

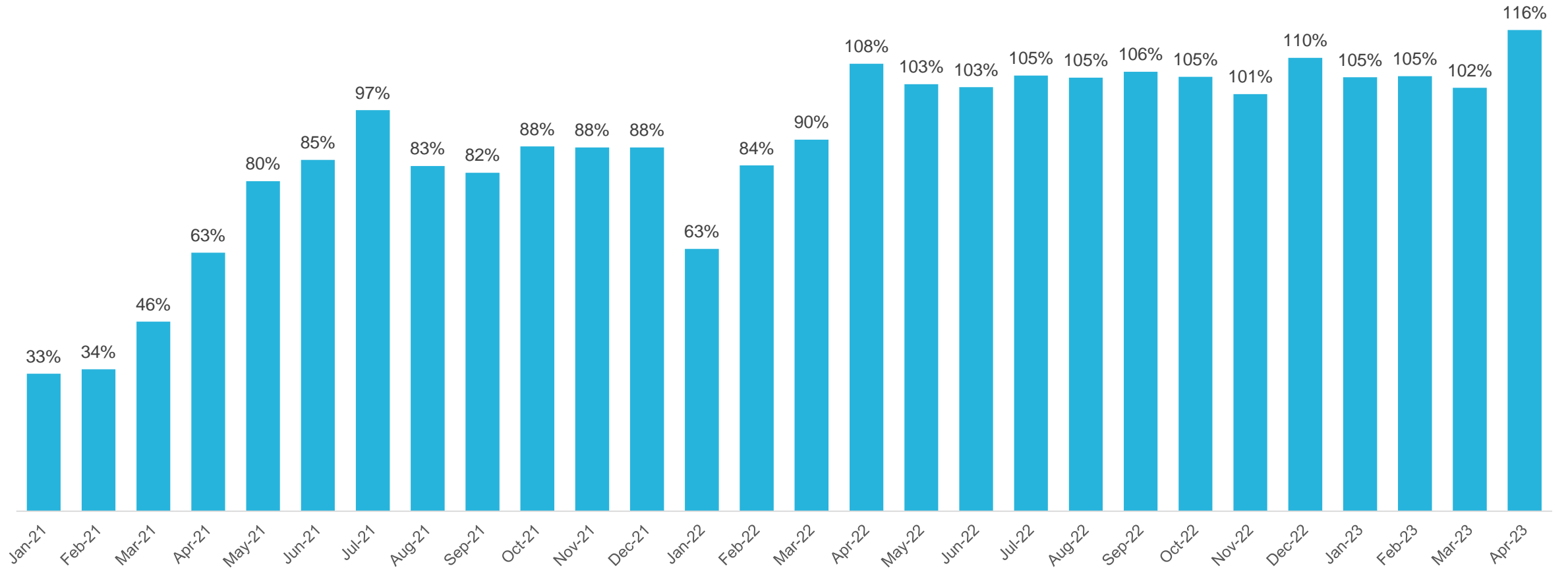


APRIL 2023

Monthly Report

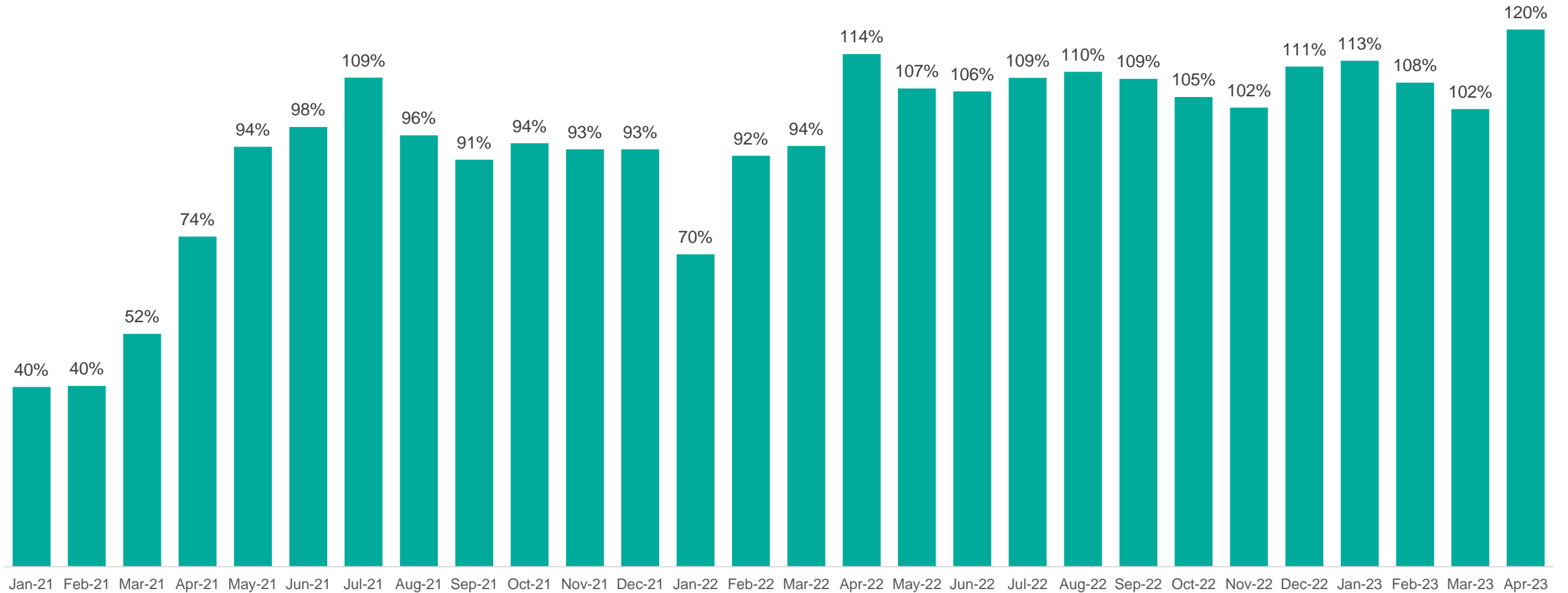
# ★ STAY-OVER VISITOR ARRIVALS RECOVERY VS 2019

% MONTHLY RECOVERY TOTAL



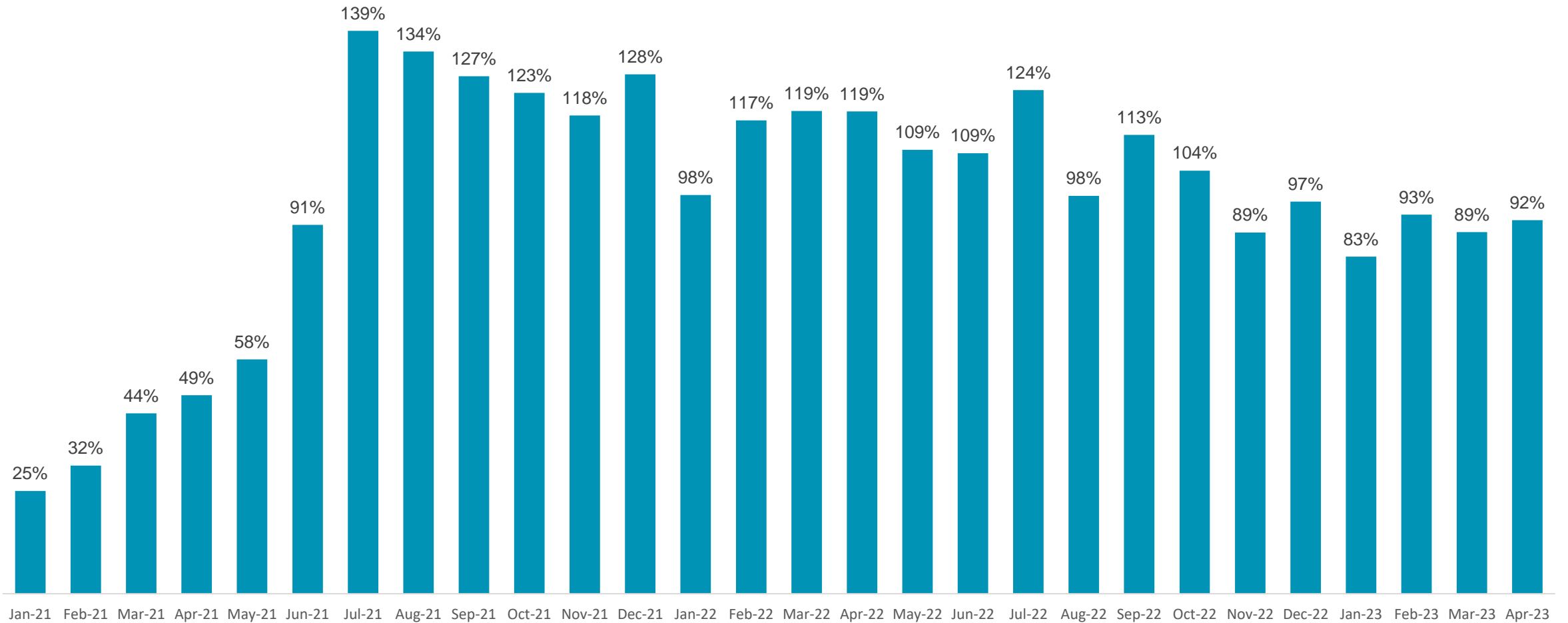
# ★ STAY-OVER VISITOR ARRIVALS RECOVERY VS 2019

% MONTHLY RECOVERY USA



# ★ STAY-OVER VISITOR ARRIVALS RECOVERY VS 2019

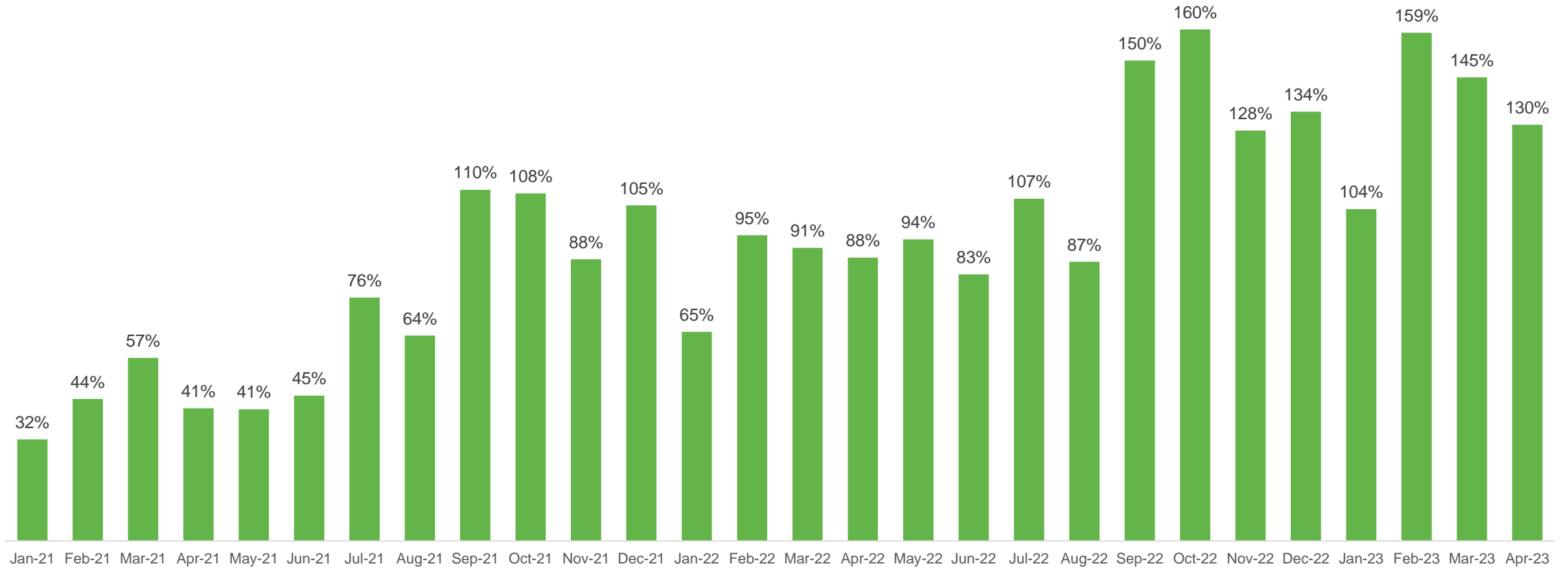
## % MONTHLY RECOVERY HOLLAND





# ★ STAY-OVER VISITOR ARRIVALS RECOVERY VS 2019

## % MONTHLY RECOVERY COLOMBIA



An artist is shown from the side, wearing glasses and a dark jacket, painting a vibrant, multi-colored building on a canvas. The building has blue, red, and white sections with arched windows. The artist's hands are visible, holding a brush and palette. The background is a blurred gallery space with other people and art pieces.

# COMPARISON 2023 VERSUS 2022

# SNAPSHOT YTD APR 2023/2022



HOW MANY ARRIVALS?

415,648

23.9%



HOW MANY CRUISE TOURISM?

425,620

16.2%

Compared to 2019



HOW LONG DID THEY STAY?

3,067,511

21.8%



WHAT DID THEY SPEND?\*

Central Bank Aruba (2022)

Avg. 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?

EP



733,677

NIGHTS

26.0%

ALL INCLUSIVE



384,414

NIGHTS

30.9%

TIMESHARE



944,003

NIGHTS

10.1%

OTHERS



1,005,417

NIGHTS

28.1%





# ARRIVALS YTD APRIL

**415,648**  
ARRIVALS

**23.9%**  
GROWTH

	2022	Growth	2023	% Growth
USA	270,061	50,307	320,368	18.6%
Canada	11,988	15,649	27,637	130.5%
<b>NA</b>	<b>282,049</b>	<b>65,956</b>	<b>348,005</b>	<b>23.4%</b>
Venezuela	484	49	533	10.1%
Colombia	8,103	4,552	12,655	56.2%
Brazil	2,167	1,310	3,477	60.5%
Argentina	3,002	2,745	5,747	91.4%
Chile	1,517	1,127	2,644	74.3%
Ecuador	814	845	1,659	103.8%
Peru	917	558	1,475	60.9%
Paraguay	563	-198	365	-35.2%
Uruguay	428	39	467	9.1%
Mexico	389	453	842	116.5%
Others	2,526	1,043	3,569	41.3%
<b>SA</b>	<b>20,910</b>	<b>12,523</b>	<b>33,433</b>	<b>59.9%</b>
Netherlands	17,063	-3,553	13,510	-20.8%
UK	1,115	395	1,510	35.4%
Germany	1,505	699	2,204	46.4%
Italy	961	80	1,041	8.3%
Sweden	378	1,145	1,523	302.9%
Belgium	805	-97	708	-12.0%
Austria	200	39	239	19.5%
Switzerland	523	120	643	22.9%
Others	2,831	652	3,483	23.0%
<b>Europe</b>	<b>25,381</b>	<b>-520</b>	<b>24,861</b>	<b>-2.0%</b>
<b>ROW</b>	<b>7,022</b>	<b>2,327</b>	<b>9,349</b>	<b>33.1%</b>
<b>Total</b>	<b>335,362</b>	<b>80,286</b>	<b>415,648</b>	<b>23.9%</b>
<b>W/O Ven.</b>	<b>334,878</b>	<b>80,237</b>	<b>415,115</b>	<b>24.0%</b>

	Marketshare 2022	Marketshare 2023
USA	80.5%	77.1%
Canada	3.6%	6.6%
<b>NA</b>	<b>84.1%</b>	<b>83.7%</b>
Venezuela	0.1%	0.1%
Colombia	2.4%	3.0%
Brazil	0.6%	0.8%
Argentina	0.9%	1.4%
Chile	0.5%	0.6%
Ecuador	0.2%	0.4%
Peru	0.3%	0.4%
Paraguay	0.2%	0.1%
Uruguay	0.1%	0.1%
Mexico	0.1%	0.2%
Others	0.8%	0.9%
<b>SA</b>	<b>6.2%</b>	<b>8.0%</b>
Netherlands	5.1%	3.3%
UK	0.3%	0.4%
Germany	0.4%	0.5%
Italy	0.3%	0.3%
Sweden	0.1%	0.4%
Belgium	0.2%	0.2%
Austria	0.1%	0.1%
Switzerland	0.2%	0.2%
Others	0.8%	0.8%
<b>Europe</b>	<b>7.6%</b>	<b>6.0%</b>
<b>ROW</b>	<b>2.1%</b>	<b>2.2%</b>



# ARRIVALS USA YTD APRIL

**320,368**  
ARRIVALS

**18.6%**  
GROWTH

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
New York	60,647	442	61,089	0.7%	22.5%	19.1%
Massachusetts	41,384	10,253	51,637	24.8%	15.3%	16.1%
New Jersey	32,313	364	32,677	1.1%	12.0%	10.2%
Pennsylvania	14,235	3,930	18,165	27.6%	5.3%	5.7%
Illinois	6,943	2,134	9,077	30.7%	2.6%	2.8%
Connecticut	11,007	1,448	12,455	13.2%	4.1%	3.9%
Florida	12,397	1,769	14,166	14.3%	4.6%	4.4%
Ohio	6,613	2,906	9,519	43.9%	2.4%	3.0%
Maryland	7,676	857	8,533	11.2%	2.8%	2.7%
Michigan	7,028	1,285	8,313	18.3%	2.6%	2.6%
Virginia	5,774	2,633	8,407	45.6%	2.1%	2.6%
Georgia	5,182	681	5,863	13.1%	1.9%	1.8%
North Carolina	5,785	2,398	8,183	41.5%	2.1%	2.6%
Texas	5,227	1,559	6,786	29.8%	1.9%	2.1%
California	3,877	661	4,538	17.0%	1.4%	1.4%
Other	43,973	16,987	60,960	38.6%	16.3%	19.0%
<b>Total</b>	<b>270,061</b>	<b>50,307</b>	<b>320,368</b>	<b>18.6%</b>		



# NIGHTS YTD APRIL

# 3,067,511

ARRIVALS

# 21.8%

GROWTH

	2022		Growth	2023	% Growth	ALOS 2022	ALOS 2023
USA	1,891,870		346,715	2,238,585	18.3%	7.0	7.0
Canada	135,059		141,002	276,061	104.4%	11.3	10.0
<b>NA</b>	<b>2,026,929</b>		<b>487,717</b>	<b>2,514,646</b>	<b>24.1%</b>	7.2	7.2
Venezuela	6,165	-1,289		4,876	-20.9%	12.7	9.1
Colombia	58,400		23,813	82,213	40.8%	7.2	6.5
Brazil	13,472		7,828	21,300	58.1%	6.2	6.1
Argentina	28,936		22,457	51,393	77.6%	9.6	8.9
Chile	12,554		7,862	20,416	62.6%	8.3	7.7
Ecuador	4,809		4,174	8,983	86.8%	5.9	5.4
Peru	6,786		3,708	10,494	54.6%	7.4	7.1
Paraguay	4,148	-1,562		2,586	-37.7%	7.4	7.1
Uruguay	3,413		228	3,641	6.7%	8.0	7.8
Mexico	2,807		2,057	4,864	73.3%	7.2	5.8
Others	17,732		5,249	22,981	29.6%	7.0	6.4
<b>SA</b>	<b>159,222</b>		<b>74,525</b>	<b>233,747</b>	<b>46.8%</b>	7.6	7.0
Netherlands	200,856	-40,293		160,563	-20.1%	11.8	11.9
UK	10,417		2,968	13,385	28.5%	9.3	8.9
Germany	17,592	-160		17,432	-0.9%	11.7	7.9
Italy	9,695	-181		9,514	-1.9%	10.1	9.1
Sweden	4,494		13,909	18,403	309.5%	11.9	12.1
Belgium	9,046	-987		8,059	-10.9%	11.2	11.4
Austria	2,214		218	2,432	9.8%	11.1	10.2
Switzerland	5,651		549	6,200	9.7%	10.8	9.6
Others	31,848		2,440	34,288	7.7%	11.2	9.8
<b>Europe</b>	<b>291,813</b>	<b>-21,537</b>		<b>270,276</b>	<b>-7.4%</b>	11.5	10.9
<b>ROW</b>	<b>39,793</b>		9,049	<b>48,842</b>	<b>22.7%</b>	5.7	5.2
<b>Total</b>	<b>2,517,757</b>		549,754	<b>3,067,511</b>	<b>21.8%</b>	7.5	7.4





# ACCOMMODATIONS YTD APRIL

**415,648**  
ARRIVALS

**23.9%**  
GROWTH

## ARRIVALS BY ACCOMMODATION

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
EP	88,598	26,018	114,616	29.4%	26.4%	27.6%
All Inclusive	58,302	13,974	72,276	24.0%	17.4%	17.4%
Timeshare	99,491	10,226	109,717	10.3%	29.7%	26.4%
Others	88,971	30,068	119,039	33.8%	26.5%	28.6%
<b>Total</b>	<b>335,362</b>	<b>80,286</b>	<b>415,648</b>	<b>23.9%</b>		

## NIGHTS BY ACCOMMODATION

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
EP	515,544	146,194	661,738	28.4%	20.5%	21.6%
All Inclusive	360,472	95,881	456,353	26.6%	14.3%	14.9%
Timeshare	857,062	86,941	944,003	10.1%	34.0%	30.8%
Others	784,679	220,738	1,005,417	28.1%	31.2%	32.8%
<b>Total</b>	<b>2,517,757</b>	<b>549,754</b>	<b>3,067,511</b>	<b>21.8%</b>		

Note: The European Plan, sometimes abbreviated as EP in hotel listings, indicates that the quoted rate is strictly for lodging and does not include any meals.



# VISITORS BY AGE YTD APRIL

**415,648**  
ARRIVALS

**23.9%**  
GROWTH

	2022	Growth	2023	% Growth
0 - 11	24,888	3,777	28,665	15.2%
12-19	23,593	2,894	26,487	12.3%
20 - 29	42,163	75	42,238	0.2%
30 - 39	56,223	4,882	61,105	8.7%
40 - 49	54,884	11,824	66,708	21.5%
50 - 59	63,547	18,582	82,129	29.2%
60 - 69	47,533	23,369	70,902	49.2%
70 +	22,521	14,852	37,373	65.9%
Not Stated	10	31	41	310.0%
<b>Total</b>	<b>335,362</b>	<b>80,286</b>	<b>415,648</b>	<b>23.9%</b>



# GENERATIONS YTD APRIL

**415,648**  
VISITORS

**23.9%**  
GROWTH

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
Gen A	19,390	3,105	22,495	16.0%	5.8%	5.4%
Gen Z	50,502	3,982	54,484	7.9%	15.1%	13.1%
Millennials	88,530	7,135	95,665	8.1%	26.4%	23.0%
Gen X	88,441	21,314	109,755	24.1%	26.4%	26.4%
Baby Boomers	81,053	39,115	120,168	48.3%	24.2%	28.9%
Silent Generations	7,436	5,604	13,040	75.4%	2.2%	3.1%
Age not specified	10	31	41	310.0%	0.0%	0.0%
<b>Total</b>	<b>335,362</b>	<b>80,286</b>	<b>415,648</b>	<b>23.9%</b>		



# CARRIERS YTD APRIL

# 415,648 VISITORS

# 23.9% GROWTH

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
JETBLUE	103,389	-7,645	95,744	-7.4%	30.8%	23.0%
AMERICAN AIRLINES	66,254	27,741	93,995	41.9%	19.8%	22.6%
DELTA AIRLINE	39,963	17,354	57,317	43.4%	11.9%	13.8%
UNITED AIRLINES	47,304	864	48,168	1.8%	14.1%	11.6%
SOUTHWEST AIRLINES	14,558	4,731	19,289	32.5%	4.3%	4.6%
AVIANCA	8,424	6,961	15,385	82.6%	2.5%	3.7%
KLM ROYAL DUTCH	14,949	-1,971	12,978	-13.2%	4.5%	3.1%
COPA AIRLINE	8,683	4,159	12,842	47.9%	2.6%	3.1%
AIR CANADA	944	8,186	9,130	867.2%	0.3%	2.2%
WESTJET AIRLINES	4,285	4,435	8,720	103.5%	1.3%	2.1%
SUNWING AIRLINES	2,700	3,924	6,624	145.3%	0.8%	1.6%
DIVI DIVI AIR	4,109	1,336	5,445	32.5%	1.2%	1.3%
TUI NL / ARKEFLIGHT	6,966	-1,710	5,256	-24.5%	2.1%	1.3%
AERO REPUBLICA/ WINGO	2,219	2,951	5,170	133.0%	0.7%	1.2%
SPIRIT AIRLINES	2,091	2,296	4,387	109.8%	0.6%	1.1%
EZ AIR	1,577	1,727	3,304	109.5%	0.5%	0.8%
PRIVATE	1,227	1,159	2,386	94.5%	0.4%	0.6%
SUN COUNTRY	2,124	131	2,255	6.2%	0.6%	0.5%
SURINAM AIRWAYS	1,258	369	1,627	29.3%	0.4%	0.4%
CHARTER	665	790	1,455	118.8%	0.2%	0.4%
SUNCLASS AIRLINES	0	1,158	1,158	-	0.0%	0.3%
JETAIR CARIBBEAN	0	789	789	-	0.0%	0.2%
BRITISH AIRWAYS	0	411	411	-	0.0%	0.1%
WINAIR	683	-334	349	-48.9%	0.2%	0.1%
ARAJET	0	347	347	-	0.0%	0.1%
EASTERN AIRLINES	0	329	329	-	0.0%	0.1%
Others	990	-202	788	-20.4%	0.3%	0.2%
<b>Total</b>	<b>335,362</b>	<b>80,286</b>	<b>415,648</b>	<b>23.9%</b>		



