



ANNUAL REPORT 2 0 2 3



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Chapter 1

FROM THE CEO

“Gran parti di nos futuro ta depende di loke cu nos ta haci awo, exito no ta bin di suerte, e ta bin di esfuerzo y dedicacion.”

In 2023 Aruba enjoyed a fully recovered tourism sector, with stay-over visitors greatly outperforming the 2019 pre-pandemic levels. According to the Caribbean Tourism Organization (CTO) Aruba was amongst one of the eleven Caribbean destinations that was able to significantly recover or moderately exceed the benchmark numbers of 2019.

Aruba welcomed a total of 1,243,554 stay-over visitor arrivals, which was equivalent to a recovery of 111% when compared to 2019. In 2023 North America and Latin America performed exceptionally well, North America increased their stay-over visitors with 13%, and Latin America with 22% compared to 2019. Europe in turn has not been able to reach pre-pandemic levels and closed the year with a 77% recovery rate versus 2019; a trend that can also be observed in other Caribbean islands which have also seen a slow incline from the European market compared to North America & Latin America.

When observing the results of 2023, Aruba not only surpassed the overall 2019 levels in terms of stay-over visitor arrivals, but also surpassed important metrics such as Tourism Receipts and RevPAR, contributing to the destination's objective of focusing on high value visitors. Tourism Receipts, the most important metric, is estimated at a 134% recovery by year end 2023 compared to 2019, reaching Afl. 4.7 billion, the highest number to date when looking back to 2011.

When diving deeper on the performance of the primary markets it can be observed that the USA recovered with a 113% recovery rate, Canada with 119%, Colombia with 160%, and the Netherlands with 87% when compared to 2019.

Notwithstanding the global challenges that continue to impact the airline industry the US market was able to grow its seat capacity with 2% year-over-year, resulting in an addition of 23,537 seats. The unwavering strength of the Aruba brand, coupled with the A.T.A.'s destination and partnership marketing efforts, contributed significantly to achieving a remarkable combined annual load factor for all airlines, reaching 94%. This marks a notable increase of seven percentage points over the previous record results of 87% in both 2017 and 2019.

Latin America in turn saw substantial growth, adding an estimated total of 180,000 seats, marking a 6% increase compared to 2019 and a 29% increase compared to the previous year, 2022. This growth was fueled by additional frequencies from Avianca, Copa, and new routes introduced by Wingo.

The European market saw a noticeable decline in travel to Aruba in 2023. This decline was attributed to a combination of factors, including a change in available air service, a robust North American market leading to compression in inventory on island, heightened inflation in Europe, and a growing preference for last-minute bookings which did not always allow for availability on island. When looking at the general Caribbean performance in terms of arrivals from Europe many other islands also experienced stagnant numbers in 2023 indicating that other islands were also facing challenges.

The Aruba Hotel and Tourism Association (AHATA) member hotels were able to surpass the Average Daily Rate (ADR) of 2019 by 24%. In addition, the revenue per available room (RevPAR) experienced a full (114%) recovery when compared to the 2019 level. Also short-term vacation rentals (STVR) saw a significant growth in their ADR with an increase of 55% when compared to 2019 and a 17% increase when compared to 2022. The average occupancy level increased from 49% in 2019 to 57% in 2023. The market share of visitors staying in other accommodations, including thus the pool of STVR accommodations increased from 25% in 2022 to 28% in 2023. The A.T.A. continues to advocate for balanced representation in all accommodation categories, as it pertains to the distribution of business.

The cruise industry also had a positive growth in 2023, it almost fully recovered, Aruba was able to recover 98% of the 2019 cruise business, recording a total of 817,670 cruise passengers and a total of 317 calls.

From a marketing and promotional standpoint the primary goal continued to be the shift from volume to value guided by the High-value, Low-impact tourism (HVLi) growth model. Niche tourism played a crucial role in our approach to facilitating the destination's sustainable long-term development. In line with this commitment, the A.T.A. developed the Niche framework in 2023, to prioritize and further develop our Niche segments, placing them at the core of our strategy.

In North America the market continued building upon the core strategic foundation introduced in 2022, and a concentrated effort was made to optimize and evolve the strategic approach and creative marketing executions. The Aruba Effect was further evolved, and centered on Aruba being a transformative destination, highlighting the lasting effects of Aruba after visitors depart, emphasizing various Aruban attributes staying with visitors with the aim of encouraging visitation and driving demand.

