

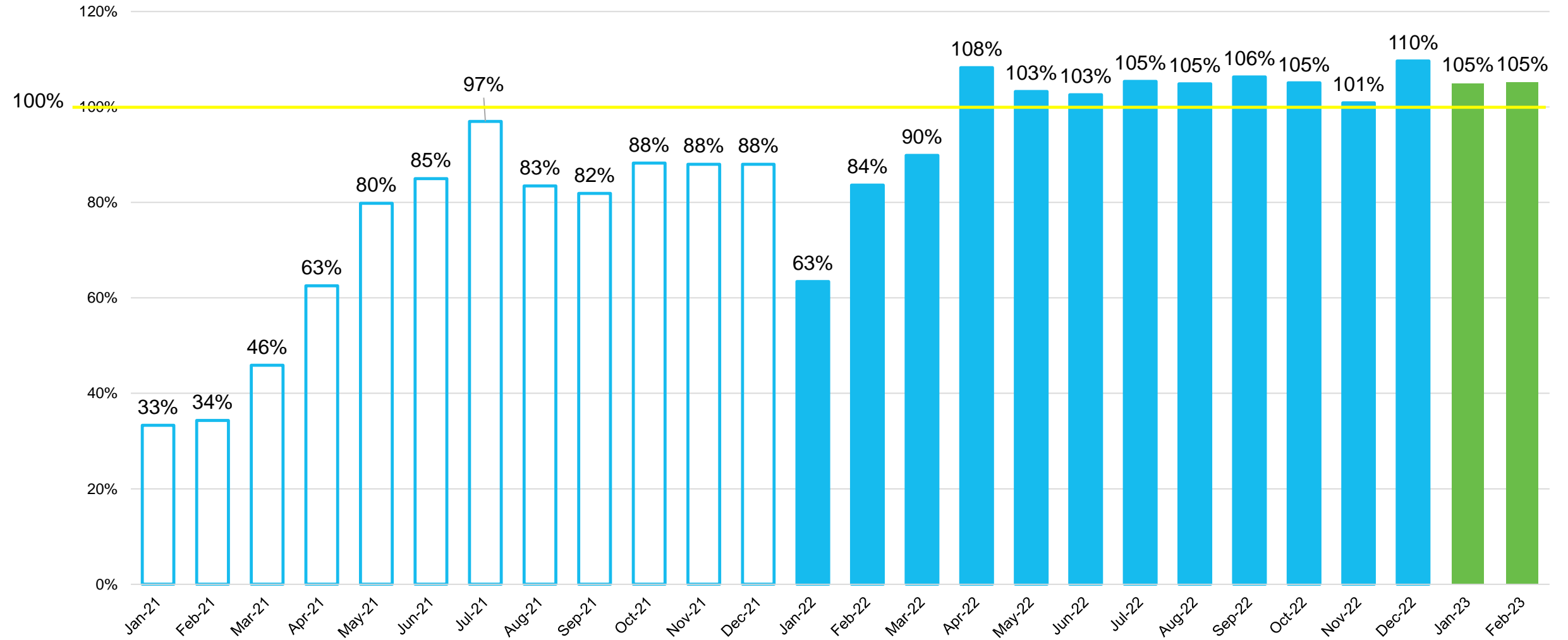


**FEBRUARY 2023**

**M o n t h l y R e p o r t**

# ★ STAY-OVER VISITOR ARRIVALS RECOVERY VS 2019

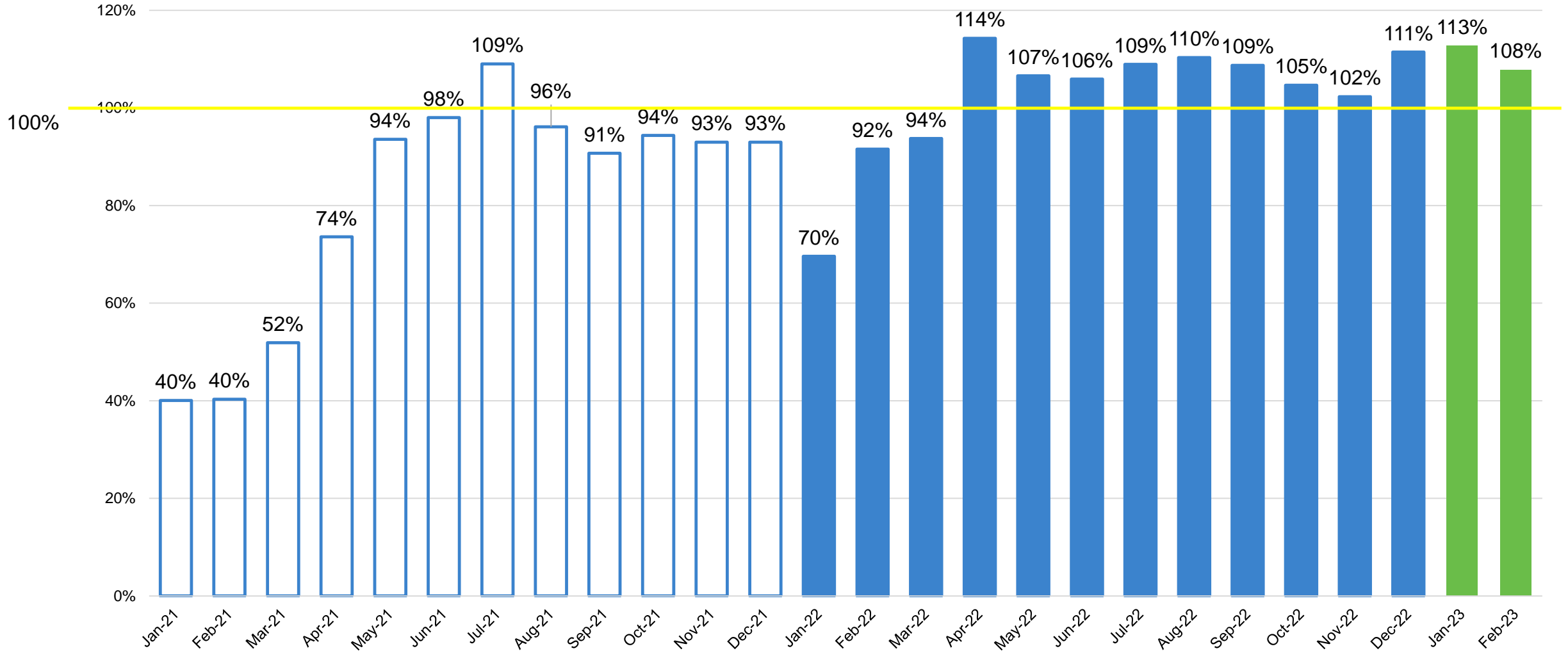
% MONTHLY RECOVERY TOTAL





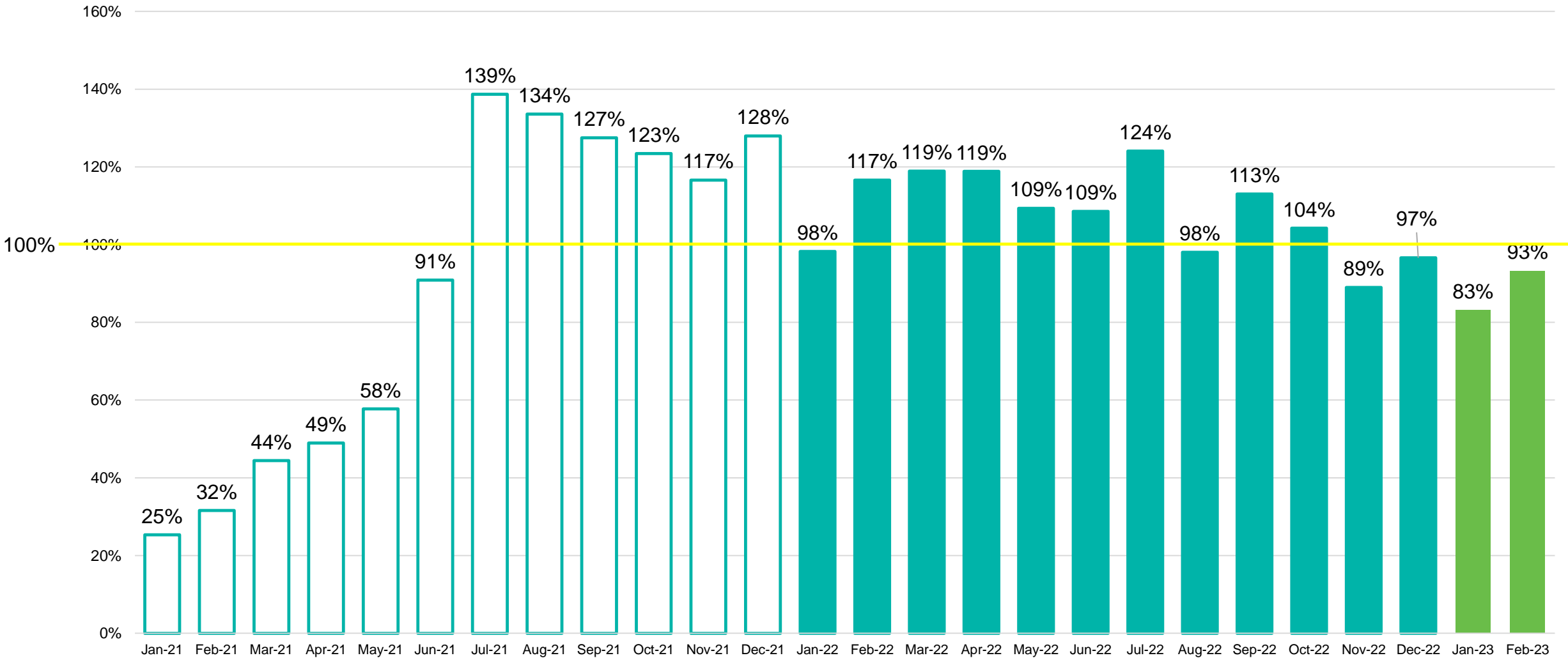
# US VISITOR ARRIVALS RECOVERY VS 2019

% MONTHLY RECOVERY USA



# ★ HOLLAND VISITOR ARRIVALS RECOVERY VS 2019

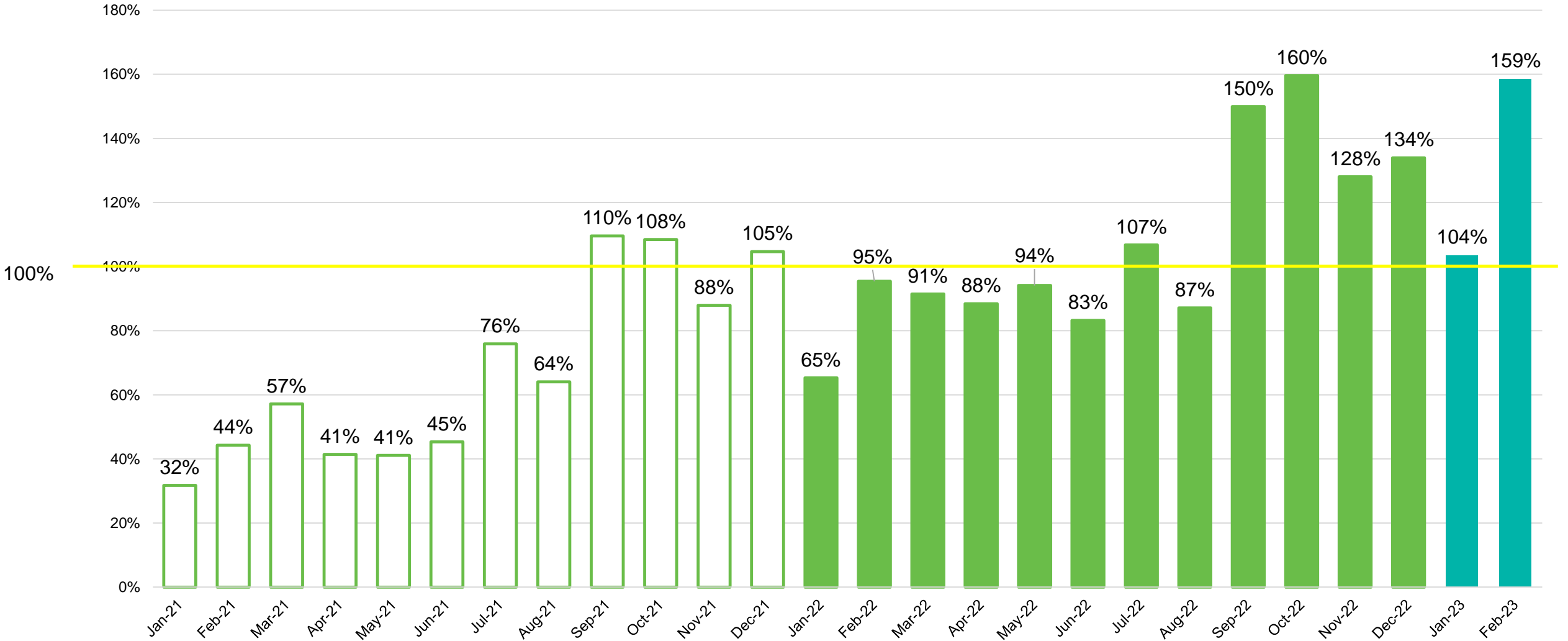
% MONTHLY RECOVERY HOLLAND





# ★ COLOMBIA VISITOR ARRIVALS RECOVERY VS 2019

% MONTHLY RECOVERY COLOMBIA



# COMPARISON

## 2023 VERSUS 2022



# SNAPSHOT YTD FEB 2023/2022



HOW MANY ARRIVALS?

197,010

43.0%



HOW MANY CRUISE TOURISM?

242,568

13%

Compared to 2019



HOW LONG DID THEY STAY?

1,586,609

36.7%



WHAT DID THEY SPEND? \*\*  
Central Bank Aruba (Q1-Q3 2022)

AWG 3,206 min

48%

Q1- Q3 2021: AWG 2,170

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

## WHERE DID THEY STAY?

HIGH RISE



432,283

NIGHTS

63.2%

LOW RISE



111,821

NIGHTS

25.1%

TIMESHARE



482,454

NIGHTS

17.4%

OTHERS



560,051

NIGHTS

41.7%



# ARRIVALS YTD FEBRUARY 2023/2022

**197,010**  
ARRIVALS

**43.0%**  
GROWTH

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
USA	108,670	39,467	148,137	36.3%	78.9%	75.2%
Canada	5,122	10,493	15,615	204.9%	3.7%	7.9%
<b>NA</b>	<b>113,792</b>	<b>49,960</b>	<b>163,752</b>	<b>43.9%</b>	<b>82.6%</b>	<b>83.1%</b>
Venezuela	196	52	248	26.5%	0.1%	0.1%
Colombia	3,629	2,239	5,868	61.7%	2.6%	3.0%
Brazil	784	1,057	1,841	134.8%	0.6%	0.9%
Argentina	1,570	1,511	3,081	96.2%	1.1%	1.6%
Chile	729	829	1,558	113.7%	0.5%	0.8%
Ecuador	367	292	659	79.6%	0.3%	0.3%
Peru	368	281	649	76.4%	0.3%	0.3%
Paraguay	389	-175	214	-45.0%	0.3%	0.1%
Uruguay	205	19	224	9.3%	0.1%	0.1%
Mexico	130	160	290	123.1%	0.1%	0.1%
Others	772	647	1,419	83.8%	0.6%	0.7%
<b>SA</b>	<b>9,139</b>	<b>6,912</b>	<b>16,051</b>	<b>75.6%</b>	<b>6.6%</b>	<b>8.1%</b>
Netherlands	8,474	-1,508	6,966	-17.8%	6.2%	3.5%
UK	398	160	558	40.2%	0.3%	0.3%
Germany	510	225	735	44.1%	0.4%	0.4%
Italy	551	139	690	25.2%	0.4%	0.4%
Sweden	199	1,158	1,357	581.9%	0.1%	0.7%
Belgium	269	44	313	16.4%	0.2%	0.2%
Austria	105	12	117	11.4%	0.1%	0.1%
Switzerland	244	26	270	10.7%	0.2%	0.1%
Others	1,390	657	2,047	47.3%	1.0%	1.0%
<b>Europe</b>	<b>12,140</b>	<b>913</b>	<b>13,053</b>	<b>7.5%</b>	<b>8.8%</b>	<b>6.6%</b>
<b>ROW</b>	<b>2,683</b>	<b>1,471</b>	<b>4,154</b>	<b>54.8%</b>	<b>1.9%</b>	<b>2.1%</b>
<b>Total</b>	<b>137,754</b>	<b>59,256</b>	<b>197,010</b>	<b>43.0%</b>		
<b>W/O Ven.</b>	<b>137,558</b>	<b>59,204</b>	<b>196,762</b>	<b>43.0%</b>		



# ARRIVALS USA YTD FEBRUARY 2023/2022

**148,137**  
ARRIVALS

**36.3%**  
GROWTH

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
New York	28,967	3,165	32,132	10.9%	26.7%	21.7%
Massachusetts	15,779	6,605	22,384	41.9%	14.5%	15.1%
New Jersey	12,075	2,206	14,281	18.3%	11.1%	9.6%
Pennsylvania	5,875	2,900	8,775	49.4%	5.4%	5.9%
Illinois	2,886	1,728	4,614	59.9%	2.7%	3.1%
Connecticut	3,644	1,504	5,148	41.3%	3.4%	3.5%
Florida	4,456	1,666	6,122	37.4%	4.1%	4.1%
Ohio	2,743	1,675	4,418	61.1%	2.5%	3.0%
Maryland	2,562	1,256	3,818	49.0%	2.4%	2.6%
Michigan	2,900	996	3,896	34.3%	2.7%	2.6%
Virginia	1,945	2,013	3,958	103.5%	1.8%	2.7%
Georgia	1,808	446	2,254	24.7%	1.7%	1.5%
North Carolina	1,999	1,408	3,407	70.4%	1.8%	2.3%
Texas	1,856	783	2,639	42.2%	1.7%	1.8%
California	1,494	491	1,985	32.9%	1.4%	1.3%
Other	17,681	10,625	28,306	60.1%	16.3%	19.1%
<b>Total</b>	<b>108,670</b>	<b>39,467</b>	<b>148,137</b>	<b>36.3%</b>		