# APRIL RESULT 2023

NORTH AMERICA



91,544

83.7%

SOUTH AMERICA



9,514

8.7%

EUROPE



5,631

5.1%

OTHERS



2,654

2.4%

TOTAL ARRIVALS

109,343

100%



# ARRIVALS APRIL

**109,343**  
ARRIVALS

**7.5%**  
GROWTH

	2022	Growth	2023	% Growth
USA	83,033	3,959	86,992	4.8%
Canada	2,788	1,764	4,552	63.3%
<b>NA</b>	<b>85,821</b>	<b>5,723</b>	<b>91,544</b>	<b>6.7%</b>
Venezuela	209	-33	176	-15.8%
Colombia	2,542	1,190	3,732	46.8%
Brazil	676	258	934	38.2%
Argentina	681	724	1,405	106.3%
Chile	410	126	536	30.7%
Ecuador	222	247	469	111.3%
Peru	316	63	379	19.9%
Paraguay	109	-18	91	-16.5%
Uruguay	110	3	113	2.7%
Mexico	165	169	334	102.4%
Others	1,304	41	1,345	3.1%
<b>SA</b>	<b>6,744</b>	<b>2,770</b>	<b>9,514</b>	<b>41.1%</b>
Netherlands	4,360	-984	3,376	-22.6%
UK	450	43	493	9.6%
Germany	496	-88	408	-17.7%
Italy	197	-19	178	-9.6%
Sweden	106	-38	68	-35.8%
Belgium	400	-166	234	-41.5%
Austria	52	-1	51	-1.9%
Switzerland	167	18	185	10.8%
Others	744	-106	638	-14.2%
<b>Europe</b>	<b>6,972</b>	<b>-1,341</b>	<b>5,631</b>	<b>-19.2%</b>
<b>ROW</b>	<b>2,159</b>	<b>495</b>	<b>2,654</b>	<b>22.9%</b>
<b>Total</b>	<b>101,696</b>	<b>7,647</b>	<b>109,343</b>	<b>7.5%</b>
<b>W/O Ven.</b>	<b>101,487</b>	<b>7,680</b>	<b>109,167</b>	<b>7.6%</b>

Marketshare 2022	Marketshare 2023
81.6%	79.6%
2.7%	4.2%
84.4%	83.7%
0.2%	0.2%
2.5%	3.4%
0.7%	0.9%
0.7%	1.3%
0.4%	0.5%
0.2%	0.4%
0.3%	0.3%
0.1%	0.1%
0.1%	0.1%
0.2%	0.3%
1.3%	1.2%
6.6%	8.7%
4.3%	3.1%
0.4%	0.5%
0.5%	0.4%
0.2%	0.2%
0.1%	0.1%
0.4%	0.2%
0.1%	0.0%
0.2%	0.2%
0.7%	0.6%
6.9%	5.1%
2.1%	2.4%





# ARRIVALS USA APRIL

**86,992**  
ARRIVALS

**4.8%**  
GROWTH

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
New York	17,016	-1,481	15,535	-8.7%	20.5%	17.9%
Massachusetts	12,971	1,402	14,373	10.8%	15.6%	16.5%
New Jersey	11,529	-985	10,544	-8.5%	13.9%	12.1%
Pennsylvania	4,298	419	4,717	9.7%	5.2%	5.4%
Illinois	1,567	188	1,755	12.0%	1.9%	2.0%
Connecticut	4,342	-189	4,153	-4.4%	5.2%	4.8%
Florida	3,487	362	3,849	10.4%	4.2%	4.4%
Ohio	1,589	468	2,057	29.5%	1.9%	2.4%
Maryland	2,933	-347	2,586	-11.8%	3.5%	3.0%
Michigan	1,754	-337	1,417	-19.2%	2.1%	1.6%
Virginia	2,286	53	2,339	2.3%	2.8%	2.7%
Georgia	1,869	64	1,933	3.4%	2.3%	2.2%
North Carolina	2,033	624	2,657	30.7%	2.4%	3.1%
Texas	1,452	561	2,013	38.6%	1.7%	2.3%
California	1,300	104	1,404	8.0%	1.6%	1.6%
Other	12,607	3,053	15,660	24.2%	15.2%	18.0%
<b>Total</b>	<b>83,033</b>	<b>3,959</b>	<b>86,992</b>	<b>4.8%</b>		



# NIGHTS APRIL

# 730,495 NIGHTS

# 5.9% GROWTH

	2022	Growth	2023	% Growth	ALOS 2022	ALOS 2023
USA	533,060	24,724	557,784	4.6%	6.4	6.4
Canada	24,194	13,556	37,750	56.0%	8.7	8.3
<b>NA</b>	<b>557,254</b>	<b>38,280</b>	<b>595,534</b>	<b>6.9%</b>	<b>6.5</b>	<b>6.5</b>
Venezuela	2,298	-838	1,460	-36.5%	11.0	8.3
Colombia	17,284	5,301	22,585	30.7%	6.8	6.1
Brazil	3,910	1,835	5,745	46.9%	5.8	6.2
Argentina	6,247	5,638	11,885	90.3%	9.2	8.5
Chile	3,348	562	3,910	16.8%	8.2	7.3
Ecuador	1,136	1,231	2,367	108.4%	5.1	5.0
Peru	2,064	450	2,514	21.8%	6.5	6.6
Paraguay	910	-264	646	-29.0%	8.3	7.1
Uruguay	848	35	883	4.1%	7.7	7.8
Mexico	1,062	764	1,826	71.9%	6.4	5.5
Others	8,438	-134	8,304	-1.6%	6.5	6.2
<b>SA</b>	<b>47,545</b>	<b>14,580</b>	<b>62,125</b>	<b>30.7%</b>	<b>7.0</b>	<b>6.5</b>
Netherlands	48,534	-10,032	38,502	-20.7%	11.1	11.4
UK	3,528	1,248	4,776	35.4%	7.8	9.7
Germany	5,544	-1,357	4,187	-24.5%	11.2	10.3
Italy	1,930	-320	1,610	-16.6%	9.8	9.0
Sweden	915	-415	500	-45.4%	8.6	7.4
Belgium	3,955	-1,818	2,137	-46.0%	9.9	9.1
Austria	435	-17	418	-3.9%	8.4	8.2
Switzerland	1,649	226	1,875	13.7%	9.9	10.1
Others	7,233	-1,648	5,585	-22.8%	9.7	8.8
<b>Europe</b>	<b>73,723</b>	<b>-14,133</b>	<b>59,590</b>	<b>-19.2%</b>	<b>10.6</b>	<b>10.6</b>
<b>ROW</b>	<b>11,094</b>	<b>2,152</b>	<b>13,246</b>	<b>19.4%</b>	<b>5.1</b>	<b>5.0</b>
<b>Total</b>	<b>689,616</b>	<b>40,879</b>	<b>730,495</b>	<b>5.9%</b>	<b>6.8</b>	<b>6.7</b>



# ACCOMMODATIONS APRIL

**109,343**  
ARRIVALS

**7.5%**  
GROWTH

## ARRIVALS BY ACCOMMODATION

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
EP	28,244	2,170	30,414	7.7%	27.8%	27.8%
All Inclusive	19,917	14	19,931	0.1%	19.6%	18.2%
Timeshare	30,780	639	31,419	2.1%	30.3%	28.7%
Others	22,755	4,824	27,579	21.2%	22.4%	25.2%
<b>Total</b>	<b>101,696</b>	7,647	<b>109,343</b>	<b>7.5%</b>		

## NIGHTS BY ACCOMMODATION

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
EP	157,346	12,717	170,063	8.1%	22.8%	23.3%
All Inclusive	118,312	242	118,554	0.2%	17.2%	16.2%
Timeshare	233,108	2,443	235,551	1.0%	33.8%	32.2%
Others	180,850	25,477	206,327	14.1%	26.2%	28.2%
<b>Total</b>	<b>689,616</b>	40,879	<b>730,495</b>	<b>5.9%</b>		

Note: The European Plan, sometimes abbreviated as EP in hotel listings, indicates that the quoted rate is strictly for lodging and does not include any meals.





# VISITORS BY AGE APRIL

**109,343**  
ARRIVALS

**7.5%**  
GROWTH

	2022		Growth	2023	% Growth
0 - 11	9,329		73	9,402	0.8%
12-19	8,691		218	8,909	2.5%
20 - 29	10,443	-421		10,022	-4.0%
30 - 39	16,598		239	16,837	1.4%
40 - 49	18,755		1,258	20,013	6.7%
50 - 59	18,626		2,008	20,634	10.8%
60 - 69	13,112		2,604	15,716	19.9%
70 +	6,139		1,664	7,803	27.1%
Not Stated	3		4	7	133.3%
<b>Total</b>	<b>101,696</b>		<b>7,647</b>	<b>109,343</b>	<b>7.5%</b>



# GENERATIONS APRIL

**109,343**  
ARRIVALS

**7.5%**  
GROWTH

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
Gen A	6,981	107	7,088	1.5%	6.9%	6.5%
Gen Z	15,834	26	15,860	0.2%	15.6%	14.5%
Millennials	26,160	190	26,350	0.7%	25.7%	24.1%
Gen X	28,248	2,455	30,703	8.7%	27.8%	28.1%
Baby Boomers	22,490	4,274	26,764	19.0%	22.1%	24.5%
Silent Generations	1,980	591	2,571	29.8%	1.9%	2.4%
Age not specified	3	4	7	133.3%	0.0%	0.0%
<b>Total</b>	<b>101,696</b>	<b>7,647</b>	<b>109,343</b>	<b>7.5%</b>		



# CARRIERS APRIL

# 109,343

ARRIVALS

# 7.6%

GROWTH

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
JETBLUE	33,040	-5,639	27,401	-17.1%	32.5%	25.1%
AMERICAN AIRLINES	19,507	3,869	23,376	19.8%	19.2%	21.4%
UNITED AIRLINES	14,148	915	15,063	6.5%	13.9%	13.8%
DELTA AIRLINE	12,007	1,646	13,653	13.7%	11.8%	12.5%
SOUTHWEST AIRLINES	5,155	514	5,669	10.0%	5.1%	5.2%
AVIANCA	2,260	2,486	4,746	110.0%	2.2%	4.3%
COPA AIRLINE	2,534	824	3,358	32.5%	2.5%	3.1%
KLM ROYAL DUTCH	4,149	-1,484	2,665	-35.8%	4.1%	2.4%
WESTJET AIRLINES	976	826	1,802	84.6%	1.0%	1.6%
AIR CANADA	0	1,474	1,474	-	0.0%	1.3%
DIVI DIVI	1,379	28	1,407	2.0%	1.4%	1.3%
TUI NL	1,803	-418	1,385	-23.2%	1.8%	1.3%
SPIRIT AIRLINES	761	478	1,239	62.8%	0.7%	1.1%
AERO REPUBLICA/ WINGO	986	213	1,199	21.6%	1.0%	1.1%
SUNWING AIRLINES	554	356	910	64.3%	0.5%	0.8%
EZ AIR	578	276	854	47.8%	0.6%	0.8%
SURINAM AIRWAYS	825	-140	685	-17.0%	0.8%	0.6%
PRIVATE	287	156	443	54.4%	0.3%	0.4%
BRITISH AIRWAYS	0	339	339	-	0.0%	0.3%
EASTERN AIRLINES	0	329	329	-	0.0%	0.3%
CHARTER	118	181	299	153.4%	0.1%	0.3%
GLOBAL X	0	265	265	-	0.0%	0.2%
SUN COUNTRY	145	114	259	78.6%	0.1%	0.2%
JETAIR CARIBBEAN	0	216	216	-	0.0%	0.2%
ARAJET	0	111	111	-	0.0%	0.1%
WINAIR	177	-85	92	-48.0%	0.2%	0.1%
OTHERS	307	-203	104	-66.1%	0.3%	0.1%
<b>Total</b>	<b>101,696</b>	<b>7,647</b>	<b>109,343</b>	<b>7.5%</b>		





# COMPARISON

## 2023 VERSUS 2019



# SNAPSHOT YTD APR 2023/2019



HOW MANY  
ARRIVALS?

415,648

7.1%



HOW MANY  
CRUISE TOURISM?

425,620

15.4%

Compared to 2019



HOW LONG  
DID THEY STAY?

3,067,511

5.7%



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?



733,677

NIGHTS

-13.0%



384,414

NIGHTS

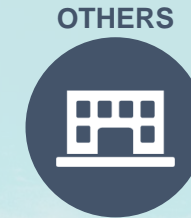
5.5%



944,003

NIGHTS

11.9%



1,005,417

NIGHTS

18.0%



# ARRIVALS YTD APRIL

**415,648**  
ARRIVALS

**7.1%**  
GROWTH

	2019		Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
USA	290,623		29,745	320,368	10.2%	74.9%	77.1%
Canada	23,677		3,960	27,637	16.7%	6.1%	6.6%
<b>NA</b>	<b>314,300</b>		<b>33,705</b>	<b>348,005</b>	<b>10.7%</b>	<b>81.0%</b>	<b>83.7%</b>
Venezuela	7,152	-6,619		533	-92.5%	1.8%	0.1%
Colombia	9,841		2,814	12,655	28.6%	2.5%	3.0%
Brazil	3,405		72	3,477	2.1%	0.9%	0.8%
Argentina	5,390		357	5,747	6.6%	1.4%	1.4%
Chile	3,593	-949		2,644	-26.4%	0.9%	0.6%
Ecuador	573		1,086	1,659	189.5%	0.1%	0.4%
Peru	1,585	-110		1,475	-6.9%	0.4%	0.4%
Paraguay	1,106	-741		365	-67.0%	0.3%	0.1%
Uruguay	741	-274		467	-37.0%	0.2%	0.1%
Mexico	518		324	842	62.5%	0.1%	0.2%
Others	3,024		545	3,569	18.0%	0.8%	0.9%
<b>SA</b>	<b>36,928</b>	<b>-3,495</b>		<b>33,433</b>	<b>-9.5%</b>	<b>9.5%</b>	<b>8.0%</b>
Netherlands	15,147	-1,637		13,510	-10.8%	3.9%	3.3%
UK	1,243		267	1,510	21.5%	0.3%	0.4%
Germany	2,169		35	2,204	1.6%	0.6%	0.5%
Italy	1,708	-667		1,041	-39.1%	0.4%	0.3%
Sweden	2,346	-823		1,523	-35.1%	0.6%	0.4%
Belgium	822	-114		708	-13.9%	0.2%	0.2%
Austria	296	-57		239	-19.3%	0.1%	0.1%
Switzerland	705	-62		643	-8.8%	0.2%	0.2%
Others	3,980	-497		3,483	-12.5%	1.0%	0.8%
<b>Europe</b>	<b>28,416</b>	<b>-3,555</b>		<b>24,861</b>	<b>-12.5%</b>	<b>7.3%</b>	<b>6.0%</b>
<b>ROW</b>	<b>8,492</b>		<b>857</b>	<b>9,349</b>	<b>10.1%</b>	<b>2.2%</b>	<b>2.2%</b>
<b>Total</b>	<b>388,136</b>		<b>27,512</b>	<b>415,648</b>	<b>7.1%</b>		
<b>W/O Ven.</b>	<b>380,984</b>		<b>34,131</b>	<b>415,115</b>	<b>9.0%</b>		



# ARRIVALS USA YTD APRIL

**320,368**  
ARRIVALS

**10.2%**  
GROWTH

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
New York	59,013	2,076	61,089	3.5%	20.3%	19.1%
Massachusetts	41,351	10,286	51,637	24.9%	14.2%	16.1%
New Jersey	30,002	2,675	32,677	8.9%	10.3%	10.2%
Pennsylvania	15,665	2,500	18,165	16.0%	5.4%	5.7%
Illinois	8,613	464	9,077	5.4%	3.0%	2.8%
Connecticut	10,844	1,611	12,455	14.9%	3.7%	3.9%
Florida	13,751	415	14,166	3.0%	4.7%	4.4%
Ohio	8,923	596	9,519	6.7%	3.1%	3.0%
Maryland	7,251	1,282	8,533	17.7%	2.5%	2.7%
Michigan	7,872	441	8,313	5.6%	2.7%	2.6%
Virginia	6,193	2,214	8,407	35.8%	2.1%	2.6%
Georgia	5,012	851	5,863	17.0%	1.7%	1.8%
North Carolina	5,532	2,651	8,183	47.9%	1.9%	2.6%
Texas	5,602	1,184	6,786	21.1%	1.9%	2.1%
California	4,455	83	4,538	1.9%	1.5%	1.4%
Other	60,544	416	60,960	0.7%	20.8%	19.0%
<b>Total</b>	<b>290,623</b>	<b>29,745</b>	<b>320,368</b>	<b>10.2%</b>		





# NIGHTS YTD APRIL

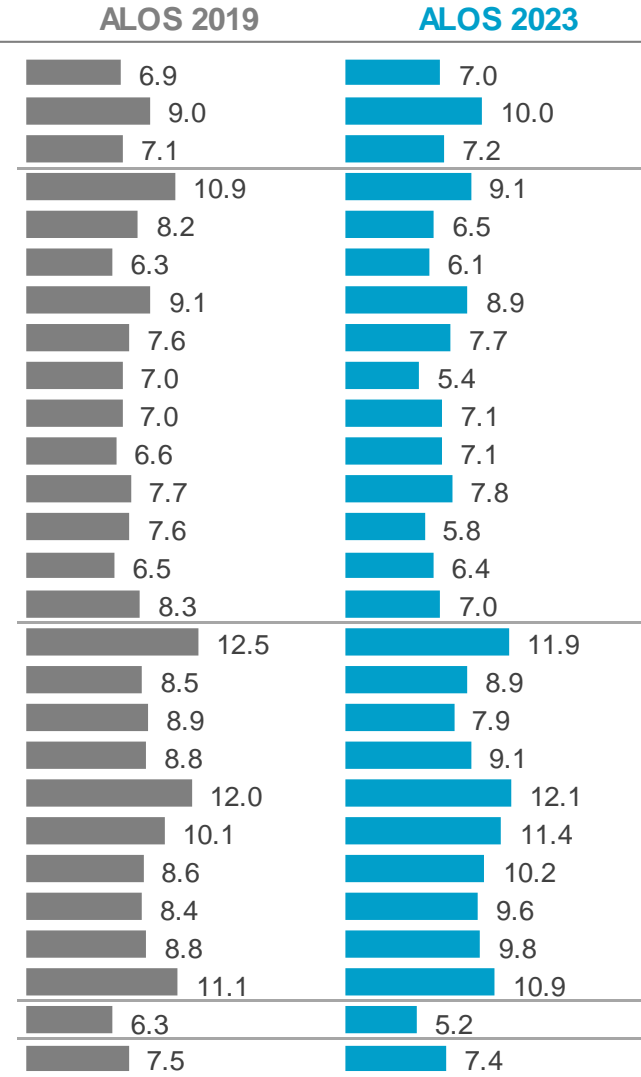
# 3,067,511

ARRIVALS

# 5.7%

GROWTH

	2019		Growth	2023	% Growth
USA	2,013,090		225,495	2,238,585	11.2%
Canada	213,934		62,127	276,061	29.0%
<b>NA</b>	<b>2,227,024</b>		<b>287,622</b>	<b>2,514,646</b>	<b>12.9%</b>
Venezuela	77,637	-72,761		4,876	-93.7%
Colombia	80,653		1,560	82,213	1.9%
Brazil	21,497	-197		21,300	-0.9%
Argentina	49,144		2,249	51,393	4.6%
Chile	27,138	-6,722		20,416	-24.8%
Ecuador	4,034		4,949	8,983	122.7%
Peru	11,102	-608		10,494	-5.5%
Paraguay	7,289	-4,703		2,586	-64.5%
Uruguay	5,677	-2,036		3,641	-35.9%
Mexico	3,934		930	4,864	23.6%
Others	19,571		3,410	22,981	17.4%
<b>SA</b>	<b>307,676</b>	<b>-73,929</b>		<b>233,747</b>	<b>-24.0%</b>
Netherlands	190,043	-29,480		160,563	-15.5%
UK	10,562		2,823	13,385	26.7%
Germany	19,303	-1,871		17,432	-9.7%
Italy	14,979	-5,465		9,514	-36.5%
Sweden	28,264	-9,861		18,403	-34.9%
Belgium	8,293	-234		8,059	-2.8%
Austria	2,532	-100		2,432	-3.9%
Switzerland	5,955		245	6,200	4.1%
Others	34,935	-647		34,288	-1.9%
<b>Europe</b>	<b>314,866</b>	<b>-44,590</b>		<b>270,276</b>	<b>-14.2%</b>
<b>ROW</b>	<b>53,652</b>	<b>-4,810</b>		<b>48,842</b>	<b>-9.0%</b>
<b>Total</b>	<b>2,903,218</b>		<b>164,293</b>	<b>3,067,511</b>	<b>5.7%</b>





# ACCOMMODATIONS YTD APRIL

**415,648**  
ARRIVALS

**7.1%**  
GROWTH

## ARRIVALS BY ACCOMMODATION

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
EP	131,763	-17,147	114,616	-13.0%	33.9%	27.6%
All Inclusive	64,489	7,787	72,276	12.1%	16.6%	17.4%
Timeshare	98,158	11,559	109,717	11.8%	25.3%	26.4%
Others	93,726	25,313	119,039	27.0%	24.1%	28.6%
<b>Total</b>	<b>388,136</b>	<b>27,512</b>	<b>415,648</b>	<b>7.1%</b>		

## NIGHTS BY ACCOMMODATION

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
EP	786,346	-124,608	661,738	-15.8%	27.1%	21.6%
All Inclusive	421,310	35,043	456,353	8.3%	14.5%	14.9%
Timeshare	843,749	100,254	944,003	11.9%	29.1%	30.8%
Others	851,813	153,604	1,005,417	18.0%	29.3%	32.8%
<b>Total</b>	<b>2,903,218</b>	<b>164,293</b>	<b>3,067,511</b>	<b>5.7%</b>		

Note: The European Plan, sometimes abbreviated as EP in hotel listings, indicates that the quoted rate is strictly for lodging and does not include any meals.