During 2023, the Latin American countries experienced the post COVID-19 "revenge travel" effect. A high interest for travel was present, especially to the Caribbean. To capitalize on the market's propensity to travel during the year, Latin America refined its marketing strategy, maintaining the Big Play approach with a central focus on sales-driven activations. Additionally, they implemented the Mini Big Plays (MBP) as targeted market-focused campaigns were initiated.

In Europe the overall primary strategy was to target the high household income audiences, with a hyper-focus on those with double the median yearly income. Therefore A.T.A. executed a structural digital media campaign for Aruba, utilizing the "Aruba effect" concept.

Aruba's annual tourism conferences for the North America and Latin America markets (ATCA and CATA), along with the bi-annual Aruba Meets Europe conferences, consistently served as vital platforms for forging partnerships within the travel and tourism industry.

In 2023, we broke down geographical barriers, establishing an international forum that transcended boundaries and allowed for personal interaction. Aruba held one conference for all markets.

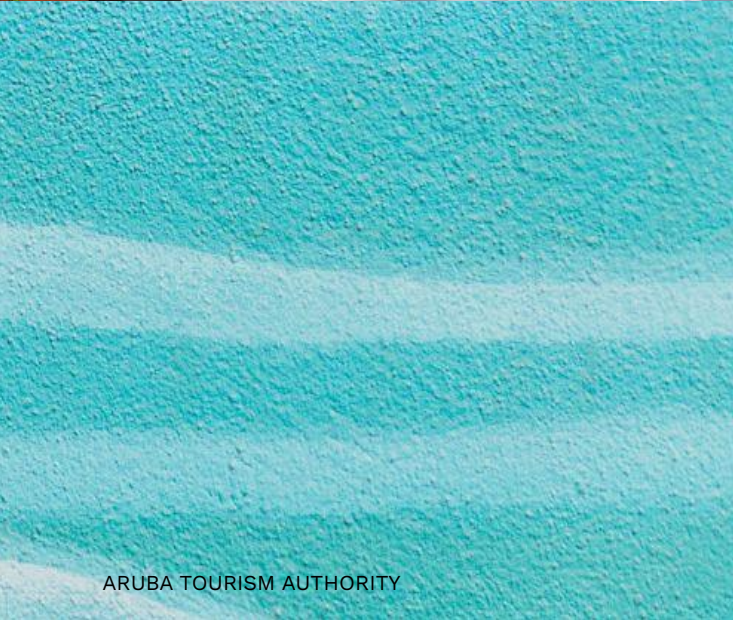
We are grateful and proud of the industry's consistent high levels of visitor satisfaction in 2023, with a monthly average satisfaction score of 9, with 10 being the highest rating. This is a testament to the hard work and dedication of everyone involved. While Aruba excelled in overall satisfaction.

The A.T.A. played an active role in shaping and enhancing the Aruba vacation experience. Whether through advocacy work or active participation in joint private/public sector committees and boards, we strived to make a difference. Projects, integral to Aruba's Government Tourism Policy, such as the Seroe Colorado Master Plan, construction of Mountain Bike Trails, Beach Management efforts, improved Visitor Flow Management, and the Aruba Quality Seal, were examples of how we enhanced the quality of the visitor experience.

The A.T.A.'s Destination Services Unit (DSU) also contributed to the destination's environmental protection and conservation through various efforts, whether through awareness campaigns, or as an advocate in various committees. Furthermore in 2023 the DSU introduced a multi-year strategic plan in the fourth quarter, to outline the unit's main focus areas and provide a roadmap to guide the unit's decision making, efforts, stakeholder management, and resource allocation.

In addition to projects defined through the Ministry of Tourism Policy 2021-2025, the A.T.A. reactivated and initiated various destination development and enhancement programs, including cultural activities and events. Projects included the restart of the Bon Bini Festival following the necessary maintenance work at the Fort Zoutman property, the creation, maintenance and restoration of new and existing murals in San Nicolas as well as maintenance and upkeep of the Blue Horse sculptures in Oranjestad.

The A.T.A. diligently worked on updating the tourism indicator model which formed an integral part of a previous Carrying Capacity study, conducted in 2018.



The recommendations that will come from these efforts will undoubtedly require a renewed dedication and cooperation of each and every one of us in our local community. Not following the recommendations will simply go against the pursuit of the High Value Low Impact Tourism Model.