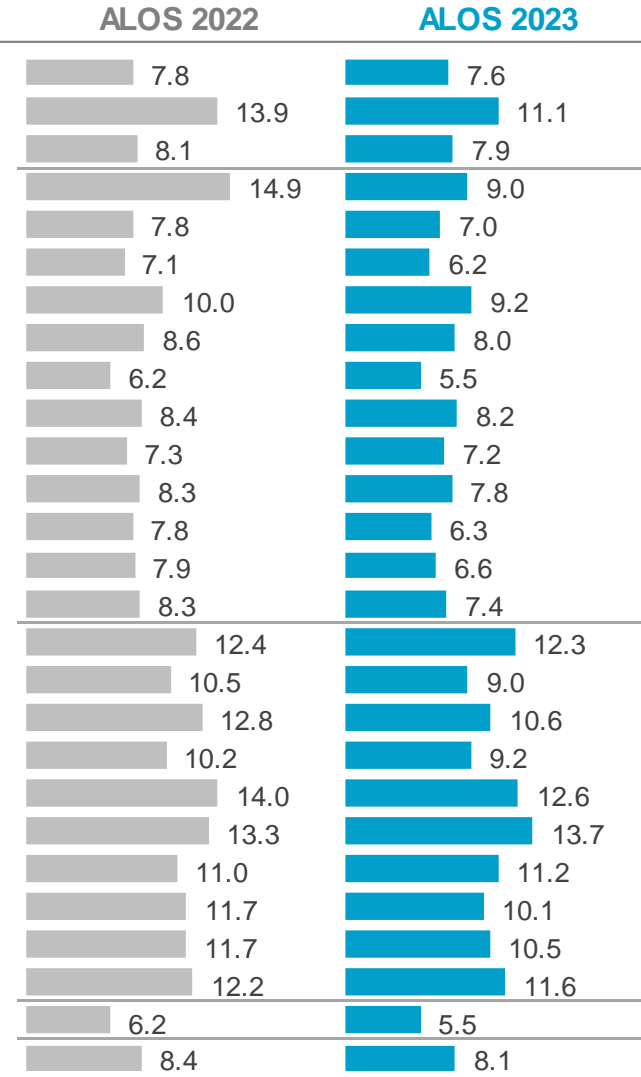


# NIGHTS YTD FEBRUARY 2023/2022

**1,586,609**  
ARRIVALS

**36.7%**  
GROWTH

	2022		Growth	2023	% Growth
USA	849,041		269,978	1,119,019	31.8%
Canada	71,305		102,438	173,743	143.7%
<b>NA</b>	<b>920,346</b>		<b>372,416</b>	<b>1,292,762</b>	<b>40.5%</b>
Venezuela	2,916	-695		2,221	-23.8%
Colombia	28,314		12,654	40,968	44.7%
Brazil	5,603		5,856	11,459	104.5%
Argentina	15,762		12,723	28,485	80.7%
Chile	6,301		6,145	12,446	97.5%
Ecuador	2,266		1,381	3,647	60.9%
Peru	3,101		2,221	5,322	71.6%
Paraguay	2,853	-1,303		1,550	-45.7%
Uruguay	1,700		44	1,744	2.6%
Mexico	1,009		811	1,820	80.4%
Others	6,113		3,291	9,404	53.8%
<b>SA</b>	<b>75,938</b>		<b>43,128</b>	<b>119,066</b>	<b>56.8%</b>
Netherlands	104,767	-18,869		85,898	-18.0%
UK	4,181		820	5,001	19.6%
Germany	6,533		1,282	7,815	19.6%
Italy	5,619		700	6,319	12.5%
Sweden	2,784		14,341	17,125	515.1%
Belgium	3,577		707	4,284	19.8%
Austria	1,155		150	1,305	13.0%
Switzerland	2,858	-133		2,725	-4.7%
Others	16,224		5,346	21,570	33.0%
<b>Europe</b>	<b>147,698</b>		<b>4,344</b>	<b>152,042</b>	<b>2.9%</b>
<b>ROW</b>	<b>16,517</b>		<b>6,222</b>	<b>22,739</b>	<b>37.7%</b>
<b>Total</b>	<b>1,160,499</b>		<b>426,110</b>	<b>1,586,609</b>	<b>36.7%</b>





# ACCOMMODATIONS

## YTD FEBRUARY 2023/2022

**197,010**  
ARRIVALS

**43.0%**  
GROWTH

### ARRIVALS BY ACCOMMODATION

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
High Rise	42,194	28,636	70,830	67.9%	30.6%	36.0%
Low Rise	13,449	2,520	15,969	18.7%	9.8%	8.1%
Timeshare	42,368	8,358	50,726	19.7%	30.8%	25.7%
Others	39,743	19,742	59,485	49.7%	28.9%	30.2%
<b>Total</b>	<b>137,754</b>	59,256	<b>197,010</b>	<b>43.0%</b>		

### NIGHTS BY ACCOMMODATION

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
High Rise	264,921	167,362	432,283	63.2%	35.3%	27.2%
Low Rise	89,375	22,446	111,821	25.1%	7.7%	7.0%
Timeshare	411,000	71,454	482,454	17.4%	35.4%	30.4%
Others	395,203	164,848	560,051	41.7%	34.1%	35.3%
<b>Total</b>	<b>1,160,499</b>	426,110	<b>1,586,609</b>	<b>36.7%</b>		



# ACCOMMODATIONS MAIN MARKETS

## YTD FEBRUARY 2023/2022

**197,010**  
ARRIVALS

**43.0%**  
GROWTH

### MARKET SHARE OF THE MARKET BY ACCOMMODATION CATEGORY

	HIGH RISE			LOW RISE			TIME SHARE			OTHERS		
	2022	2023	%Growth	2022	2023	%Growth	2022	2023	%Growth	2022	2023	% Growth
USA	85.4%	82.9%	-2.6%	78.8%	76.0%	-2.8%	85.2%	91.0%	5.7%	57.2%	52.4%	-4.9%
Venezuela	0.0%	0.1%	0.0%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.4%	0.3%	-0.1%
Netherlands	2.3%	0.9%	-1.4%	9.4%	3.1%	-6.3%	1.0%	0.5%	-0.6%	14.5%	9.4%	-5.1%
Canada	3.3%	7.7%	4.4%	2.1%	6.4%	4.3%	2.2%	4.6%	2.3%	6.1%	11.4%	5.4%
Brazil	0.9%	1.0%	0.1%	0.6%	1.0%	0.4%	0.2%	0.4%	0.2%	0.6%	1.3%	0.7%
Colombia	1.5%	1.1%	-0.4%	2.0%	1.8%	-0.2%	0.7%	0.8%	0.1%	6.0%	7.4%	1.4%
Argentina	1.9%	2.4%	0.6%	0.7%	1.0%	0.3%	0.7%	0.8%	0.1%	0.9%	1.3%	0.4%
Chile	1.0%	1.0%	0.0%	0.5%	0.7%	0.2%	0.2%	0.3%	0.1%	0.4%	0.9%	0.6%
Peru	0.4%	0.3%	0.0%	0.1%	0.3%	0.2%	0.1%	0.1%	0.0%	0.4%	0.6%	0.1%
UK	0.1%	0.2%	0.1%	0.4%	0.3%	-0.1%	0.1%	0.1%	0.0%	0.6%	0.5%	-0.1%
Italy	0.3%	0.1%	-0.2%	0.7%	0.6%	-0.1%	0.1%	0.1%	-0.1%	0.6%	0.8%	0.1%
<b>Total mainmkt</b>	<b>97.2%</b>	<b>97.8%</b>	<b>0.6%</b>	<b>95.3%</b>	<b>91.3%</b>	<b>-4.0%</b>	<b>90.6%</b>	<b>98.6%</b>	<b>7.9%</b>	<b>87.8%</b>	<b>86.3%</b>	<b>-1.5%</b>



# ACCOMMODATIONS MAIN MARKETS

## YTD FEBRUARY 2023/2022

**112,338**  
ARRIVALS

**-50.9%**  
GROWTH

### VISITOR ARRIVALS AT THE ACCOMMODATION TYPE FOR THE MARKET

	HIGH RISE			LOW RISE			TIME SHARE			OTHERS		
	2022	2023	Growth	2022	2023	Growth	2022	2023	Growth	2022	2023	Growth
USA	36,050	58,703	22,653	10,594	12,135	1,541	39,275	46,142	6,867	22,751	31,157	8,406
Venezuela	21	58	37	8	10	2	12	17	5	155	163	8
Netherlands	986	658	-328	1,264	497	-767	464	231	-233	5,760	5,580	-180
Canada	1,402	5,474	4,072	287	1,021	734	1,027	2,314	1,287	2,406	6,806	4,400
Brazil	370	704	334	83	160	77	84	178	94	247	799	552
Colombia	646	782	136	271	289	18	331	397	66	2,381	4,400	2,019
Argentina	781	1,715	934	100	165	65	328	420	92	361	781	420
Chile	429	717	288	61	111	50	95	174	79	144	556	412
Peru	151	236	85	12	48	36	35	30	-5	170	335	165
UK	45	156	111	54	55	1	50	48	-2	249	299	50
Italy	145	103	-42	88	95	7	65	40	-25	253	452	199
<b>Total mainmkt</b>	<b>41,026</b>	<b>69,306</b>	<b>28,280</b>	<b>12,822</b>	<b>14,586</b>	<b>1,764</b>	<b>41,766</b>	<b>49,991</b>	<b>8,225</b>	<b>34,877</b>	<b>51,328</b>	<b>16,451</b>





# VISITORS BY AGE YTD FEBRUARY 2023/2022

**197,010**  
ARRIVALS

**43.0%**  
GROWTH

LARGEST ABSOLUTE INCREASE: **60-69 years old**

	2022	Growth	2023	% Growth
0 - 11	9,874	2,445	12,319	24.8%
12-19	8,502	1,801	10,303	21.2%
20 - 29	18,053	1,992	20,045	11.0%
30 - 39	23,567	4,406	27,973	18.7%
40 - 49	21,185	8,504	29,689	40.1%
50 - 59	26,043	13,645	39,688	52.4%
60 - 69	20,445	16,396	36,841	80.2%
70 +	10,078	10,050	20,128	99.7%
Not Stated	7	17	24	242.9%
<b>Total</b>	<b>137,754</b>	<b>59,256</b>	<b>197,010</b>	<b>43.0%</b>





# GENERATIONS

## YTD FEBRUARY 2023/2022

**197,010**  
VISITORS

**43.0%**  
GROWTH

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
Gen A	7,913	19,149	9,950	25.7%	5.0%	5.4%
Gen Z	19,578	35,138	23,156	18.3%	16.9%	15.6%
Millennials	37,027	57,299	44,010	18.9%	29.3%	26.6%
Gen X	34,921	79,566	50,181	43.7%	26.4%	26.5%
Baby Boomers	34,895	92,843	62,538	79.2%	20.7%	23.6%
Silent Generations	3,413	10,421	7,151	109.5%	1.8%	2.2%
Age not specified	7	26	24	242.9%	0.0%	0.0%
<b>Total</b>	<b>137,754</b>	<b>294,442</b>	<b>197,010</b>	<b>43.0%</b>		



# CARRIERS YTD FEBRUARY 2023/2022

**197,010**  
VISITORS

**43.0%**  
GROWTH

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
AMERICAN AIRLINES	25,889	19,766	45,655	76.3%	18.8%	23.2%
JETBLUE	41,457	588	42,045	1.4%	30.1%	21.3%
DELTA AIRLINE	16,473	12,157	28,630	73.8%	12.0%	14.5%
UNITED AIRLINES	19,549	1,672	21,221	8.6%	14.2%	10.8%
SOUTHWEST AIRLINES	5,168	3,517	8,685	68.1%	3.8%	4.4%
KLM ROYAL DUTCH	7,220	-141	7,079	-2.0%	5.2%	3.6%
AVIANCA	3,890	3,085	7,079	-2.0%	2.8%	3.5%
COPA AIRLINE	3,769	2,274	6,975	79.3%	2.7%	3.1%
AIR CANADA	944	3,959	6,043	60.3%	0.7%	2.5%
WESTJET AIRLINES	1,866	2,817	4,903	419.4%	1.4%	2.4%
SUNWING AIRLINES	1,048	3,166	4,683	151.0%	0.8%	2.1%
AERO REPUBLICA/ WINGO	1,025	1,760	4,214	302.1%	0.7%	1.4%
DIVI DIVI AIR	1,473	1,174	2,785	171.7%	1.1%	1.3%
TUI NL	3,334	-1,165	2,647	79.7%	2.4%	1.1%
SPIRIT AIRLINES	895	789	2,169	-34.9%	0.6%	0.9%
EZ AIR	463	967	1,684	88.2%	0.3%	0.7%
SUN COUNTRY	1,345	-9	1,430	208.9%	1.0%	0.7%
SUNCLASS AIRLINES	0	1,156	1,336	-0.7%	0.0%	0.6%
PRIVATE	634	503	1,156	-	0.5%	0.6%
CHARTER	455	406	1,137	79.3%	0.3%	0.4%
SURINAM AIRWAYS	238	395	861	89.2%	0.2%	0.3%
JETAIR CARIBBEAN	0	418	633	166.0%	0.0%	0.2%
ARAJET	0	180	418	-	0.0%	0.1%
WINAIR	291	-119	180	-	0.2%	0.1%
SKY HIGH AVIATION	45	41	172	-40.9%	0.0%	0.0%
AIR CENTURY	73	-11	86	91.1%	0.1%	0.0%
Others	210	-89	62	-15.1%	0.2%	0.1%
<b>Total</b>	<b>137,754</b>	<b>59,256</b>	<b>197,010</b>	<b>43.0%</b>		

# FEBRUARY RESULT 2023

NORTH AMERICA



81,846

83.5%

SOUTH AMERICA



7,701

7.9%

EUROPE



6,491

6.6%

OTHERS



2,030

2.1%

TOTAL ARRIVALS

98,068

100%



# ARRIVALS FEBRUARY 2023/2022

**98,068**  
ARRIVALS

**25.8%**  
GROWTH

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
USA	63,114	11,239	74,353	17.8%	81.0%	75.8%
Canada	2,678	4,815	7,493	179.8%	3.4%	7.6%
<b>NA</b>	<b>65,792</b>	<b>16,054</b>	<b>81,846</b>	<b>24.4%</b>	<b>84.4%</b>	<b>83.5%</b>
Venezuela	78	14	92	17.9%	0.1%	0.1%
Colombia	1,456	964	2,420	66.2%	1.9%	2.5%
Brazil	389	462	851	118.8%	0.5%	0.9%
Argentina	764	650	1,414	85.1%	1.0%	1.4%
Chile	443	506	949	114.2%	0.6%	1.0%
Ecuador	280	171	451	61.1%	0.4%	0.5%
Peru	241	150	391	62.2%	0.3%	0.4%
Paraguay	174	-106	68	-60.9%	0.2%	0.1%
Uruguay	111	-10	101	-9.0%	0.1%	0.1%
Mexico	76	107	183	140.8%	0.1%	0.2%
Others	432	349	781	80.8%	0.6%	0.8%
<b>SA</b>	<b>4,444</b>	<b>3,257</b>	<b>7,701</b>	<b>73.3%</b>	<b>5.7%</b>	<b>7.9%</b>
Netherlands	4,395	-876	3,519	-19.9%	5.6%	3.6%
UK	178	108	286	60.7%	0.2%	0.3%
Germany	245	81	326	33.1%	0.3%	0.3%
Italy	253	35	288	13.8%	0.3%	0.3%
Sweden	118	560	678	474.6%	0.2%	0.7%
Belgium	126	5	131	4.0%	0.2%	0.1%
Austria	63	10	73	15.9%	0.1%	0.1%
Switzerland	134	10	144	7.5%	0.2%	0.1%
Others	757	289	1,046	38.2%	1.0%	1.1%
<b>Europe</b>	<b>6,269</b>	<b>222</b>	<b>6,491</b>	<b>3.5%</b>	<b>8.0%</b>	<b>6.6%</b>
<b>ROW</b>	<b>1,456</b>	<b>574</b>	<b>2,030</b>	<b>39.4%</b>	<b>1.9%</b>	<b>2.1%</b>
<b>Total</b>	<b>77,961</b>	<b>20,107</b>	<b>98,068</b>	<b>25.8%</b>		
<b>W/O Ven.</b>	<b>77,883</b>	<b>20,093</b>	<b>97,976</b>	<b>25.8%</b>		





# ARRIVALS USA FEBRUARY 2023/2022

**74,353**  
ARRIVALS

**17.8%**  
GROWTH

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
New York	16,893	-830	16,063	-4.9%	26.8%	21.6%
Massachusetts	10,514	1,710	12,224	16.3%	16.7%	16.4%
New Jersey	7,126	-409	6,717	-5.7%	11.3%	9.0%
Pennsylvania	3,295	929	4,224	28.2%	5.2%	5.7%
Illinois	1,605	333	1,938	20.7%	2.5%	2.6%
Connecticut	2,250	445	2,695	19.8%	3.6%	3.6%
Florida	2,595	405	3,000	15.6%	4.1%	4.0%
Ohio	1,411	775	2,186	54.9%	2.2%	2.9%
Maryland	1,372	302	1,674	22.0%	2.2%	2.3%
Michigan	1,644	483	2,127	29.4%	2.6%	2.9%
Virginia	1,143	960	2,103	84.0%	1.8%	2.8%
Georgia	1,025	162	1,187	15.8%	1.6%	1.6%
North Carolina	1,000	534	1,534	53.4%	1.6%	2.1%
Texas	868	387	1,255	44.6%	1.4%	1.7%
California	636	306	942	48.1%	1.0%	1.3%
Other	9,737	4,747	14,484	48.8%	15.4%	19.5%
<b>Total</b>	<b>63,114</b>	<b>11,239</b>	<b>74,353</b>	<b>17.8%</b>		