# VISITORS BY AGE YTD APRIL

**415,648**  
ARRIVALS

**7.1%**  
GROWTH

	2022	Growth	2023	% Growth
0 - 11	27,807	858	28,665	3.1%
12-19	25,193	1,294	26,487	5.1%
20 - 29	41,428	810	42,238	2.0%
30 - 39	55,352	5,753	61,105	10.4%
40 - 49	64,732	1,976	66,708	3.1%
50 - 59	80,607	1,522	82,129	1.9%
60 - 69	61,995	8,907	70,902	14.4%
70 +	30,955	6,418	37,373	20.7%
Not Stated	67	-26	41	-38.8%
<b>Total</b>	<b>388,136</b>	<b>27,512</b>	<b>415,648</b>	<b>7.1%</b>



# GENERATIONS YTD APRIL

**415,648**  
VISITORS

**7.1%**  
GROWTH

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
Gen A	0		22,495	#DIV/0!	0.0%	5.4%
Gen Z	58,844		54,484	-7.4%	15.2%	13.1%
Millennials	79,806		95,665	19.9%	20.6%	23.0%
Gen X	99,643		109,755	10.1%	25.7%	26.4%
Baby Boomers	128,100		120,168	-6.2%	33.0%	28.9%
Silent Generations	21,676		13,040	-39.8%	5.6%	3.1%
Age not specified	67		41	-38.8%	0.0%	0.0%
<b>Total</b>	<b>388,136</b>		<b>415,648</b>	<b>7.1%</b>		



# CARRIERS YTD APRIL

**415,648**  
VISITORS

**7.1%**  
GROWTH

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
JETBLUE	94,801	943	95,744	1.0%	24.4%	23.0%
AMERICAN AIRLINES	67,659	26,336	93,995	38.9%	17.4%	22.6%
DELTA AIRLINE	45,456	11,861	57,317	26.1%	11.7%	13.8%
UNITED AIRLINES	54,936	-6,768	48,168	-12.3%	14.2%	11.6%
SOUTHWEST AIRLINES	26,286	-6,997	19,289	-26.6%	6.8%	4.6%
AVIANCA	15,716	-331	15,385	-2.1%	4.0%	3.7%
KLM ROYAL DUTCH	10,944	2,034	12,978	18.6%	2.8%	3.1%
COPA AIRLINE	11,518	1,324	12,842	11.5%	3.0%	3.1%
AIR CANADA	7,299	1,831	9,130	25.1%	1.9%	2.2%
WESTJET AIRLINES	975	7,745	8,720	794.4%	0.3%	2.1%
SUNWING AIRLINES	7,448	-824	6,624	-11.1%	1.9%	1.6%
DIVI DIVI AIR	3,043	2,402	5,445	78.9%	0.8%	1.3%
TUI NL / ARKEFLIGHT	6,833	-1,577	5,445	-23.1%	1.8%	1.3%
AERO REPUBLICA/ WINGO	303	4,867	5,256	1606.3%	0.1%	1.2%
SPIRIT AIRLINES	1,731	2,656	4,387	153.4%	0.4%	1.1%
EZ AIR	677	2,627	3,304	388.0%	0.2%	0.8%
PRIVATE	1,894	492	2,386	26.0%	0.5%	0.6%
SUN COUNTRY	2,399	-144	2,255	-6.0%	0.6%	0.5%
SURINAM AIRWAYS	1,551	76	1,627	4.9%	0.4%	0.4%
CHARTER	11,497	-10,042	1,455	-87.3%	3.0%	0.4%
SUNCLASS AIRLINES	0	1,158	1,158	-	0.0%	0.3%
JETAIR CARIBBEAN	1	788	789	78800.0%	0.0%	0.2%
BRITISH AIRWAYS	0	411	411	-	0.0%	0.1%
WINAIR	1,692	-1,343	349	-79.4%	0.4%	0.1%
ARAJET	5,622	-5,275	347	-93.8%	1.4%	0.1%
EASTERN AIRLINES	0	329	329	-	0.0%	0.1%
Others	7,855	-7,067	788	-90.0%	2.0%	0.2%
<b>Total</b>	<b>388,136</b>	<b>27,512</b>	<b>415,648</b>	<b>7.1%</b>		

# APRIL RESULT 2023

NORTH AMERICA



91,544

83.7%

SOUTH AMERICA



9,514

8.7%

EUROPE



5,631

5.1%

OTHERS



2,654

2.4%

TOTAL ARRIVALS

109,343

100%





# ARRIVALS APRIL

**109,343**  
ARRIVALS

**16.4%**  
GROWTH

	2019	Growth	2023	% Growth
USA	72,681		86,992	19.7%
Canada	3,997	555	4,552	13.9%
<b>NA</b>	<b>76,678</b>	<b>14,866</b>	<b>91,544</b>	<b>19.4%</b>
Venezuela	940	-764	176	-81.3%
Colombia	2,874	858	3,732	29.9%
Brazil	754	180	934	23.9%
Argentina	904	501	1,405	55.4%
Chile	705	-169	536	-24.0%
Ecuador	152	317	469	208.6%
Peru	467	-88	379	-18.8%
Paraguay	212	-121	91	-57.1%
Uruguay	217	-104	113	-47.9%
Mexico	173	161	334	93.1%
Others	1,095	250	1,345	22.8%
<b>SA</b>	<b>8,493</b>	<b>1,021</b>	<b>9,514</b>	<b>12.0%</b>
Netherlands	3,669	-293	3,376	-8.0%
UK	374	119	493	31.8%
Germany	653	-245	408	-37.5%
Italy	367	-189	178	-51.5%
Sweden	170	-102	68	-60.0%
Belgium	317	-83	234	-26.2%
Austria	45	6	51	13.3%
Switzerland	246	-61	185	-24.8%
Others	779	-141	638	-18.1%
<b>Europe</b>	<b>6,620</b>	<b>-989</b>	<b>5,631</b>	<b>-14.9%</b>
<b>ROW</b>	<b>2,162</b>	<b>492</b>	<b>2,654</b>	<b>22.8%</b>
<b>Total</b>	<b>93,953</b>	<b>15,390</b>	<b>109,343</b>	<b>16.4%</b>
<b>W/O Ven.</b>	<b>93,013</b>	<b>16,154</b>	<b>109,167</b>	<b>17.4%</b>

Marketshare 2019	Marketshare 2023
77.4%	79.6%
4.3%	4.2%
81.6%	83.7%
1.0%	0.2%
3.1%	3.4%
0.8%	0.9%
1.0%	1.3%
0.8%	0.5%
0.2%	0.4%
0.5%	0.3%
0.2%	0.1%
0.2%	0.1%
0.2%	0.3%
1.2%	1.2%
9.0%	8.7%
3.9%	3.1%
0.4%	0.5%
0.7%	0.4%
0.4%	0.2%
0.2%	0.1%
0.3%	0.2%
0.0%	0.0%
0.3%	0.2%
0.8%	0.6%
7.0%	5.1%
2.3%	2.4%



# ARRIVALS USA APRIL

**86,992**  
ARRIVALS

**19.7%**  
GROWTH

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
New York	14,035	1,500	15,535	10.7%	19.3%	17.9%
Massachusetts	10,656	3,717	14,373	34.9%	14.7%	16.5%
New Jersey	9,420	1,124	10,544	11.9%	13.0%	12.1%
Pennsylvania	3,739	978	4,717	26.2%	5.1%	5.4%
Illinois	1,437	318	1,755	22.1%	2.0%	2.0%
Connecticut	3,451	702	4,153	20.3%	4.7%	4.8%
Florida	3,306	543	3,849	16.4%	4.5%	4.4%
Ohio	1,724	333	2,057	19.3%	2.4%	2.4%
Maryland	1,772	814	2,586	45.9%	2.4%	3.0%
Michigan	1,396	21	1,417	1.5%	1.9%	1.6%
Virginia	1,827	512	2,339	28.0%	2.5%	2.7%
Georgia	1,272	661	1,933	52.0%	1.8%	2.2%
North Carolina	1,572	1,085	2,657	69.0%	2.2%	3.1%
Texas	1,279	734	2,013	57.4%	1.8%	2.3%
California	1,342	62	1,404	4.6%	1.8%	1.6%
Other	14,453	1,207	15,660	8.4%	19.9%	18.0%
<b>Total</b>	<b>72,681</b>	<b>14,311</b>	<b>86,992</b>	<b>19.7%</b>		



# NIGHTS APRIL

# 730,495 NIGHTS

# 11.7% GROWTH

	2019		Growth	2023	% Growth	ALOS 2019	ALOS 2023
USA	464,298		93,486	557,784	20.1%	6.4	6.4
Canada	31,211		6,539	37,750	21.0%	7.8	8.3
<b>NA</b>	<b>495,509</b>		<b>100,025</b>	<b>595,534</b>	<b>20.2%</b>	6.5	6.5
Venezuela	14,675	-13,215		1,460	-90.1%	15.6	8.3
Colombia	22,645	-60		22,585	-0.3%	7.9	6.1
Brazil	4,706		1,039	5,745	22.1%	6.2	6.2
Argentina	7,807		4,078	11,885	52.2%	8.6	8.5
Chile	5,179	-1,269		3,910	-24.5%	7.3	7.3
Ecuador	1,106		1,261	2,367	114.0%	7.3	5.0
Peru	2,845	-331		2,514	-11.6%	6.1	6.6
Paraguay	1,388	-742		646	-53.5%	6.5	7.1
Uruguay	1,595	-712		883	-44.6%	7.4	7.8
Mexico	1,057		769	1,826	72.8%	6.1	5.5
Others	7,586		718	8,304	9.5%	6.9	6.2
<b>SA</b>	<b>70,589</b>	<b>-8,464</b>		<b>62,125</b>	<b>-12.0%</b>	8.3	6.5
Netherlands	47,194	-8,692		38,502	-18.4%	12.9	11.4
UK	3,154		1,622	4,776	51.4%	8.4	9.7
Germany	6,148	-1,961		4,187	-31.9%	9.4	10.3
Italy	2,982	-1,372		1,610	-46.0%	8.1	9.0
Sweden	1,311	-811		500	-61.9%	7.7	7.4
Belgium	2,969	-832		2,137	-28.0%	9.4	9.1
Austria	478	-60		418	-12.6%	10.6	8.2
Switzerland	2,080	-205		1,875	-9.9%	8.5	10.1
Others	6,742	-1,157		5,585	-17.2%	8.7	8.8
<b>Europe</b>	<b>73,058</b>	<b>-13,468</b>		<b>59,590</b>	<b>-18.4%</b>	11.0	10.6
<b>ROW</b>	<b>14,619</b>	<b>-1,373</b>		<b>13,246</b>	<b>-9.4%</b>	6.8	5.0
<b>Total</b>	<b>653,775</b>		<b>76,720</b>	<b>730,495</b>	<b>11.7%</b>	7.0	6.7





# ACCOMMODATIONS APRIL

**109,343**  
ARRIVALS

**16.4%**  
GROWTH

## ARRIVALS BY ACCOMMODATION

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
EP	32,989	-2,575	30,414	-7.8%	35.1%	27.8%
All Inclusive	17,682	2,249	19,931	12.7%	18.8%	18.2%
Timeshare	24,999	6,420	31,419	25.7%	26.6%	28.7%
Others	18,283	9,296	27,579	50.8%	19.5%	25.2%
<b>Total</b>	<b>93,953</b>	<b>15,390</b>	<b>109,343</b>	<b>16.4%</b>		

## NIGHTS BY ACCOMMODATION

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
EP	190,064	-20,001	170,063	-10.5%	29.1%	23.3%
All Inclusive	108,138	10,416	118,554	9.6%	16.5%	16.2%
Timeshare	188,012	47,539	235,551	25.3%	28.8%	32.2%
Others	167,561	38,766	206,327	23.1%	25.6%	28.2%
<b>Total</b>	<b>653,775</b>	<b>76,720</b>	<b>730,495</b>	<b>11.7%</b>		

Note: The European Plan, sometimes abbreviated as EP in hotel listings, indicates that the quoted rate is strictly for lodging and does not include any meals.





# VISITORS BY AGE APRIL

**109,343**  
ARRIVALS

**16.4%**  
GROWTH

















	2019	Growth	2023	% Growth
0 - 11	8,559	843	9,402	9.8%
12-19	7,665	1,244	8,909	16.2%
20 - 29	8,678	1,344	10,022	15.5%
30 - 39	14,147	2,690	16,837	19.0%
40 - 49	17,830	2,183	20,013	12.2%
50 - 59	18,448	2,186	20,634	11.8%
60 - 69	12,819	2,897	15,716	22.6%
70 +	5,802	2,001	7,803	34.5%
Not Stated	5	2	7	40.0%
<b>Total</b>	<b>93,953</b>	<b>15,390</b>	<b>109,343</b>	<b>16.4%</b>



# GENERATIONS APRIL

**109,343**  
ARRIVALS

**16.4%**  
GROWTH

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
Gen A	0	 7,088	7,088	#DIV/0!	0.0%	 6.5%
Gen Z	16,955	-1,095 	15,860	-6.5%	 18.0%	 14.5%
Millennials	19,084	 7,266	26,350	38.1%	 20.3%	 24.1%
Gen X	26,579	 4,124	30,703	15.5%	 28.3%	 28.1%
Baby Boomers	27,335		26,764	-2.1%	 29.1%	 24.5%
Silent Generations	3,995		2,571	-35.6%	 4.3%	 2.4%
Age not specified	5	2	7	40.0%	0.0%	0.0%
<b>Total</b>	<b>93,953</b>	 <b>15,390</b>	<b>109,343</b>	<b>16.4%</b>		



# CARRIERS APRIL

# 109,343 ARRIVALS

# 16.4% GROWTH

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
JETBLUE	25,894	1,507	27,401	5.8%	27.6%	25.1%
AMERICAN AIRLINES	15,926	7,450	23,376	46.8%	17.0%	21.4%
UNITED AIRLINES	14,460	603	15,063	4.2%	15.4%	13.8%
DELTA AIRLINE	10,967	2,686	13,653	24.5%	11.7%	12.5%
SOUTHWEST AIRLINES	5,295	374	5,669	7.1%	5.6%	5.2%
AVIANCA	4,204	542	4,746	12.9%	4.5%	4.3%
COPA AIRLINE	2,977	381	3,358	12.8%	3.2%	3.1%
KLM ROYAL DUTCH	2,943	-278	2,665	-9.4%	3.1%	2.4%
WESTJET AIRLINES	0	1,802	1,802	-	0.0%	1.6%
AIR CANADA	1,528	-54	1,474	-3.5%	1.6%	1.3%
DIVI DIVI	693	714	1,407	103.0%	0.7%	1.3%
TUI NL	0	1,385	1,385	-	0.0%	1.3%
SPIRIT AIRLINES	441	798	1,239	181.0%	0.5%	1.1%
AERO REPUBLICA/ WINGO	0	1,199	1,199	-	0.0%	1.1%
SUNWING AIRLINES	1,114	-204	910	-18.3%	1.2%	0.8%
EZ AIR	260	594	854	228.5%	0.3%	0.8%
SURINAM AIRWAYS	575	110	685	19.1%	0.6%	0.6%
PRIVATE	455	-12	443	-2.6%	0.5%	0.4%
BRITISH AIRWAYS	0	339	339	-	0.0%	0.3%
EASTERN AIRLINES	0	329	329	-	0.0%	0.3%
CHARTER	2,231	-1,932	299	-86.6%	2.4%	0.3%
GLOBAL X	0	265	265	-	0.0%	0.2%
SUN COUNTRY	120	139	259	115.8%	0.1%	0.2%
JETAIR CARIBBEAN	0	216	216	-	0.0%	0.2%
ARAJET	0	111	111	-	0.0%	0.1%
WINAIR	422	-330	92	-78.2%	0.4%	0.1%
OTHERS	3,448	-3,344	104	-97.0%	3.7%	0.1%
<b>Total</b>	<b>93,953</b>	<b>15,390</b>	<b>109,343</b>	<b>16.4%</b>		





# CRUISE COMPARISON



*One happy island* ✦ [ARUBA.COM](http://ARUBA.COM)