Furthermore, reports such as the 2022 Annual Report and the 2024 Corporate Plan and Budget were developed and submitted in a timely manner and both received a seal of approval from the Minister of Tourism. In 2023 the A.T.A.'s total operating income was Afl. 121,314 thousand, which is 25% more than what was budgeted. Of the Afl. 82,284 thousand that was budgeted for marketing expenses 90% was spent.

With the submission of this 12th Annual Report of the A.T.A. SG, we reflect on the many accomplishments of the year in review despite continued challenges we face on a local and global level.

Notwithstanding the many accomplishments of the past year, it remains imperative in the years ahead that we continue to reassess Aruba's tourism direction and strategic priorities as a destination, as we proceed on a smart path towards sustainable and regenerative tourism development.

Ronella Croes
CEO, Aruba Tourism Authority

Sustainable Tourism Practices

In 2023, the A.T.A. made significant progress in advancing sustainable tourism practices, closely aligning with the High-value, Low-impact (HVLI) model. Through partnerships and investments in organizations like the Aruba Hospitality & Security Foundation, the Aruba Excellence Foundation and the Fundacion Parke Nacional Aruba, as well as other governmental and non-governmental entities, the A.T.A. actively contributed to environmental protection and conservation efforts in the destination.

A comprehensive reassessment and refinement of the Tourism Correlation Model and Tourism Impact Model (formerly referred to as the Carrying Capacity Model) underscored the A.T.A.'s commitment to informed decision-making, ensuring that sustainability remains a top priority in strategic planning. This alongside other key research, advocacy and advisory work conducted in 2023.

The year also witnessed heightened emphasis on community cooperation and sustainability principles, with on-island awareness campaigns, integration of eco-friendly messaging into marketing efforts, and active engagement in committees and boards, all aimed at addressing resident concerns and preserving cultural and natural heritage and other sustainable practices.

Furthermore, the creation of the Niche framework and the initiation of the third cycle of the 'Aruba Signature Experiences' encouraged entrepreneurs to prioritize unique niche offerings, enriching the visitor experience through the high value and low impact principle. The A.T.A. continued its commitment to facilitating and enhancing the Aruba vacation experience through advocacy roles and active participation in committees related to amenities, infrastructure, labor shortage, and more.

Economic sustainability remained a focal point of the A.T.A.'s efforts in 2023, with a strategic focus on maximizing tourism receipts, attracting high-value visitors, and diversifying markets. Through targeted investments in marketing strategies and partnerships, the A.T.A. aimed to drive long-term growth and prosperity for the destination, while maintaining its dedication to sustainability and responsible destination management.

Chapter 2

SUPERVISORY BOARD



Supervisory Board as per yearend 2023

The Supervisory Board's primary function is to supervise and confirm that the organization properly performs its core tasks and responsibilities within the legal framework set out in the State Ordinance.

The Supervisory Board is charged with ensuring that the strategic business plan of the organization and the resulting plans of actions and budgets are aimed toward the realization of the Tourism Policy as defined by the Government of Aruba. Additionally, the Supervisory Board is charged with monitoring the performance of management, being the CEO, and ensuring that the institution's internal control and risk management systems are effective.

The Supervisory Board is part of the system of checks and balances and ensures that decisions reflect the A.T.A. and Aruba's best interests.

Supervisory Board composition and membership

The Supervisory Board members are appointed, as per the State Ordinance, for a period of 4 years. The A.T.A. has a Supervisory Board consisting of seven members who are experts in business operations and tourism. As per the regulations applicable to the Supervisory Board, the following applies:

Name Supervisory Board Members	Date of Birth	First Appointed on	End of 1 st Term
Mrs. Janien Huistra	December 21, 1972	April 1, 2017	April 1, 2025 - 2 nd Term
Mr. Francisco Quant	May 12, 1969	January 1, 2018	January 1, 2026 - 2 nd Term
Mr. Gregory Croeze	February 15, 1977	July 1, 2019	July 1, 2027 - 2 nd term
Mr. Joe Najjar	January 18, 1957	January 6, 2020	January 6, 2024
Mr. Gerald Tsu	July 14, 1975	September 1, 2021	September 1, 2025
Mrs. Tisa LaSorte	April 9, 1962	September 1, 2021	September 1, 2025
Mr. Charleson Oduber	November 19, 1978	September 1, 2022	September 1, 2026

SUPERVISORY BOARD AS PER YEAR-END 2023



Francisco Quant
Chairman

Francisco Quant has more than 20 years of banking experience. As assistant to the Managing Director and as part of the Management Team at Caribbean Mercantile Bank N.V., where Mr. Quant worked for over 17 years, he was in charge of Retail Loans, Credit Card, Insurance and Investment departments of the banks. The affinity with the tourism industry was always present. Mr. Quant served as the General Manager at Tierra del Sol Resort & Golf for nine years. Presently, he operates as a consultant in the industry.