# NIGHTS FEBRUARY 2023/2022

**756,169**  
NIGHTS

**25.3%**  
GROWTH

	2022	Growth	2023	% Growth	ALOS 2022	ALOS 2023
USA	456,019	83,921	539,940	18.4%	7.2	7.3
Canada	31,959	45,165	77,124	141.3%	11.9	10.3
<b>NA</b>	<b>487,978</b>	<b>129,086</b>	<b>617,064</b>	<b>26.5%</b>	7.4	7.5
Venezuela	1,084	-250	834	-23.1%	13.9	9.1
Colombia	12,828	4,597	17,425	35.8%	8.8	7.2
Brazil	2,689	2,500	5,189	93.0%	6.9	6.1
Argentina	6,962	5,294	12,256	76.0%	9.1	8.7
Chile	3,865	3,600	7,465	93.1%	8.7	7.9
Ecuador	1,578	850	2,428	53.9%	5.6	5.4
Peru	2,188	1,023	3,211	46.8%	9.1	8.2
Paraguay	1,226	-794	432	-64.8%	7.0	6.4
Uruguay	863	-109	754	-12.6%	7.8	7.5
Mexico	564	519	1,083	92.0%	7.4	5.9
Others	3,236	1,875	5,111	57.9%	7.5	6.5
<b>SA</b>	<b>37,083</b>	<b>19,105</b>	<b>56,188</b>	<b>51.5%</b>	8.3	7.3
Netherlands	49,520	-8,572	40,948	-17.3%	11.3	11.6
UK	1,823	500	2,323	27.4%	10.2	8.1
Germany	2,951	147	3,098	5.0%	12.0	9.5
Italy	2,513	97	2,610	3.9%	9.9	9.1
Sweden	1,578	7,029	8,607	445.4%	13.4	12.7
Belgium	1,362	109	1,471	8.0%	10.8	11.2
Austria	551	214	765	38.8%	8.7	10.5
Switzerland	1,180	-13	1,167	-1.1%	8.8	8.1
Others	8,453	1,570	10,023	18.6%	11.2	9.6
<b>Europe</b>	<b>69,931</b>	<b>1,081</b>	<b>71,012</b>	<b>1.5%</b>	11.2	10.9
<b>ROW</b>	<b>8,537</b>	<b>3,368</b>	<b>11,905</b>	<b>39.5%</b>	5.9	5.9
<b>Total</b>	<b>603,529</b>	<b>152,640</b>	<b>756,169</b>	<b>25.3%</b>	7.7	7.7



# ACCOMMODATIONS

## FEBRUARY 2023/2022

**98,068**  
ARRIVALS

**25.8%**  
GROWTH

### ARRIVALS BY ACCOMMODATION

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
High Rise	24,511	10,630	35,141	43.4%	31.4%	35.8%
Low Rise	8,065	-89	7,976	-1.1%	10.3%	8.1%
Timeshare	23,002	1,910	24,912	8.3%	29.5%	25.4%
Others	22,383	7,656	30,039	34.2%	28.7%	30.6%
<b>Total</b>	<b>77,961</b>	20,107	<b>98,068</b>	<b>25.8%</b>		

### NIGHTS BY ACCOMMODATION

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
High Rise	146,968	64,715	211,683	44.0%	24.4%	28.0%
Low Rise	51,553	4,322	55,875	8.4%	8.5%	7.4%
Timeshare	206,660	20,749	227,409	10.0%	34.2%	30.1%
Others	198,348	62,854	261,202	31.7%	32.9%	34.5%
<b>Total</b>	<b>603,529</b>	152,640	<b>756,169</b>	<b>25.3%</b>		



# ACCOMMODATIONS MAIN MARKETS

## FEBRUARY 2023/2022

**98,068**  
ARRIVALS

**25.8%**  
GROWTH

### MARKET SHARE OF THE MARKET BY ACCOMMODATION CATEGORY

	HIGH RISE			LOW RISE			TIME SHARE			OTHERS		
	2022	2023	%Growth	2022	2023	%Growth	2022	2023	%Growth	2022	2023	% Growth
USA	87.3%	83.5%	-3.8%	80.5%	76.3%	-4.3%	93.5%	92.2%	-1.4%	61.2%	53.1%	-8.1%
Venezuela	0.0%	0.1%	0.1%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.3%	0.2%	-0.1%
Netherlands	2.0%	0.9%	-1.1%	8.9%	3.2%	-5.7%	1.1%	0.5%	-0.6%	13.1%	9.4%	-3.7%
Canada	3.1%	7.3%	4.1%	1.9%	6.0%	4.1%	2.2%	4.4%	2.2%	5.6%	11.2%	5.6%
Brazil	0.7%	1.0%	0.2%	0.5%	0.8%	0.3%	0.1%	0.2%	0.0%	0.6%	1.3%	0.7%
Colombia	0.8%	0.8%	0.0%	1.6%	1.6%	0.0%	0.4%	0.3%	-0.1%	4.6%	6.4%	1.8%
Argentina	1.6%	2.3%	0.7%	0.7%	1.0%	0.3%	0.6%	0.5%	-0.1%	0.8%	1.3%	0.5%
Chile	1.1%	1.4%	0.3%	0.4%	0.8%	0.4%	0.3%	0.3%	0.0%	0.3%	1.1%	0.7%
Peru	0.3%	0.4%	0.1%	0.1%	0.4%	0.3%	0.1%	0.1%	0.0%	0.6%	0.6%	0.1%
UK	0.1%	0.2%	0.1%	0.3%	0.4%	0.0%	0.1%	0.1%	0.0%	0.5%	0.6%	0.1%
Italy	0.2%	0.1%	-0.2%	0.5%	0.5%	0.1%	0.1%	0.1%	0.0%	0.6%	0.6%	0.1%
<b>Total mainmkt</b>	<b>97.3%</b>	<b>97.9%</b>	<b>0.6%</b>	<b>95.6%</b>	<b>91.1%</b>	<b>-4.5%</b>	<b>98.7%</b>	<b>98.6%</b>	<b>-0.1%</b>	<b>88.2%</b>	<b>86.0%</b>	<b>-2.2%</b>





# ACCOMMODATIONS FEBRUARY 2023/2022

**98,068**  
ARRIVALS

**25.8%**  
GROWTH

## VISITOR ARRIVALS AT THE ACCOMMODATION TYPE FOR THE MARKET

	HIGH RISE			LOW RISE			TIME SHARE			OTHERS		
	2022	2023	Growth	2022	2023	Growth	2022	2023	Growth	2022	2023	Growth
USA	21,392	29,350	7,958	6,496	6,083	-413	21,518	22,958	1,440	13,708	15,962	2,254
Venezuela	4	28	24	2	5	3	6	3	-3	66	56	-10
Netherlands	487	311	-176	720	256	-464	262	122	-140	2,926	2,830	-96
Canada	770	2,556	1,786	151	475	324	509	1,092	583	1,248	3,370	2,122
Brazil	177	338	161	41	67	26	34	44	10	137	402	265
Colombia	197	294	97	132	130	-2	102	77	-25	1,025	1,919	894
Argentina	384	795	411	58	82	24	138	135	-3	184	402	218
Chile	272	482	210	33	64	31	60	74	14	78	329	251
Peru	78	155	77	10	32	22	25	16	-9	128	188	60
UK	19	61	42	28	29	1	20	26	6	111	170	59
Italy	60	30	-30	37	43	6	24	22	-2	132	193	61
<b>Total mainmkt</b>	<b>23,840</b>	<b>34,400</b>	<b>10,560</b>	<b>7,708</b>	<b>7,266</b>	<b>-442</b>	<b>22,698</b>	<b>24,569</b>	<b>1,871</b>	<b>19,743</b>	<b>25,821</b>	<b>6,078</b>



# VISITORS BY AGE FEBRUARY 2023/2022

**98,068**  
ARRIVALS

**25.8%**  
GROWTH

	2022	Growth	2023	% Growth
0 - 11	6,085	679	6,764	11.2%
12-19	5,392	389	5,781	7.2%
20 - 29	8,857	-600	8,257	-6.8%
30 - 39	13,034	878	13,912	6.7%
40 - 49	12,883	3,103	15,986	24.1%
50 - 59	15,020	4,916	19,936	32.7%
60 - 69	11,328	6,647	17,975	58.7%
70 +	5,358	4,086	9,444	76.3%
Not Stated	4	9	13	225.0%
<b>Total</b>	<b>77,961</b>	<b>20,107</b>	<b>98,068</b>	<b>25.8%</b>




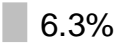
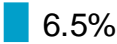
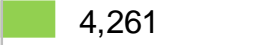


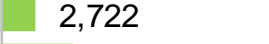


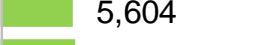


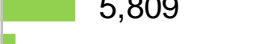
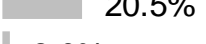


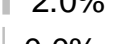
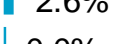



# GENERATIONS

## FEBRUARY 2023/2022

**98,068**  
ARRIVALS

**25.8%**  
GROWTH

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
Gen A	4,768	 1,444	5,311	11.4%	 6.3%	 6.5%
Gen Z	10,733	 4,261	10,977	2.3%	 19.1%	 19.3%
Millennials	20,585	 2,722	21,831	6.1%	 26.6%	 24.1%
Gen X	20,719	 5,604	26,246	26.7%	 25.4%	 25.7%
Baby Boomers	19,396	 5,809	30,395	56.7%	 20.5%	 21.9%
Silent Generations	1,756	 1,045	3,295	87.6%	 2.0%	 2.6%
Age not specified	4	9	13	225.0%	0.0%	0.0%
<b>Total</b>	<b>77,961</b>	 20,894	<b>98,068</b>	<b>25.8%</b>		



# CARRIERS FEBRUARY 2023/2022

**98,068**  
ARRIVALS

**25.8%**  
GROWTH

	2022		Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
AMERICAN AIRLINES	14,454		8,784	23,238	60.8%	18.5%	23.7%
JETBLUE	25,220	-3,625		21,595	-14.4%	32.3%	22.0%
DELTA AIRLINE	9,462		4,218	13,680	44.6%	12.1%	13.9%
UNITED AIRLINES	10,796	-849		9,947	-7.9%	13.8%	10.1%
SOUTHWEST AIRLINES	3,220	-221		4,367	35.6%	4.1%	4.5%
KLM ROYAL DUTCH	3,709		1,515	3,488	-6.0%	4.8%	3.6%
AVIANCA	1,878		924	3,393	80.7%	2.4%	3.5%
COPA AIRLINE	2,153		1,214	3,077	42.9%	2.8%	3.1%
WESTJET AIRLINES	1,184		2,204	2,398	102.5%	1.5%	2.4%
AIR CANADA	0		1,432	2,204	-	0.0%	2.2%
SUNWING AIRLINES	600		462	2,032	238.7%	0.8%	2.1%
DIVI DIVI AIR	841		968	1,303	54.9%	1.1%	1.3%
AERO REPUBLICA/ WINGO	216	-619		1,184	448.1%	0.3%	1.2%
TUI NL	1,730		615	1,111	-35.8%	2.2%	1.1%
SPIRIT AIRLINES	492		419	1,107	125.0%	0.6%	1.1%
EZ AIR	276		23	695	151.8%	0.4%	0.7%
SUN COUNTRY	640		298	663	3.6%	0.8%	0.7%
PRIVATE	327		263	625	91.1%	0.4%	0.6%
CHARTER	322		582	585	81.7%	0.4%	0.6%
SUNCLASS AIRLINES	0		227	582	-	0.0%	0.6%
SURINAM AIRWAYS	125		193	352	181.6%	0.2%	0.4%
JETAIR CARIBBEAN	0	-48		193	-	0.0%	0.2%
WINAIR	149		34	101	-32.2%	0.2%	0.1%
SKY HIGH AVIATION	17		3	51	200.0%	0.0%	0.1%
AIR CENTURY	36		29	39	8.3%	0.0%	0.0%
ALBATROS AIRLINE	0	-85		29	-	0.0%	0.0%
OTHERS	114		20,107	29	-74.6%	0.1%	0.0%
<b>Total</b>	<b>77,961</b>			<b>98,068</b>	<b>25.8%</b>		



A tropical beach scene featuring a weathered wooden door with a teal-painted panel, set within an ornate wooden frame. The frame is topped with a large, vibrant bouquet of flowers. Two smaller floral arrangements sit on wooden stands on either side of the door. The background shows a calm blue sea, a sandy beach, and palm trees under a clear sky. The text 'COMPARISON 2023 VERSUS 2019' is overlaid in white, bold, sans-serif font.

# COMPARISON

## 2023 VERSUS 2019



# SNAPSHOT YTD FEB 2023/2019



HOW MANY ARRIVALS?

197,010

5.1%



HOW MANY CRUISE TOURISM?

242,568

13%

Compared to 2019



HOW LONG DID THEY STAY?

1,586,609

6.2%



WHAT DID THEY SPEND? \*\*  
Central Bank Aruba (Q1-Q3 2023)

Avg. 3,206 min

116%

Q1-Q3 2019: 2,760.6

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

## WHERE DID THEY STAY?

HIGH RISE



432,283

NIGHTS

-9.5%

LOW RISE



111,821

NIGHTS

-1.9%

TIMESHARE



482,454

NIGHTS

12.7%

OTHERS



560,051

NIGHTS

18.1%



# ARRIVALS YTD FEBRUARY 2023/2019

**197,010**  
ARRIVALS

**5.1%**  
GROWTH

	2019		Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
USA	134,356		13,781	148,137	10.3%	71.7%	75.2%
Canada	12,961		2,654	15,615	20.5%	6.9%	7.9%
<b>NA</b>	<b>147,317</b>		<b>16,435</b>	<b>163,752</b>	<b>11.2%</b>	<b>78.6%</b>	<b>83.1%</b>
Venezuela	5,470	-5,222		248	-95.5%	2.9%	0.1%
Colombia	4,855		1,013	5,868	20.9%	2.6%	3.0%
Brazil	1,717		124	1,841	7.2%	0.9%	0.9%
Argentina	3,415	-334		3,081	-9.8%	1.8%	1.6%
Chile	2,109	-551		1,558	-26.1%	1.1%	0.8%
Ecuador	255		404	659	158.4%	0.1%	0.3%
Peru	796	-147		649	-18.5%	0.4%	0.3%
Paraguay	496	-282		214	-56.9%	0.3%	0.1%
Uruguay	386	-162		224	-42.0%	0.2%	0.1%
Mexico	209		81	290	38.8%	0.1%	0.1%
Others	1,192		227	1,419	19.0%	0.6%	0.7%
<b>SA</b>	<b>20,900</b>	<b>-4,849</b>		<b>16,051</b>	<b>-23.2%</b>	<b>11.1%</b>	<b>8.1%</b>
Netherlands	7,921	-955		6,966	-12.1%	4.2%	3.5%
UK	599	-41		558	-6.8%	0.3%	0.3%
Germany	939	-204		735	-21.7%	0.5%	0.4%
Italy	972	-282		690	-29.0%	0.5%	0.4%
Sweden	1,685	-328		1,357	-19.5%	0.9%	0.7%
Belgium	275		38	313	13.8%	0.1%	0.2%
Austria	169	-52		117	-30.8%	0.1%	0.1%
Switzerland	303	-33		270	-10.9%	0.2%	0.1%
Others	2,383	-336		2,047	-14.1%	1.3%	1.0%
<b>Europe</b>	<b>15,246</b>	<b>-2,193</b>		<b>13,053</b>	<b>-14.4%</b>	<b>8.1%</b>	<b>6.6%</b>
<b>ROW</b>	<b>3,990</b>		164	<b>4,154</b>	<b>4.1%</b>	2.1%	2.1%
<b>Total</b>	<b>187,453</b>		9,557	<b>197,010</b>	<b>5.1%</b>		
<b>W/O Ven.</b>	<b>181,983</b>		14,779	<b>196,762</b>	<b>8.1%</b>		



# ARRIVALS USA YTD FEBRUARY 2023/2019

**148,137**  
ARRIVALS

**10.3%**  
GROWTH

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
New York	31,182	950	32,132	3.0%	23.2%	21.7%
Massachusetts	18,973	3,411	22,384	18.0%	14.1%	15.1%
New Jersey	13,179	1,102	14,281	8.4%	9.8%	9.6%
Pennsylvania	7,465	1,310	8,775	17.5%	5.6%	5.9%
Illinois	4,124	490	4,614	11.9%	3.1%	3.1%
Connecticut	4,498	650	5,148	14.5%	3.3%	3.5%
Florida	5,955	167	6,122	2.8%	4.4%	4.1%
Ohio	3,918	500	4,418	12.8%	2.9%	3.0%
Maryland	3,434	384	3,818	11.2%	2.6%	2.6%
Michigan	3,509	387	3,896	11.0%	2.6%	2.6%
Virginia	2,670	1,288	3,958	48.2%	2.0%	2.7%
Georgia	1,967	287	2,254	14.6%	1.5%	1.5%
North Carolina	2,418	989	3,407	40.9%	1.8%	2.3%
Texas	2,273	366	2,639	16.1%	1.7%	1.8%
California	1,932	53	1,985	2.7%	1.4%	1.3%
Other	26,859	1,447	28,306	5.4%	20.0%	19.1%
<b>Total</b>	<b>134,356</b>	<b>13,781</b>	<b>148,137</b>	<b>10.3%</b>		



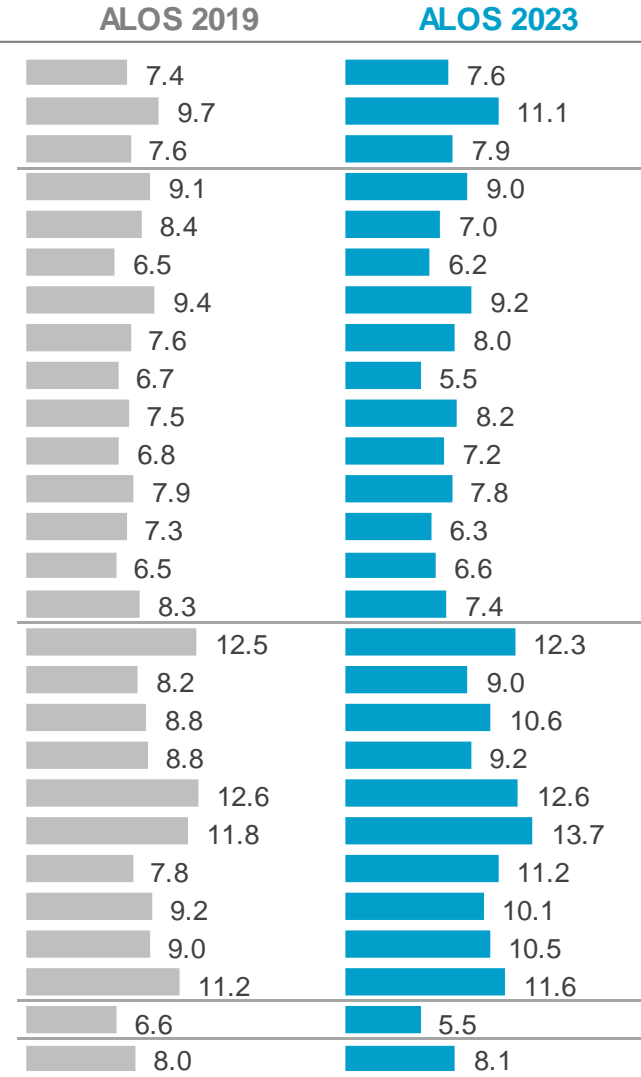


# NIGHTS YTD FEBRUARY 2023/2019

**1,586,609**  
ARRIVALS

**6.2%**  
GROWTH

	2019		Growth	2023	% Growth
USA	998,357		120,662	1,119,019	12.1%
Canada	125,875		47,868	173,743	38.0%
<b>NA</b>	<b>1,124,232</b>		<b>168,530</b>	<b>1,292,762</b>	<b>15.0%</b>
Venezuela	49,684	-47,463		2,221	-95.5%
Colombia	40,842		126	40,968	0.3%
Brazil	11,180		279	11,459	2.5%
Argentina	32,153	-3,668		28,485	-11.4%
Chile	16,045	-3,599		12,446	-22.4%
Ecuador	1,710		1,937	3,647	113.3%
Peru	5,951	-629		5,322	-10.6%
Paraguay	3,376	-1,826		1,550	-54.1%
Uruguay	3,043	-1,299		1,744	-42.7%
Mexico	1,534		286	1,820	18.6%
Others	7,798		1,606	9,404	20.6%
<b>SA</b>	<b>173,316</b>	<b>-54,250</b>		<b>119,066</b>	<b>-31.3%</b>
Netherlands	98,695	-12,797		85,898	-13.0%
UK	4,900		101	5,001	2.1%
Germany	8,273	-458		7,815	-5.5%
Italy	8,602	-2,283		6,319	-26.5%
Sweden	21,164	-4,039		17,125	-19.1%
Belgium	3,252		1,032	4,284	31.7%
Austria	1,311	-6		1,305	-0.5%
Switzerland	2,777	-52		2,725	-1.9%
Others	21,469		101	21,570	0.5%
<b>Europe</b>	<b>170,443</b>	<b>-18,401</b>		<b>152,042</b>	<b>-10.8%</b>
<b>ROW</b>	<b>26,382</b>	<b>-3,643</b>		<b>22,739</b>	<b>-13.8%</b>
<b>Total</b>	<b>1,494,373</b>		<b>92,236</b>	<b>1,586,609</b>	<b>6.2%</b>