# CRUISE YTD APRIL



2019



CRUISE PAX

**355,435**

CRUISE CALLS

**143**



2023



CRUISE PAX

**425,620**

**19.7%**

CRUISE CALLS

**165**

**15.4%**

ABSOLUTE GROWTH PAX YTD APRIL

**70,185**

**19.7%**

ABSOLUTE GROWTH CALLS YTD APRIL

**22**

**15.4%**



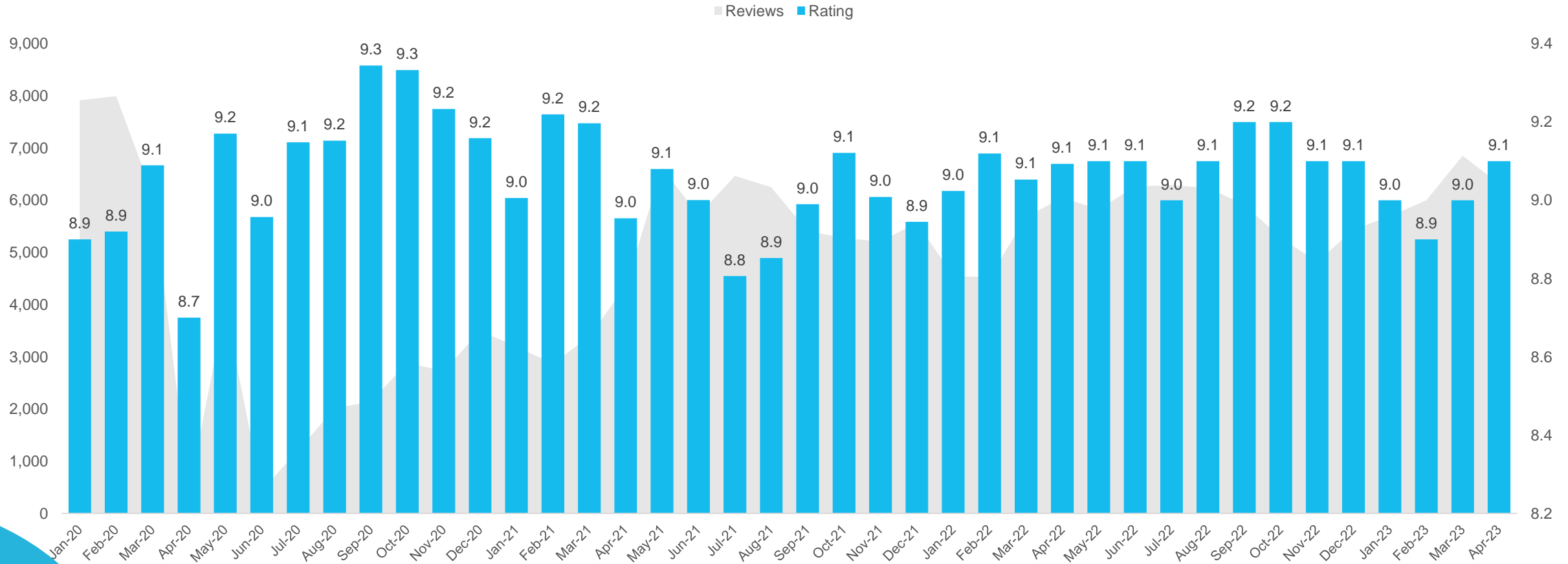
# GUEST SATISFACTION





# GUEST EXPERIENCE INDEX (GEI)

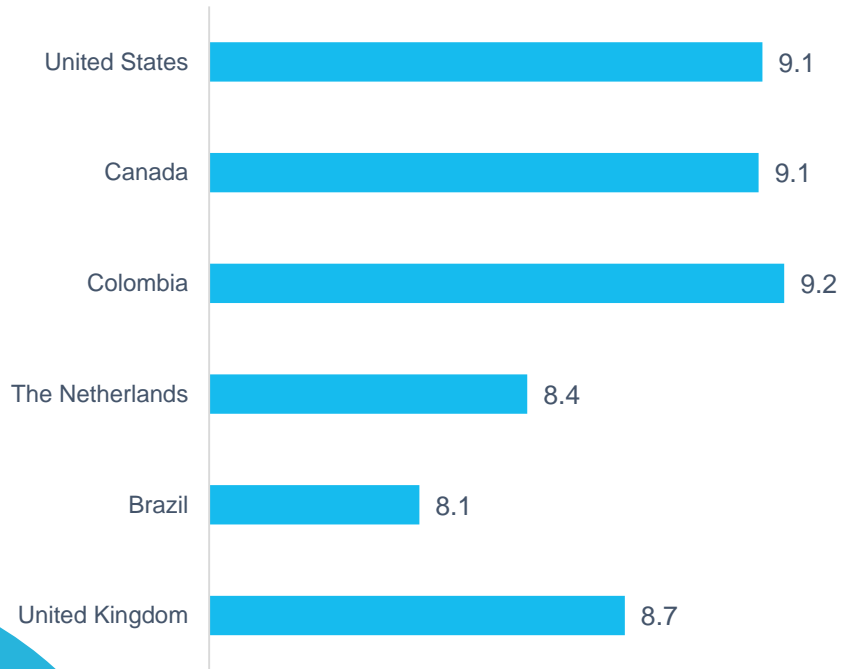
## Reviews and Ratings



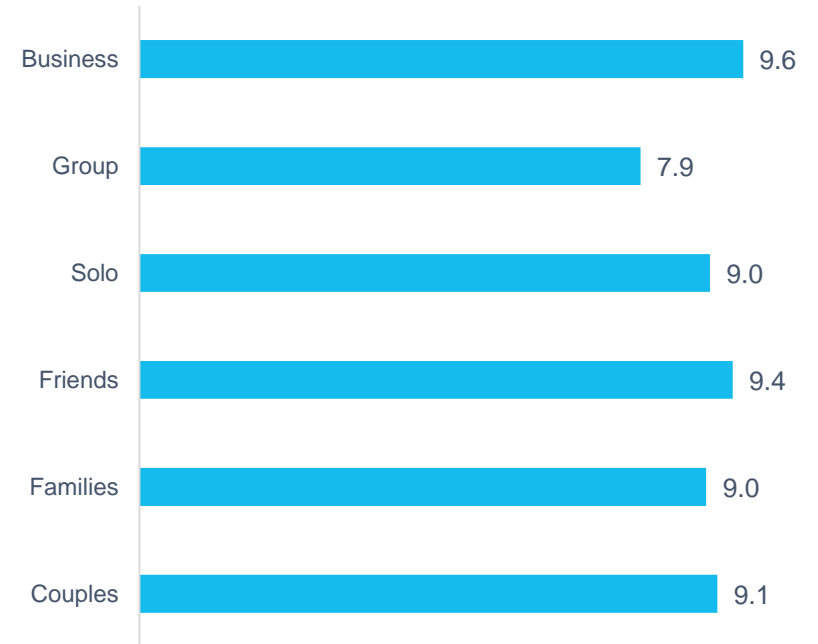


# GEI April 2023

## Markets



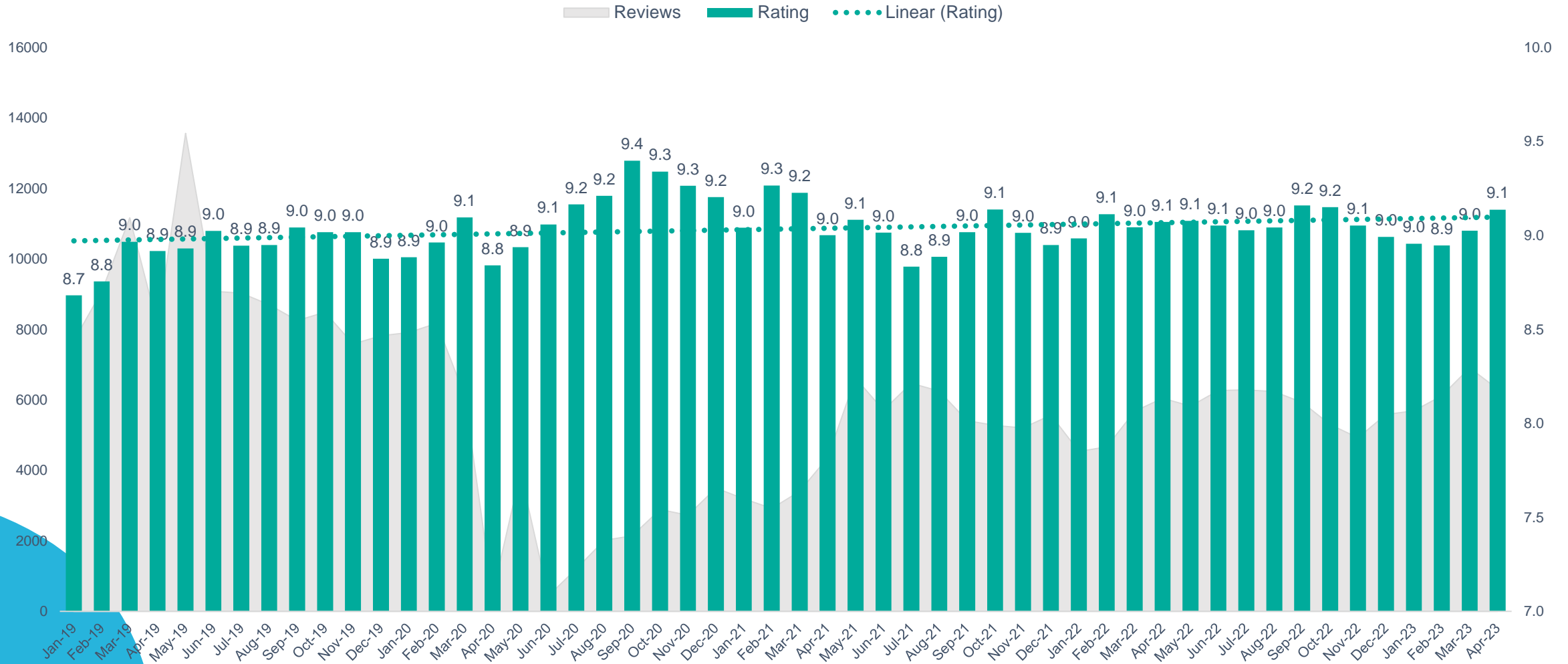
## Travel Party





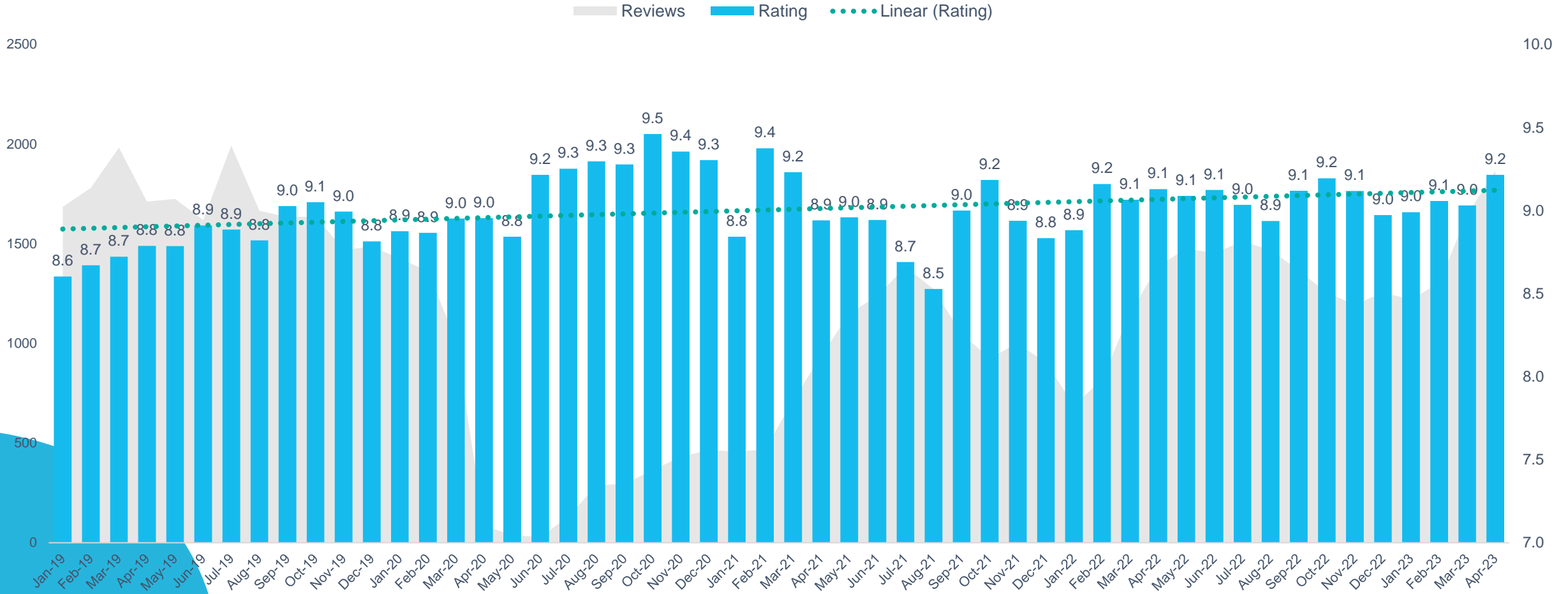


# Overall



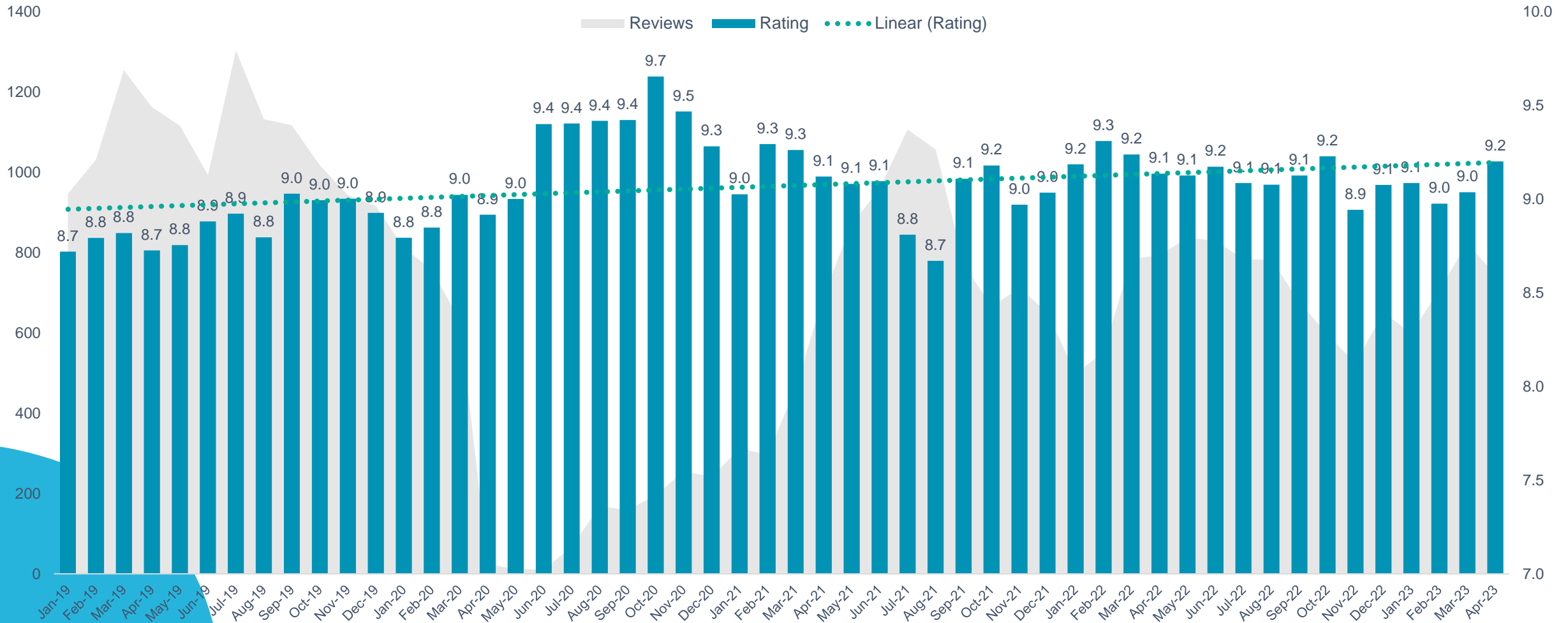


# Service



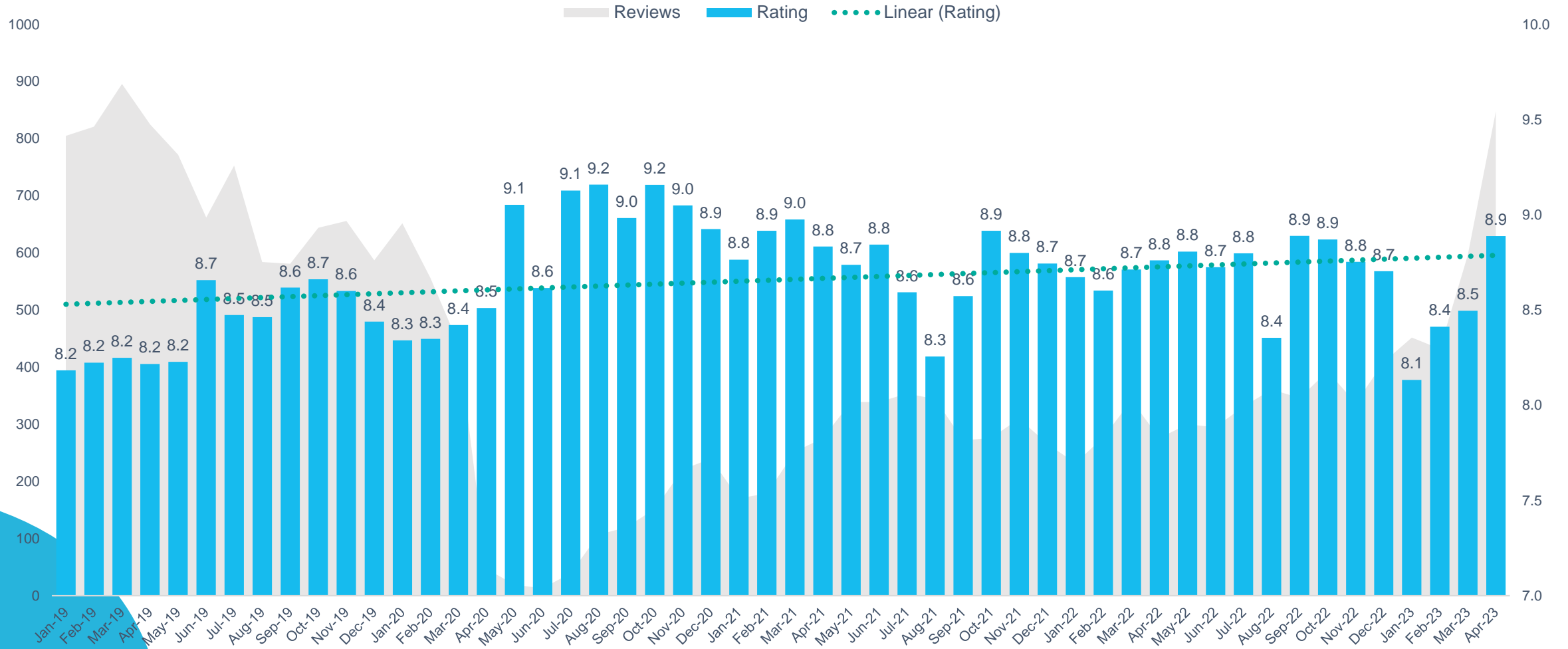


# Cleanliness





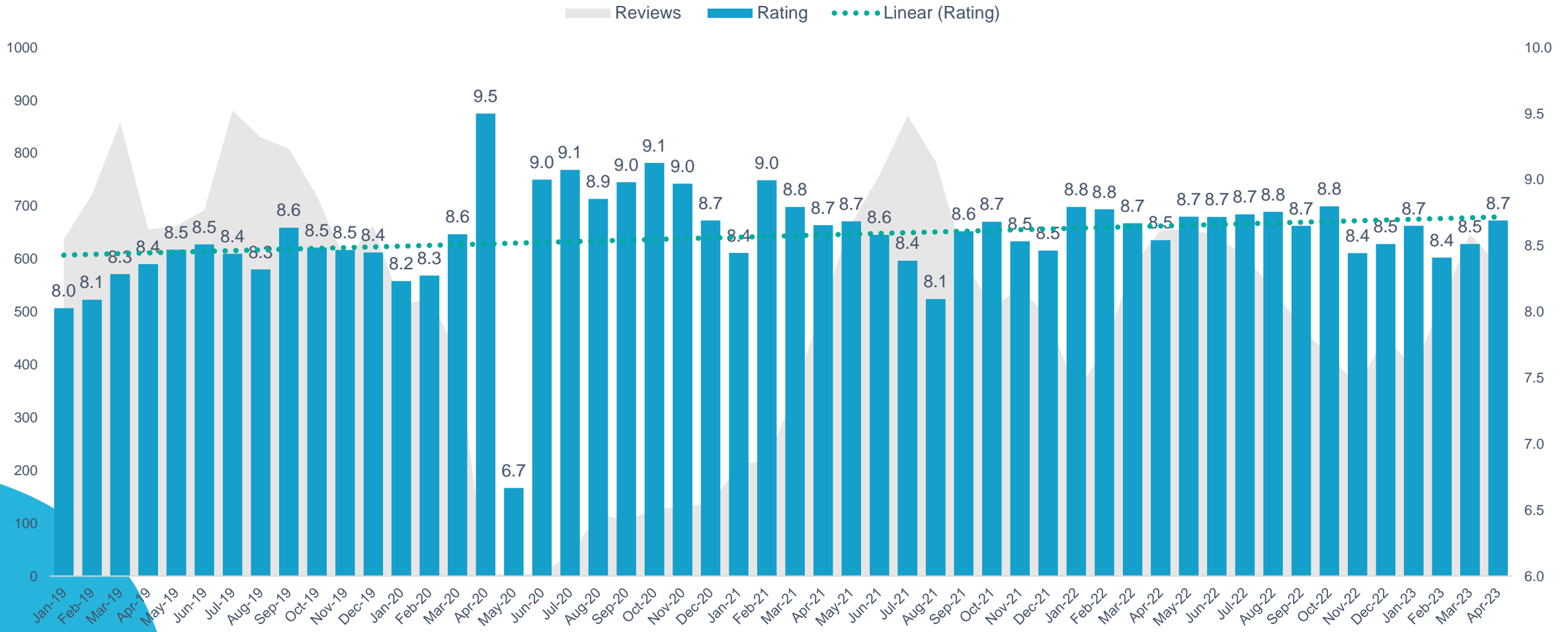
# Value





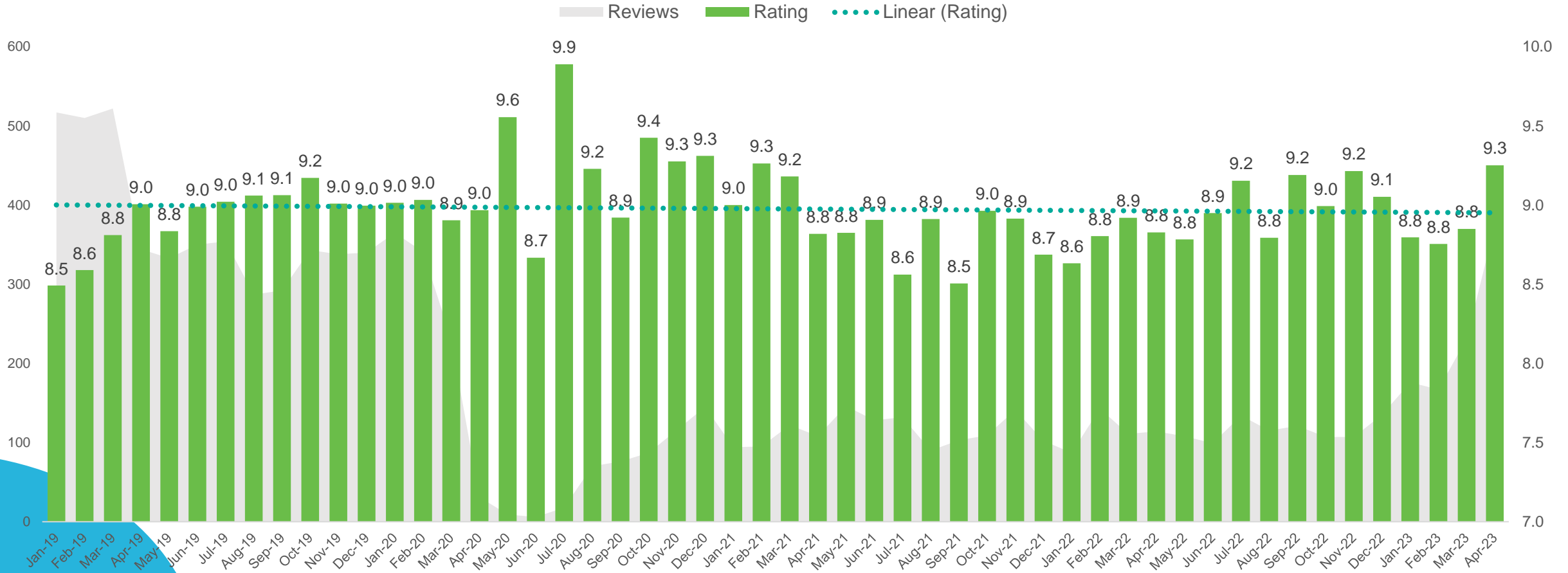


# Facilities





# Location





# VACATIONS RENTALS

 **Transparent**

an OTA INSIGHT company



# INTRODUCTION

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





# NUMBER OF PROPERTIES

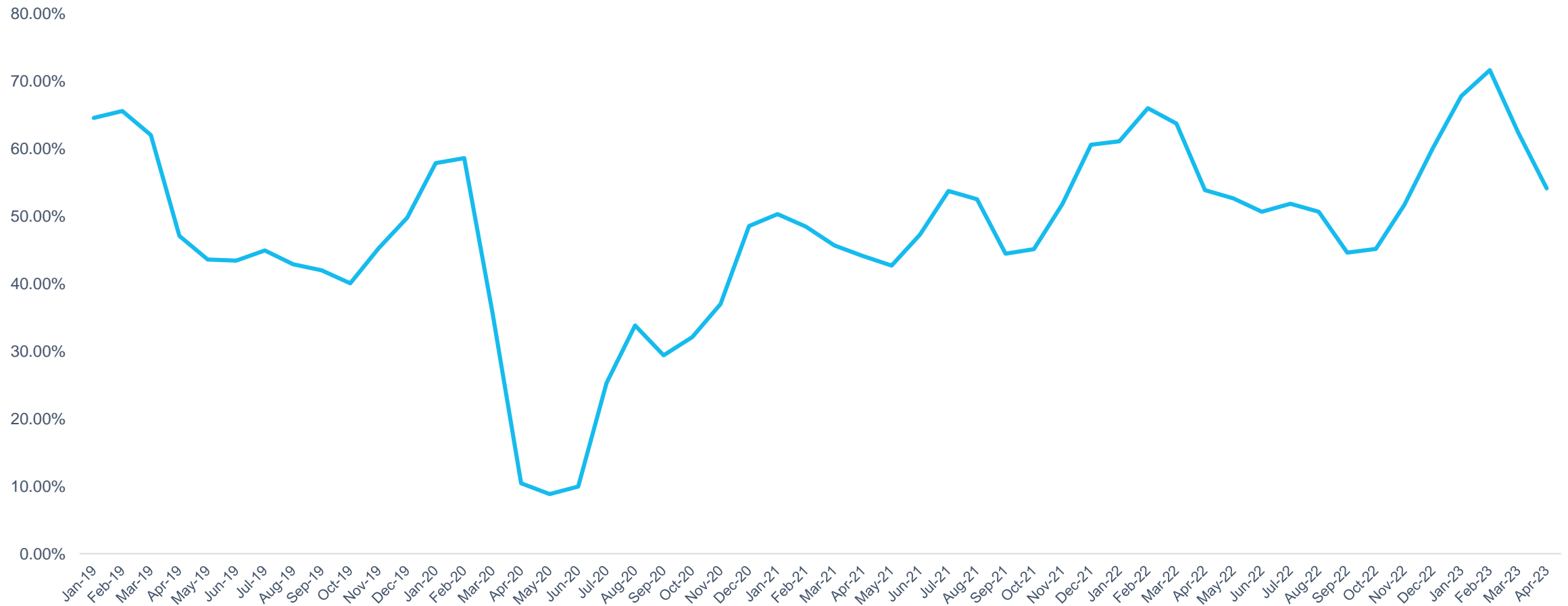
## AVAILABLE IN A SPECIFIC MONTH



	Jan	Feb	Mar	April
2019	2,985	2,937	2,947	2,969
2022	3,615	3,646	3,721	3,735
2023	4,560	4,560	4,651	4,671

# OCCUPANCY

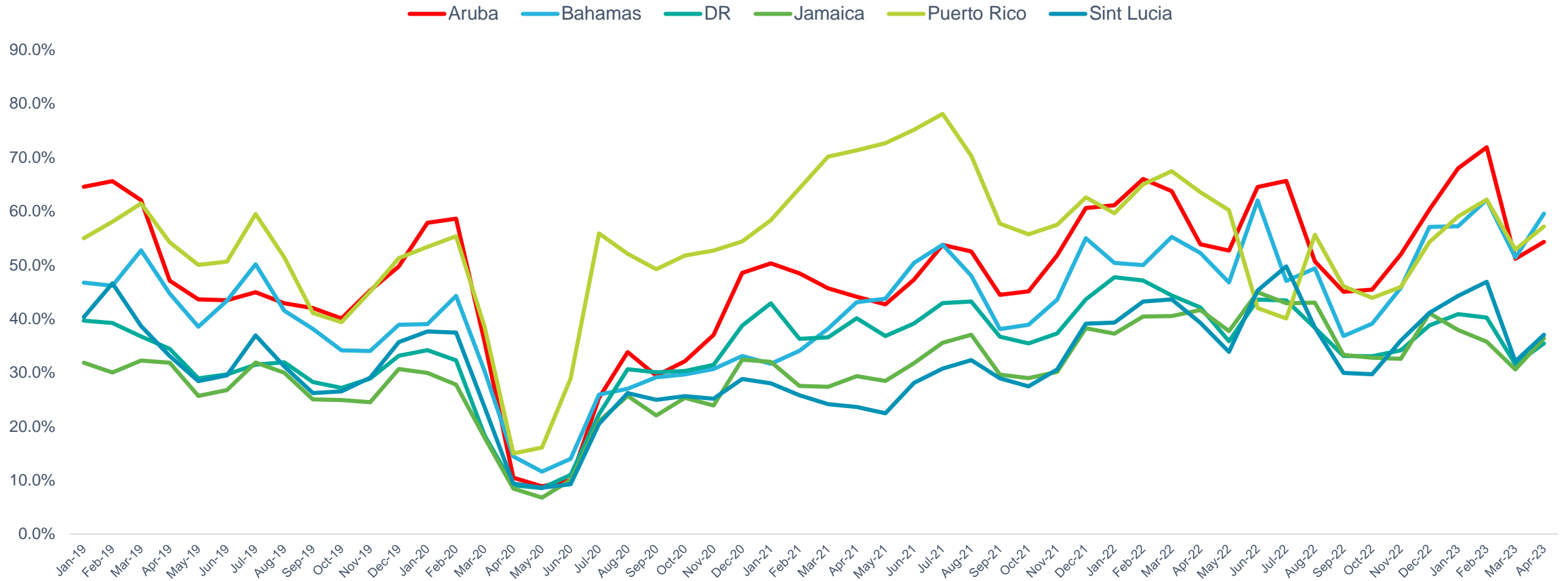
April 2023 Occupancy: 54.1% | April 2022 Occupancy: 53.8%



# CARIBBEAN OCCUPANCY

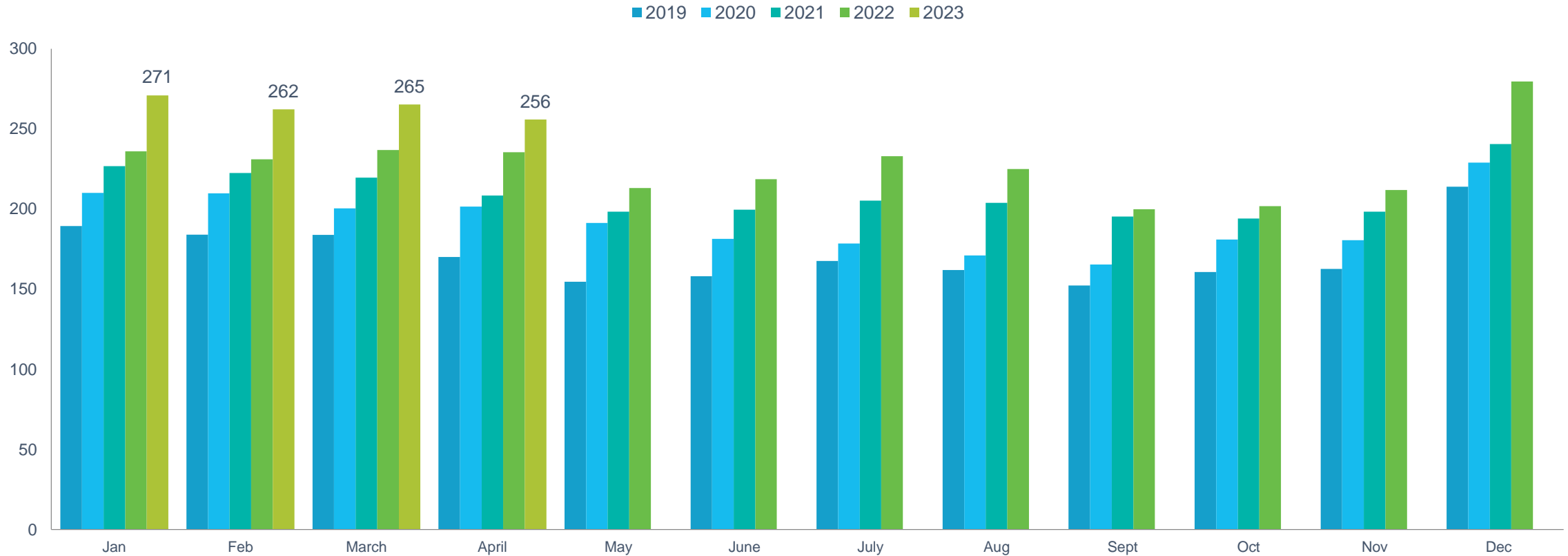
April

AUA: 54.1% | Bahamas: 59.5% | DR: 35.4% | Jamaica: 36.4% | PR: 57.1% | Sint Lucia: 37%



