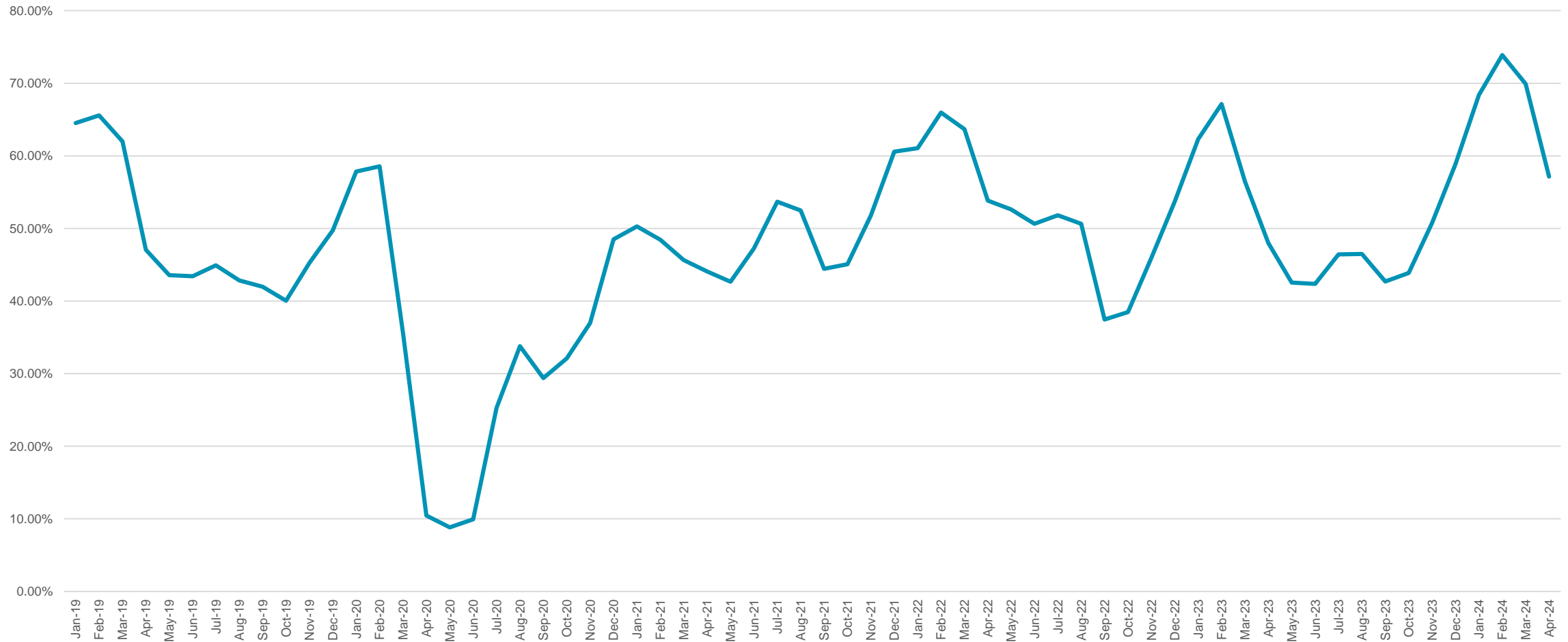
INTRODUCTION

- ▶ In 2023, A.T.A. started working with Lighthouse formerly Transparent Insights. Lighthouse tracks short-term rentals at the property level through their dashboard.
- ▶ With Lighthouse, 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.