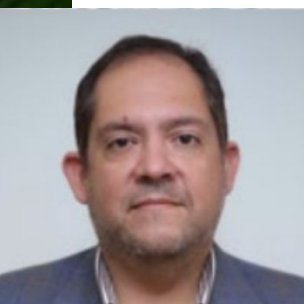
Joe Najjar
Board Member

Joe Najjar has called Aruba home since 1995. With more than 30 years of experience in the hospitality industry, including several years with Marriott and Wyndham properties in the US and later Radisson and Wyndham resorts in Aruba, he is currently leading La Cabana Beach Resort and Casino, a premier Timeshare Resort. In addition to being the current chairman of the board of AHATA, Mr. Najjar has been involved on various Boards and the Community services that La Cabana has embraced over the years. Mr. Najjar continues to focus on enhancing Aruba's Product and its environment to help ensure sustainability for our Tourism industry.



Janien Huistra
Board Member

Janien Huistra began her career in hospitality in her home country of The Netherlands. After a 10-year career in trades how organization and concept development, Mrs. Huistra opted for a change of scenery and moved to Aruba. Upon arriving in Aruba, Mrs. Huistra joined Renaissance Aruba as Director of Events. In 2006, Mrs. Huistra was promoted to Director of Sales and Marketing, and in 2009, Mrs. Huistra's responsibilities were extended to assist with the opening of Renaissance Curacao. After successfully transitioning responsibilities to a new on-site sales and marketing team in 2012, Mrs. Huistra returned her focus to Aruba and currently holds the position of Director of Sales & Marketing for Renaissance Aruba Resort & Casino.



Gregory Croeze
Board Member

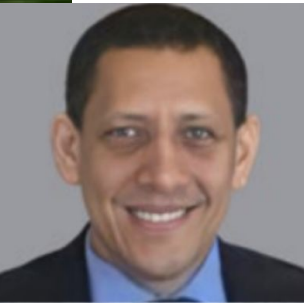
Gregory Croeze is an Aruban born financial director with over 17 years of experience in the financial and healthcare field. After working for 8 years in auditing at Big Four accounting firms, Mr. Croeze decided to switch to the medical field. Mr. Croeze was the CFO at Instituto Medico San Nicolas for more than 8 years and as of April 2020 is a member of the Board of Directors at the Horacio Oduber Hospital. Mr. Croeze's vast experience in the financial field is an added value to the Supervisory Board of A.T.A. Mr. Croeze also has a seat on the Supervisory Board of the Aruba Ports Authority and in the past served as board member and treasurer of the Aruba Excellence Foundation (AEF). Mr. Croeze holds an MBA degree from the University of Central Florida.



**Charleson
Oduber**

Board Member

Charleson G. Oduber is an Aruban-born professional with a broad experience in Aruba's overall economy, and its market dynamics as well as in different legal aspects such as Corporate Governance and Private Law. With over 17 years of work experience at the housing mortgage bank Fundacion Cas pa Comunidad Arubano (FCCA), he holds the position of Deputy Director of Technical & Commercial affairs, since 2018. Mr. Oduber has a bachelor's degree in industrial engineering with commercial affinity, which he obtained at the Technische Hogeschool Rijswijk (TH Rijswijk) in the Netherlands. He also holds a master's degree in Private Law, which he obtained at the University of Aruba. Mr. Oduber has always had an interest in Aruba's tourism industry development.



Gerald Tsu

Board Member

Gerald Tsu is an Aruba born engineer with a passion for investments. After his studies he worked for 14 years at the Department of Infrastructure and Planning where he led the Team of Institutional, Commercial, Tourism, Recreational and Nature-Focused projects. He also served as Deputy Director of the Department of Infrastructure and Planning. After the aforementioned tenure he served as the Chief of Staff of the Minister of Tourism, Public Health, and Sports. Today he focuses on his own investments. Gerald Tsu holds a Master of Science degree in Real Estate Management.