# ACCOMMODATIONS YTD FEBRUARY 2023/2019

**197,010**  
ARRIVALS

**5.1%**  
GROWTH

## ARRIVALS BY ACCOMMODATION

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
High Rise	75,871	-5,041	70,830	-6.6%	40.5%	36.0%
Low Rise	15,917	52	15,969	0.3%	8.5%	8.1%
Timeshare	45,410	5,316	50,726	11.7%	24.2%	25.7%
Others	50,255	9,230	59,485	18.4%	26.8%	30.2%
<b>Total</b>	<b>187,453</b>	<b>9,557 </b>	<b>197,010</b>	<b>5.1%</b>		

## NIGHTS BY ACCOMMODATION

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
High Rise	477,795	-45,512	432,283	-9.5%	35.3%	27.2%
Low Rise	113,964	-2,143	111,821	-1.9%	7.6%	7.0%
Timeshare	428,219	54,235	482,454	12.7%	28.7%	30.4%
Others	474,395	85,656	560,051	18.1%	31.7%	35.3%
<b>Total</b>	<b>1,494,373</b>	<b>92,236 </b>	<b>1,586,609</b>	<b>6.2%</b>		



# ACCOMMODATIONS MAIN MARKETS

## YTD FEBRUARY 2023/2019

**197,010**  
ARRIVALS

**5.1%**  
GROWTH

### MARKET SHARE OF THE MARKET BY ACCOMMODATION CATEGORY

	HIGH RISE			LOW RISE			TIME SHARE			OTHERS		
	2019	2023	%Growth	2019	2023	%Growth	2019	2023	%Growth	2019	2023	% Growth
USA	79.8%	82.9%	3.1%	66.0%	76.0%	10.0%	87.5%	91.0%	3.5%	46.9%	52.4%	5.5%
Venezuela	1.0%	0.1%	-0.9%	3.4%	0.1%	-3.3%	1.2%	0.0%	-1.2%	7.3%	0.3%	-7.0%
Netherlands	1.0%	0.9%	-0.1%	4.5%	3.1%	-1.4%	0.6%	0.5%	-0.1%	12.2%	9.4%	-2.9%
Canada	7.1%	7.7%	0.6%	6.7%	6.4%	-0.3%	4.6%	4.6%	0.0%	8.8%	11.4%	2.6%
Brazil	1.2%	1.0%	-0.2%	0.8%	1.0%	0.2%	0.3%	0.4%	0.1%	1.1%	1.3%	0.2%
Colombia	1.5%	1.1%	-0.4%	2.5%	1.8%	-0.6%	1.1%	0.8%	-0.3%	5.6%	7.4%	1.8%
Argentina	2.3%	2.4%	0.1%	1.6%	1.0%	-0.6%	1.2%	0.8%	-0.4%	1.7%	1.3%	-0.4%
Chile	1.6%	1.0%	-0.5%	1.4%	0.7%	-0.7%	0.4%	0.3%	0.0%	1.1%	0.9%	-0.1%
Peru	0.4%	0.3%	-0.1%	0.4%	0.3%	-0.1%	0.1%	0.1%	-0.1%	0.7%	0.6%	-0.1%
UK	0.2%	0.2%	0.0%	0.6%	0.3%	-0.3%	0.1%	0.1%	0.0%	0.5%	0.5%	0.0%
Italy	0.3%	0.1%	-0.1%	0.8%	0.6%	-0.2%	0.2%	0.1%	-0.1%	1.2%	0.8%	-0.4%
<b>Total mainmkt</b>	<b>96.4%</b>	<b>97.8%</b>	<b>1.5%</b>	<b>88.5%</b>	<b>91.3%</b>	<b>2.8%</b>	<b>97.2%</b>	<b>98.6%</b>	<b>1.3%</b>	<b>87.2%</b>	<b>86.3%</b>	<b>-0.9%</b>





# ACCOMMODATIONS MAIN MARKETS

## YTD FEBRUARY 2023/2019

**197,010**  
ARRIVALS

**5.1%**  
GROWTH

### VISITOR ARRIVALS AT THE ACCOMMODATION TYPE FOR THE MARKET

	HIGH RISE			LOW RISE			TIME SHARE			OTHERS		
	2019	2023	Growth	2019	2023	Growth	2019	2023	Growth	2019	2023	Growth
USA	60,564	58,703	-1,861	10,500	12,135	1,635	39,717	46,142	6,425	23,575	31,157	7,582
Venezuela	734	58	-676	537	10	-527	541	17	-524	3,658	163	-3,495
Netherlands	779	658	-121	716	497	-219	271	231	-40	6,155	5,580	-575
Canada	5,374	5,474	100	1,070	1,021	-49	2,089	2,314	225	4,428	6,806	2,378
Brazil	907	704	-203	122	160	38	133	178	45	555	799	244
Colombia	1,137	782	-355	391	289	-102	491	397	-94	2,836	4,400	1,564
Argentina	1,742	1,715	-27	257	165	-92	550	420	-130	866	781	-85
Chile	1,183	717	-466	223	111	-112	169	174	5	534	556	22
Peru	338	236	-102	58	48	-10	60	30	-30	340	335	-5
UK	186	156	-30	96	55	-41	44	48	4	273	299	26
Italy	191	103	-88	123	95	-28	77	40	-37	581	452	-129
<b>Total mainmkt</b>	<b>73,135</b>	<b>69,306</b>	<b>-3,829</b>	<b>14,093</b>	<b>14,586</b>	<b>493</b>	<b>44,142</b>	<b>49,991</b>	<b>5,849</b>	<b>43,801</b>	<b>51,328</b>	<b>7,527</b>



# VISITORS BY AGE YTD FEBRUARY 2023/2019

**197,010**  
ARRIVALS

**5.1%**  
GROWTH

	2019	Growth	2023	% Growth
0 - 11	12,238	81	12,319	0.7%
12-19	9,690	613	10,303	6.3%
20 - 29	19,966	79	20,045	0.4%
30 - 39	26,031	1,942	27,973	7.5%
40 - 49	29,229	460	29,689	1.6%
50 - 59	39,730	-42	39,688	-0.1%
60 - 69	32,888	3,953	36,841	12.0%
70 +	17,639	2,489	20,128	14.1%
Not Stated	42	-18	24	-42.9%
<b>Total</b>	<b>187,453</b>	<b>9,557</b>	<b>197,010</b>	<b>5.1%</b>



# GENERATIONS

## YTD FEBRUARY 2023/2019

**197,010**  
VISITORS

**5.1%**  
GROWTH

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
Gen A	0	19,149	9,950	#DIV/0!	5.0%	5.4%
Gen Z	24,749	35,138	23,156	-6.4%	16.9%	15.6%
Millennials	38,088	57,299	44,010	15.5%	29.3%	26.6%
Gen X	45,656	79,566	50,181	9.9%	26.4%	26.5%
Baby Boomers	66,423	92,843	62,538	-5.8%	20.7%	23.6%
Silent Generations	12,495	10,421	7,151	-42.8%	1.8%	2.2%
Age not specified	42	26	24	-42.9%	0.0%	0.0%
<b>Total</b>	<b>187,453</b>	<b>294,442</b>	<b>197,010</b>	<b>5.1%</b>		





# CARRIERS YTD FEBRUARY 2023/2019

**197,010**  
VISITORS

**5.1%**  
GROWTH

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
AMERICAN AIRLINES	31,805	13,850	45,655	43.5%	17.0%	23.2%
JETBLUE	42,052	6,982	42,045	0.0%	22.4%	21.3%
DELTA AIRLINE	21,648	-3,836	28,630	32.3%	11.5%	14.5%
UNITED AIRLINES	25,057	-4,513	21,221	-15.3%	13.4%	10.8%
SOUTHWEST AIRLINES	13,198	2,427	8,685	-34.2%	7.0%	4.4%
KLM ROYAL DUTCH	4,652	-678	7,079	52.2%	2.5%	3.6%
AVIANCA	7,653	353	6,975	-8.9%	4.1%	3.5%
COPA AIRLINE	5,690	1,401	6,043	6.2%	3.0%	3.1%
AIR CANADA	3,502	2,358	4,903	40.0%	1.9%	2.5%
WESTJET AIRLINES	2,325	-166	4,683	101.4%	1.2%	2.4%
SUNWING AIRLINES	4,380	2,482	4,214	-3.8%	2.3%	2.1%
AERO REPUBLICA/ WINGO	303	1,418	2,785	819.1%	0.2%	1.4%
DIVI DIVI AIR	1,229	-636	2,647	115.4%	0.7%	1.3%
TUI NL / ARKEFLIGHT	2,805	911	2,169	-22.7%	1.5%	1.1%
SPIRIT AIRLINES	773	1,318	1,684	117.9%	0.4%	0.9%
EZ AIR	112	139	1,430	1176.8%	0.1%	0.7%
SUN COUNTRY	1,197	1,156	1,336	11.6%	0.6%	0.7%
SUNCLASS AIRLINES	0	34	1,156	-	0.0%	0.6%
PRIVATE	1,103	-4,531	1,137	3.1%	0.6%	0.6%
CHARTER	5,392	15	861	-84.0%	2.9%	0.4%
SURINAM AIRWAYS	618	418	633	2.4%	0.3%	0.3%
JETAIR CARIBBEAN	0	180	418	-	0.0%	0.2%
ARAJET	0	-642	180	-	0.0%	0.1%
WINAIR	814	50	172	-78.9%	0.4%	0.1%
SKY HIGH AVIATION	36	-20	86	138.9%	0.0%	0.0%
AIR CENTURY	82	-10,906	62	-24.4%	0.0%	0.0%
Others	11,027	9,557	121	-98.9%	5.9%	0.1%
<b>Total</b>	<b>187,453</b>		<b>197,010</b>	<b>5.1%</b>		