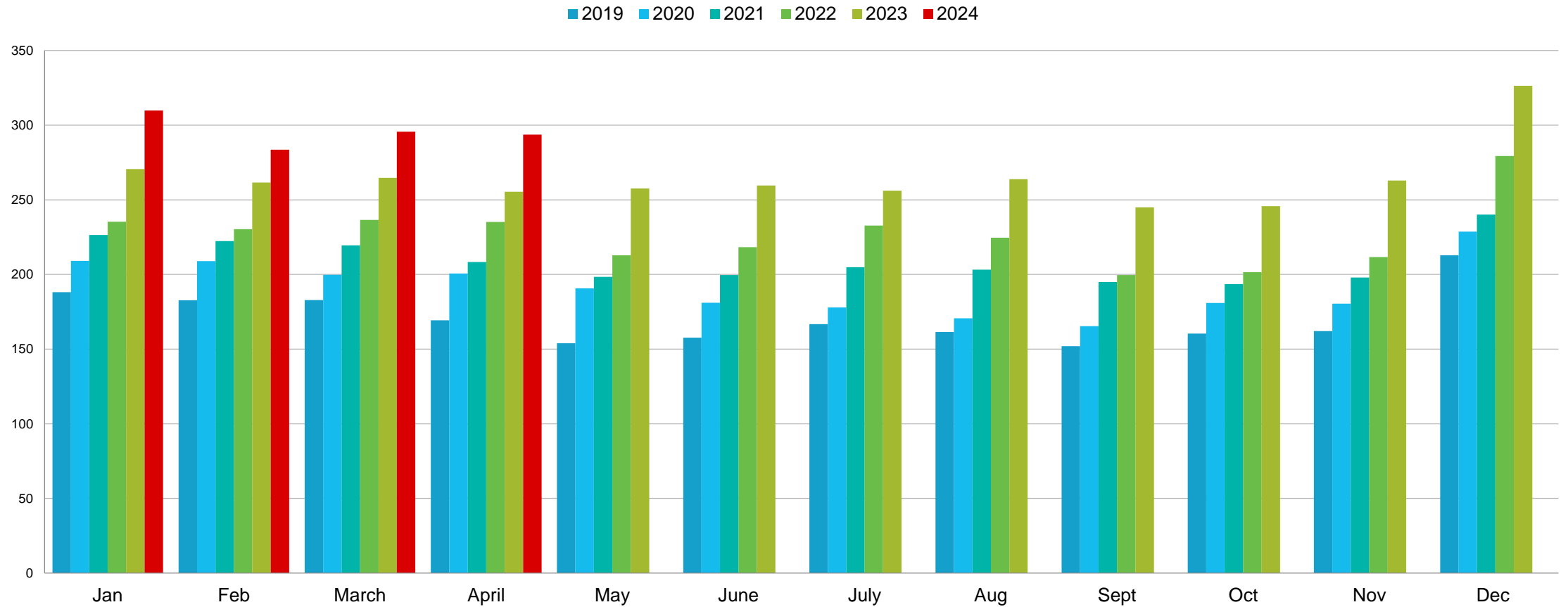
OCCUPANCY

April 2023 Occupancy: 48% | April 2024 Occupancy: 57%



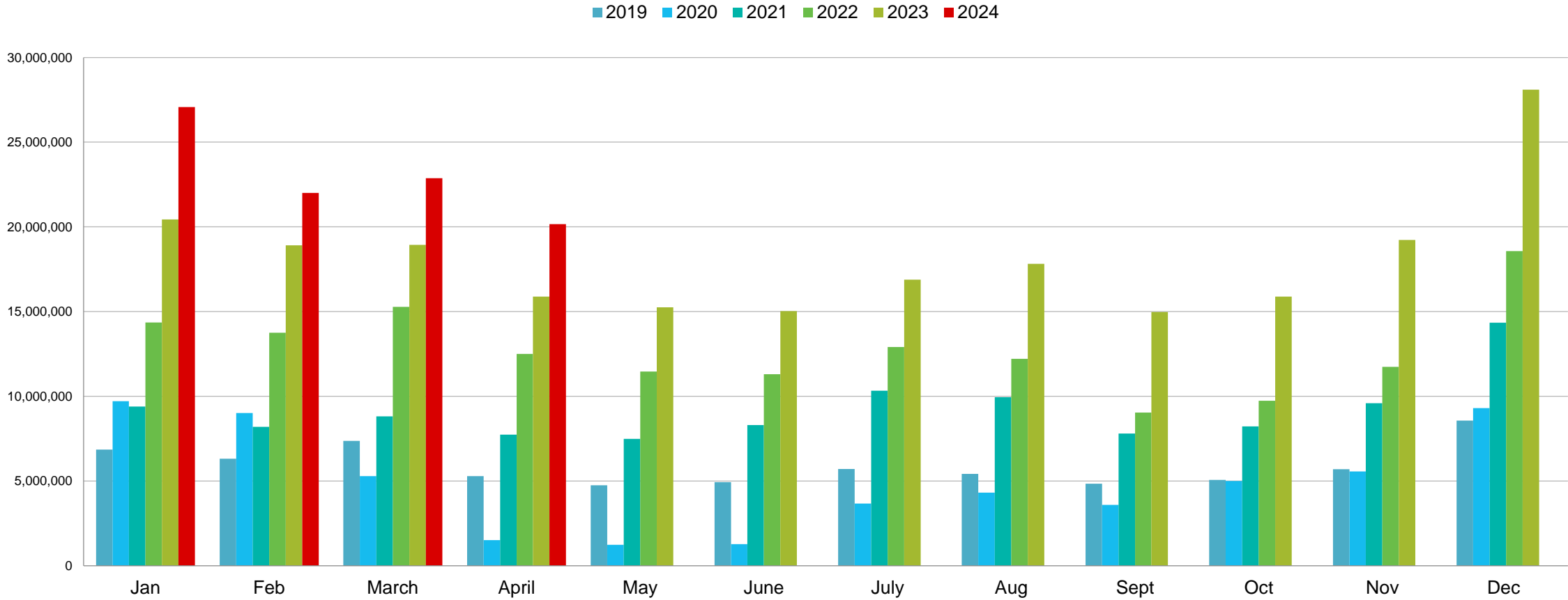
ADR

April 2023 ADR: \$255 | April 2024 ADR: \$294



REVENUE

Total Revenue YTD April 2024: USD\$92,115,187 | Total Revenue YTD April 2023: USD\$74,175,747
April 2024: USD\$20,155,958 | April 2023: USD\$18,941,874



TIDBITS

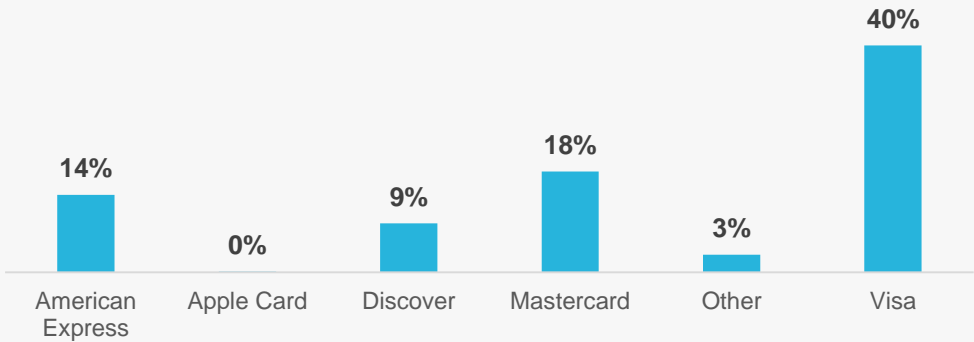
USA Credit Card Information
Cruise Research 2023 *part two*

2023 HIGHLIGHTS USA

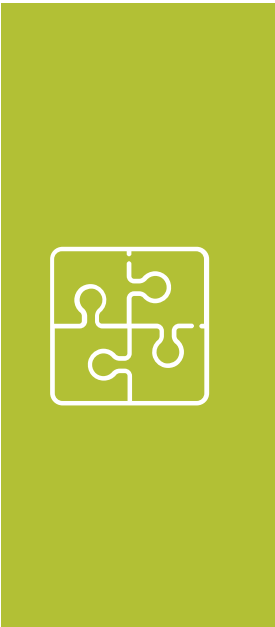
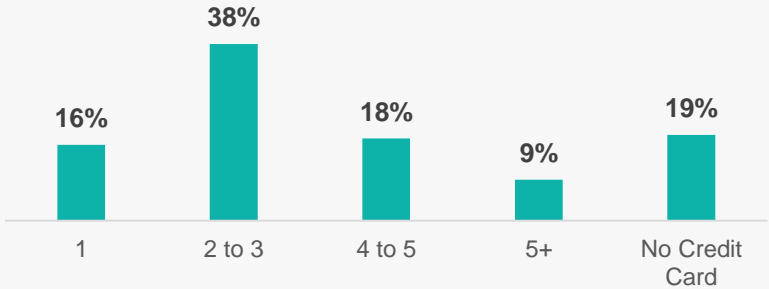
The below data points are based on 2023 data and USA-only information and n=701,222.



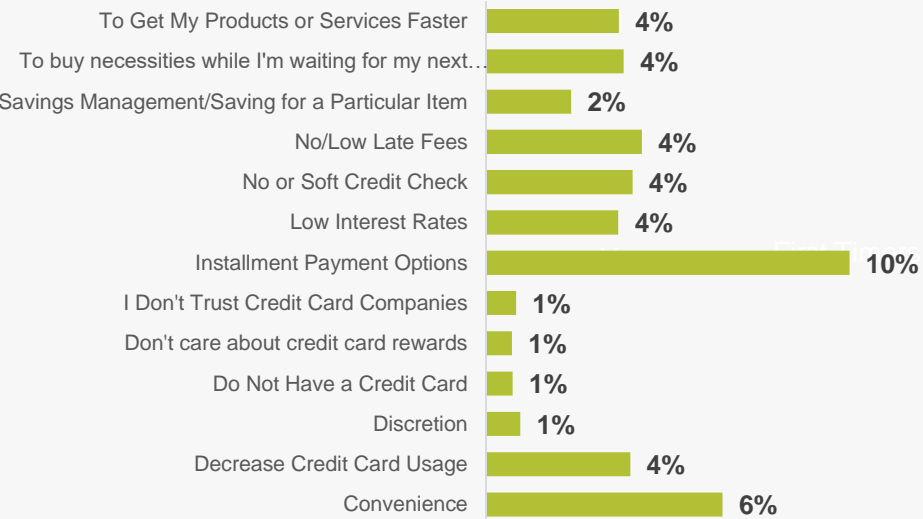
SHARE OF PRIMARY CREDIT CARD



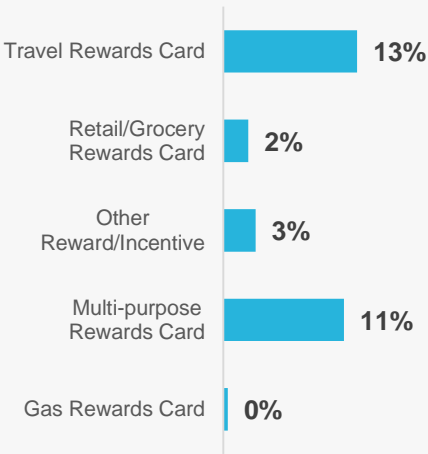
SHARE BY NUMBER OF CREDIT CARDS



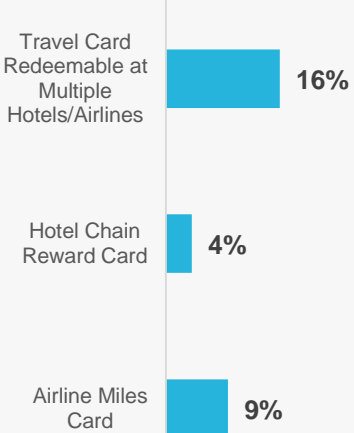
SHARE OF WHY USE BUY NOW, PAY LATER



SHARE REWARD CARD TYPE



SHARE TRAVEL REWARD CARD TYPE





TIDBITS: Cruise Survey Report 2023 *PART 2*

Methodology

Research Objectives:

The Cruise Report shares information about the on-island spending pattern of our cruise visitors, their on-island experience, cruise travel habits and motivations and the likelihood of returning to Aruba as stay-over visitor.

The Aruba Tourism Authority conducted monthly face-to-face surveys from April 29 – December 27, 2023, in the visitor center at the Aruba Port Authority.

The targeting audience were cruise visitors who are departing the island prior to boarding their cruise.

In total 2345 surveys were collected. These surveys were then checked for completeness and imported in our survey analyses tool- Qualtrics, where all data is stored and kept.