Tisa LaSorte

Board Member

Tisa LaSorte is an Aruba native whose career started as a TV reporter at TeleAruba, after which she moved to the U.S. where she worked for 20 years in broadcast news management. Upon her return to Aruba, she entered the tourism industry as General Manager of Pelican Tours & Watersports followed by an executive management position at Bucuti & Tara Beach Resort. Tisa is currently President and CEO of the Aruba Hotel and Tourism Association. She also serves as President of Aruba's Social Economic Council, Board Member of the Aruba Trade and Industry Association, and Board Trustee of the University of Aruba.

Based on the State ordinance, the following governance structure was established:

- Tourism policy and targets set by the Government are the frameworks for decisions and goals of the A.T.A.
- The Budgets and Annual Statements are presented to the Minister of Tourism for approval. Prior to approval, the Minister must make these available for viewing and commenting by Parliament for a period of 10 working days.
- A.T.A. has Supervisory Board members who are experts in business operations and tourism:
 - Three members are appointed upon the recommendation of the Minister of Tourism;
 - Three members are appointed by the Minister based on the recommendation of the Aruba Hotel and Tourism Association (AHATA) (two candidates are nominated for each of the three seats);
 - One member is appointed based on a recommendation of two candidates brought forward by the six aforementioned members.
 - The Minister appoints the Chairman of the Supervisory Board from the members.
- The Supervisory Board appoints the CEO of the A.T.A.
- The Supervisory Board and management meet monthly or every other month, and if necessary, additional meetings are scheduled accordingly. Supervisory Board-only meetings are also scheduled from time to time.
- The Minister of Tourism, the Supervisory Board, and management meet when deemed necessary.



State Ordinance

Reporting to Parliament through the Minister of Tourism, A.T.A.'s legislative requirements are outlined in the State Ordinance – “Landsverordening instelling A.T.A. Sui Generis (AB 2011 No 13, AB 2011 No 14 and AB 2015 No 63)”.

Supervisory Board Attendance

The Supervisory Board held 23 Supervisory Board meetings during the year. The Supervisory Board had an average attendance of 87%.

The CEO attended the Supervisory Board meetings and was joined by the CMO and the CFO. Other A.T.A. Executives, and in some instances contracted parties or other stakeholders, did join meetings in line with the agenda set.

Under article 14 of the State Ordinance, Afl. 750 is the compensation granted to each Supervisory Board member per attended meeting (with a maximum of Afl. 24,000 per year per Supervisory Board member). A total of Afl. 101,250 was paid as compensation to the Supervisory Board in 2023 (maximum overall: Afl. 126,000.00).

Highlights of topics discussed during the Supervisory Board meetings

Important topics which were discussed during the Supervisory Board meetings did include the presentation and approval of the Annual Report 2022 and the Corporate Plan and Budget 2024, as well as key marketing and destination services projects. In addition, the standard agenda points were discussed, such as the monthly approval of minutes of previous Supervisory Board meeting(s), the approval of purchase orders and agreements, and the revision of the monthly financial report.

Internal Audit

In 2023 quarterly internal audits were conducted in the areas of purchases, commitments and treasury, payroll, and the Travel Promotion Levy, for both the A.T.A. local and overseas offices.

As per A.T.A.'s internal auditor (Deloitte), the overall impression of A.T.A.'s internal controls and results were to their satisfaction. Management is to finalize the internal audit for 2023 and present this to the Board.

Approval of Purchase Orders

Through the decision to make the tendering rules that apply to the government also applicable for the A.T.A., in instances where these rules grant authority to the Minister of Tourism, they are to be executed by the Supervisory Board. In as far as these rules stipulate that the involvement of the Minister of Finance is required, this involvement is exercised by the Minister of Tourism.

The above-mentioned thus entails that the Supervisory Board has to approve a number of purchase requests in line with the tendering rules. As a result hereof, the Supervisory Board did approve 96 Board approval letters in 2023.

External Accountant

The audit results are an integral part of A.T.A.'s Annual Report and were conducted by Grant Thornton partially in 2023 and partially in 2024.

The external audit resulted in another positive review by the independent auditor over calendar year 2023.