# CRUISE COMPARISON



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





# CRUISE YTD FEBRUARY



2019



CRUISE PAX  
**214,509**

CRUISE CALLS  
**86**



2023



CRUISE PAX  
**242,568**

**13%**

CRUISE CALLS  
**95**

**10.5%**

ABSOLUTE GROWTH PAX YTD February

**28,059**

ABSOLUTE GROWTH CALLS YTD February

**9**





# CRUISE FEBRUARY



2019



CRUISE PAX  
**86,084**

CRUISE CALLS  
**34**



2023



CRUISE PAX  
**119,625**

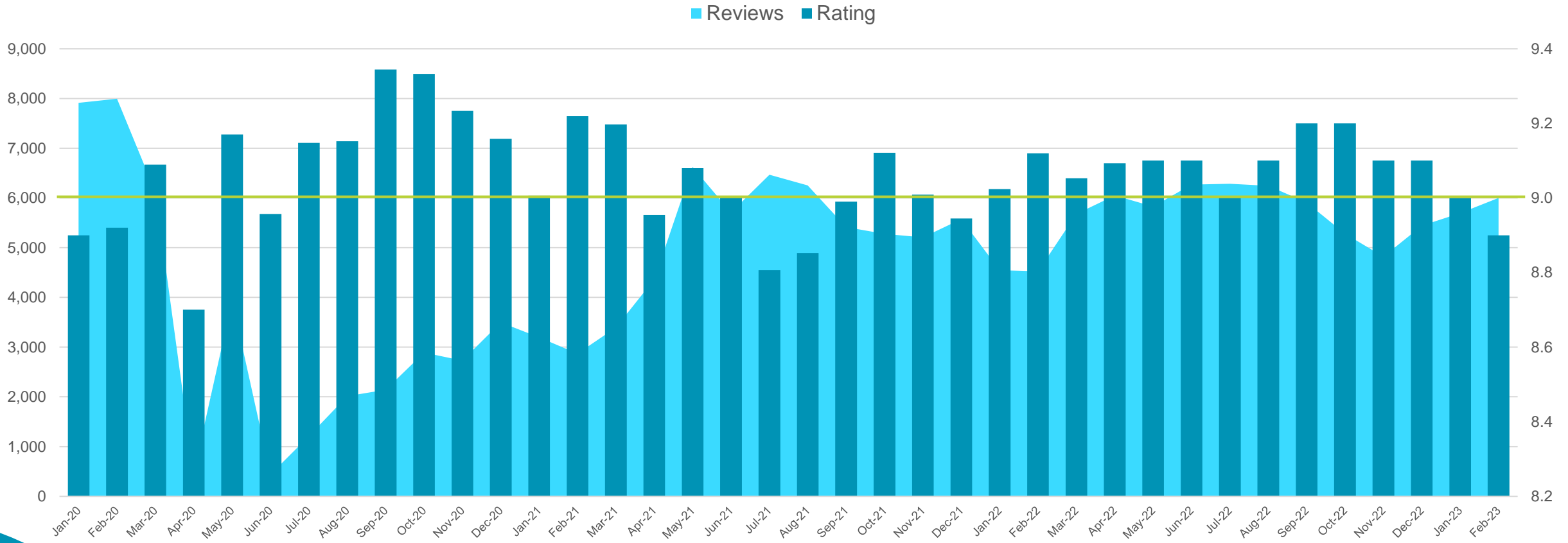
CRUISE CALLS  
**47**



# GUEST SATISFACTION



# GUEST EXPERIENCE INDEX (GEI)

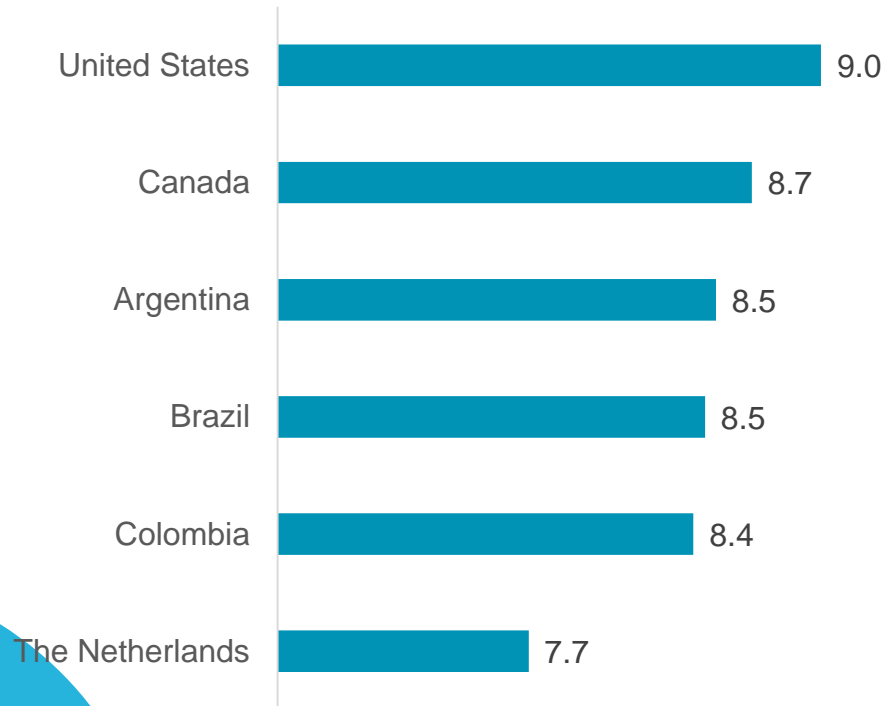




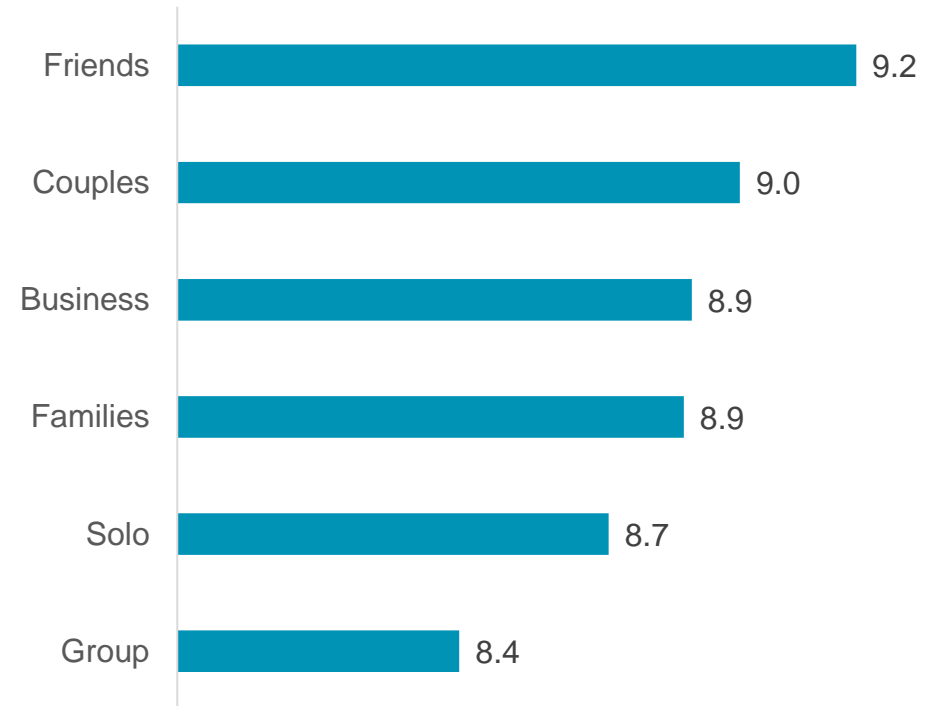


# GUEST EXPERIENCE INDEX (GEI)

GEI Top 5 Markets



GEI by Travel Party

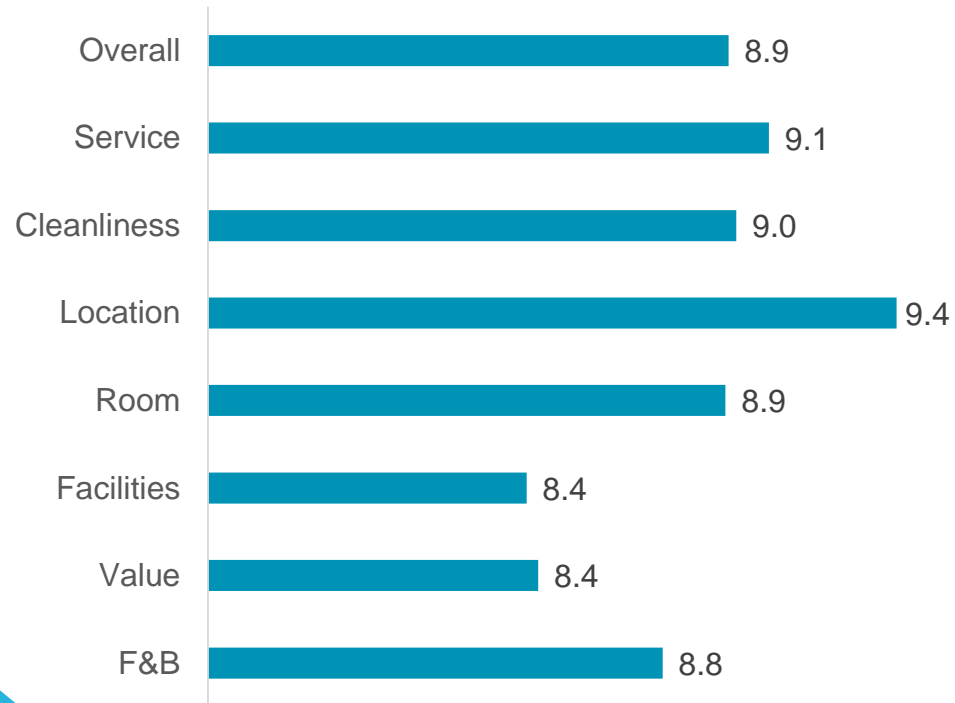




# GUEST EXPERIENCE INDEX (GEI) FEBRUARY

KPI with Overall

*With an average overall scoring of 8.9*





# VACATIONS RENTALS

 **Transparent**  
an OTA INSIGHT company



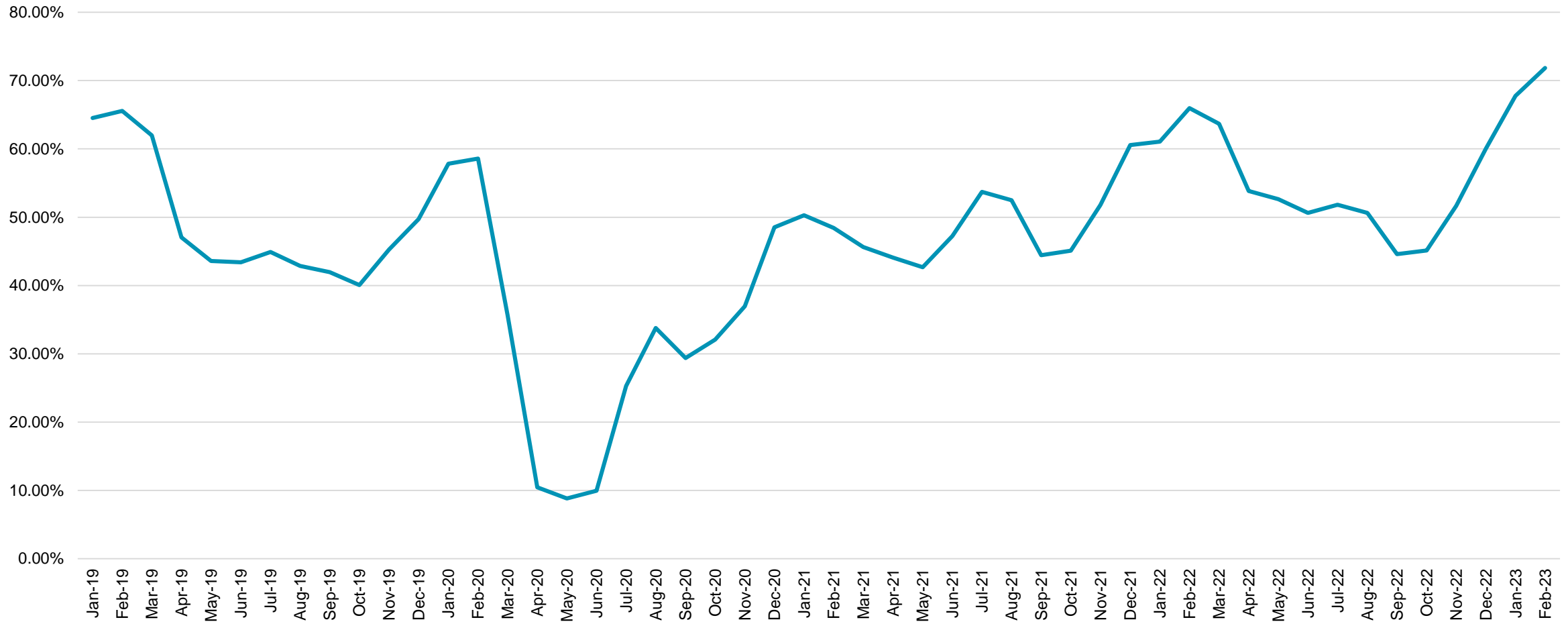
# INTRODUCTION

- ▶ In 2022, A.T.A. started working with Transparent Insights. Transparent tracks short-term rentals at the property level through their dashboard.
- ▶ With Transparent, A.T.A. is able to do the following:
  - Measure the economic impact of short-term rental, track (ADR) and occupancy and analyse the booking window.
  - The above data points are also forward-looking making it possible to make demand and revenue predictions based on the current status of property calendars and advertised rates.
  - Track visitors' origin and accommodation size.
  - The dashboard also provides the ability to make a direct comparison with similar, contrasting, or competing markets to compare data on occupancy rates, ADR, and booking window.



# OCCUPANCY

February 2023 Occupancy: 71.9% | February 2022 Occupancy: 65.9%

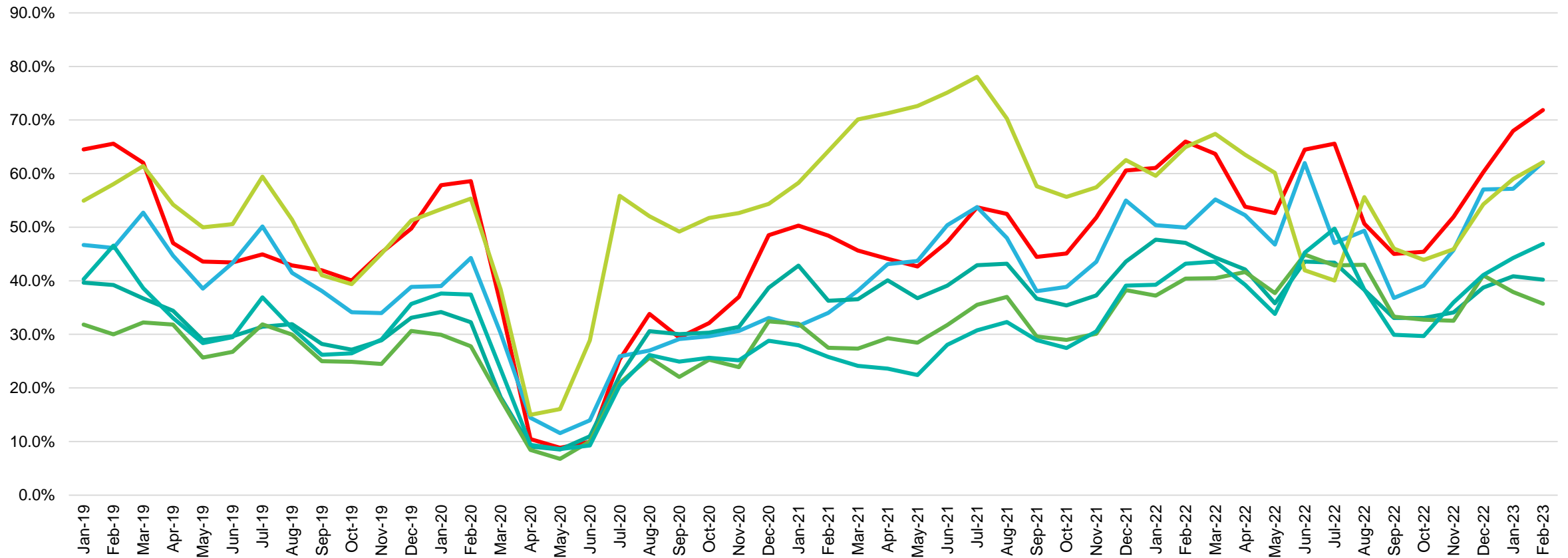


# CARIBBEAN OCCUPANCY

February

AUA: 71.85% | Bahamas: 62.1% | DR: 40.2% | Jamaica: 35.7% | PR: 62.159% | Sint Lucia: 46.9%

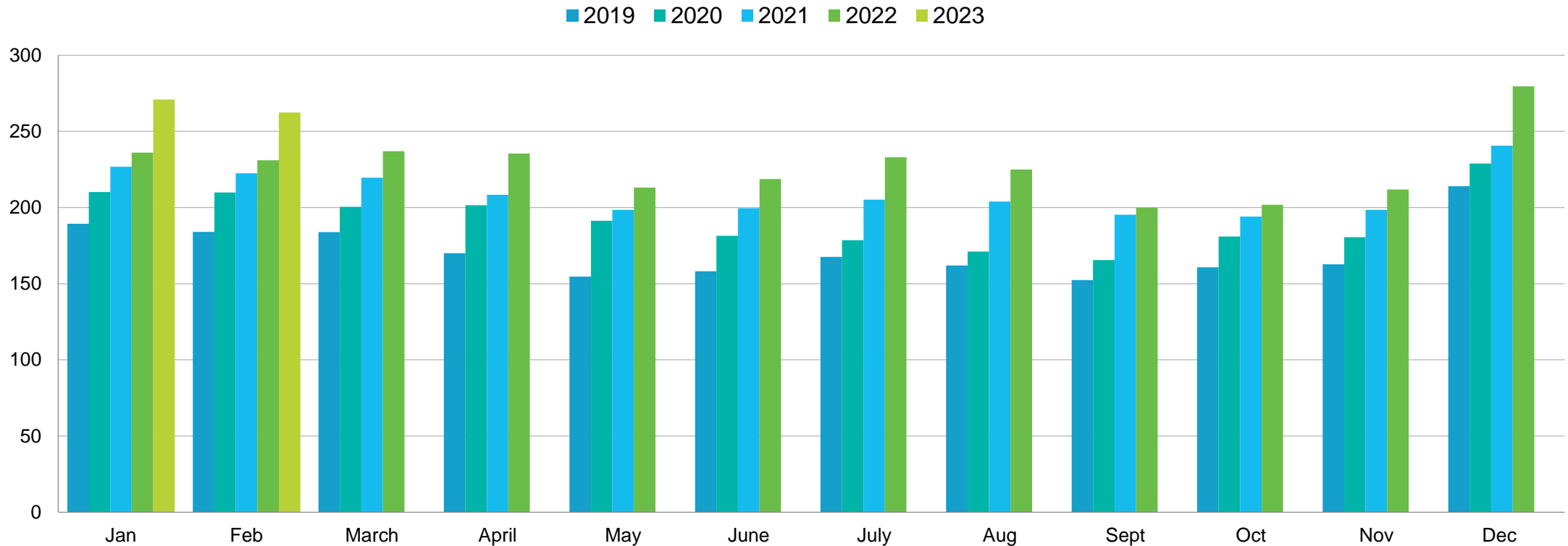
Aruba Bahamas DR Jamaica Puerto Rico Sint Lucia





# AVERAGE DAILY RATE (ADR)

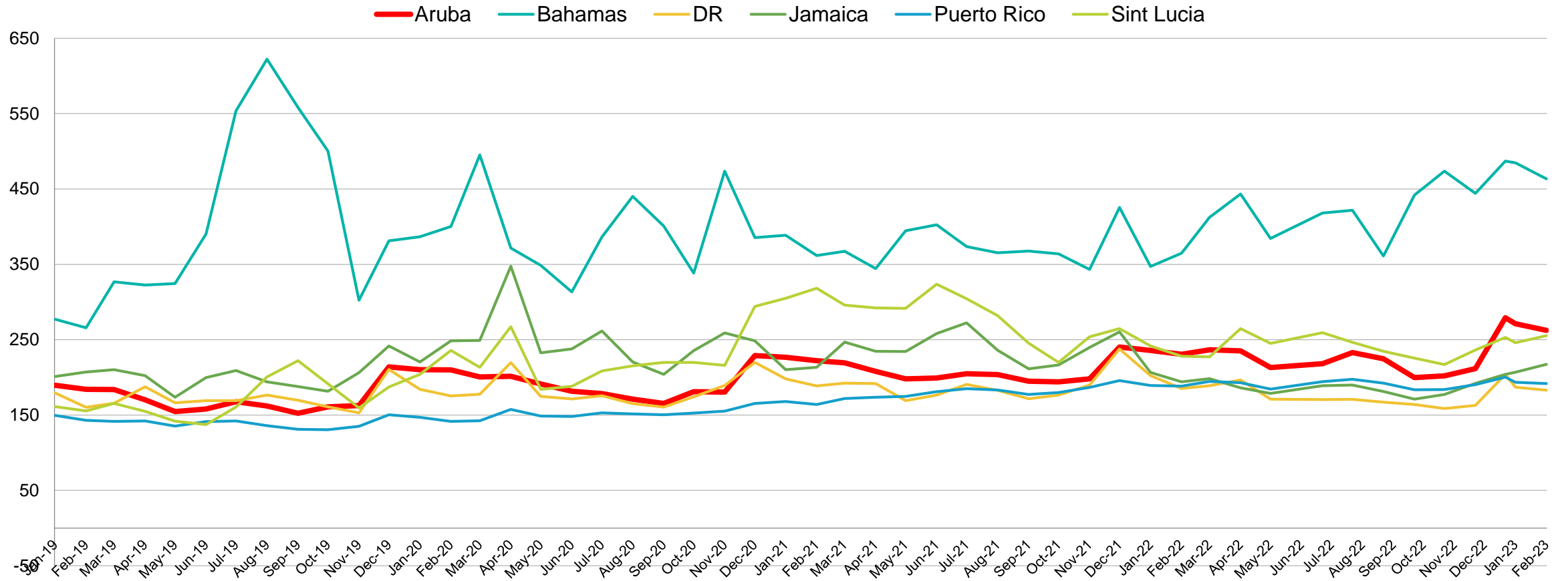
February 2023 ADR: USD\$262 | February 2022 ADR: USD\$231



# CARIBBEAN ADR

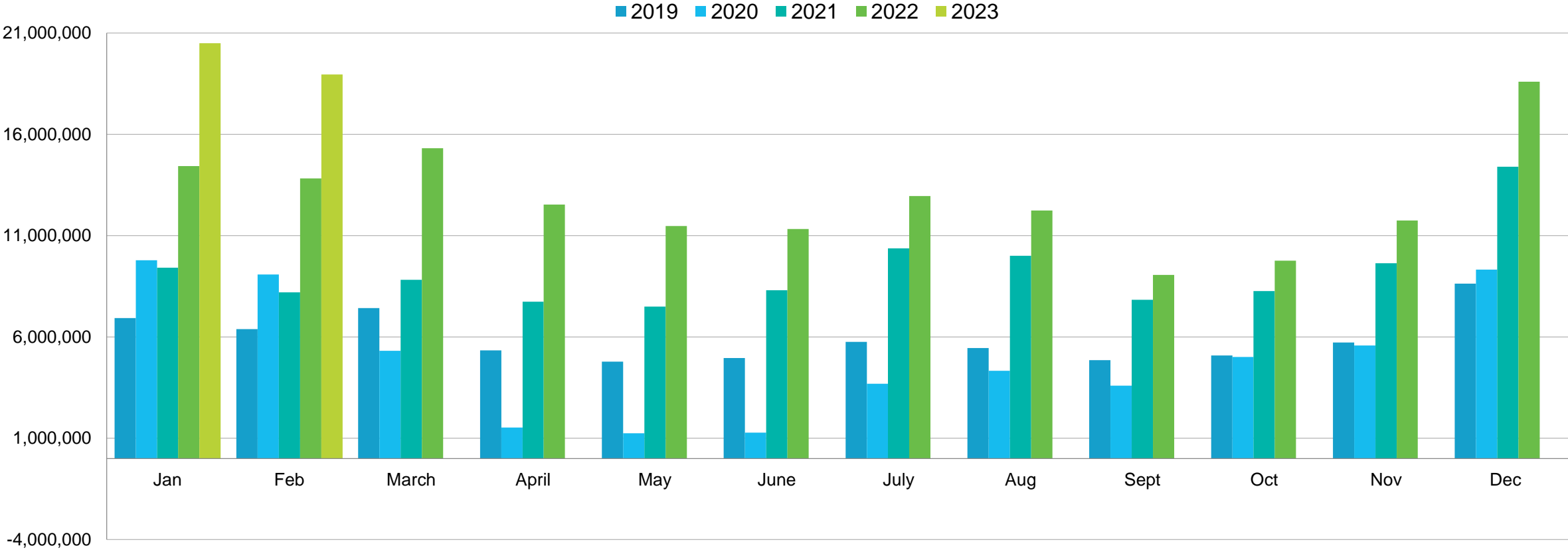
February

AUA: USD\$262 | Bahamas: USD\$464 | DR: USD\$183 | Jamaica: USD\$217 | PR: USD\$192 | Sint Lucia: USD\$255



# REVENUE

February 2023 Revenue: USD\$ 18,953,588 | February 2022 Revenue: USD\$ 13,824,906





# T I D B I T S

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# ATA RESEARCH AGENDA

Our tidbits content is adapted every month. In this section, we share several tourism-related topics such as research conducted by ATA or credit card spending information or other relevant topics. Each year, A.T.A. sets up a research agenda for the upcoming year. In this month's tidbits, we share the results of the United Kingdom research conducted by ATA. The research aims to understand the United Kingdom's travel behavior and take a deeper look at the affluent travel behaviors, type of traveler, planning and booking behavior, spending behavior, and travel preferences and criteria.