Methodology

1. Sample Size

Sample size formula: $n = \left(\frac{ZS}{E} \right)^2 \left[\frac{((1.96 * 0.5))}{0.05} \right]^2 = 385$

ATA collected a total of 2345

Z= Z-score corresponding to level of confidence (in ATA's case 1,96 corresponding to 95% level of confidence). S= sample standard deviation or estimate of the population deviation: 0.5 – this is mostly used in surveys. E= acceptable magnitude of error 5%- the level of error we are willing to accept. In our case 5%.

2. Data Cleansing

To cleanse the spend data a new variable was created in SPSS labeled “Total Spend”.

From which the Z-score was calculated :

$$Z = \frac{(X - \bar{X})}{sd},$$

Every entry smaller or greater than -3 / 3 was removed as an outlier.

3. Calculations

Per spending category the total average spend per party was calculated, and then weighted by share of on shore visit. For example 44% of the survey respondents reported spending an average of \$25.00 on food and beverages. Spread over the cruise parties that visited Aruba, this represented an average of \$10.99 per party (weighted). ($\$25 \times 44\% = \10.99). The weighted sum of each 15 spending categories is the total spend per party. The total spend per party is divided by the party size, to get the average spend per person.

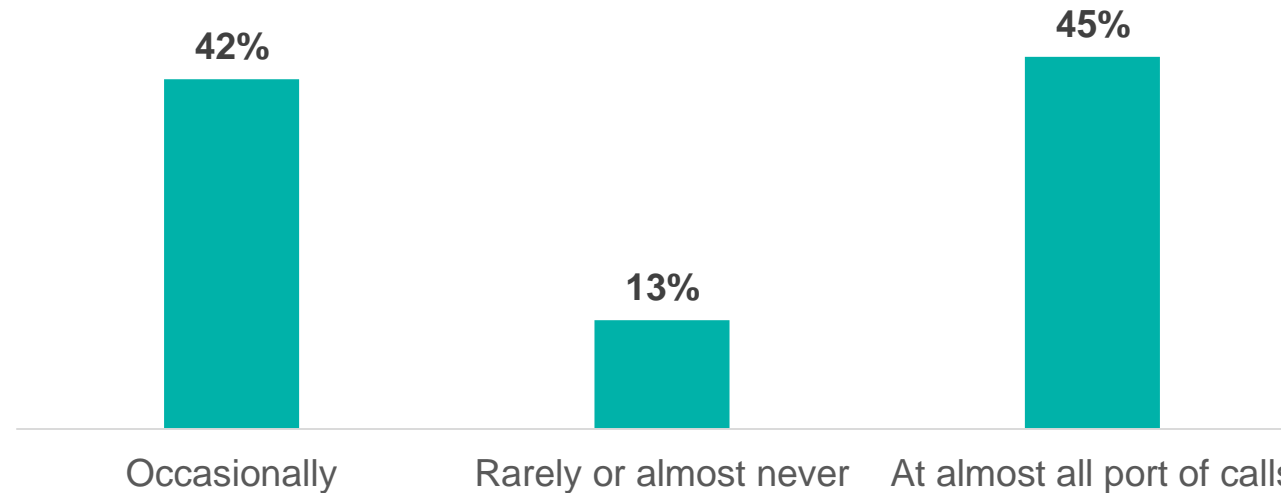
5.

Key Decision Factors



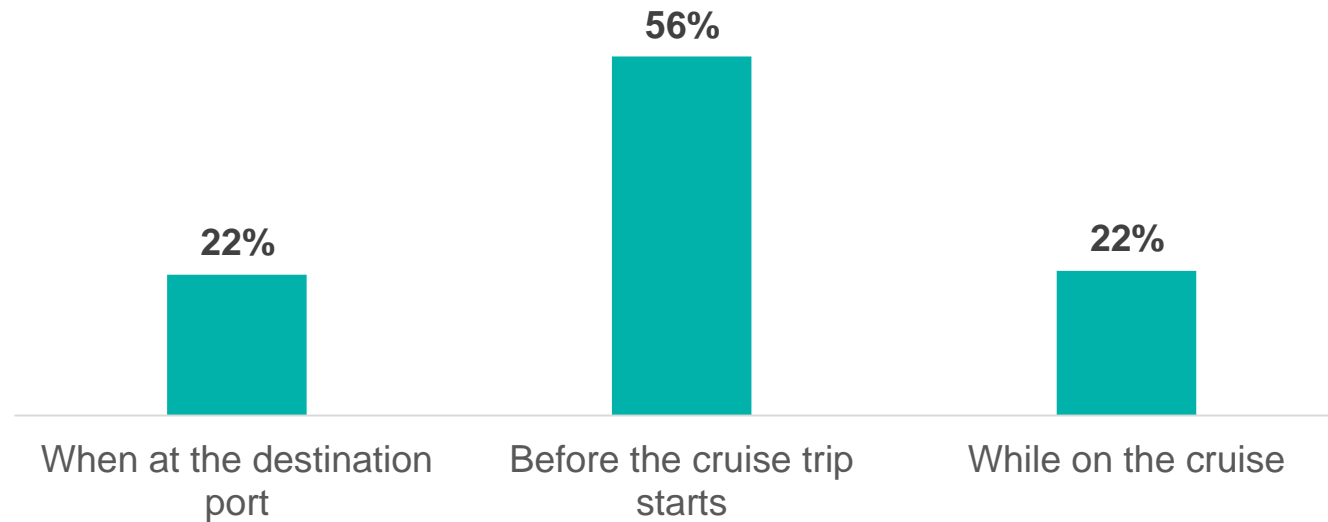
Shore Excursion Frequency Preferences

A significant portion of respondents (45%) opt to take shore excursions at almost all ports of call during a cruise, indicating a strong preference for exploring destinations beyond the ship.