# AVERAGE DAILY RATE (ADR)

April 2023 ADR: USD\$256 | April 2019 ADR: USD\$170

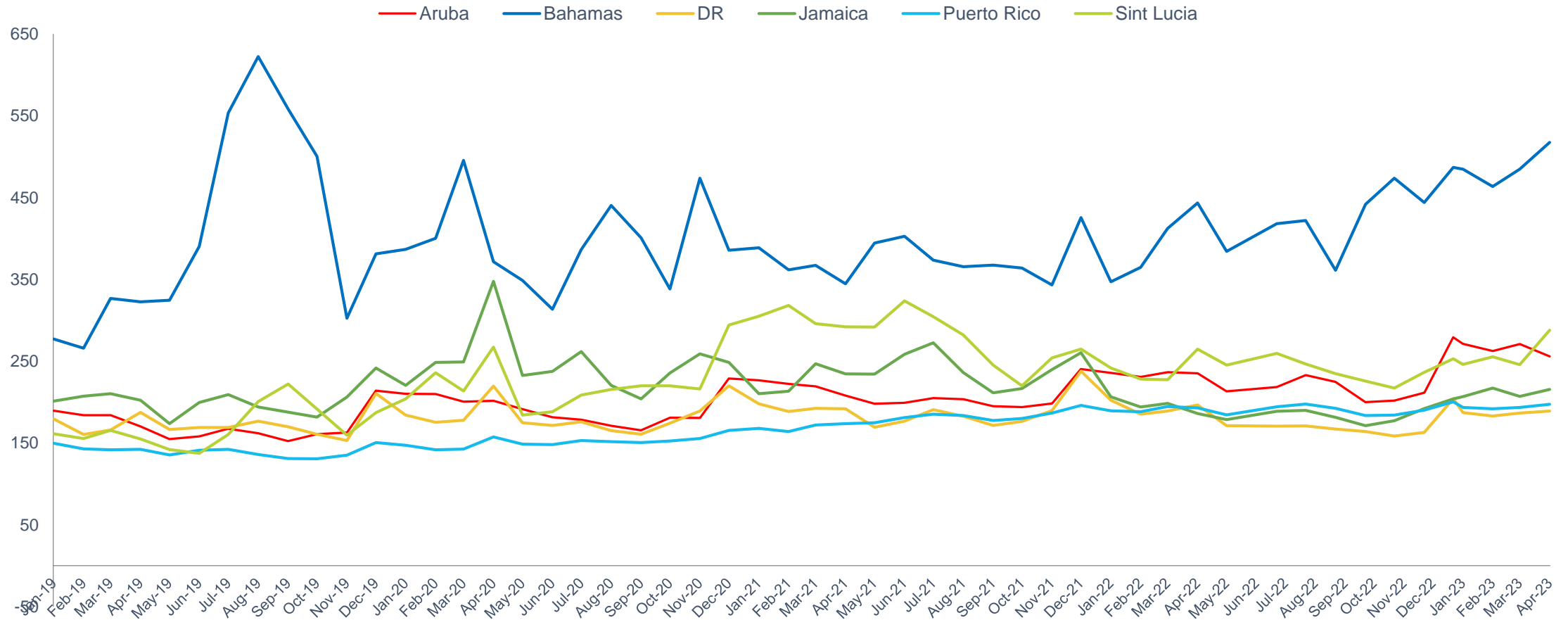




# CARIBBEAN ADR

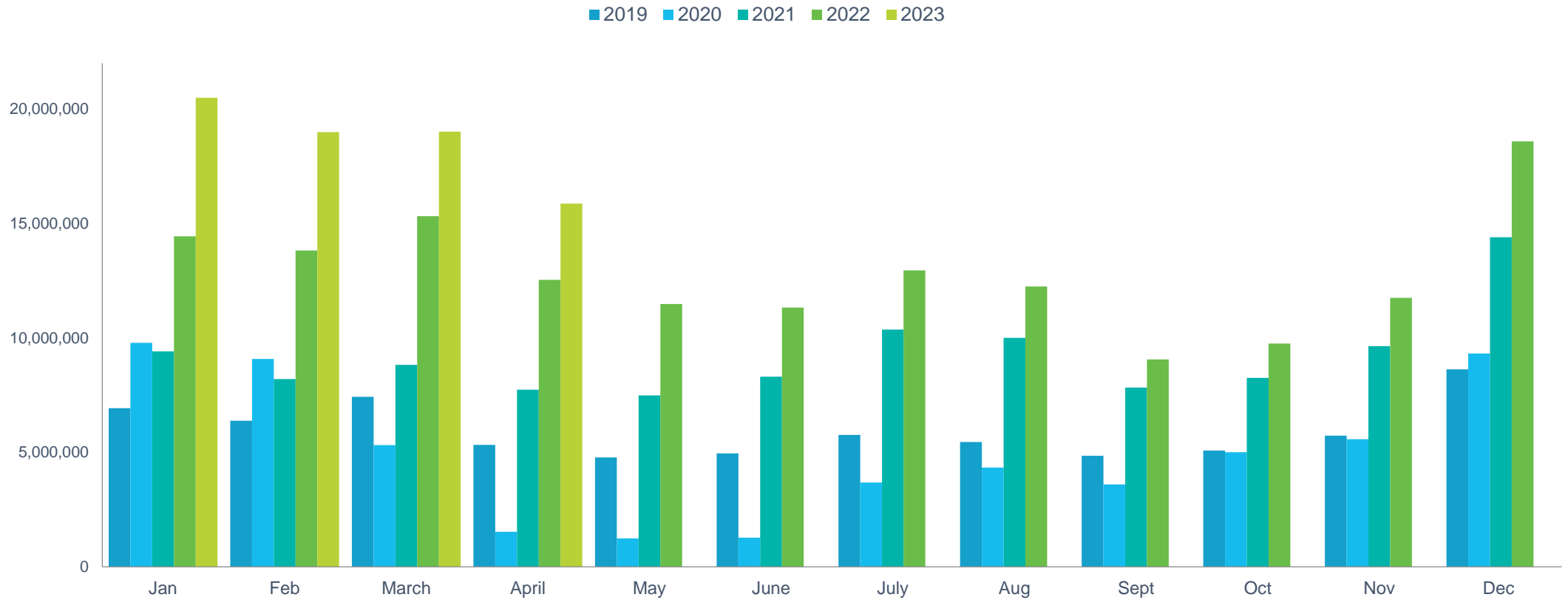
April

AUA: USD\$256 | Bahamas: USD\$517 | DR: USD\$189 | Jamaica: USD\$215 | PR: USD\$197 | Sint Lucia: USD\$288



# REVENUE

*April 2023 Revenue: USD\$ 15,866,260 | April 2022 Revenue: USD\$ 12,536,276*  
YTD April Total Revenue 2023: USD\$ 74,360,863 (YTD April 2022: USD\$ 456,115,298)



# T I D B I T S

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ATA RESEARCH



A group of four young adults are hiking on a sandy path. From left to right: a woman in a red and white striped shirt and green shorts holding binoculars; a man in a yellow and black striped shirt and khaki shorts wearing sunglasses; a woman in a blue patterned top and green shorts taking a photo with a camera; and a woman in a purple cap, black top, and black leggings. They are surrounded by green foliage and a clear sky.

# Gen Z & Millennials Travel Behavior Report



An aerial photograph showing a person in a green kayak paddling on clear, turquoise water. The water is shallow, revealing a rocky seabed. To the right, a rugged, brownish rock formation meets the water's edge. The overall scene is bright and scenic.

“

“I am a passionate traveler, and from the time I was a child, travel formed me as much as my formal education.”

David Rockefeller



# Table of Content



1. Type of Traveler
2. Values on Sustainability
3. Heard or Traveler to Aruba
4. Dreaming Phase
5. Planning & Booking Phase
6. Hotel Technology & Online Behavior
7. Experience Phase & Spending
8. Demographics



# Headlines on Millennials and Gen-Z

DERIVED FROM SEVERAL RESEARCH CONDUCTED ON THE GENERATIONS



# American Express

## 2022 Global Travel Trends Report

“ As travel continues to recover, this report looks at the motivations and considerations of travelers in Australia, Canada, Mexico, Japan, India, the UK and the US as well as trends shaping the future of travel. 70% of respondents state they are interested in cultural immersion and taking a tour on future trips

**81%**

of respondents agree they want to travel to destinations where they can immerse themselves into the local culture<sup>1</sup>

**81%**

of respondents agree they want the money they spend while traveling to go back to the local community<sup>1</sup>

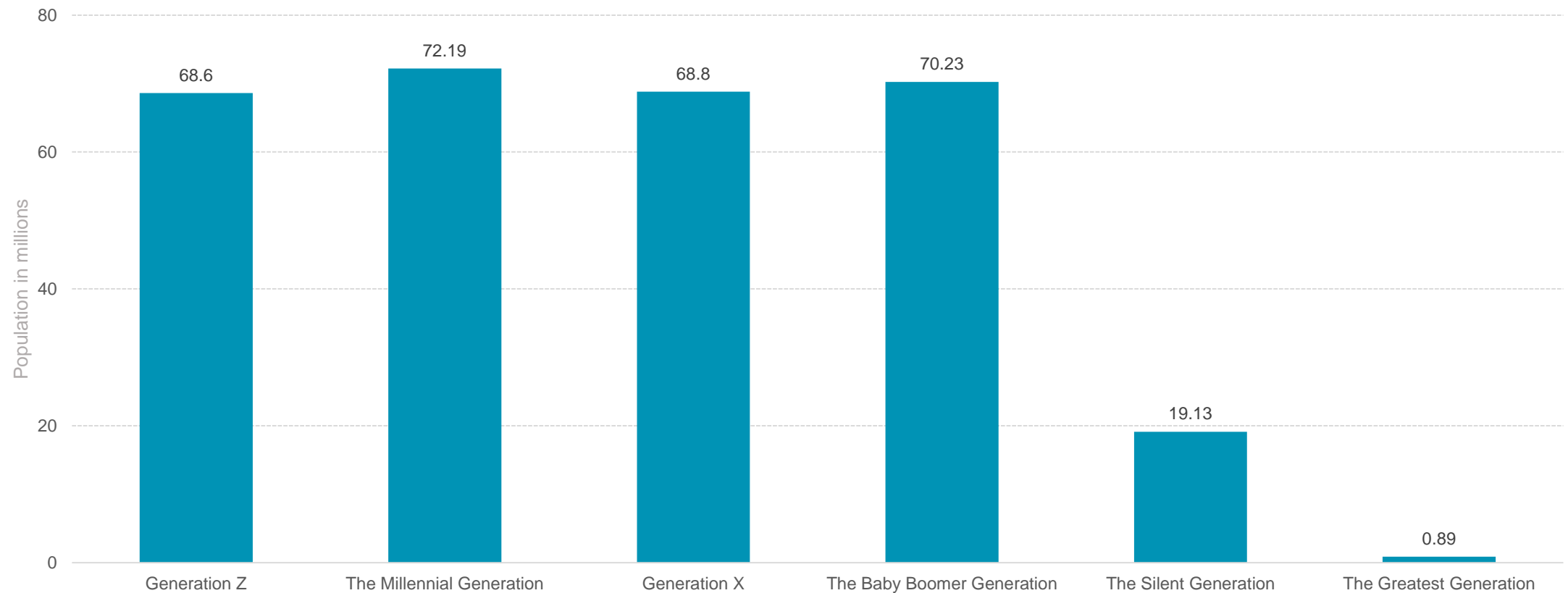
**62%**

of respondents agree they want to be more thoughtful about where and how they travel<sup>1</sup>



# US Population by Generation 2021

Millennials were the largest generation group in the U.S. in 2021, with an estimated population of 72.19 million. Born between 1981 and 1996, Millennials surpassed Baby Boomers as the biggest group and will remain a significant part of the population for many years.



# Definitions

Millennials and Gen Z are born between 1981 and 2015.

Together they make up more than two-thirds of the global population.

They constitute a significant percentage of the world's consumers today, which means they have a massive buying power.

Understanding and gaining more knowledge on these two generations will benefit ATA in strengthening marketing communications.

It is a well-known trend that Millennials prefer experience over material things, and Gen Z's are following in the same direction.



# What do we know about Gen Z?

- 1 Arrivals: 91,706
- 2 8% Market Share
- 3 ALOS 6.8
- 4 June – July – December  
Main months of travel



Source: ATA 2022

# What do we know about Millennials?

- 1 Arrivals: 196,609
- 2 18% Market Share
- 3 ALOS 6.3
- 4 June – May – August – December  
Main months of travel

Source: ATA 2022



37%	12%	19%	32%
High Rise	Low Rise	Timeshare	Other





# Research Results

# Methodology

ATA conducted a market analysis survey on Generation Z and Millennials to understand both generations' desires, needs, and wants for a vacation destination.

An online survey was created and deployed using Qualtrics online services between December 22, 2022 – January 12, 2023.

3,407 responses were collected before the data cleaning, with an end total of 2,515 (N) responses after data cleaning.

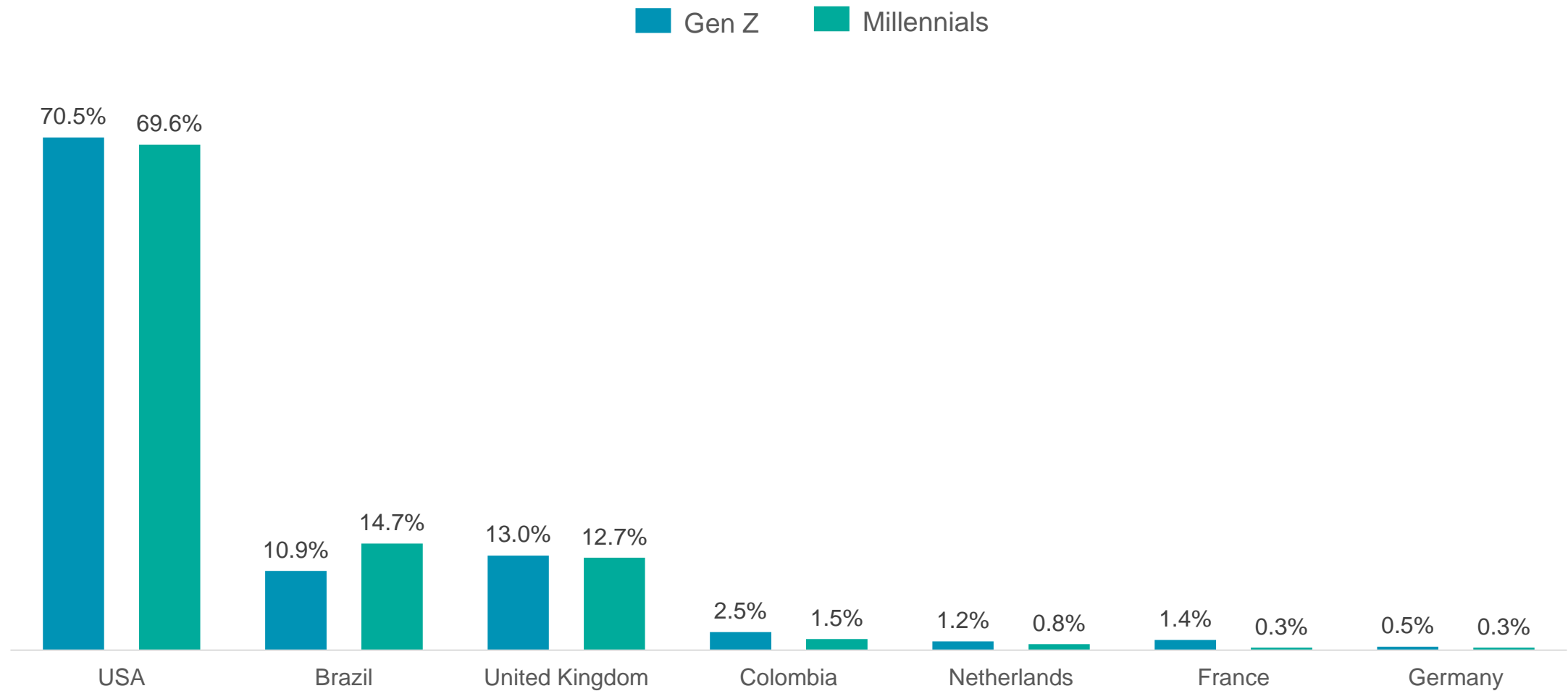
Qualifying criteria:

- Between the age of 18 and 41.
- Reside in one of the following countries: the United States, Colombia, Brazil, the United Kingdom, the Netherlands, France, and Germany.

Screening question: “Have you traveled in the last 24 months, or will you travel in the upcoming 12 months?”



# Country of Residents



## Type of Traveler

Explorer or destination repeater scored equally in both Generations





# Luxury or a Necessity

Millennials tend to prefer spending money on experiences rather than physical goods. Gen Z's also agree with the statement that they would rather spend money on experiences, however a significant number of respondents indicate to feeling neutral towards this statement.

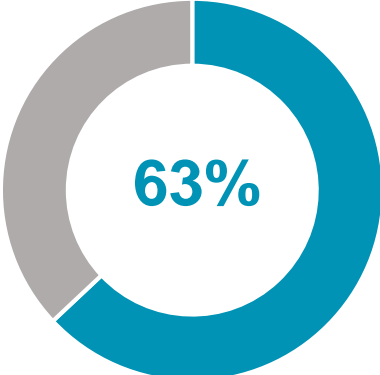




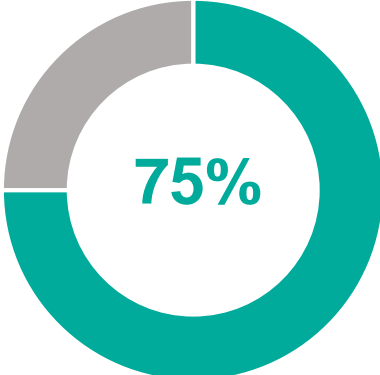
A photograph of three hikers standing on a rocky, grassy cliff overlooking a vast blue ocean. The hikers are seen from behind, looking out at the sea. The scene is captured during the golden hour, with warm light illuminating the landscape. A semi-transparent dark green rectangular box is overlaid on the middle of the image, containing the title text.

# Values on Sustainability

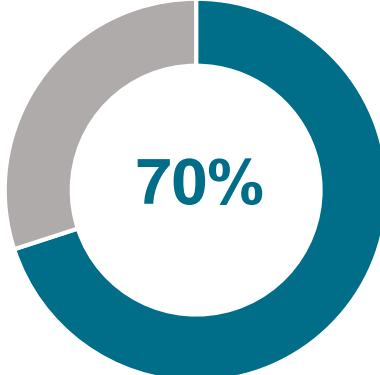
# View on Tourism Impact – Gen Z



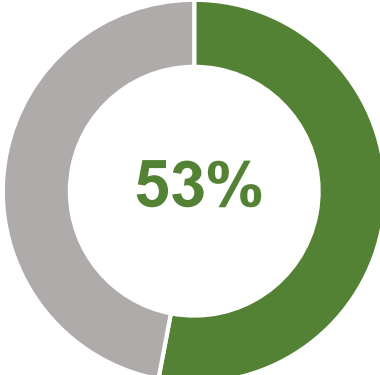
Tourism brings money to the destination's local communities



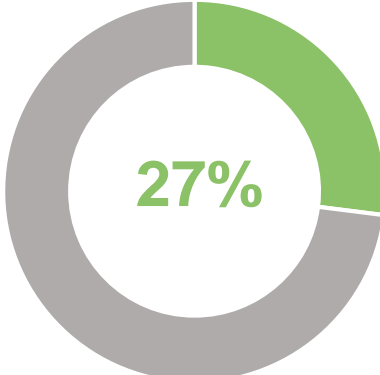
I care about the well-being of the locals in the destination I visit



Too many tourists can cause damage to the destination's local communities



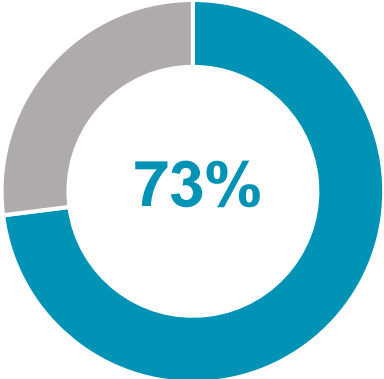
I try to avoid destinations that seem too popular



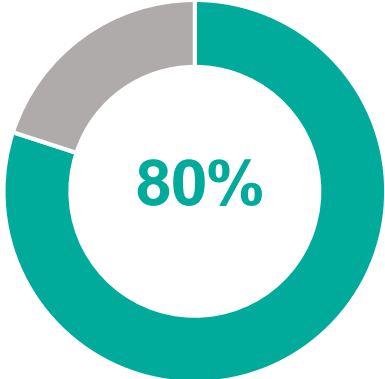
Traveling to other countries is essential to my personal development



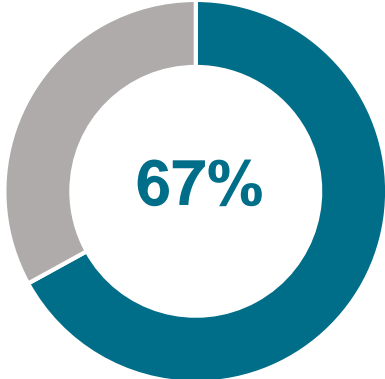
# View on Tourism Impact – Millennials



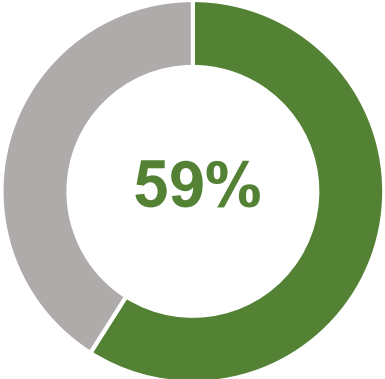
Tourism brings money to the destination's local communities



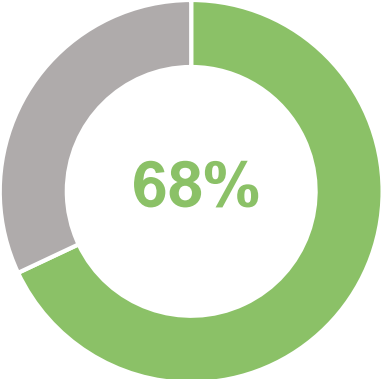
I care about the well-being of the locals in the destination I visit



Too many tourists can cause damage to the destination's local communities



I try to avoid destinations that seem too popular

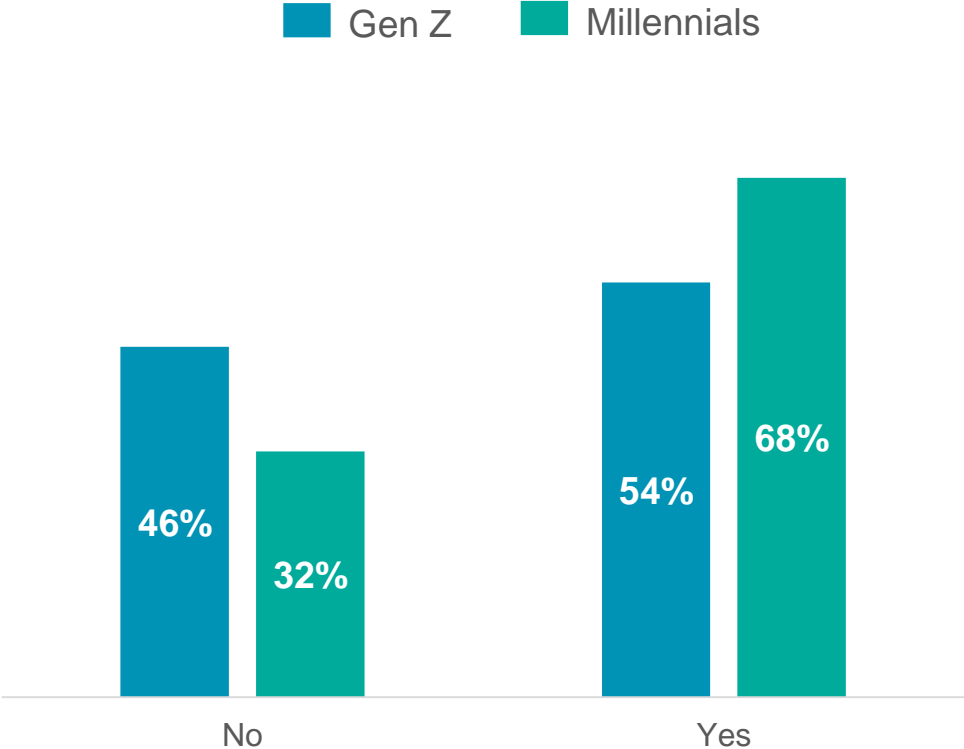


Traveling to other countries is essential to my personal development

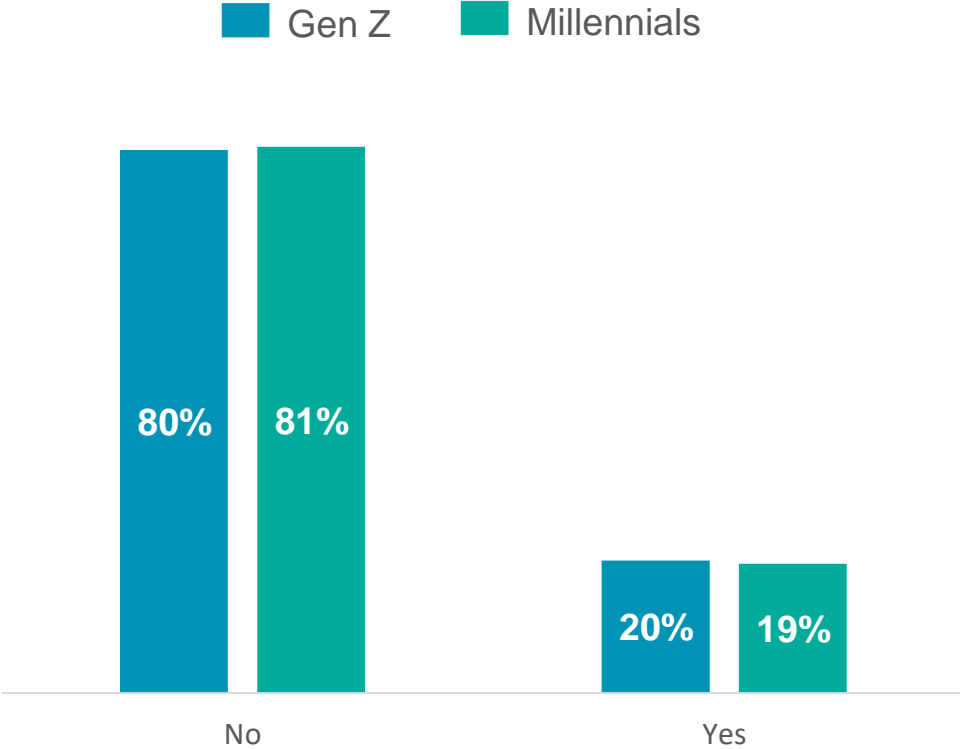
# Heard about Aruba

# Traveled to Aruba before

54% of Gen Z and 68% of the Millennial respondents have heard about Aruba. Of those that heard about Aruba, around 80% have yet to visit Aruba, which is applicable for both generations.