*United Kingdom*  
Research





# Research *Methodology*

The primary objective of this research is to understand the United Kingdom's travel behavior and take a deeper look at the affluent travel behaviors, type of traveler, planning and booking behavior, spending behavior, and travel preferences and criteria.

In addition, with this research, we seek to understand the UK resident's specific needs and requirements for their vacation.

An online survey was created and deployed by the online service Qualtrics to their Database. Responses amongst UK travelers were collected during the month of December 2022.

In total, we received 1,112 respondents. After the data clean-up, the final sample size was 1,050 respondents (N).

Qualifying criteria:

1. Do you currently reside in the United Kingdom?
  - Additionally, from the mentioned criteria, a screening question was used to select respondents who have traveled or will travel internationally to the Caribbean and if they have traveled in the past two years.
2. Household Income: - Under 100K (~50%) and above 100K (~50%)

The Survey consisted of 16 questions in total.

**Online Survey**



**Quantitative**

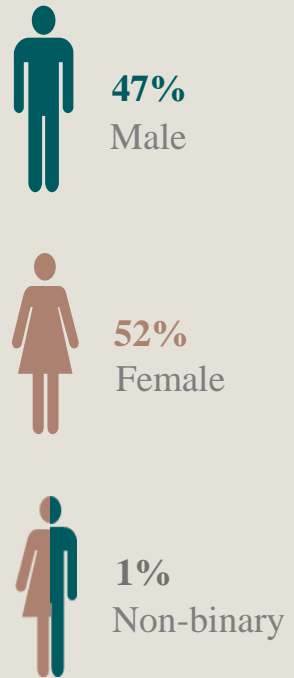




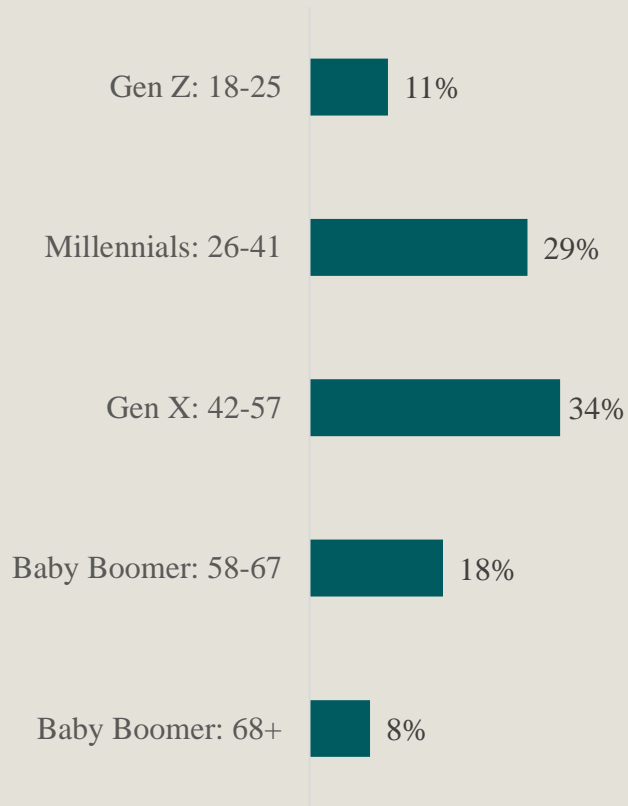
# Demographics



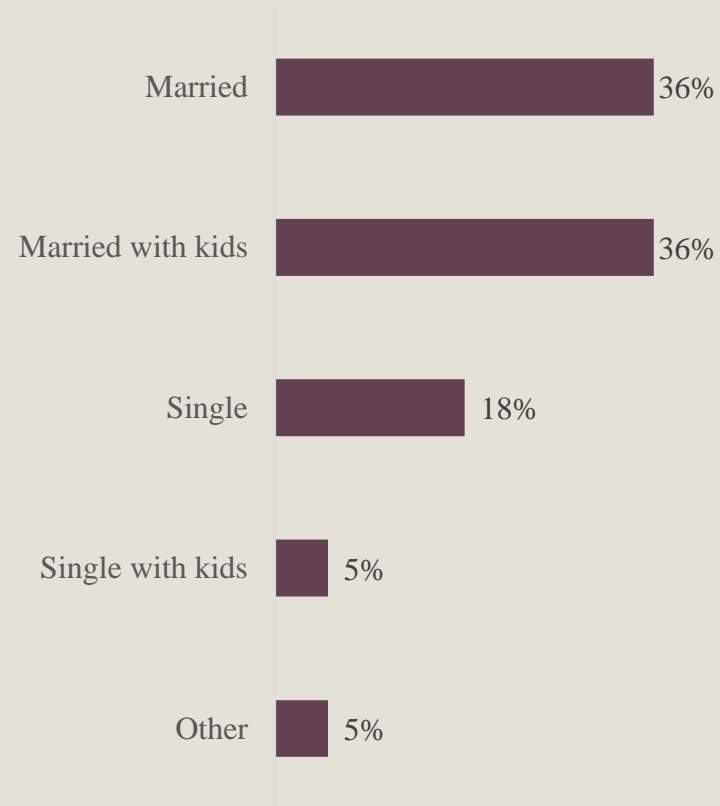
## Gender



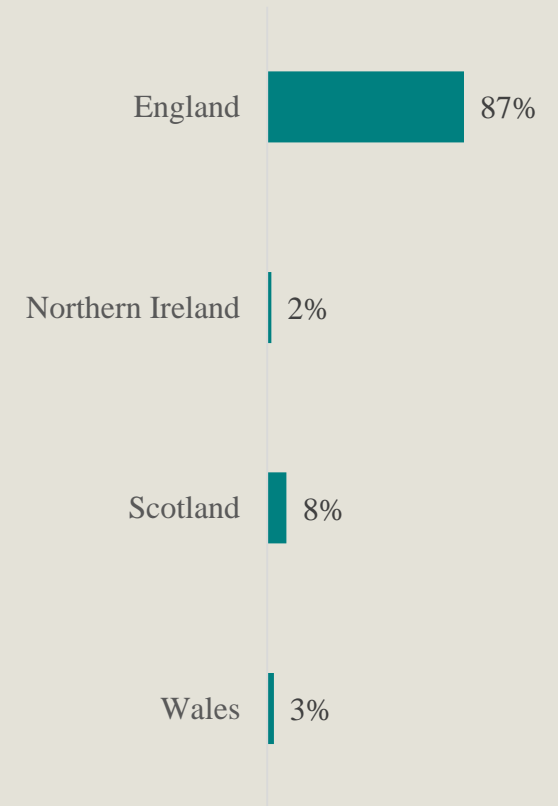
## Age Range



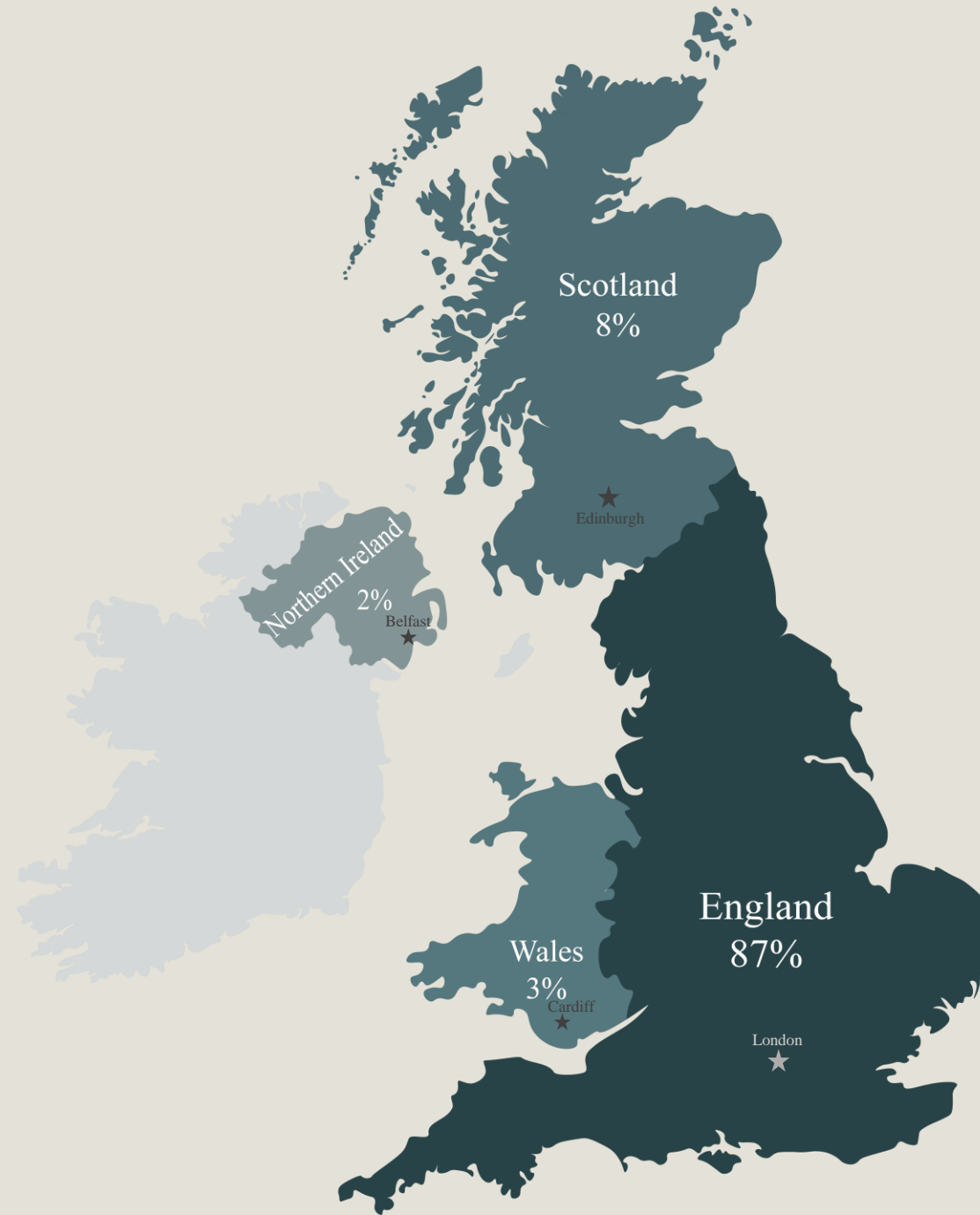
## Household



## UK Countries

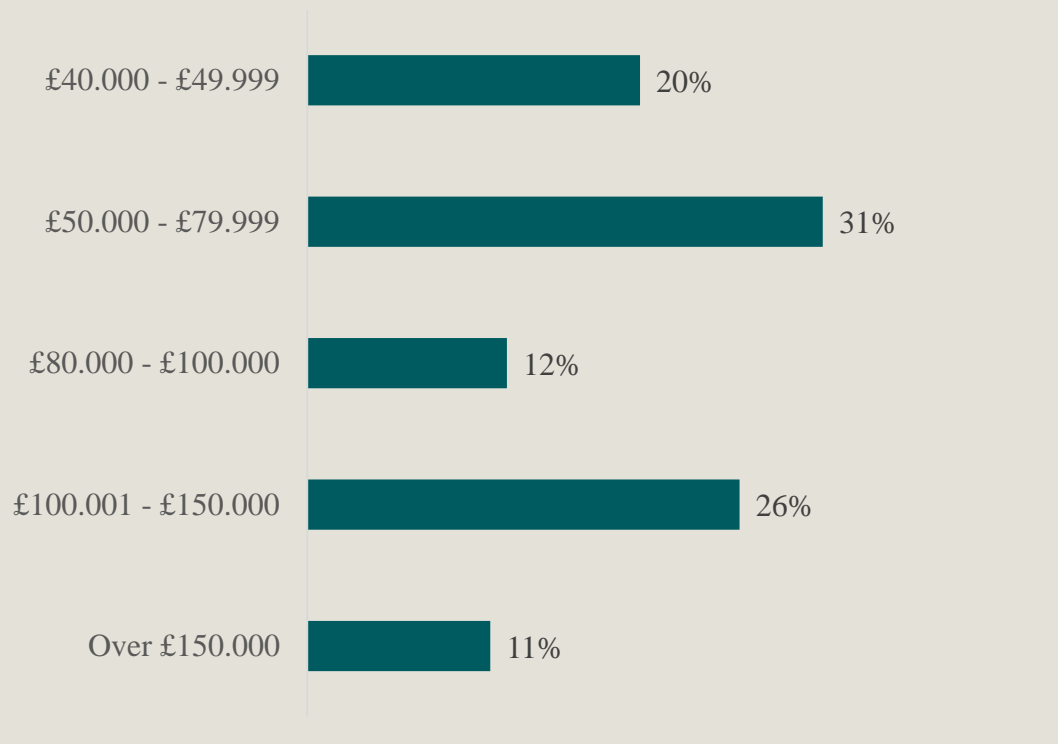


# UK Countries





## Household Income



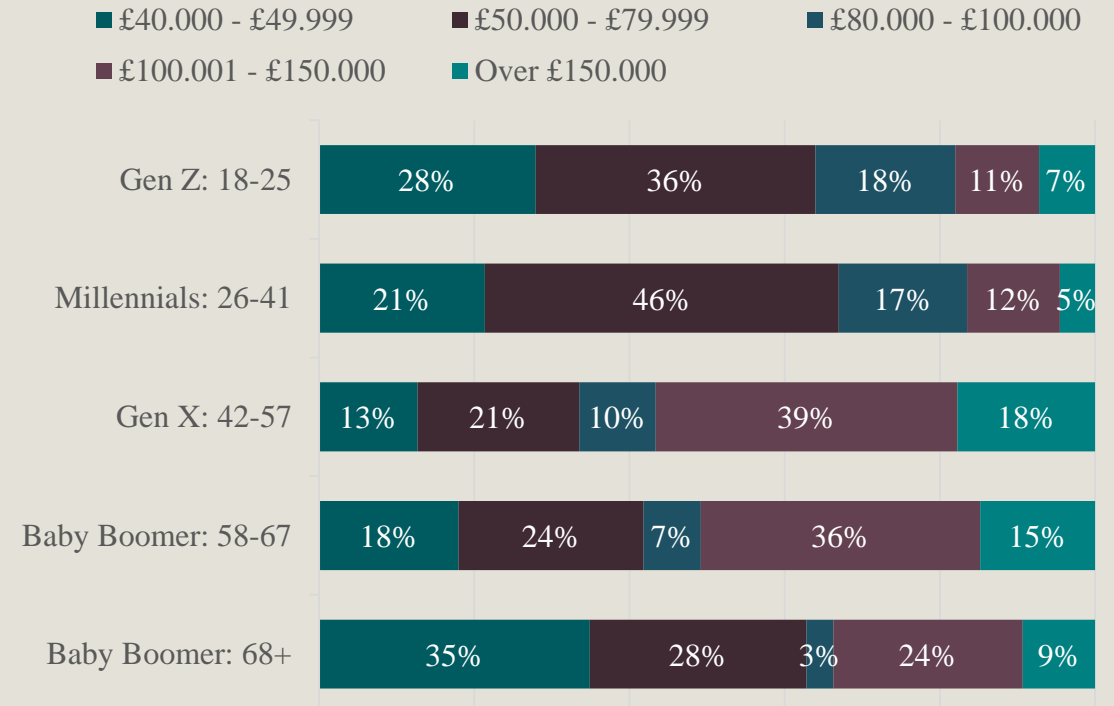
49% of the respondents are considered Affluent.