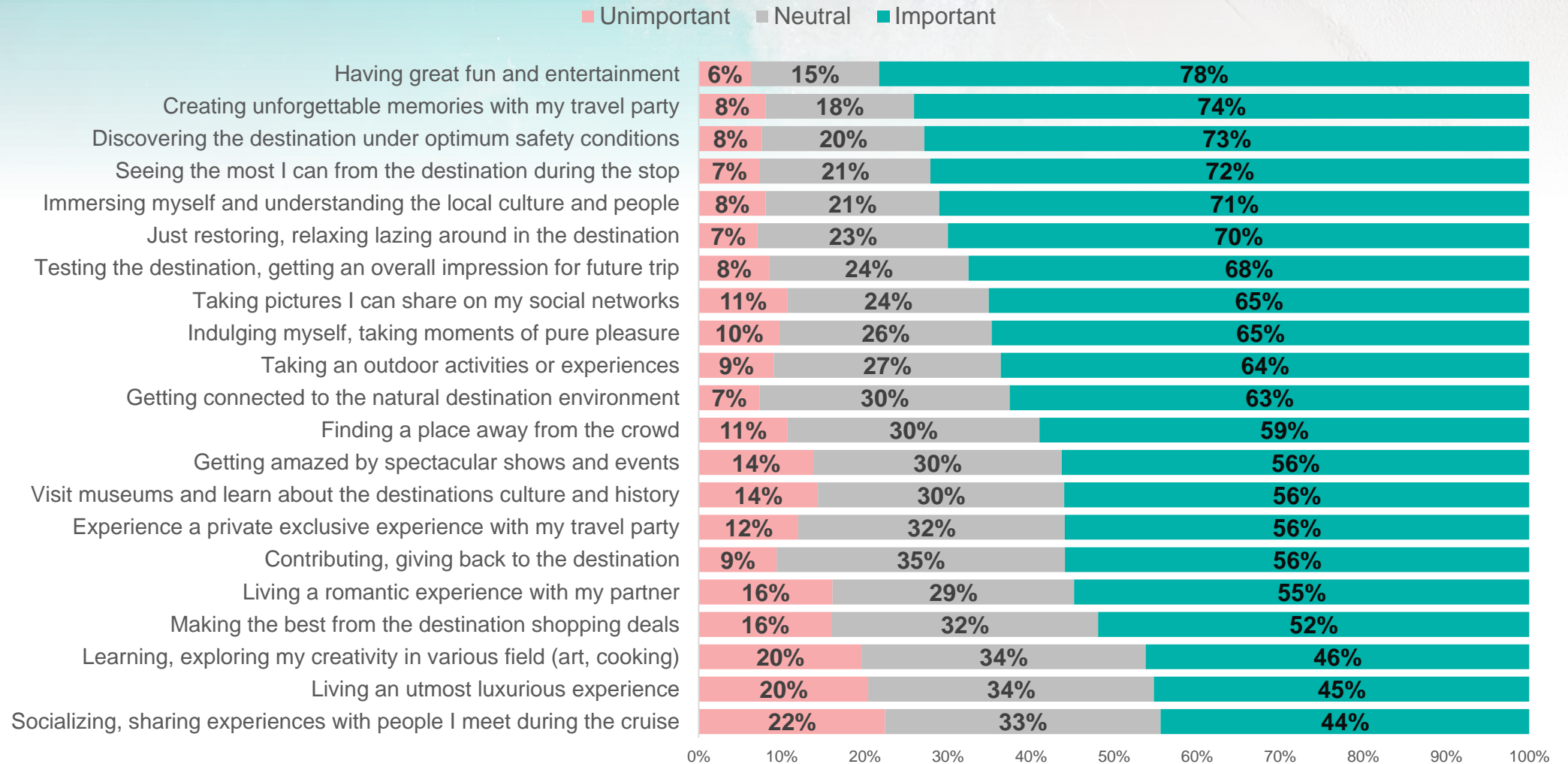


Shore Excursion Booking Preferences

The majority (56%) prefer to book their excursions before the cruise trip starts, indicating a preference for pre-planned activities.



Shore Excursion Activity Preferences

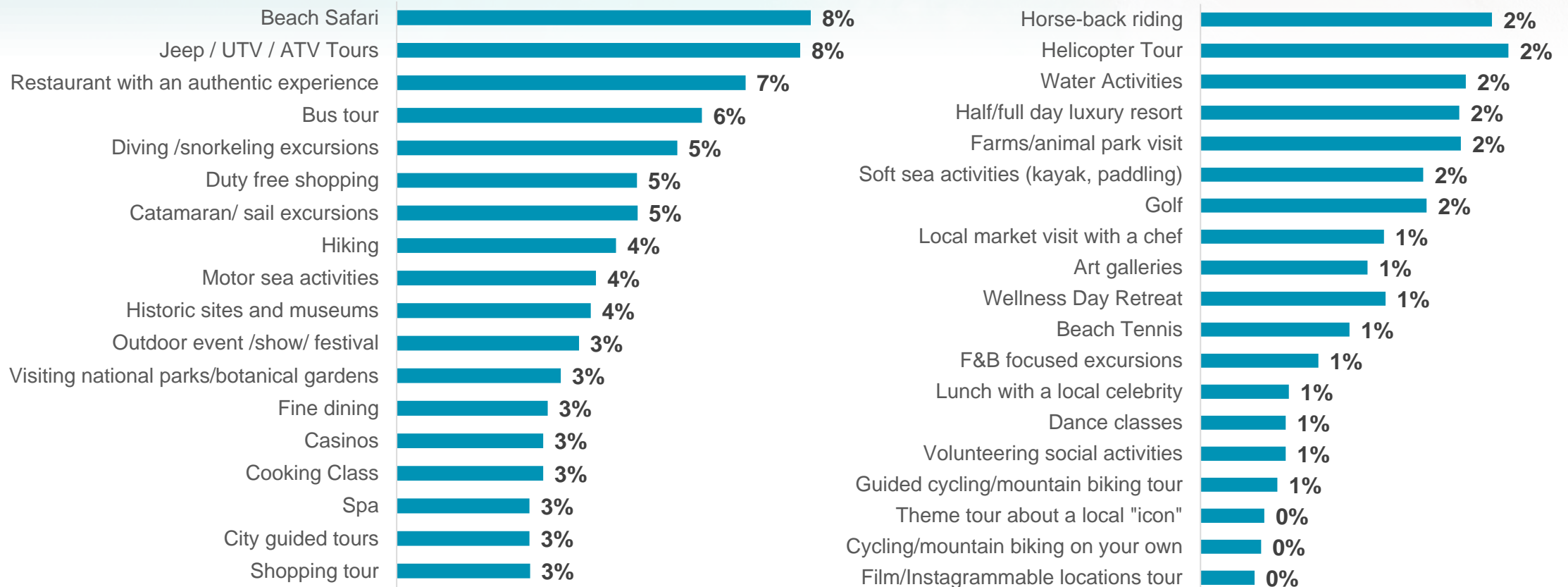


Q: How important are the following aspects when choosing a shore excursion?

N: 2345

Future Shore Excursion Preferences

Data shows that beach safaris and jeep/UTC/ATV tours are the most popular choices, indicating a preference for adventurous outdoor experiences. Additionally, dining experiences, both in authentic restaurants and through cooking classes, are highly sought after, suggesting a desire for cultural immersion and gastronomic exploration during cruise stops. Diving/snorkeling excursions also rank high, emphasizing the allure of underwater exploration for cruise travelers



Q: Select up to 3 excursions you would love to take during a future cruise stop in Aruba.

N: 2345

7. On-island Spend *Deep Dive*



Spending in Dollars

High Season vs. Low Season

High Season vs Low Season

	Low Season Average spend per party in \$	High Season Average spend per party in \$
F&B	\$60.00	\$42.00
Prepaid Tours	\$92.72	\$75.00
Tours	\$33.13	\$20.24
Car Rental	\$7.62	\$2.66
Taxi	\$14.39	\$7.27
Public Transportation	\$4.60	\$1.95
Entertainment/Nightlife/Casino	\$22.82	\$12.40
Internet/Phone	\$8.93	\$3.48
Liquors/Cheese	\$9.91	\$10.36
Apparel	\$25.07	\$26.39
Souvenirs/Local Crafts	\$46.59	\$38.40
Jewelry	\$100.29	\$78.90
Watches	\$47.68	\$23.78
Perfumes/Cosmetics	\$6.73	\$4.08
Others	\$10.24	\$14.29
Total:	\$490.72	\$361.20
Party size	2.56	2.51
Avg. Spend per Person:	\$191.34	\$143.78

Q: What were your traveling party's expenditures in total when in Aruba for each of the following categories?

N: 2345

Spending in Dollars

High Season vs. Low Season

The table illustrates the percentage of arrivals and their corresponding expenditures allocated to specific categories during high and low seasons.

	Low Season	High Season	Difference in %
F&B	75%	69%	-5%
Prepaid Tours	46%	46%	-1%
Tours	27%	19%	-8%
Car Rental	7%	3%	-4%
Taxi	24%	18%	-6%
Public Transportation	10%	8%	-2%
Entertainment/Nightlife/Casino	9%	7%	-2%
Internet/Phone	10%	6%	-4%
Liquors/Cheese	13%	12%	0%
Apparel	28%	29%	1%
Souvenirs/Local Crafts	64%	66%	2%
Jewelry	18%	12%	-6%
Watches	7%	4%	-3%
Perfumes/Cosmetics	7%	6%	-1%
Others	9%	5%	-5%