Chapter 3

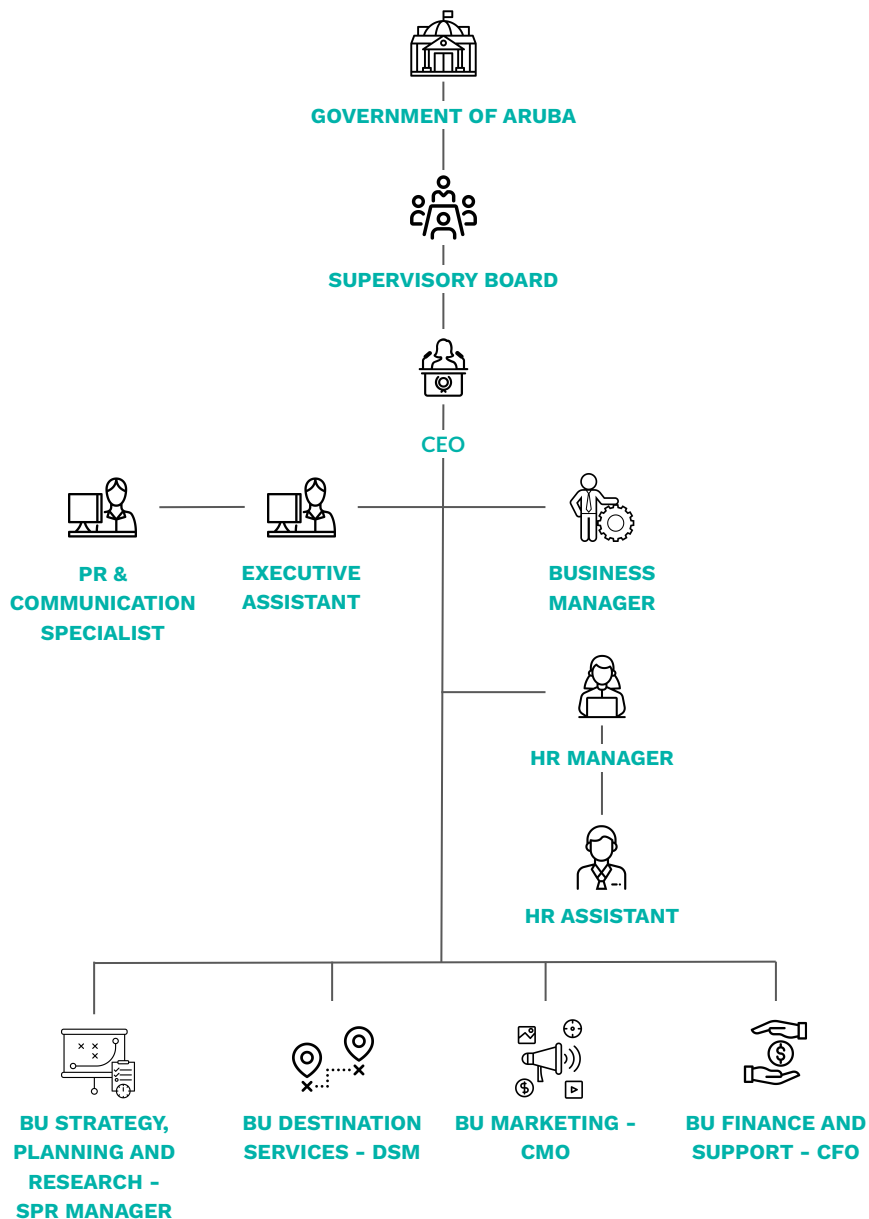
CORPORATE PROFILE



CORPORATE PROFILE

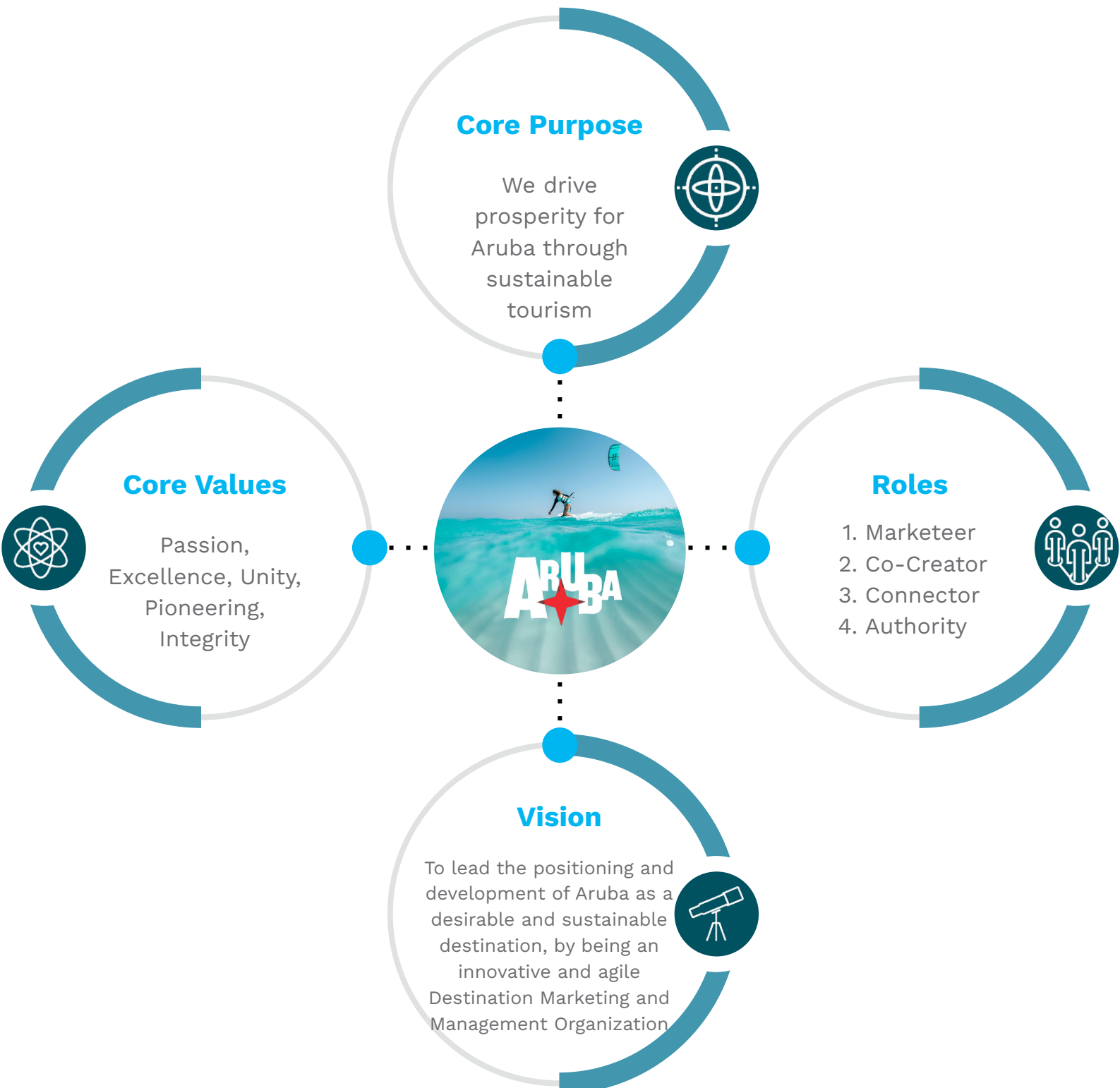
The Aruba Tourism Authority (A.T.A.) is the Destination Marketing and Management Organization (DMMO) of Aruba responsible for uniting tourism interests amongst the on- and off-island stakeholders/partners for the purpose of coordinating destination marketing, destination development and destination partnerships.

A.T.A. Organizational Chart



A.T.A.'S ASPIRATION 2025

With our Aspiration towards 2025, we clearly set what the A.T.A. aspires to be in terms of our core purpose, our vision, our roles, and our core values.



OUR GOALS & STRATEGIC OBJECTIVES

The three overarching goals and ten strategic objectives, as defined in our Multi-Annual Corporate Strategy for the period 2018-2021, remained applicable.

GOAL 1 Increase Economic Value of Tourism	GOAL 2 Position Aruba as Desirable and Sustainable Destination	GOAL 3 Lead Positioning and Development of Aruba as Destination
1.1 Drive consistent high value visitor arrivals Sustain and cultivate a constant and consistent source of visitor arrivals.	2.1 Safeguard sustainable tourism, balancing the needs of community, visitors and destination Strategically manage Aruba's tourism industry in a sustainable manner consistent with economic goals, cultural values, preservations of natural resources, community desires, and visitors.	3.1 Drive innovation and agility of the A.T.A. Develop and implement new approaches to accomplish A.T.A.'s aspiration, both within the A.T.A. organization and the tourism value chain while strengthening the ability to quickly adapt to the ever changing tourism landscape.
1.2 Grow visitor spending Increase and improve opportunities for visitor spending on Aruba.	2.2 Drive preference for Aruba as a sustainable destination Conduct innovative and inspiring marketing through the right channels with the right time to motivate visitation.	
1.3 Increase engagement of aruban community with tourism Enhance awareness and understanding within the community of the value of sustainable tourism.	2.3 Enhance visitor on-island experience and engagement Continue to evolve Aruba's product offerings to remain fresh and innovative, offer quality and value for money	3.2 Influence decision making in the aruban tourism industry Unite tourism interests amongst stakeholders and the community around the tourism positioning and development of Aruba.
1.4 Ensure preparedness for effective response to emergencies Enhance Aruba's tourism industry's capability to prepare, respond and recover from serious and precarious incidents.		