Note: Household Income of £80,000 or higher is considered wealthy in the UK

£1.00 = \$1.23

## Household Income

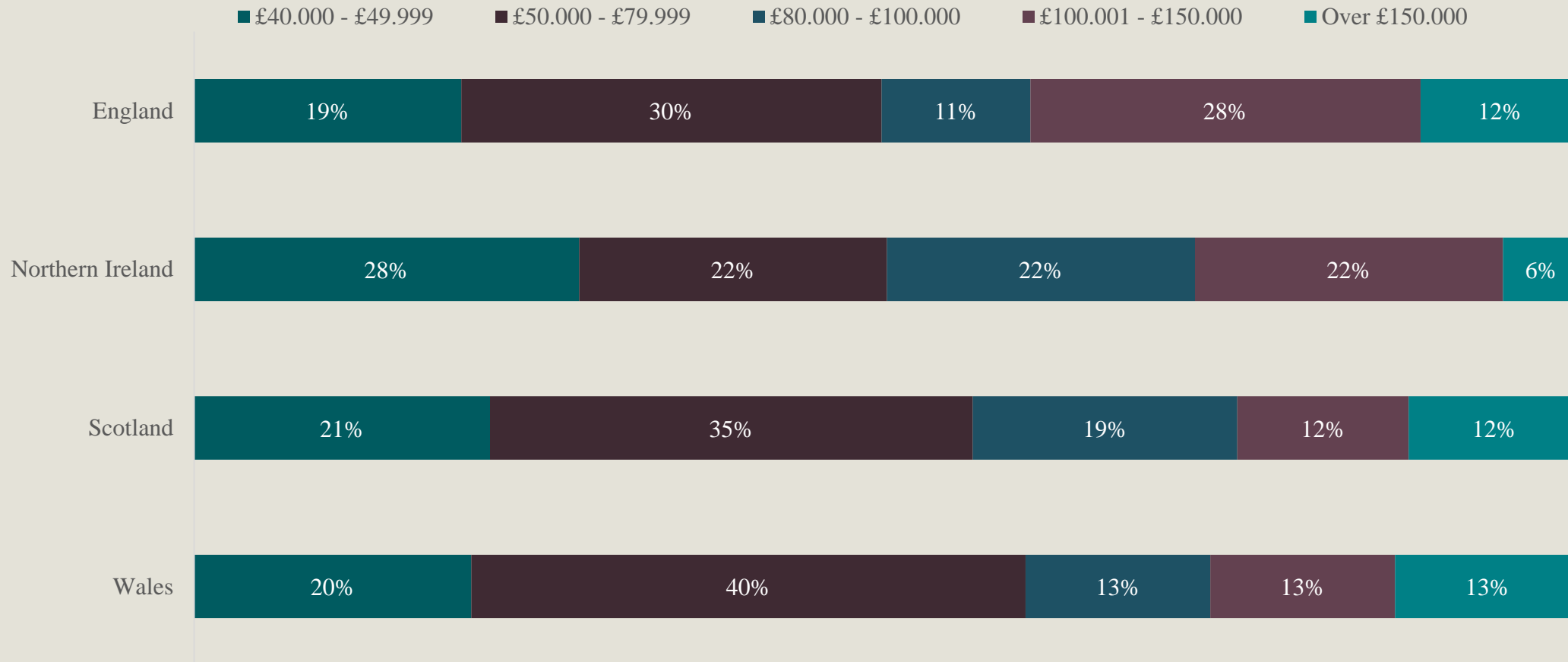
### By Generation



- Gen X are more likely to have a household income of £100,000 or more.
- Millennials tend to have a household income of around £50,000 and £79,999

# Household Income

## By UK Countries





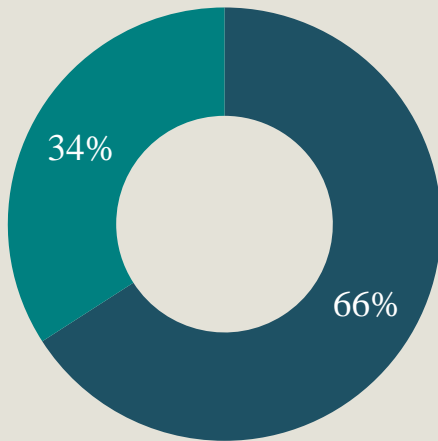
# Travel Behavior



# Type of Traveler – *Explorer vs. Repeater*

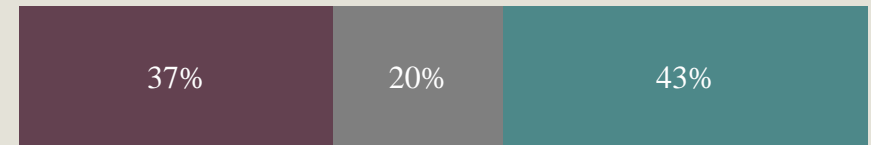
## Type of Traveler

- I like to explore new destinations on each vacation
- I like to revisit a destination I have already been to



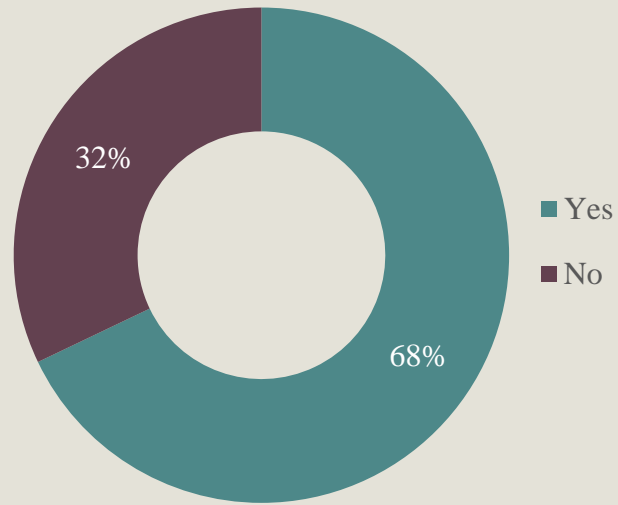
## Likelihood of Traveling to a Caribbean Island next 12 months

- Extremely unlikely & Somewhat unlikely
- Neither likely nor unlikely
- Extremely likely & Somewhat likely

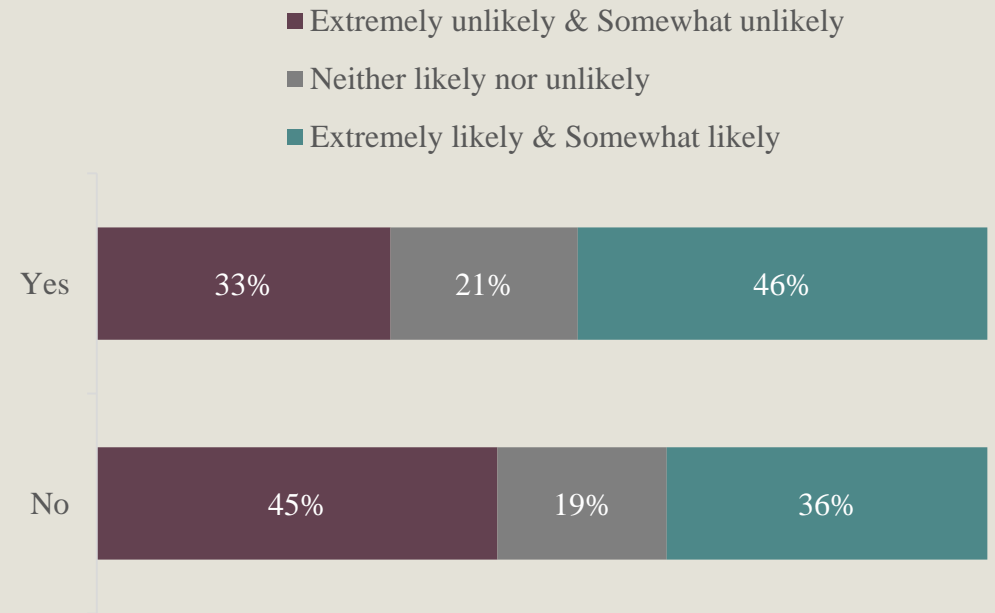




## Heard About Aruba



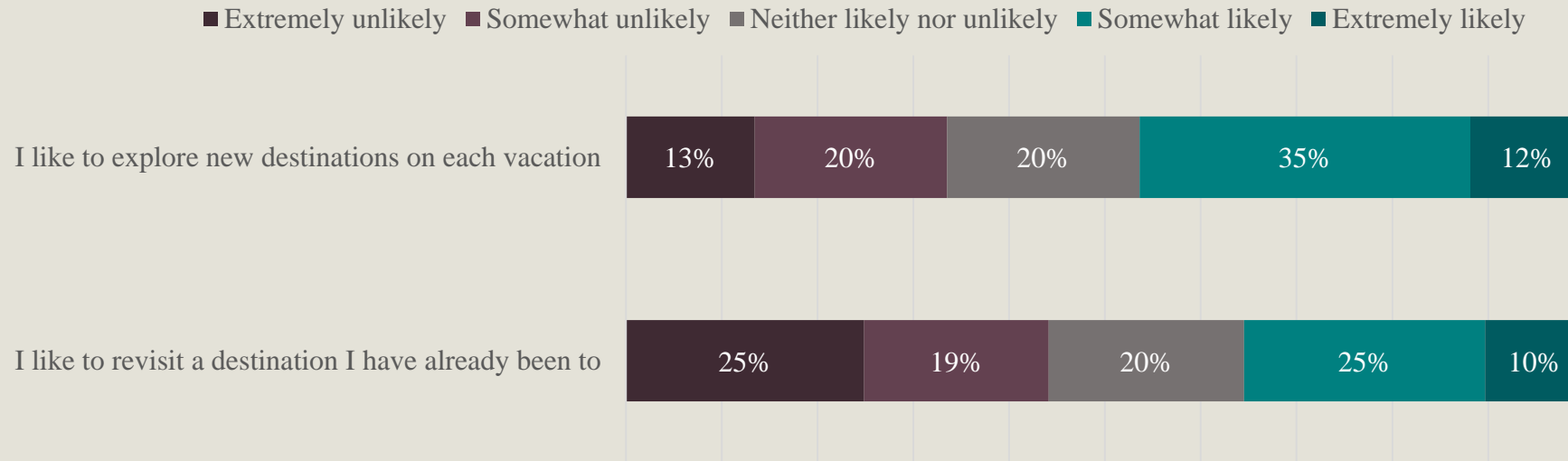
## Likelihood of Traveling to a Caribbean Island next 12 months *By Familiar with Aruba*



- Respondents who indicated that they have not heard about Aruba before are less likely to travel to a Caribbean island in the next 12 months.

## Type of traveler

*By likely to travel to the Caribbean in the next 12 months*

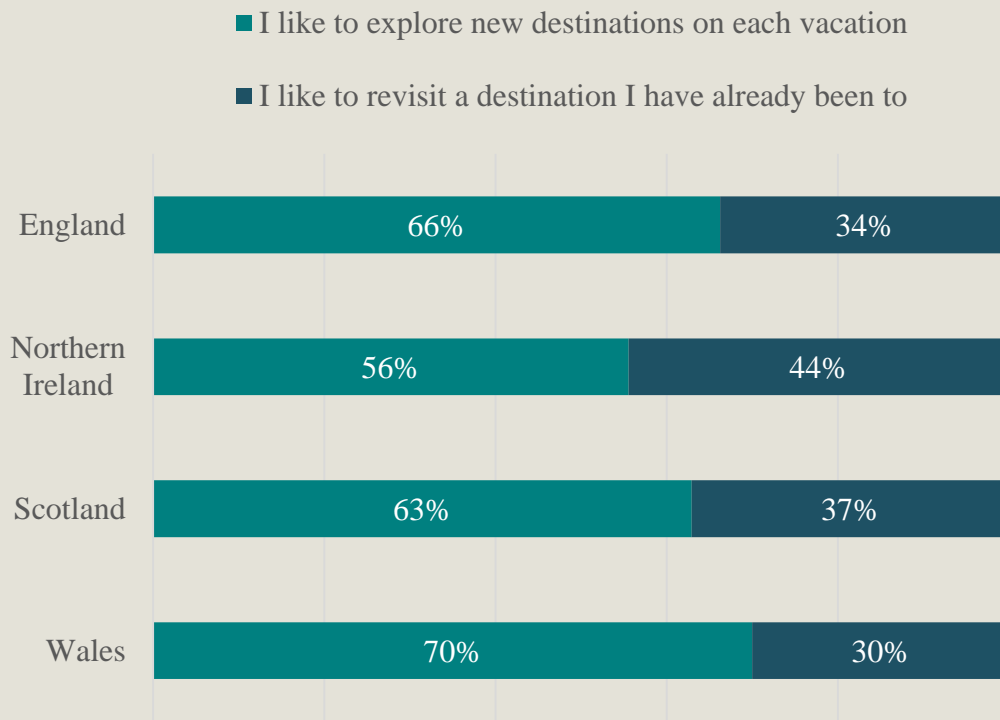


Question: Which of the following best describes you as a traveler? | How likely are you to travel abroad to a Caribbean island in the next 12 months?

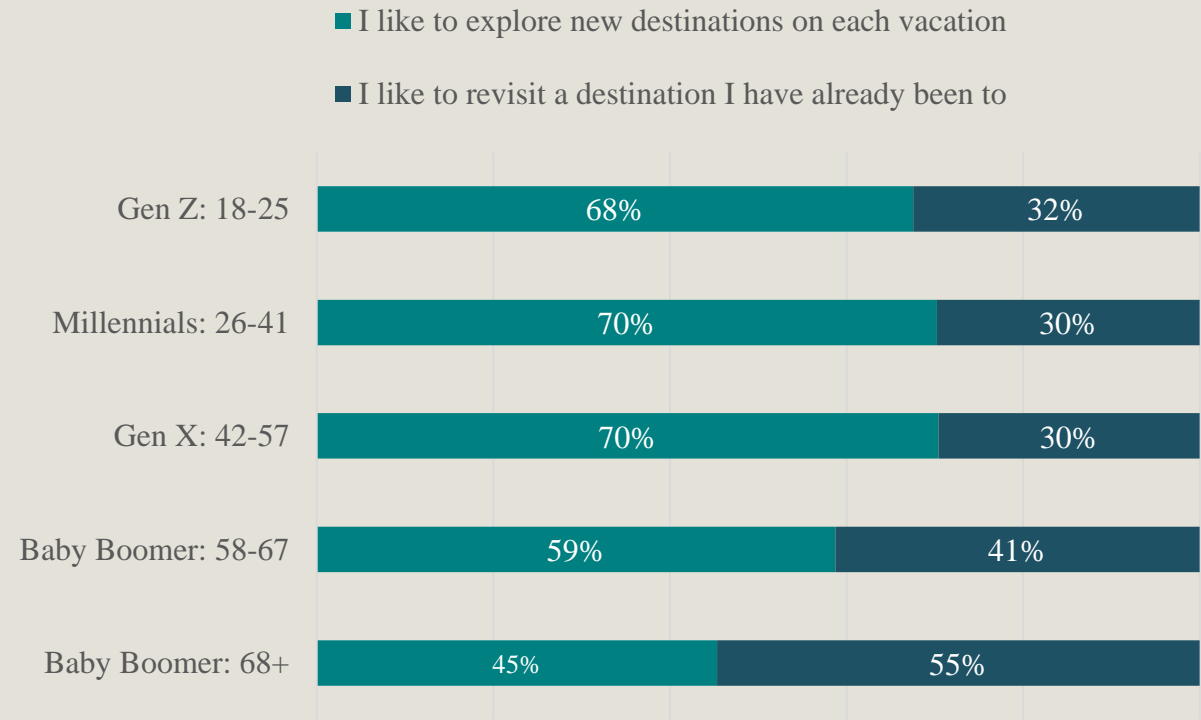
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## Type of Traveler By Country



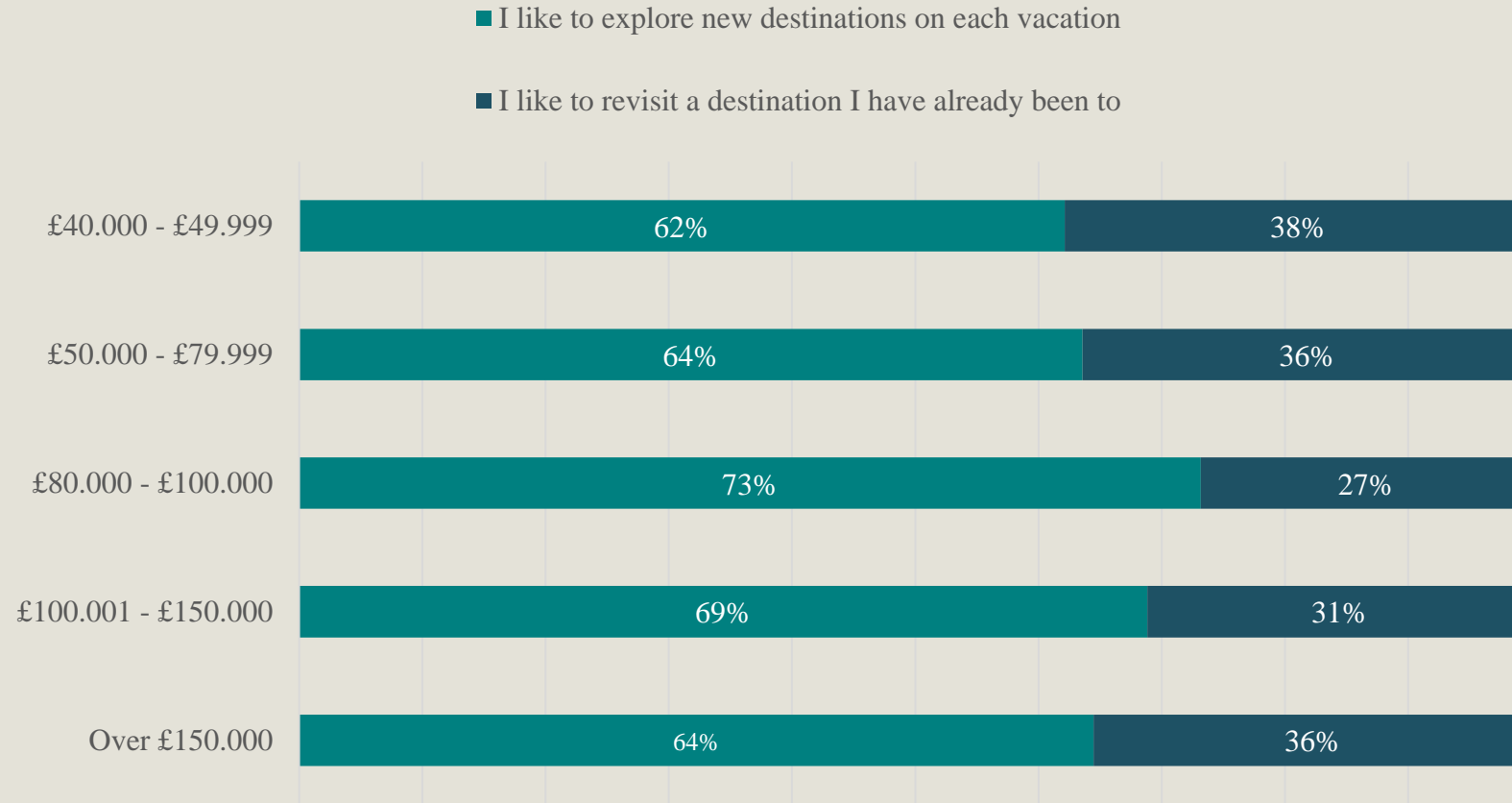
## Type of Traveler By Generation



- Older Baby Boomers tend to want to revisit destinations than explore new ones.
- Younger Baby Boomers tend to want to explore new destinations.



## Type of Traveler *By Household Income*



Question: Which of the following best describes you as a traveler? | What is your annual household income?