Low Season: April – September

High Season: October – December

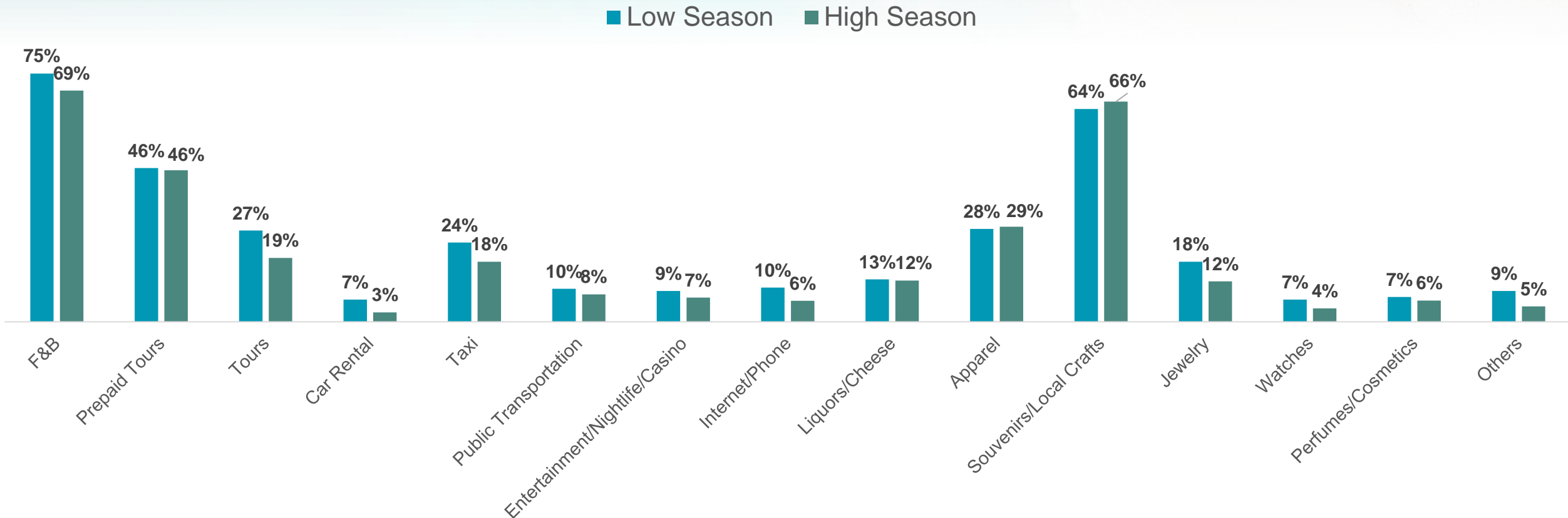
Interestingly, the data suggests that cruise passengers tend to spend less during the High Season compared to the Low Season, with an average difference of -3% points between the two seasons.

This contrasts with the findings from 2018, where the High Season showed an average increase of +2% points compared to the Low Season.

Spending in Dollars

High Season vs. Low Season

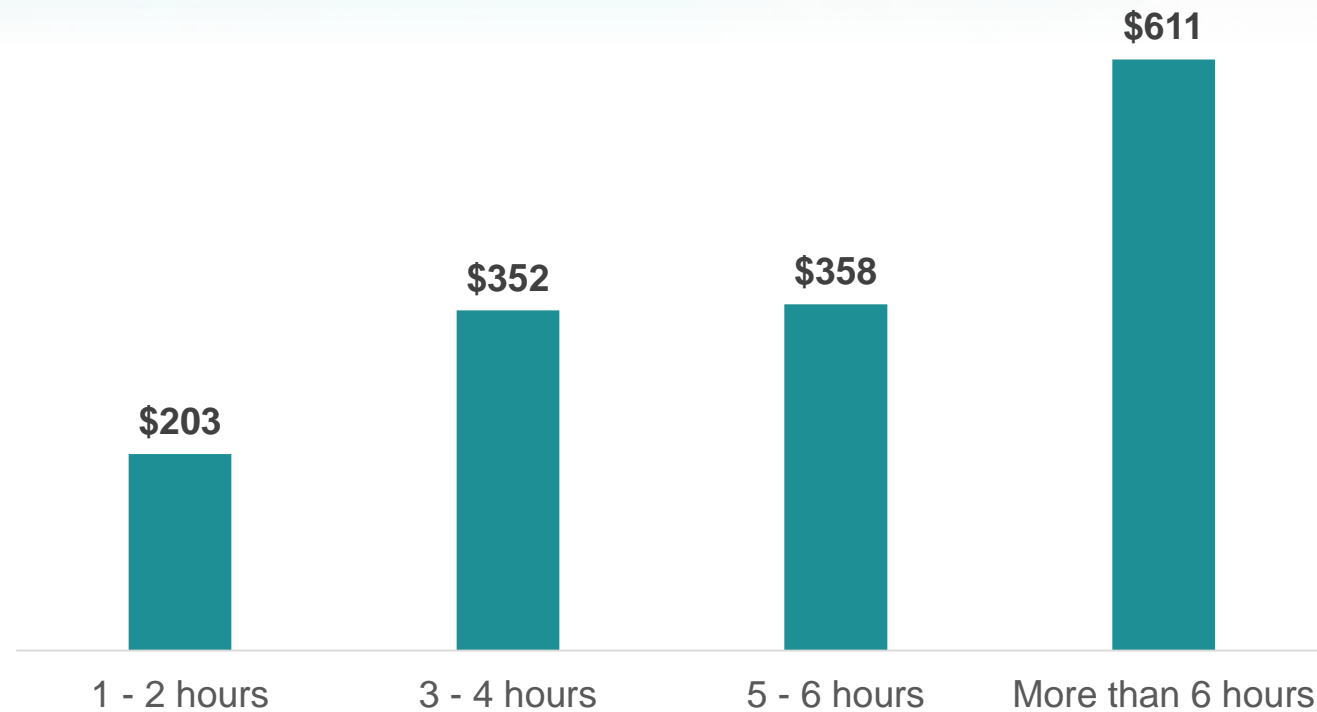
The top 5 spending categories: Food & Beverage, Souvenirs/Local Crafts, Prepaid Tours, Apparel, Tours
Data shows that Jewelry sees a significant decrease (-6%) in spending during the high season.



Spending

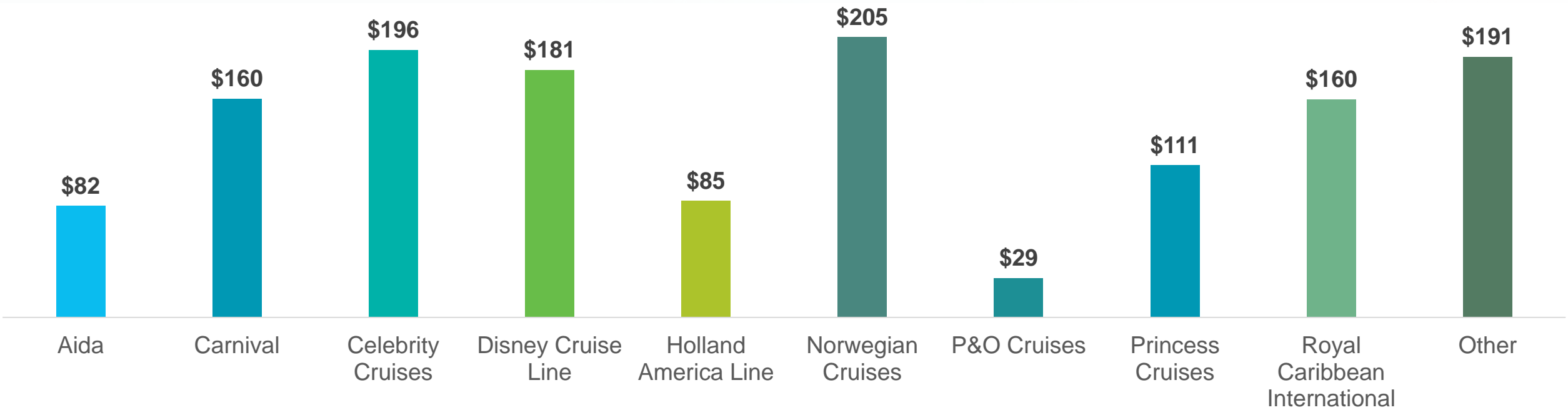
By hours on-island

It was observed in 2023, 2018, and 2017 that the longer the cruise visitors spent on shore, the more they tended to spend. Among the respondents, 32% reported spending 5-6 hours in Aruba, while 31% spent 3-4 hours.