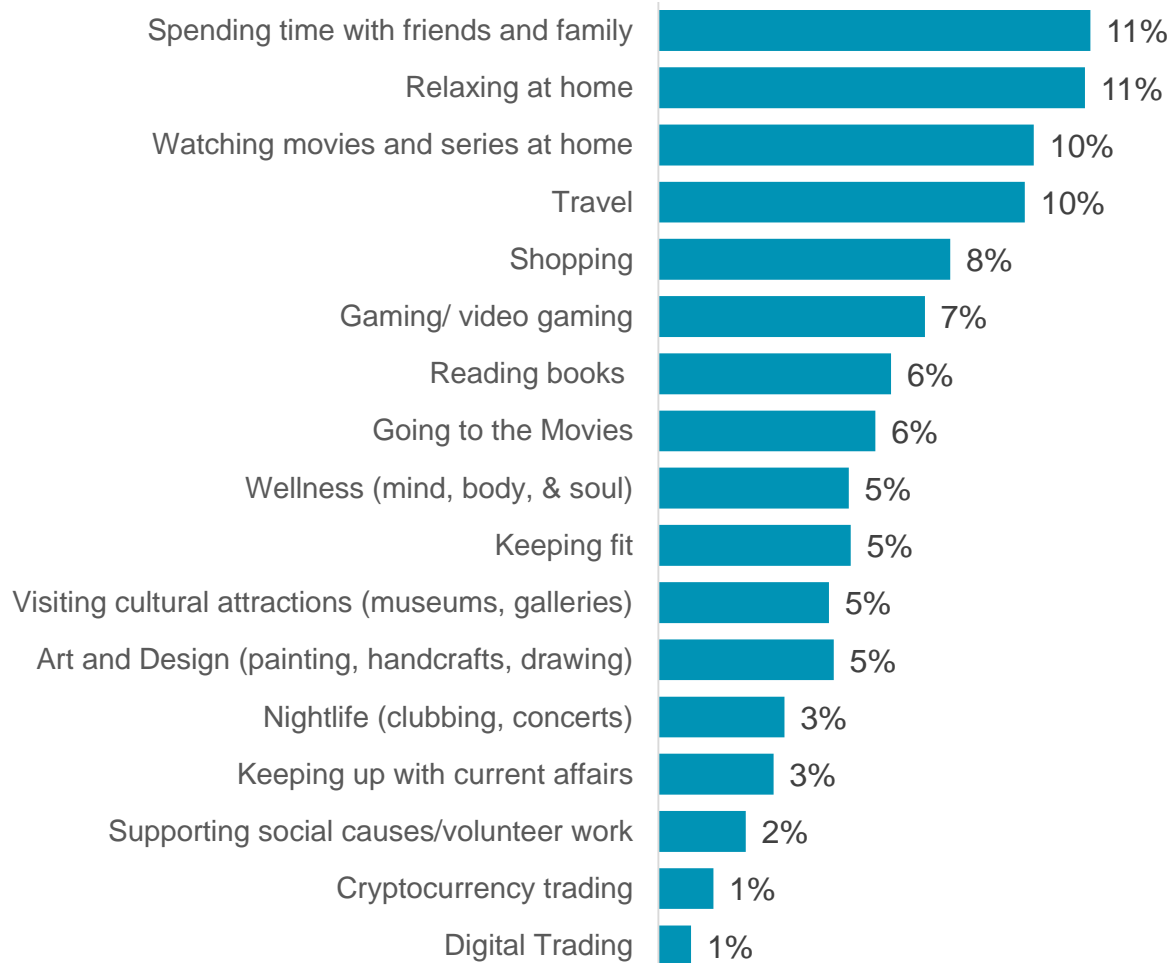
N: 2,515, Gen Z N: 1,083, Millennials N: 1,432  
Q: Have you heard about Aruba before?



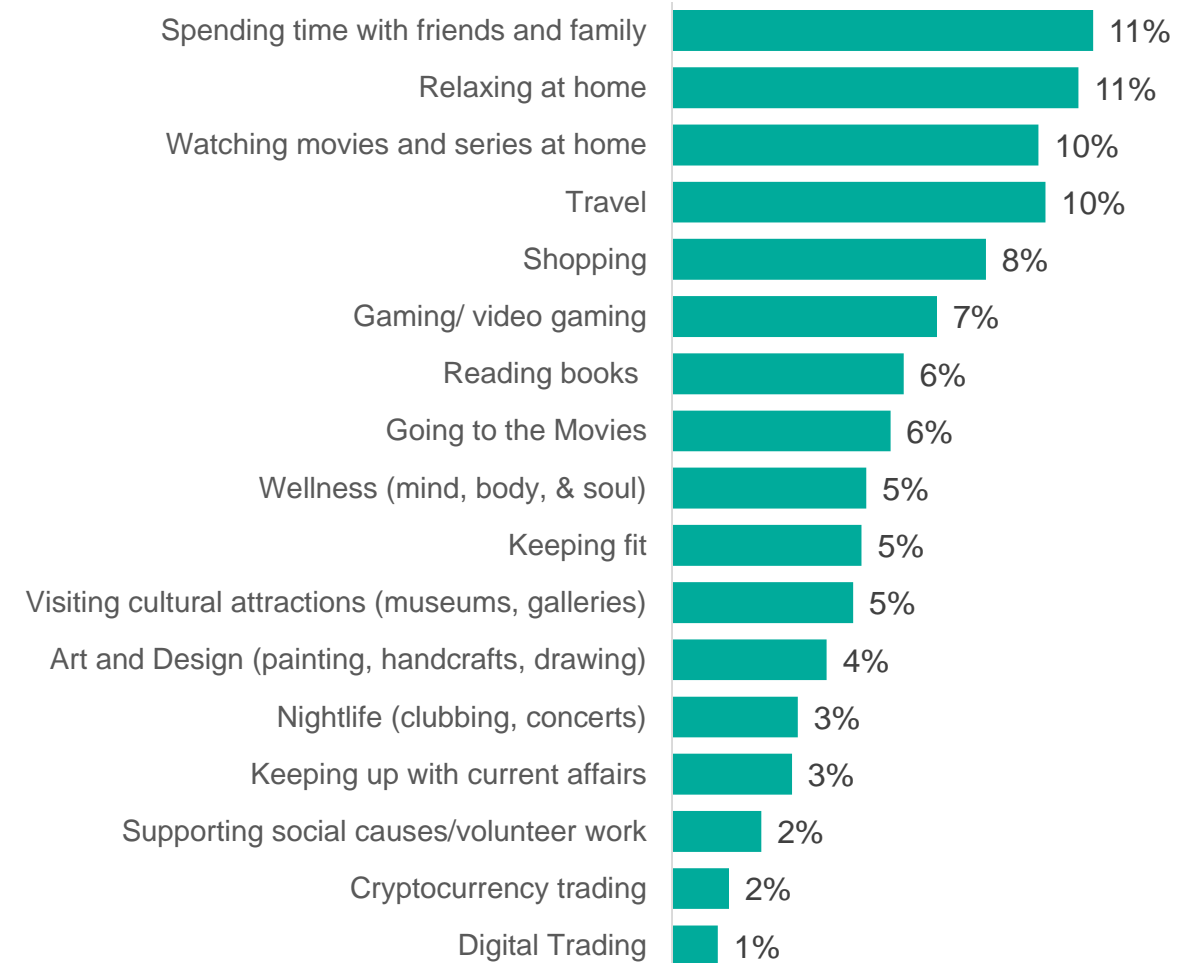
N: 1,559, Gen Z N: 587, Millennials N: 972 (answered "yes" have heard about Aruba before)  
Q: Have you traveled to Aruba before?

# Hobbies and Interests

## Gen Z

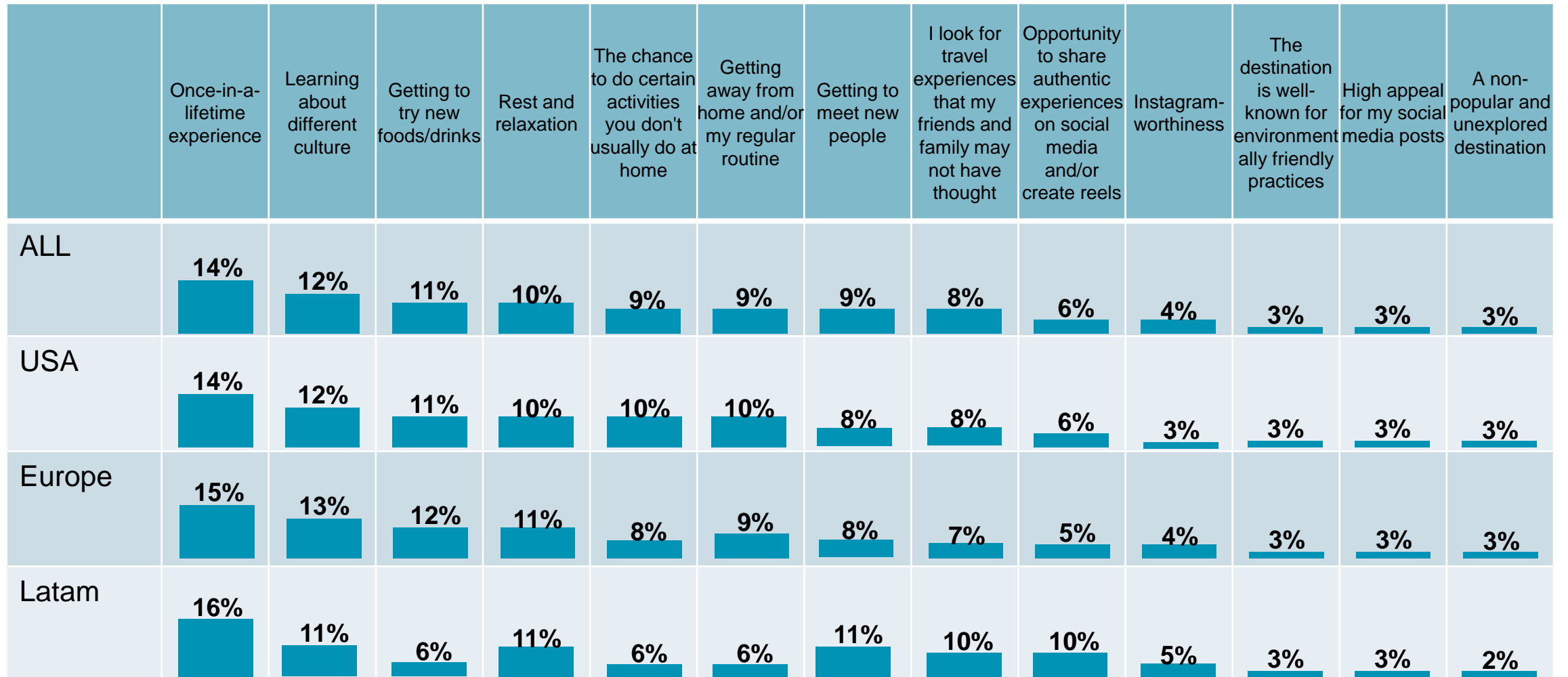


## Millennials





# Destination Bucket List Criteria – Gen Z



# Destination Bucket List Criteria – Millennials

	once-in-a-lifetime experience	Learning about different culture	Getting to try new foods/drinks	Rest and relaxation	The chance to do certain activities you don't usually do at home	Getting away from home and/or my regular routine	Getting to meet new people	I look for travel experiences that my friends and family may not have thought	Opportunity to share authentic experiences on social media and/or create reels	Instagram-worthiness	The destination is well-known for environmentally friendly practices	High appeal for my social media posts	A non-popular and unexplored destination
ALL	14%	13%	11%	12%	9%	10%	7%	6%	5%	3%	3%	2%	3%
USA	14%	13%	11%	12%	10%	11%	7%	6%	5%	3%	3%	2%	3%
Europe	15%	14%	10%	12%	8%	10%	8%	7%	4%	3%	3%	3%	4%
Latam	15%	11%	8%	11%	6%	6%	9%	10%	5%	5%	4%	4%	2%

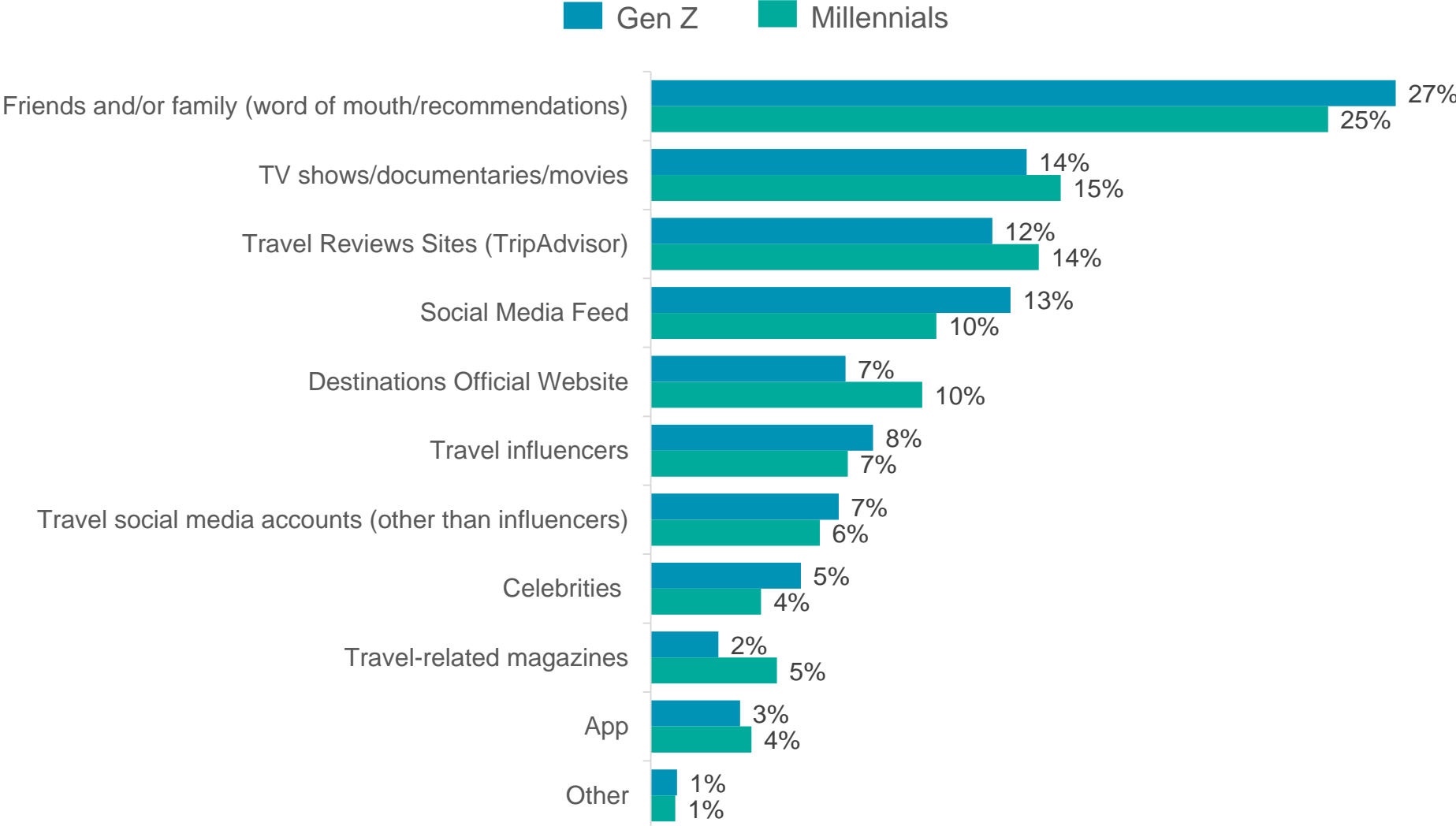
# Top Bucket List Destinations

Bahamas and Australia are the two top destinations for both Gen Z and Millennials, while Japan is the third for Gen Z and Italy is the third for Millennials.





# Travel Inspiration Source

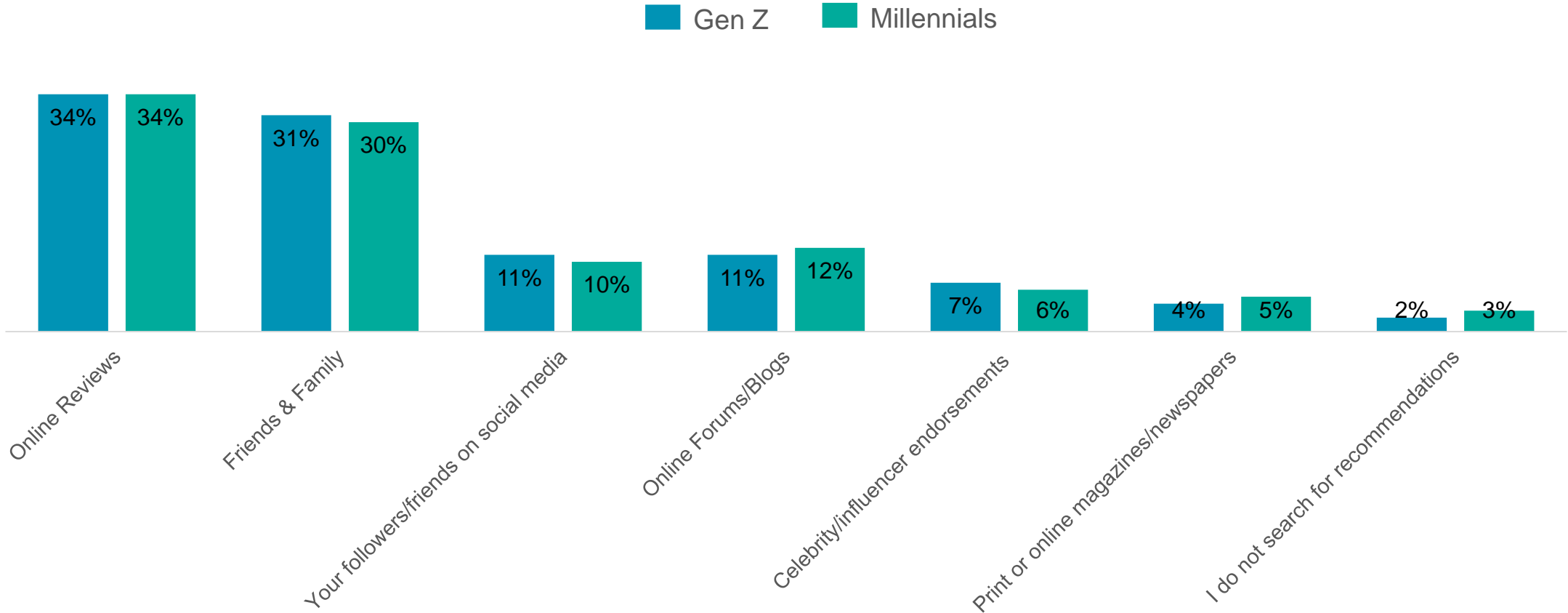


N: 2,515, Gen Z N: 1,083, Millennials N: 1,432

Q: Which of the following, if any, inspires you to travel the most? Select up to 2 of your top inspirations

# Most Used Method of Product/ Service Recommendation

The preferred product and service recommendations method is online reviews and friends & family for both generations.

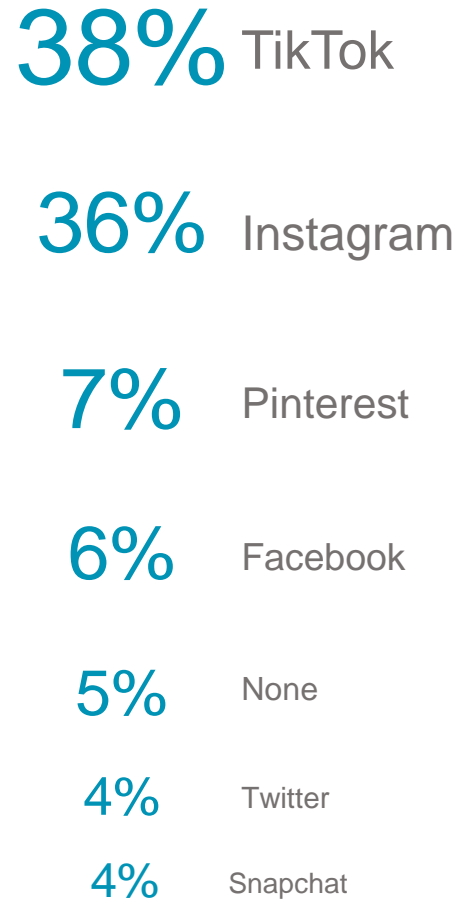


N: 2,515, Gen Z N: 1083, Millennials N: 1,432

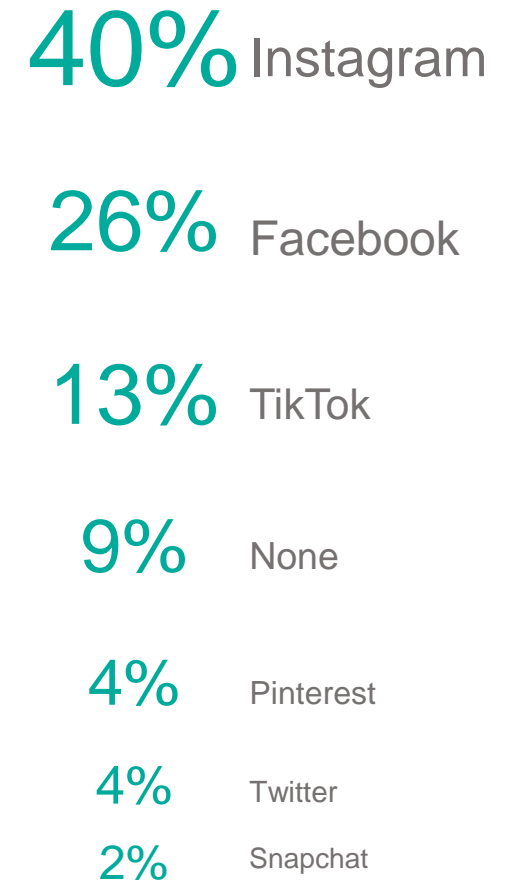
Q: Where do you look for recommendations before purchasing a product or service? Select all that applies.