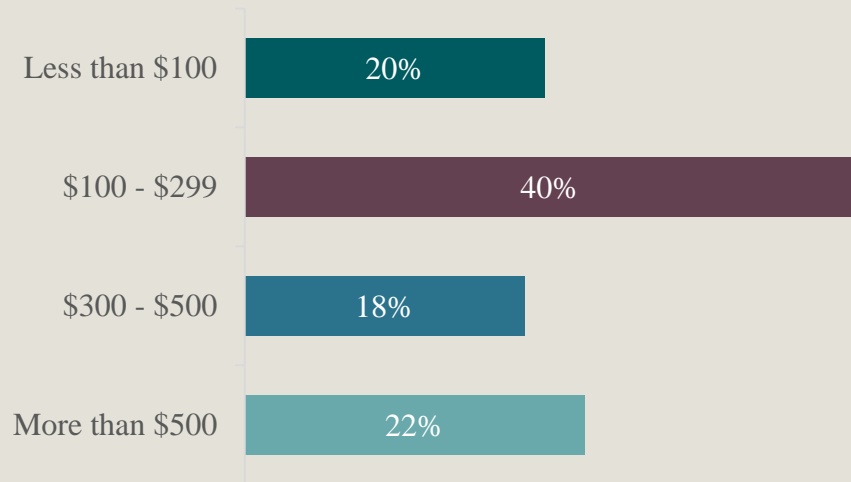
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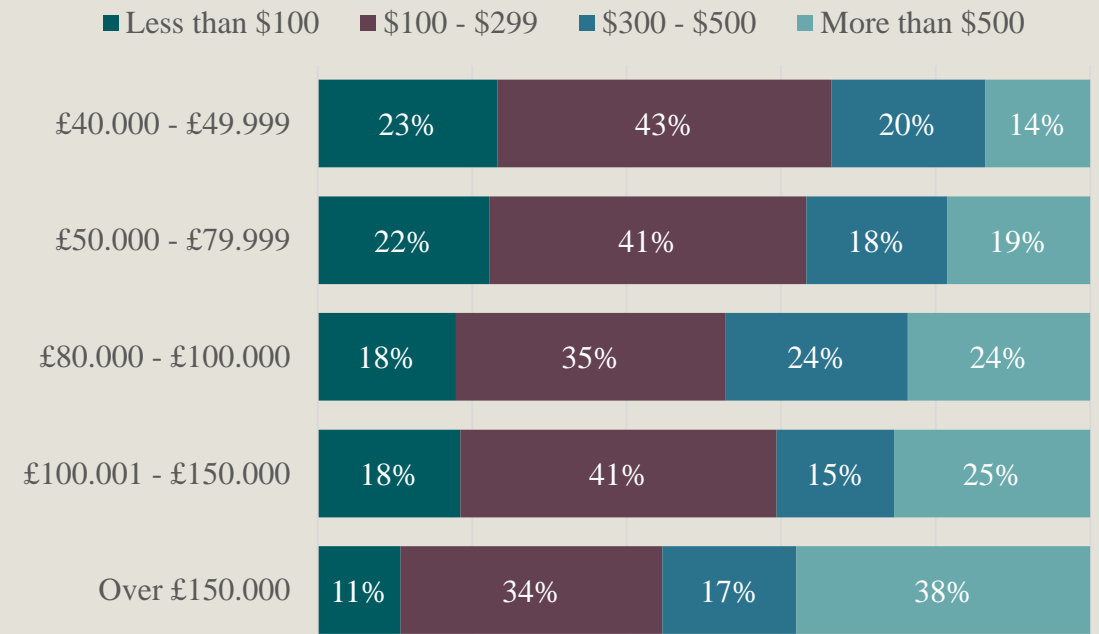
# Spend Behavior



## Spend Per Day *F&B and Activities*

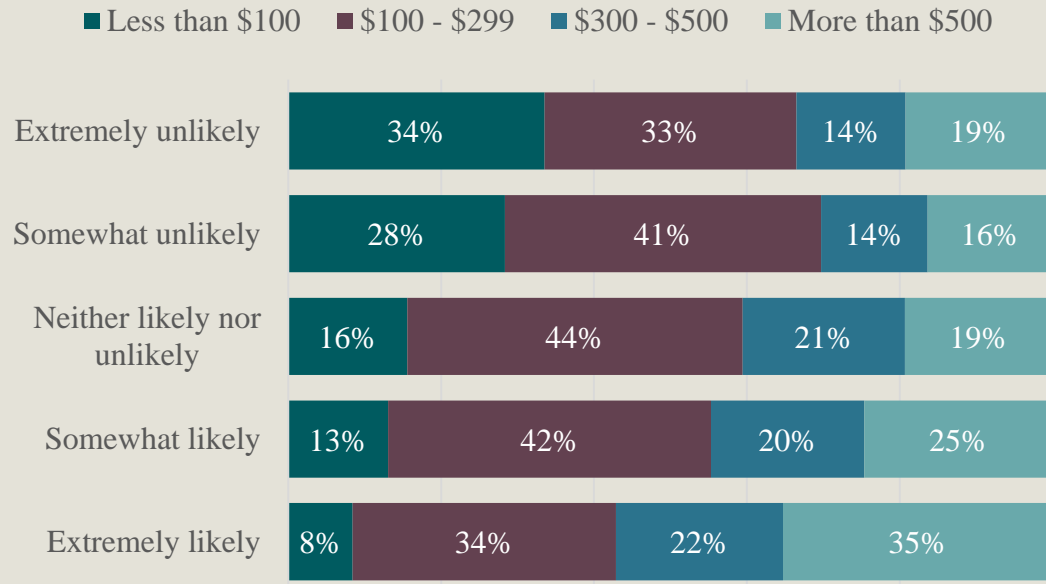


## Spend Per Day *By Household Income*



- Respondents who indicated to spending more than \$500 are more likely to have a household income over £150,000

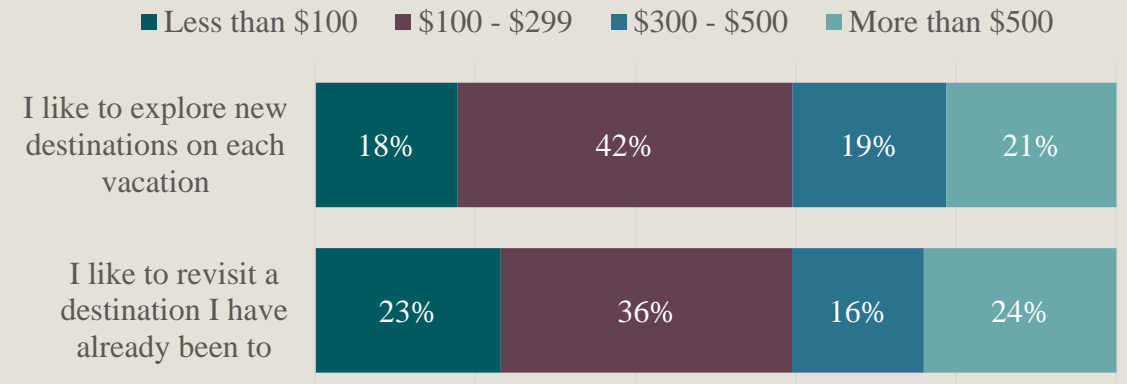
## Spend Per Day By Likelihood of Travel to a Caribbean Destination Next Year



Question: How much do you spend on average on vacation on food & beverage and other activities per person per day? | How likely are you to travel abroad to a Caribbean island in the next 12 months?

- Respondents who indicated spending more than \$500 are extremely likely to visit a Caribbean island in the next 12 months.

## Spend Per Day By Type of Traveler

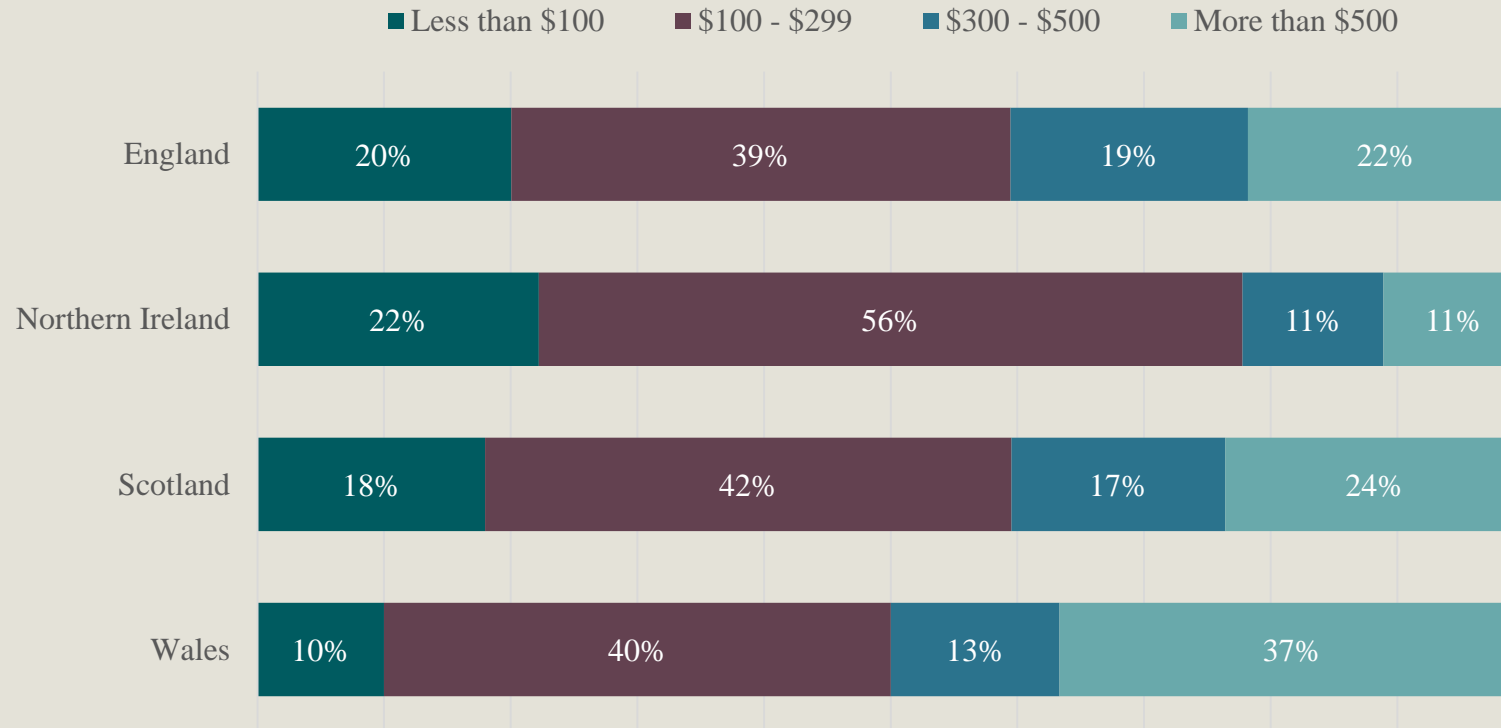


Question: How much do you spend on average on vacation on food & beverage and other activities per person per day? | Which of the following best describes you as a traveler?



# Travel Spend Behavior

## Spend Per Day By Country



Question: How much do you spend on average on vacation on food & beverage and other activities per person per day? | Which Country in the United Kingdom do you currently reside in?



# Travel *Preferences*



## TOP 5 Key Marketing Messages to Focus On

### Important Destination Criteria

- 1 Cleanliness
- 2 Safety
- 3 Appealing Natural Environment
- 4 Locals Are Welcoming & Hospitable
- 5 Direct Flights

### Important Vacation Benefits

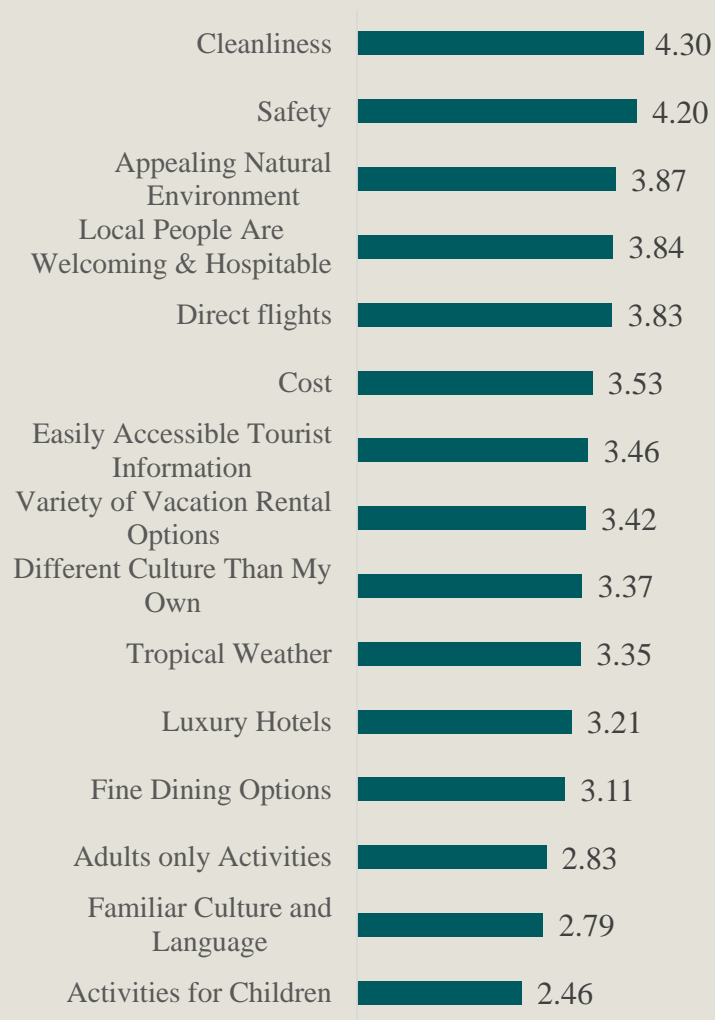
- 1 To get a break from day-to-day life
- 2 To Relax and Relieve Stress
- 3 To Create Lasting Memories
- 4 To Have Fun
- 5 To See or Do Something New

### Preferred Activities/ Experiences

- 1 Going out to eat
- 2 Outdoor Activities
- 3 Zoos & Aquariums
- 4 Museums
- 5 Festivals & Fairs

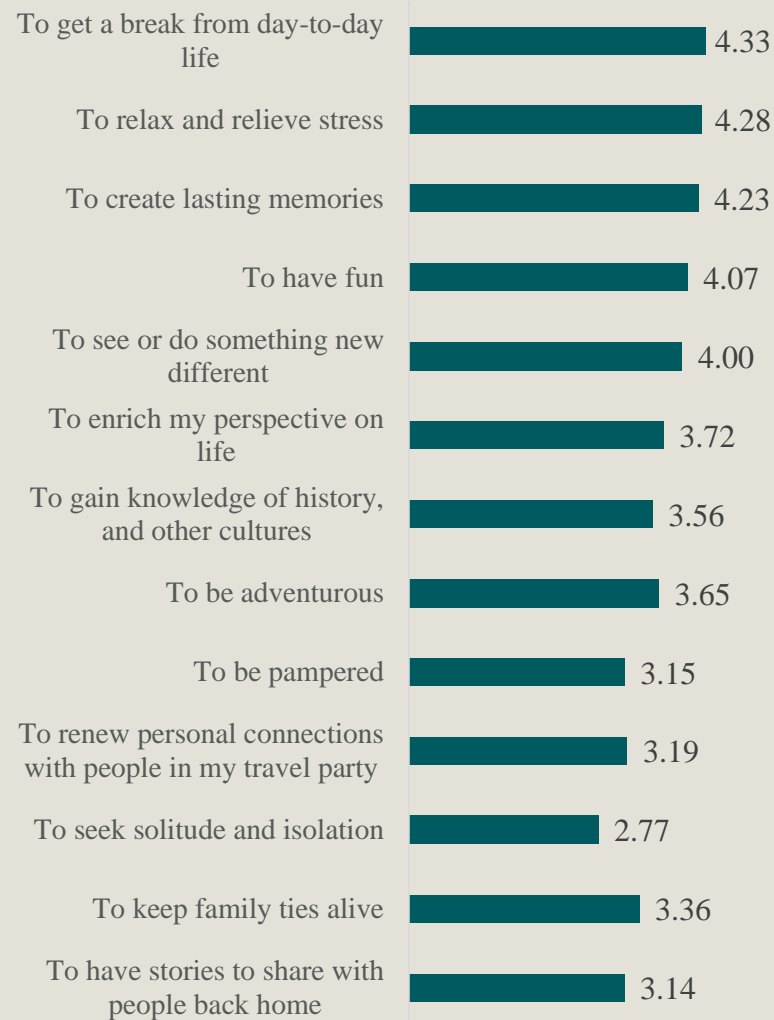
Note: Important key marketing messages to point out: the respondents indicated that Safety and health-focused measures must be communicated clearly. Another interesting observation is that UK travelers scored Direct Flights as essential criteria.

## Important Destination Criteria



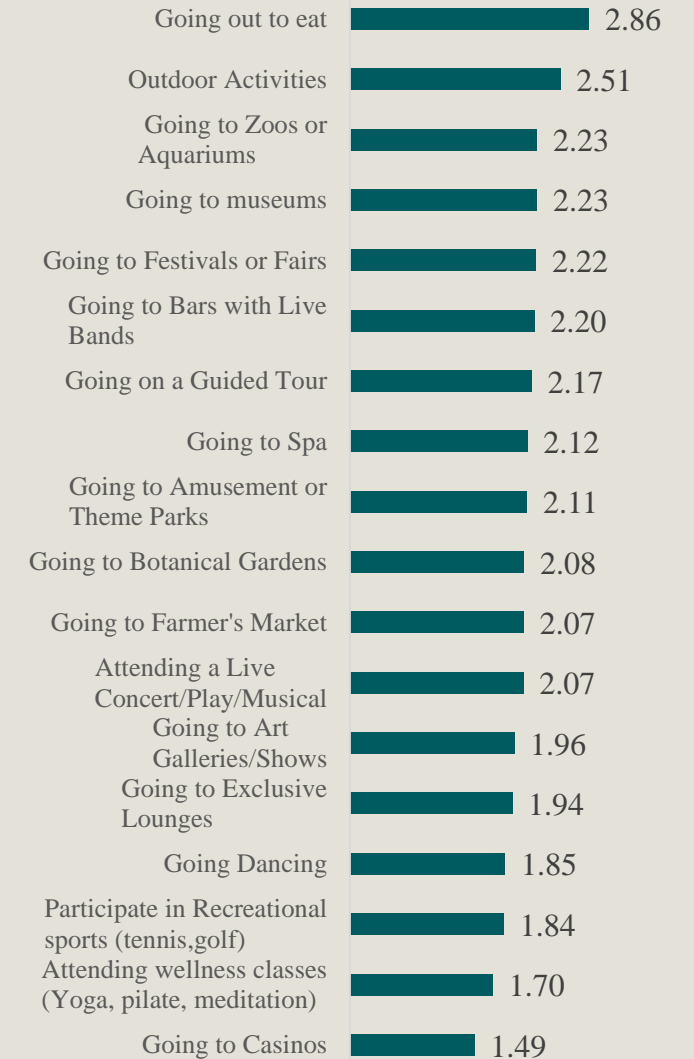
1= Not at all important to 5 = Extremely important

## Important Vacation Benefits



1= Not at all important to 5 = Extremely important

## Preferred Activities/ Experiences



1= No to 3 = Yes





# 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)