Spending by Cruise Line

Norwegian Cruises spent more on average per person, followed by Celebrity Cruise, Other Cruises, and Disney Cruise Line



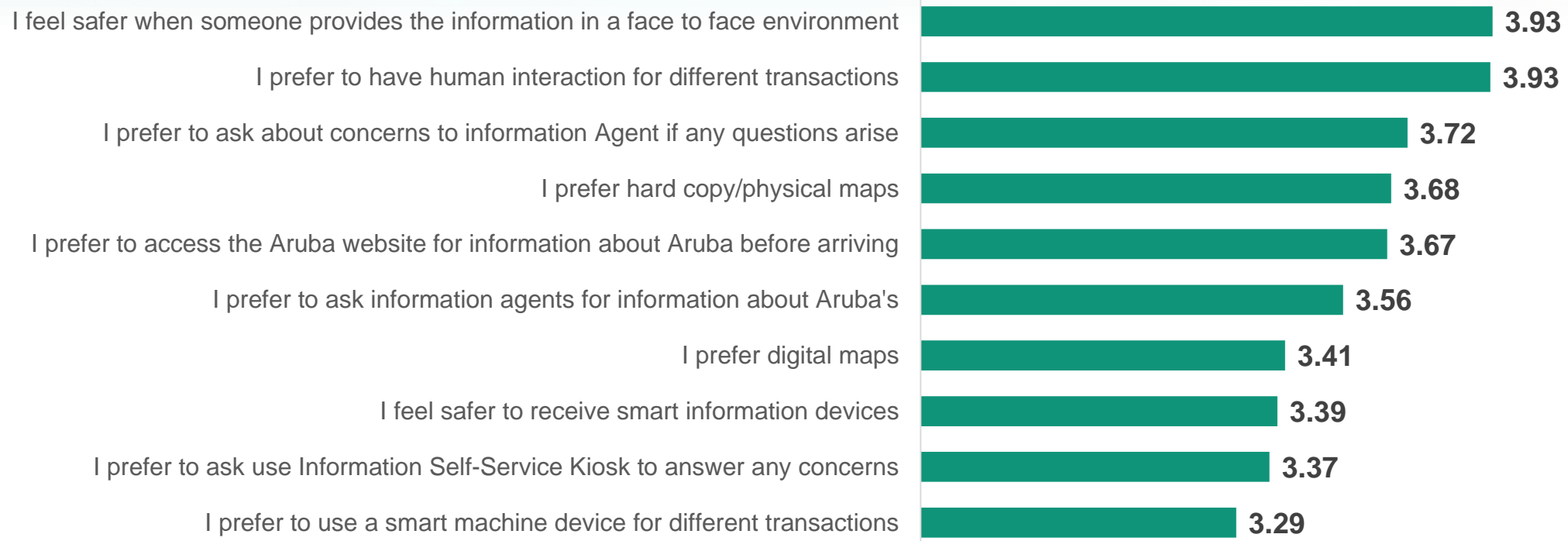
*Weighted average derived using group size composition assumptions
Q: What were your traveling party's expenditures in total when in Aruba for each of the following categories? /Please select your cruise line
N: 2345

8. On-island Ratings

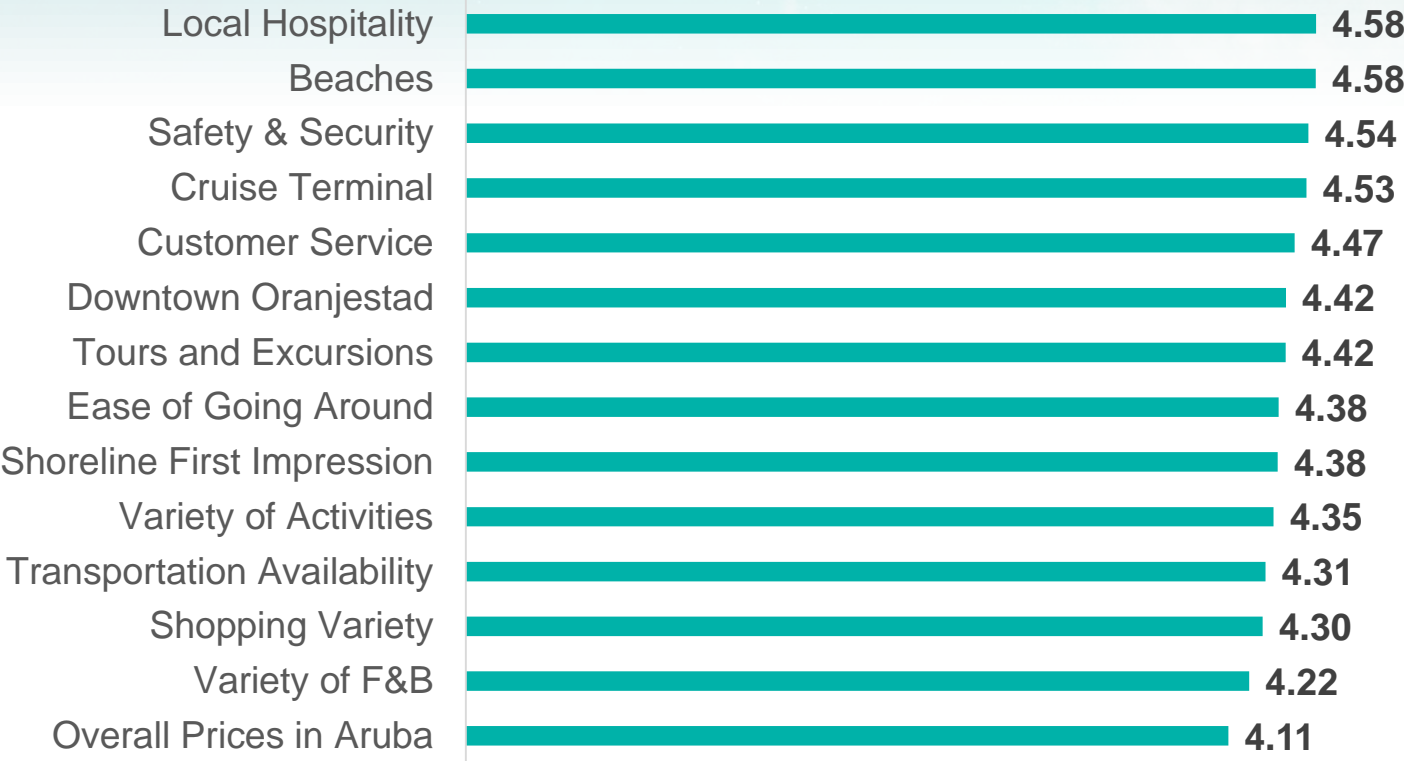


Human Interaction vs. Automation

Data shows that respondents generally value human interaction for feeling safer and prefer face-to-face environments for obtaining information and other transactions. While there is a slight preference for hard copy maps over digital ones, the trend is towards digital resources.