# Social Media Apps used for Travel Inspiration

## Gen Z

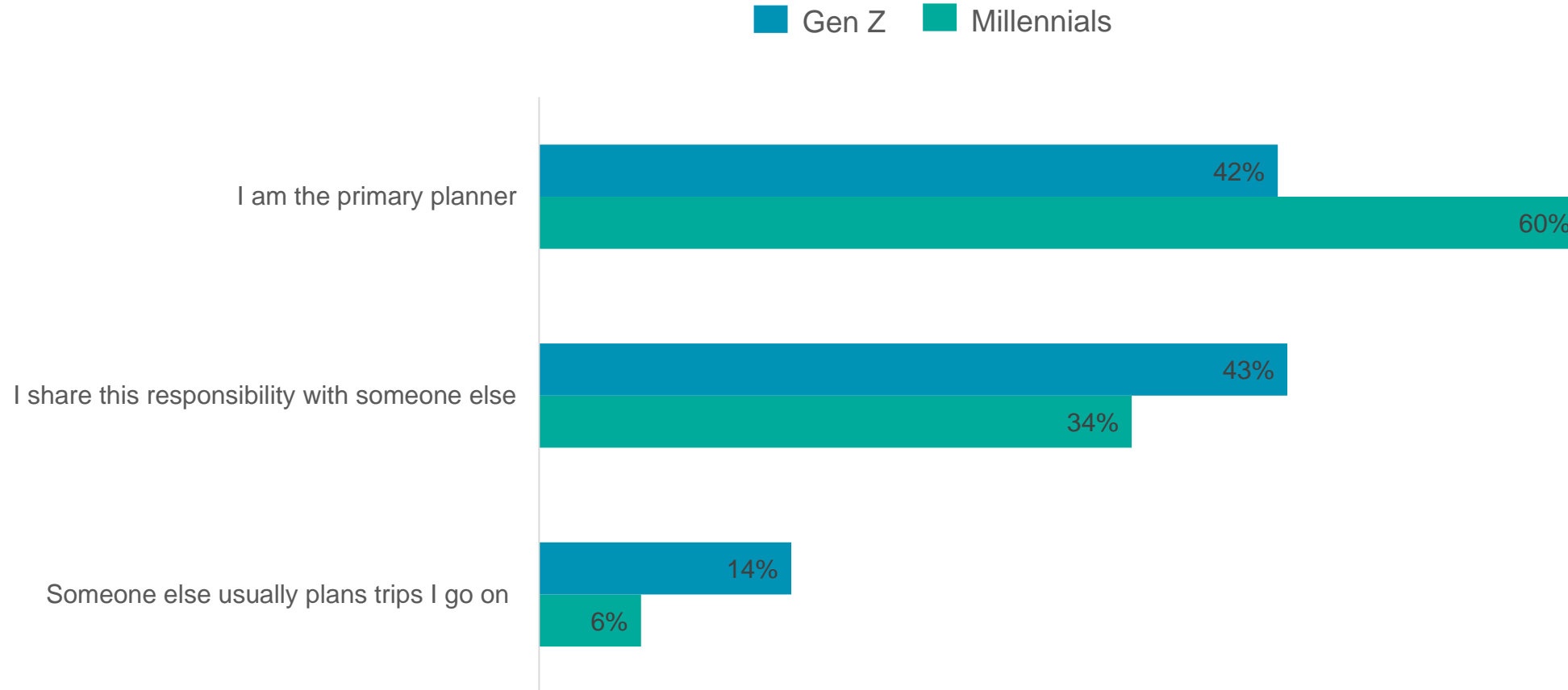


## Millennials

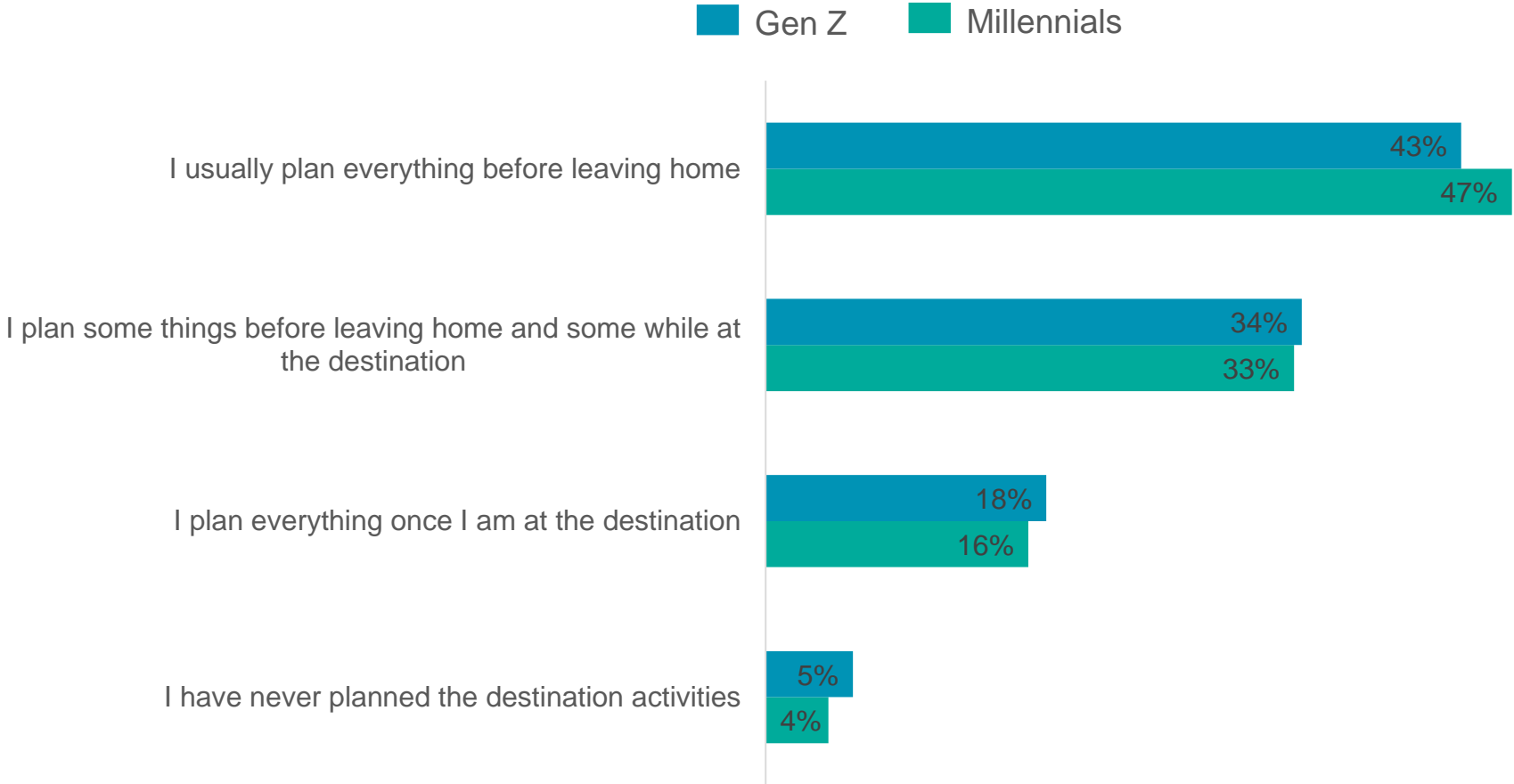




# Planning Responsibility

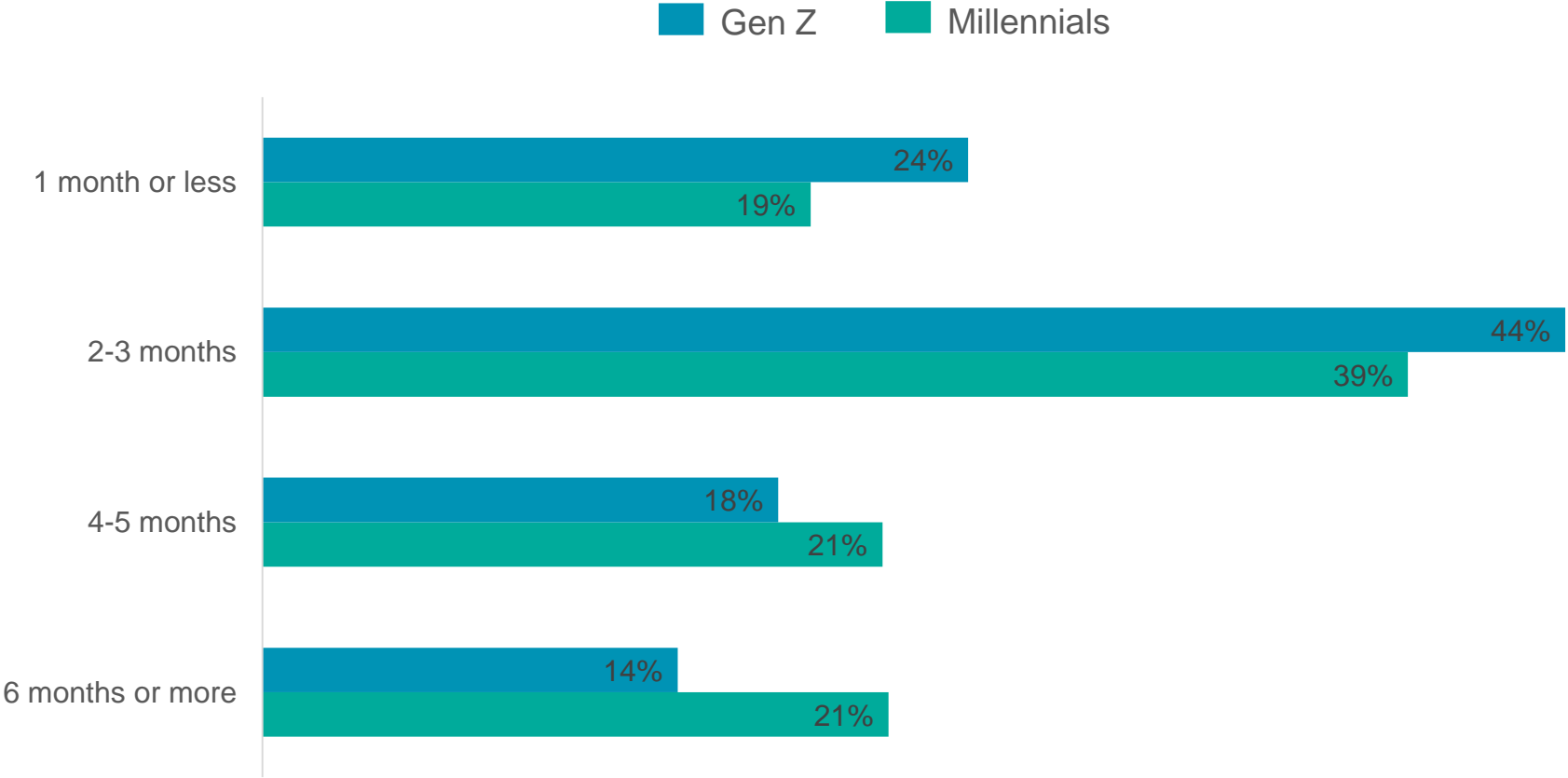


# Destination Activities Planning Timing



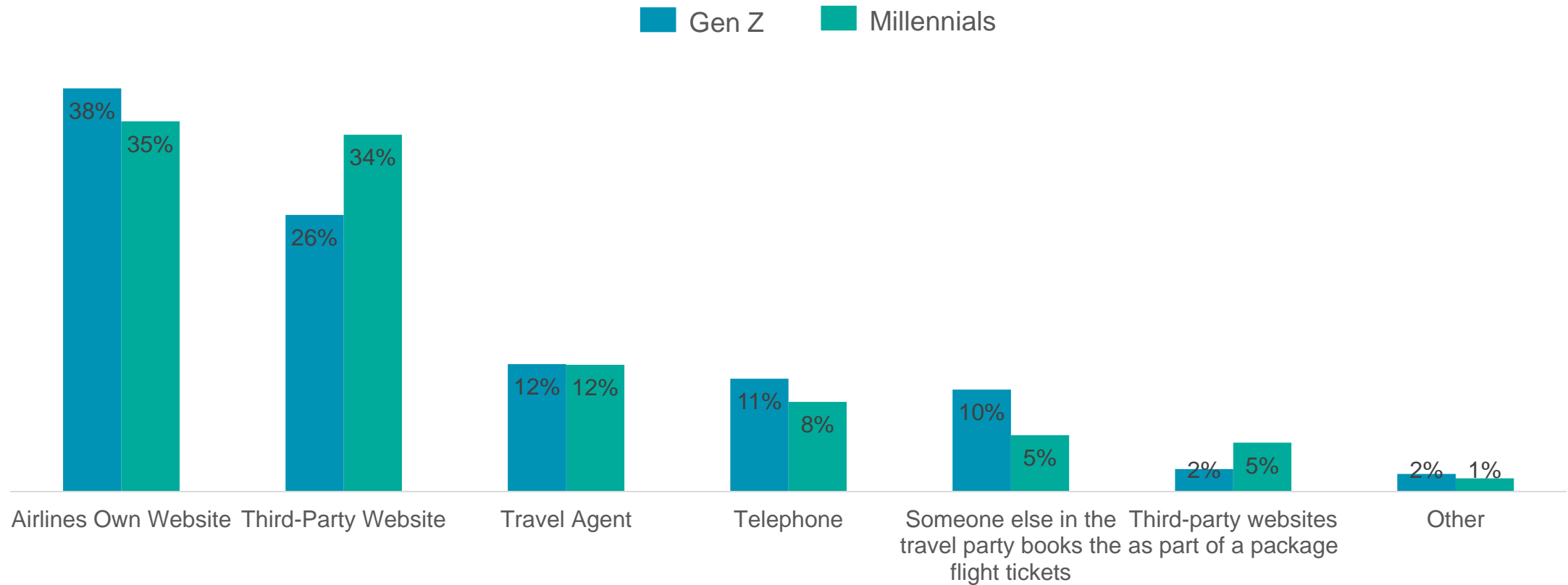
# Flight Ticket Purchase Timing

Both generations indicated they would purchase flight tickets about 2-3 months in advance (highest score). However, 24% of Gen Z tend to be more spontaneous in booking their travel by purchasing their flight tickets closer to the travel date than Millennials (19%), who prefer to buy their flight tickets less than one month in advance.



# Preferred Flight booking platform

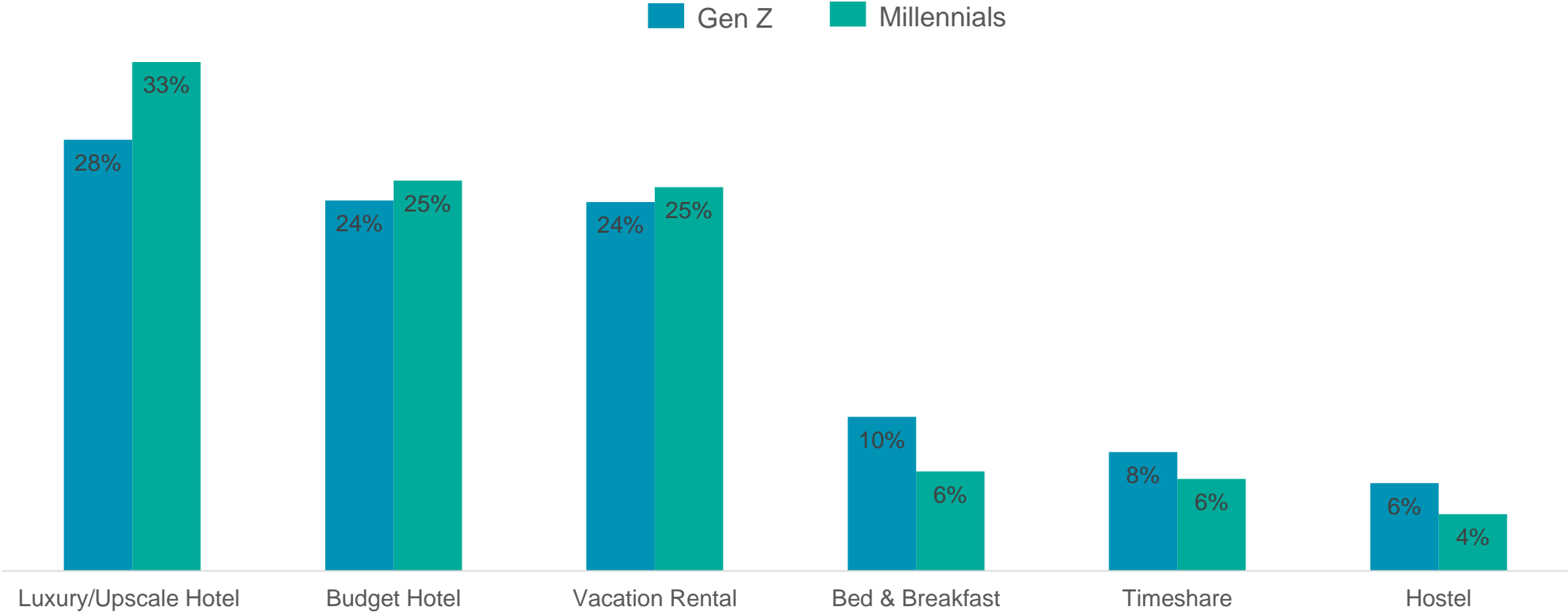
38% of Gen Z and 35% of Millennials preferred to book directly on the airline's website. 34% of the Millennials also chose to book their flights on a third-party website.





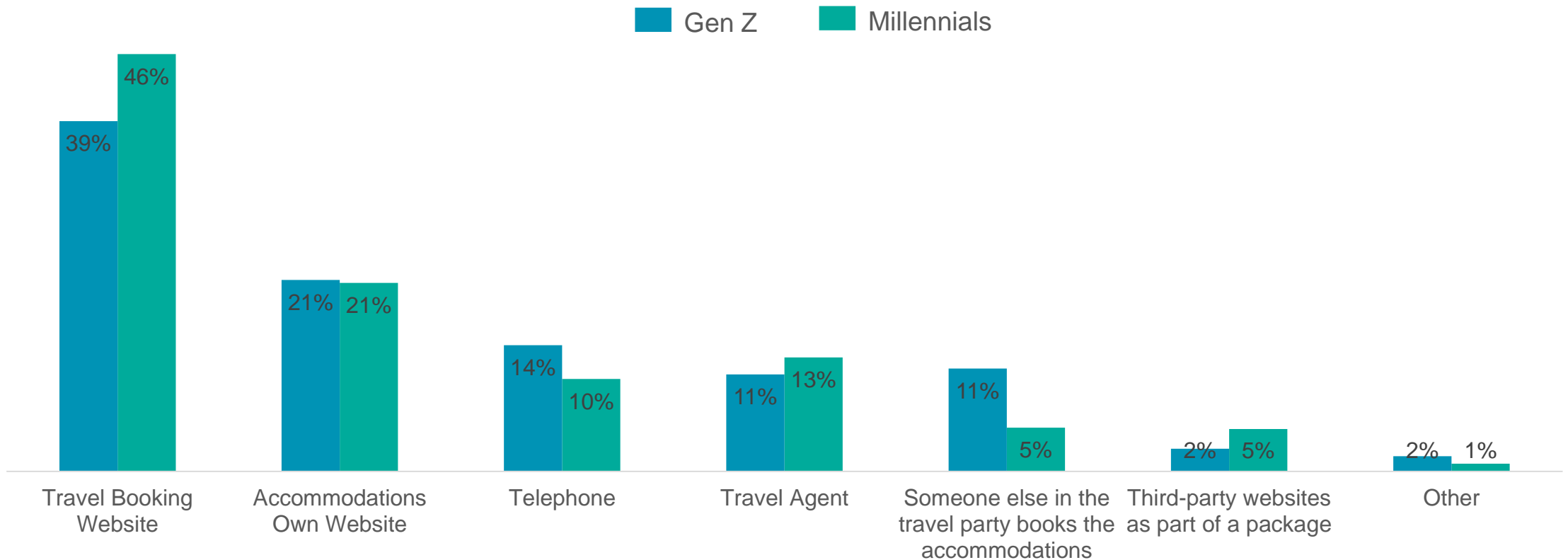
# Preferred Type of Accommodation

33% of the Millennials and 28% of Gen Z prefer luxury /upscale hotels. At the same time, 24% of Gen Z indicated they favored a budget hotel and vacation rental, and 25% of the Millennials preferred a budget hotel and vacation rental.



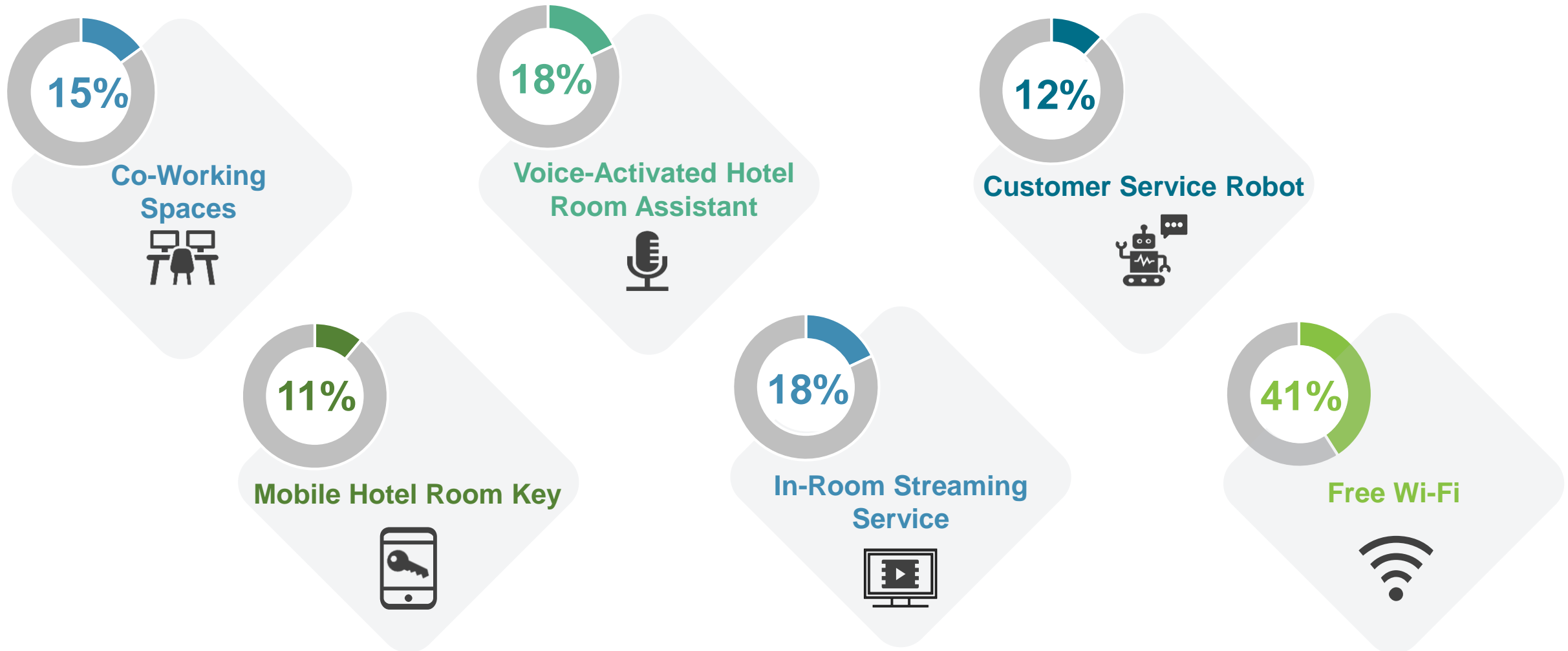
# Preferred Accommodation Booking Platform

46% of the Millennials tend to book their accommodations via a travel booking website, and 39% of Gen Z indicated the same. However, 21% of both generations preferred to book directly via the accommodations' website.



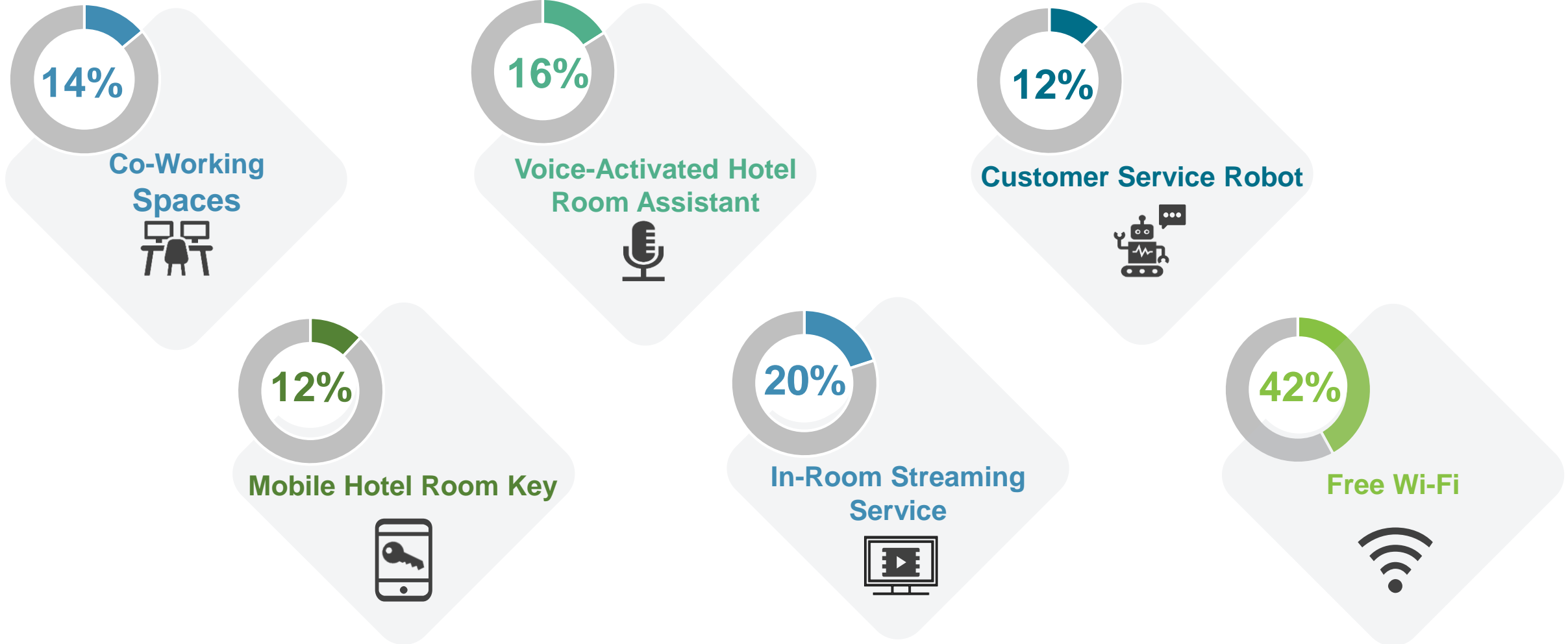
# Hotel Technology – Gen Z

Free Wi-Fi is ranked highly by both generations. However, Gen Z respondents indicate that Voice-Activated Hotel Room Assistants would enhance their hotel experience. In-Room Streaming Services are a bit less compared to Millennial respondents.



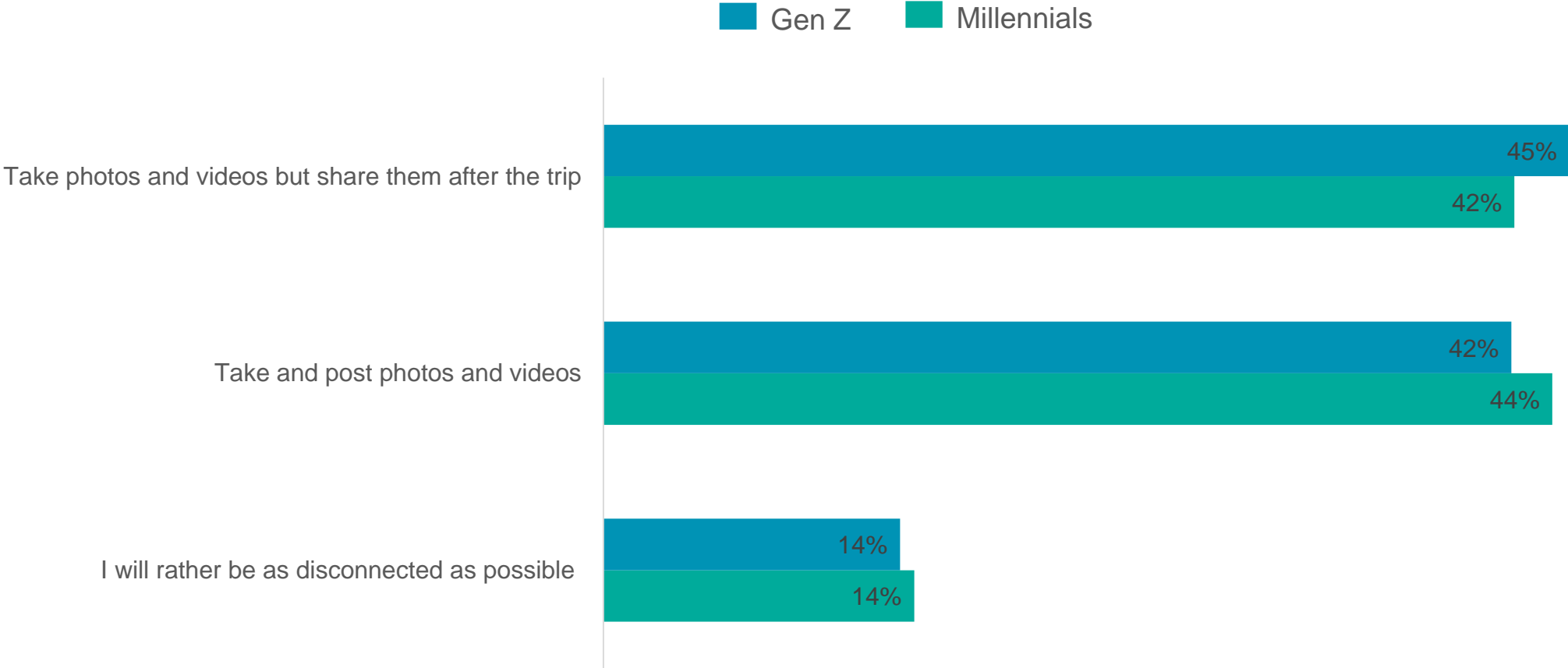
# Hotel Technology – Millennials

Free Wi-Fi is ranked highly by both generations. However, millennials prefer in-room streaming services compared to Gen Z respondents.