On-island Experience Ratings

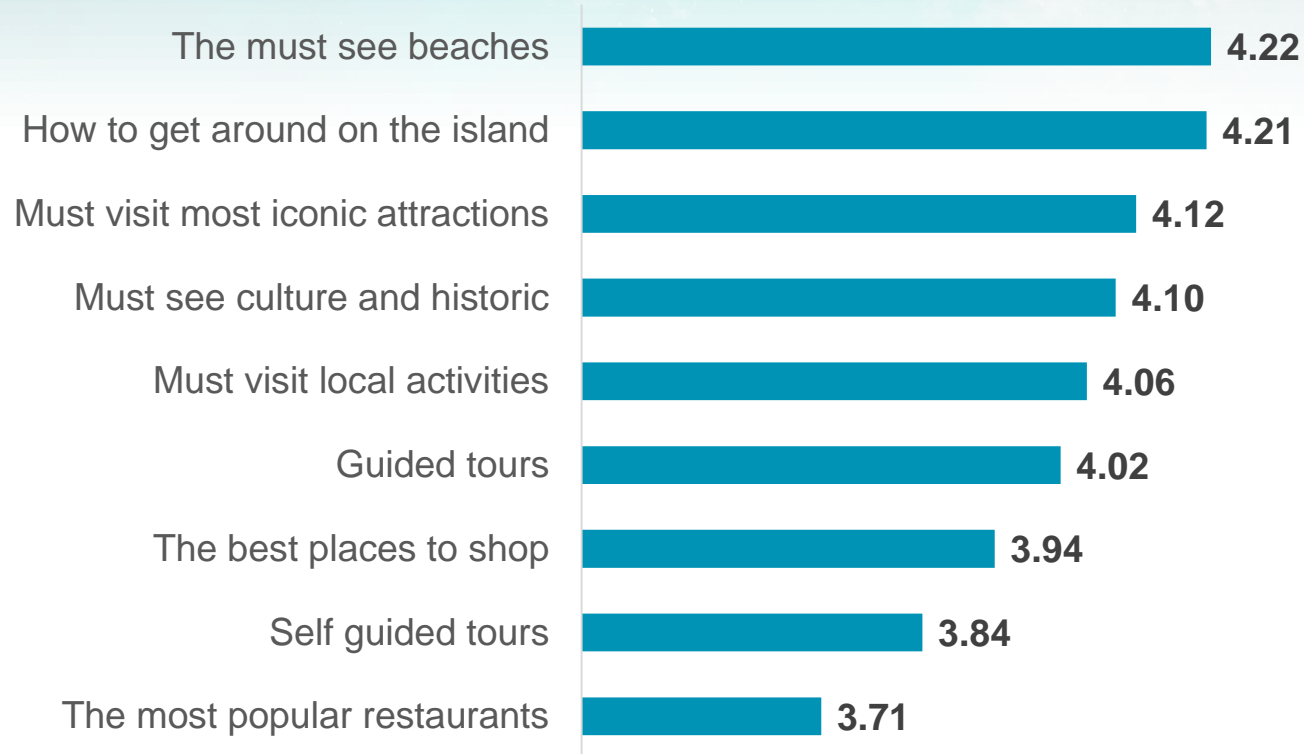


Highly rated experiences among the respondents are local hospitality, beaches, safety & security, and cruise terminal.

Overall prices in Aruba received slightly lower ratings but still maintained a positive perception overall.

In 2018, the feeling of safety & security was rated the highest, while prices in Aruba were rated the lowest.

Information Preference

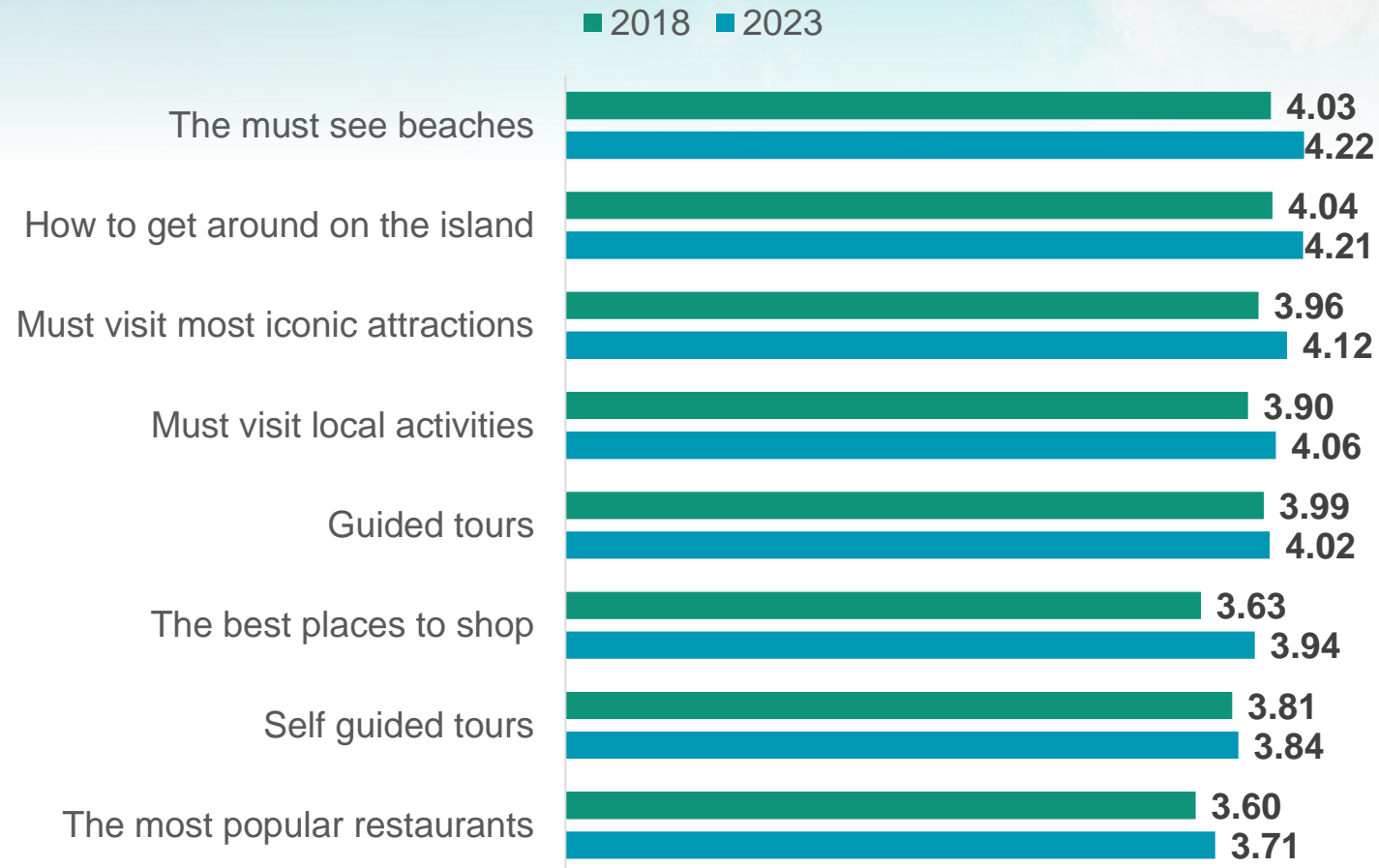


Respondents indicate that they are primarily interested in information about the must-see beaches and how to get around the island.

They are less interested in self-guided tours and popular restaurants.

Information Preference

Comparison of 2018 vs. 2023

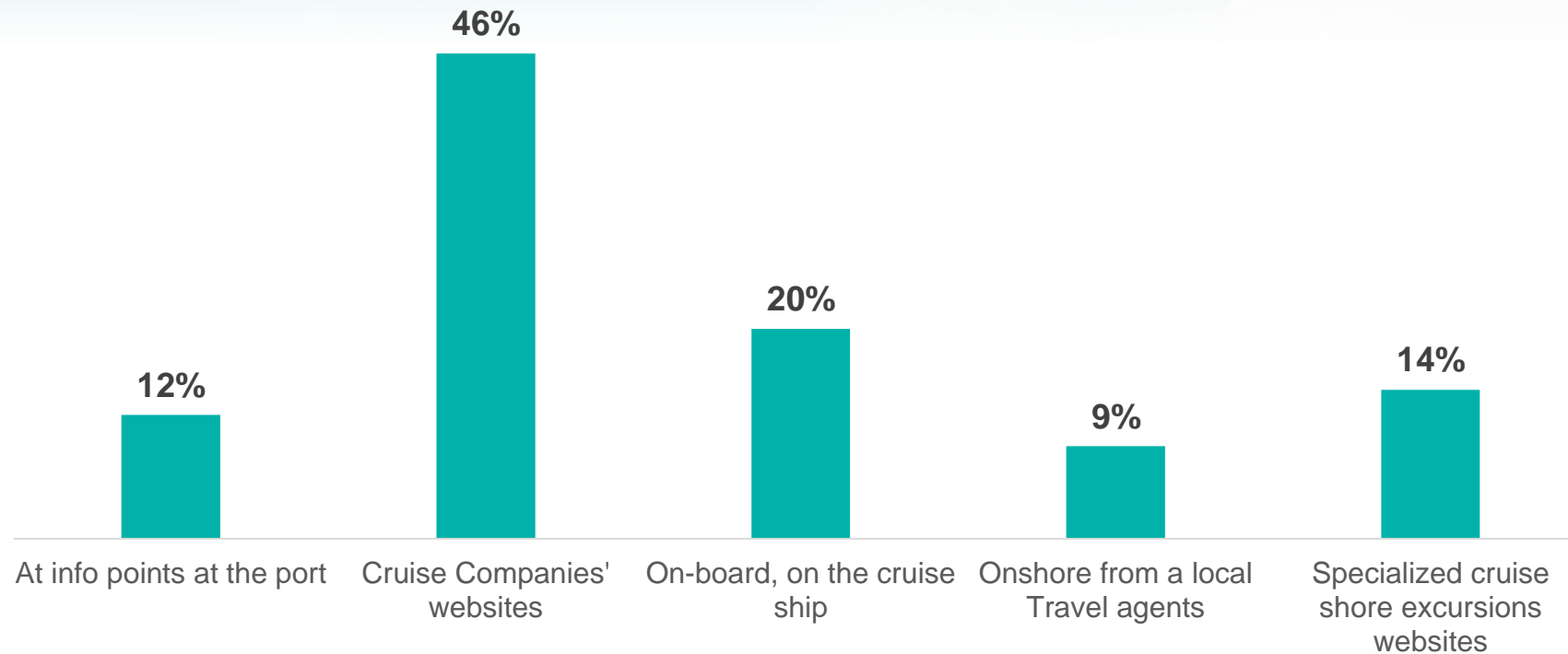


Respondents indicate that they are primarily interested in information about the must-see beaches and how to get around the island.

They are less interested in self-guided tours and popular restaurants.

Sources for Planning Shore Excursions

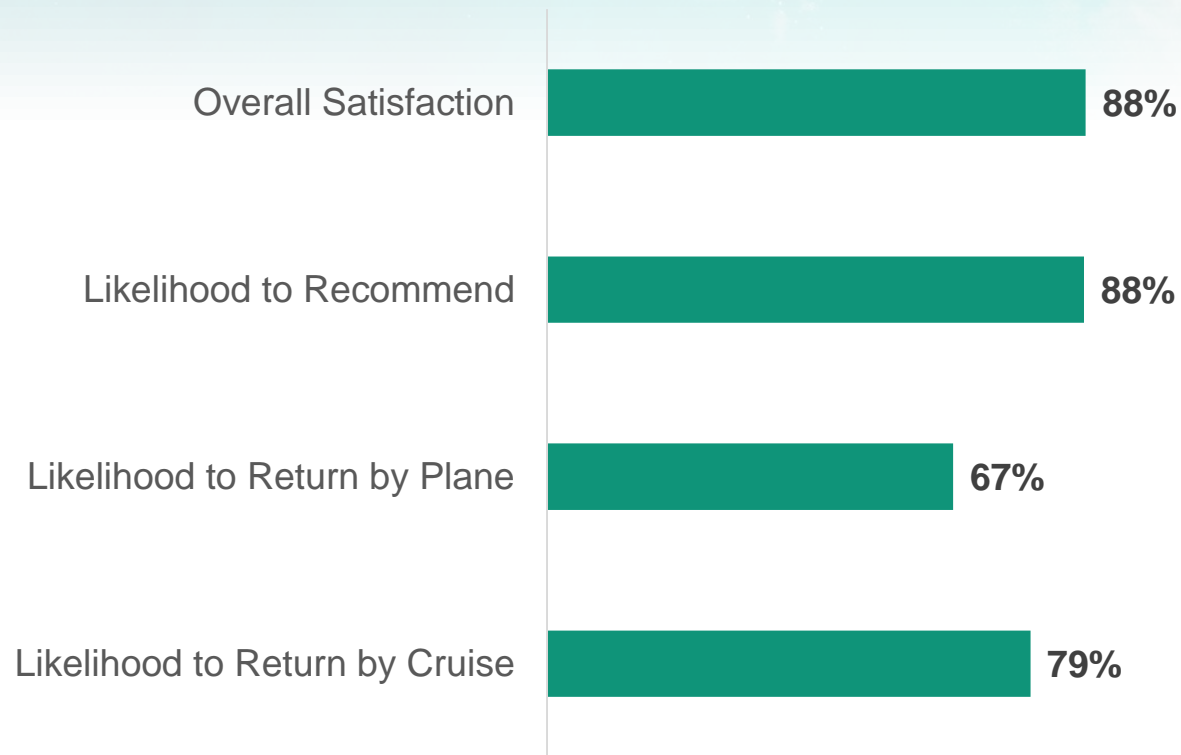
Nearly half of respondents (46%) prefer using cruise companies' websites to plan shore excursions, while 20% opt to do so onboard the cruise ship. Additionally, specialized cruise shore excursion websites accounted for 14% of respondents' preferences, suggesting a reliance on official sources for itinerary planning during cruises.



9. Net Promoter Score



Net Promoter Score

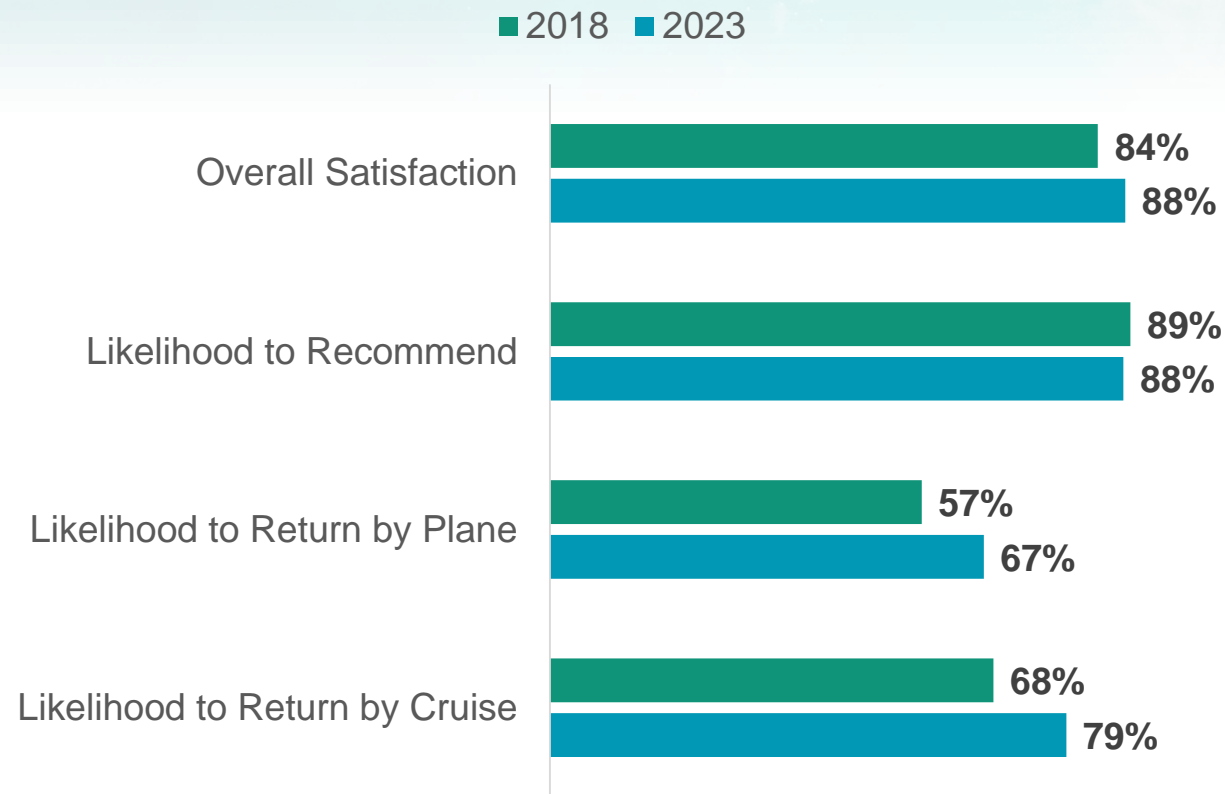


Respondents reported high overall satisfaction (88%) and likelihood to recommend Aruba (88%).

Additionally, while 67% expressed a likelihood to return by plane, 79% indicated a likelihood to return by cruise, suggesting a preference for cruising over air travel among the cruise visitors surveyed.

Net Promoter Score

Comparison of 2018 vs. 2023



Between 2018 and 2023, overall satisfaction increased by 4%, while the likelihood to recommend remained steady.

However, there were notable rises in the likelihood of returning by plane, increasing by 10%, and by cruise, increasing by 11%.



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.ata.aw