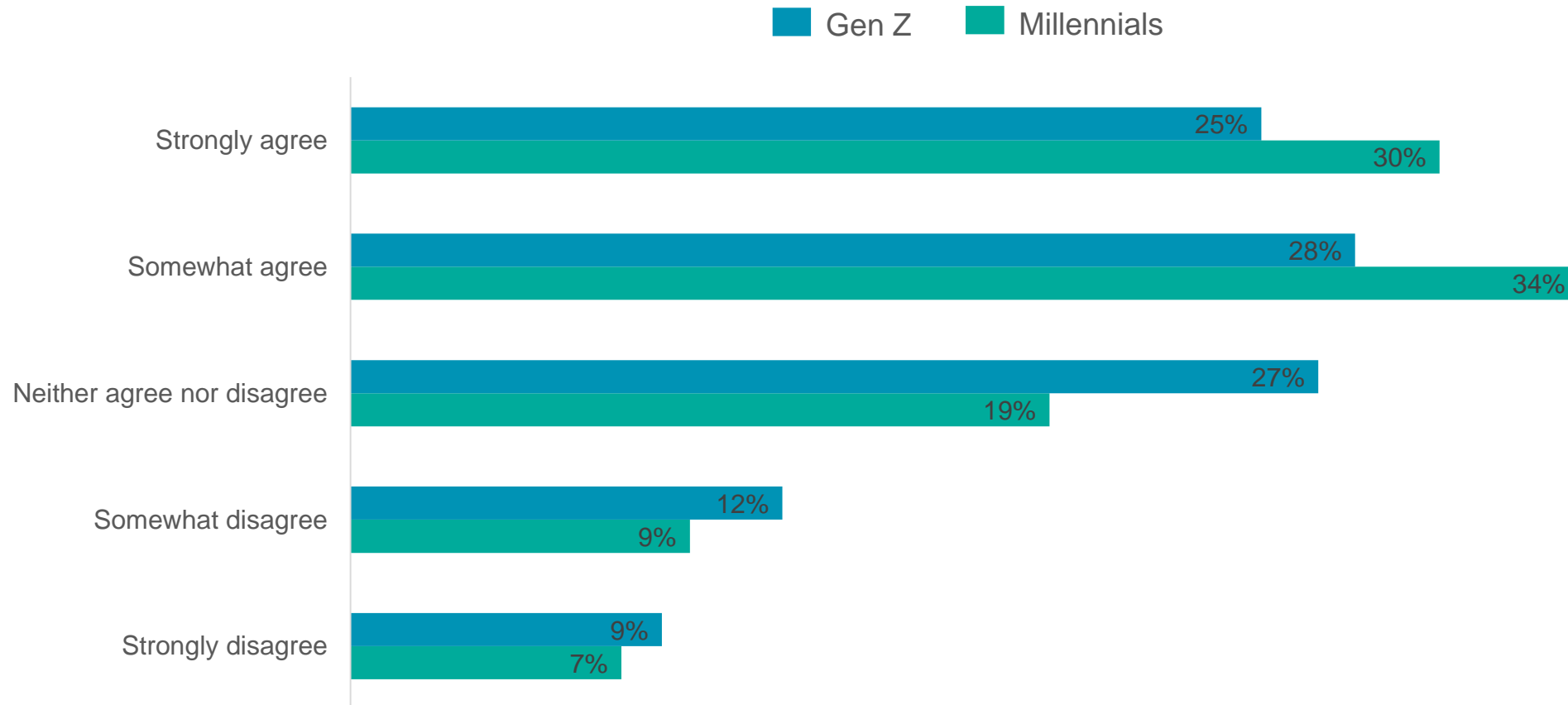


# Social Media Travel Behavior



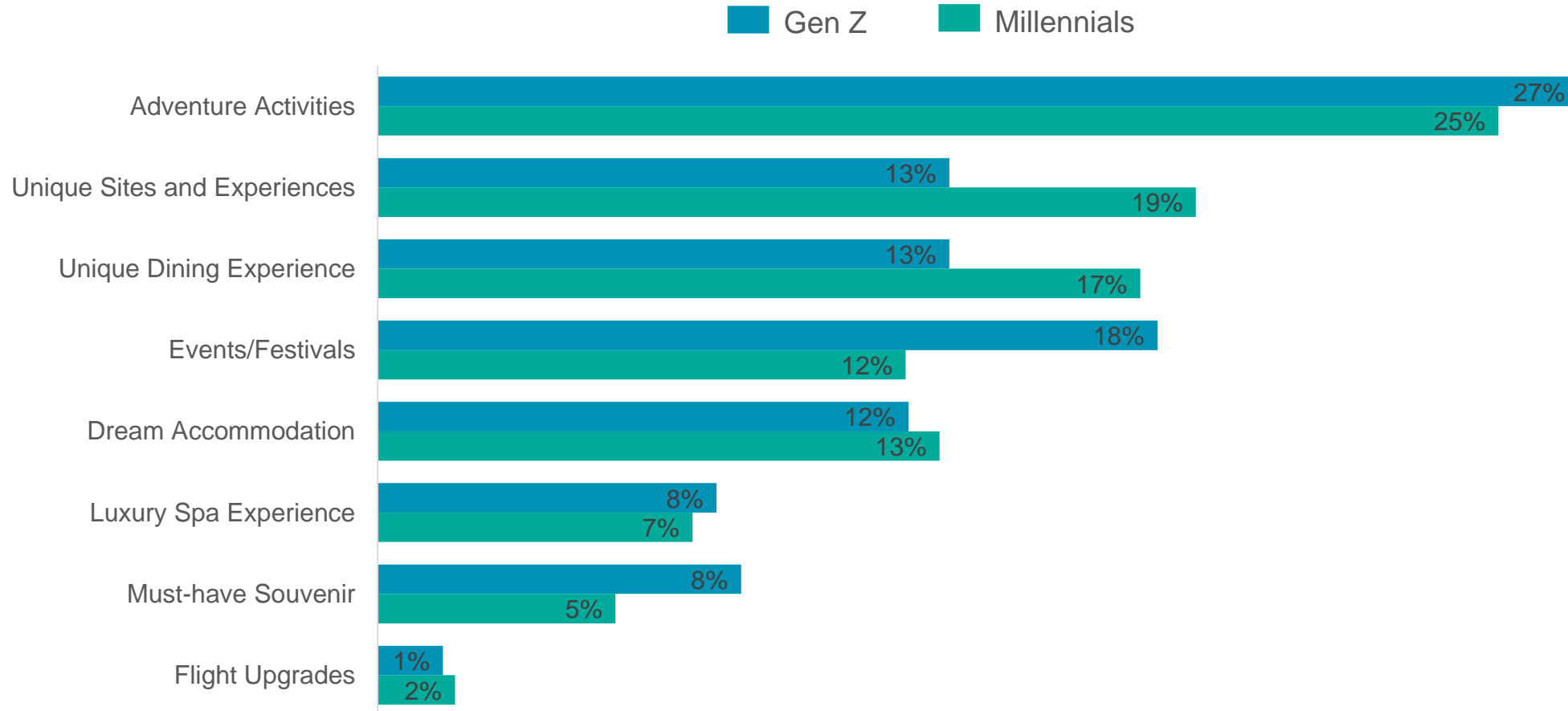
# Spending Priority

64% of Millennials (strongly and somewhat) agree that they would rather spend more money on experiences than physical goods compared to 53% of Gen Z. Noteworthy: 27% of Gen Z indicated feeling neutral towards this statement.



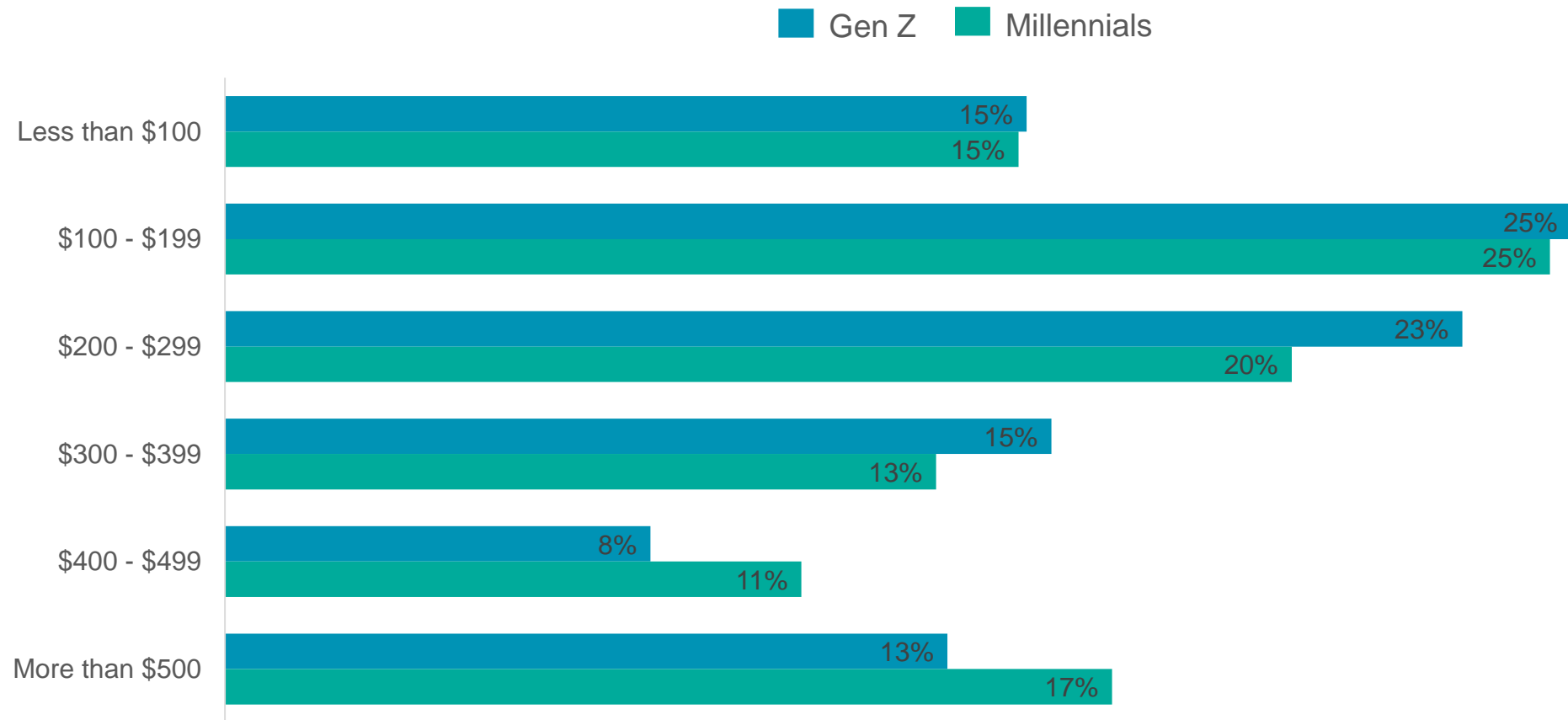
# Travel Spend Splurges

Both Generations are likelier to splurge on Adventure Activities (highest scores). However, 36% of the Millennials are more likely to splurge on Unique Sites and Experiences and Unique Dining Experiences than 26% of Gen Z. Noteworthy: 18% of Gen Z is more likely to want to splurge on Events and Festivals.



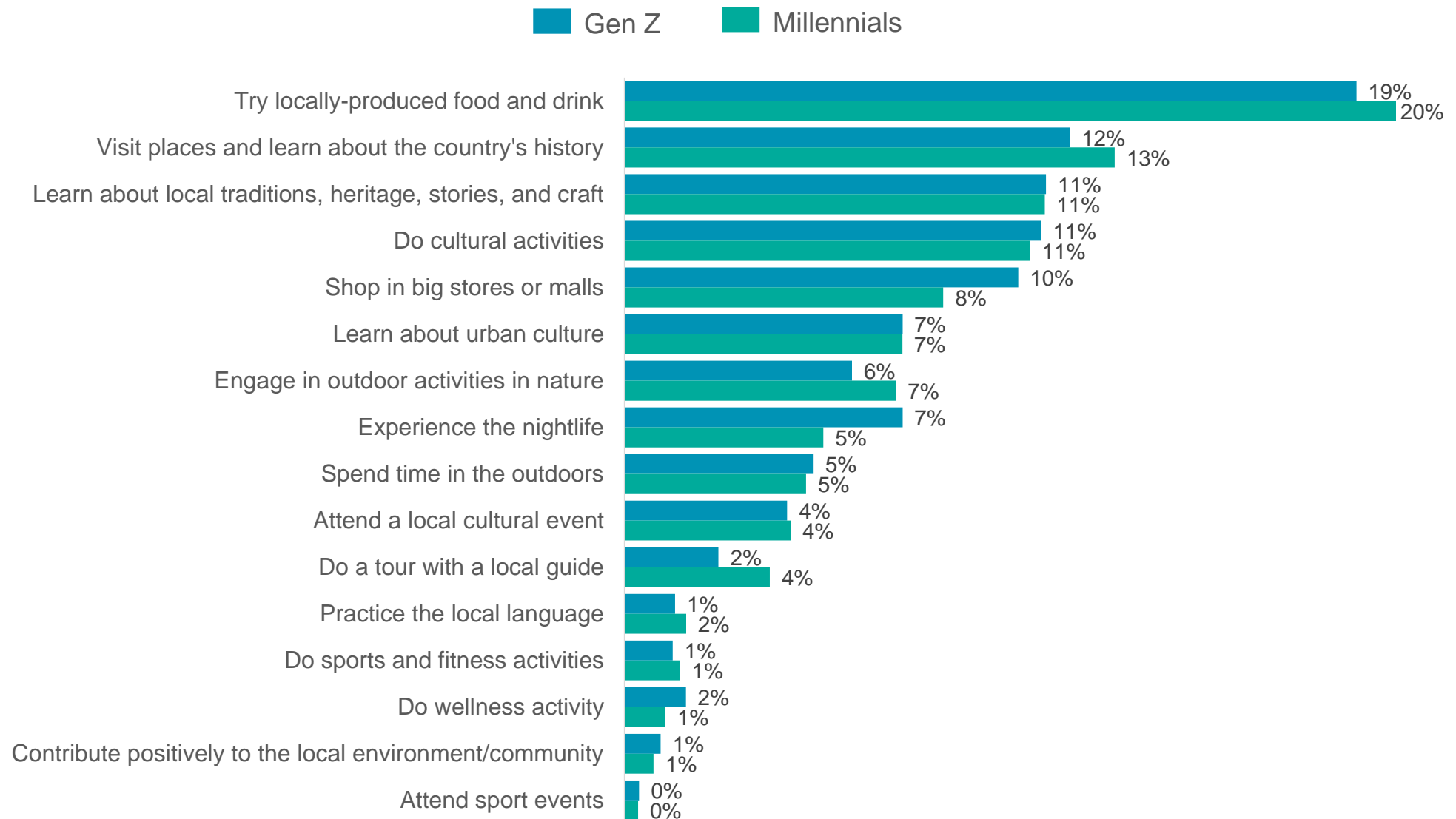
# Spending Budget Per Day

Millennial respondents indicated having a higher per-day spending budget compared to Gen Z.





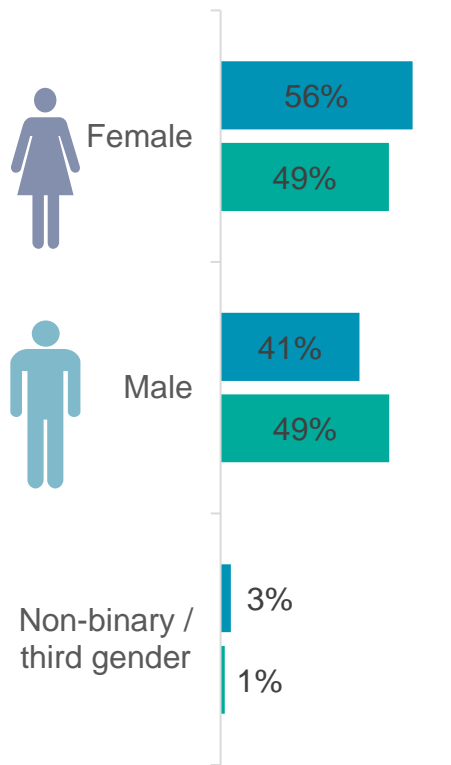
# Destination Activities



# Demographics

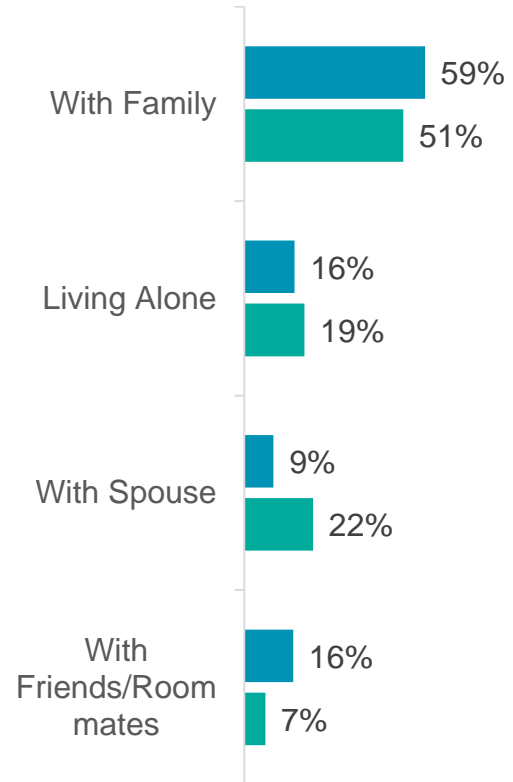
## Gender

■ Gen Z ■ Millennials



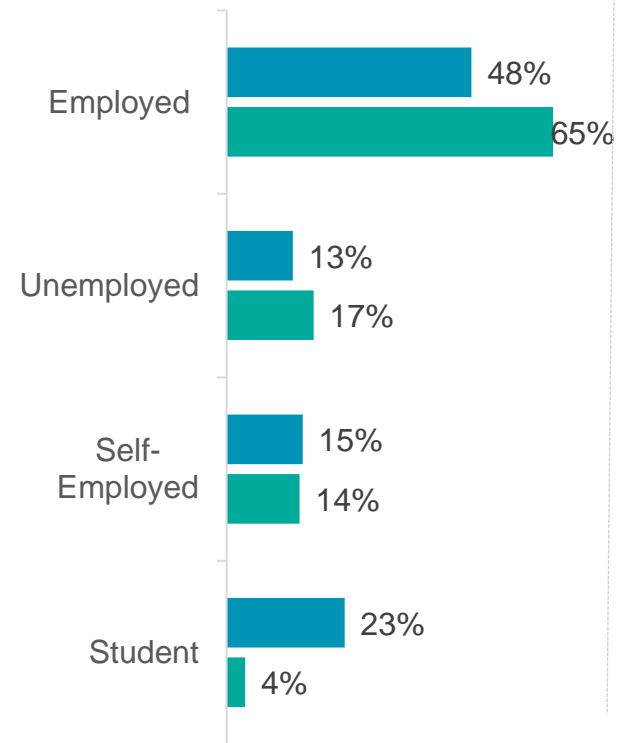
## Living Arrangement

■ Gen Z ■ Millennials



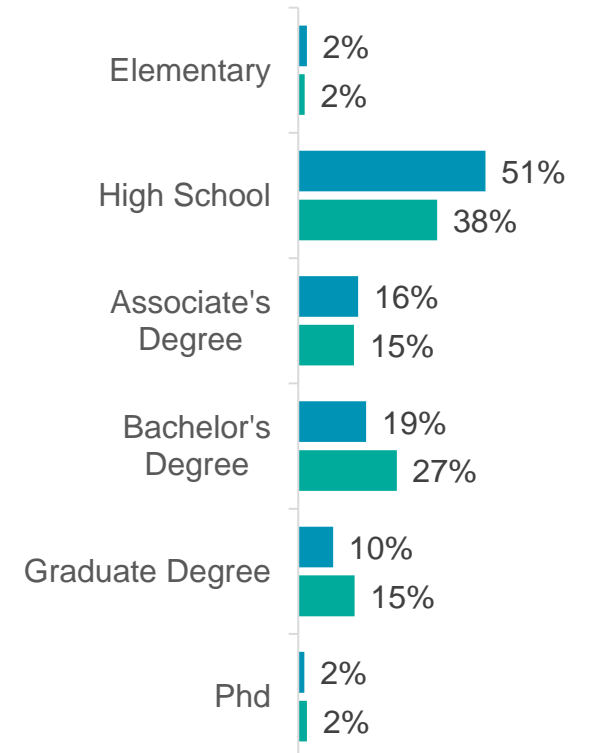
## Employment

■ Gen Z ■ Millennials

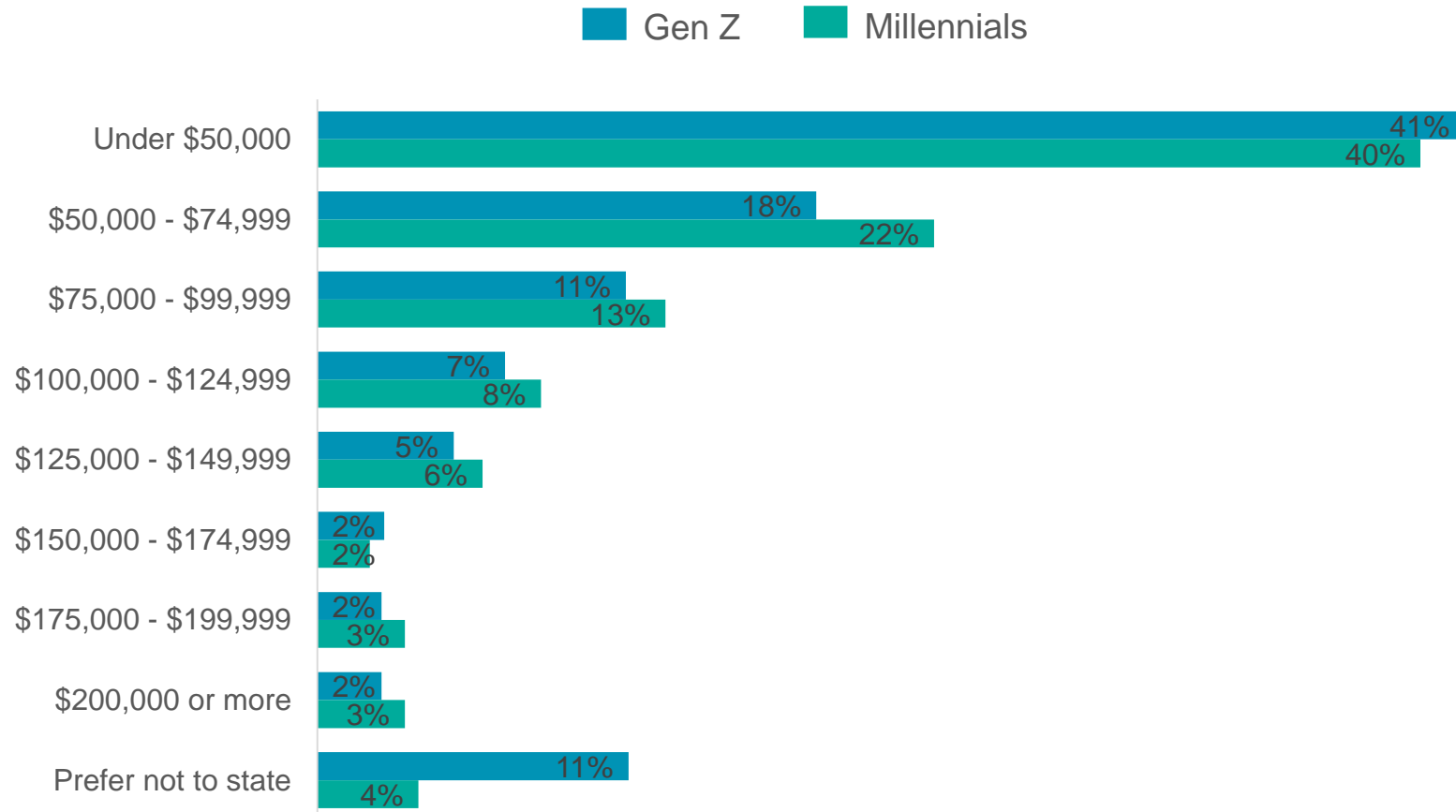


## Education

■ Gen Z ■ Millennials



# Annual Income in USD





# 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](mailto:m.kelly@aruba.com)

Or

Visit our website [www.arubainsight.com](http://www.arubainsight.com)