Chapter 4

HUMAN RESOURCES



The mission of Human Resources (HR) is to contribute to the success of the A.T.A. by implementing HR practices to retain, engage and empower high-performing individuals while encouraging innovation and attracting desired talent. A.T.A.'s team members are one of the organization's most valuable assets. They develop and implement plans and strategies, and are an essential component of the tourism product.

Staff Statistics and Recruitment Efforts

As per December 31, 2023, a total of 67 team members worked at the A.T.A. of which 30% were employed overseas.

The A.T.A. recruited eleven (11) new team members. Four (4) employees resigned and the employment agreement of one (1) employee was terminated upon mutual agreement.

The A.T.A. had 19 open FTE positions as per December 31, 2023, including open positions at the overseas offices.

Four (4) employees were promoted in 2023, all four to leadership positions:

- Area Director North America
- Aruba Convention Bureau & Events Director
- Communications Manager
- IT & Facility Supervisor

In 2023, A.T.A. launched a digitalized onboarding process via the Human Resources Information System AFAS. Onboarding is the process in which an organization welcomes its new hires so they can integrate into their new role, new team, and new organization. Through the onboarding program, new hires become familiar with the organizational structure, culture, vision, mission, and values from the initial phase. The main aim is for new hires to transition smoothly so they can become part of the organization, and feel prepared to successfully contribute to the organizational goals.

Collective Working Agreement

In 2023 the A.T.A. concluded the third Collective Working Agreement since becoming independent from the government. The term of the Collective Working Agreement is for three (3) years, from 2023 to 2025.

Wellness Program

In order to support employees with physical, emotional and mental wellbeing needs, the A.T.A. continued with the Wellness Month in June 2023. The HR unit planned several activities for the Wellness Month. The main goal was to encourage a healthy lifestyle by encouraging healthy eating habits, regular exercise and by fostering mental wellbeing. Aside from the physical aspect of wellbeing, the A.T.A. also focused on other aspects of wellbeing by providing workshops on the importance of such as sleep. Also one-on-one life coach sessions were offered.

Learning and Development

Learning and development remain critical components that fuel the A.T.A.'s innovation and agility. In A.T.A.'s rapidly changing environment, adapting to consumer and marketing trends, new marketing technologies and industry standards is key. Learning and development initiatives help employees stay abreast of these changes and adapt their skills accordingly.

Having the correct skill set is one of the prerequisites for success within our scope of influence, and it is a vital aspect of A.T.A.'s corporate strategic goal.

In 2023, the A.T.A. allocated a budget to invest in its team members' collective and individual learnings.

Some of the training and learning opportunities that the A.T.A. provided to both its local and international employees were Google UX Design, PRSA 2023 Travel & Tourism Conference, and security awareness training amongst others.

Employee Recognition Program

In 2023, the A.T.A. acknowledged for the third year the exemplary behaviors of team members, both work and personal related. These were linked to A.T.A.'s core values through the 'High Five Program' which is the organization's employee recognition program. The program that was revamped in 2023, has been one of the practices that the HR unit has implemented to boost morale and to encourage employee engagement.

Each year the program runs from January to December, allowing peers to simply and quickly mention a colleague and share why that person deserves peer recognition. The team member who receives the most High-Fives is honored with the 'Standing Ovation Award' at the start of the following year.

The High-Five program was also launched in the LATAM office in late 2023.

YOU Anniversary

The YOU Anniversary is a celebration for employees who reached a milestone in their career at the A.T.A., and at the same time it is a way for the A.T.A. to recognize team members for their continuous dedication and contributions.

In 2023, four employees at our EU office were recognized, ranging from those celebrating their fifth year anniversary to those with twenty years of experience in the industry. As a token of appreciation, team members received their personalized pendant with the official logo of Aruba.

Chapter 5

ARUBA TOURISM INDUSTRY







Aruba's tourism sector has displayed impressive resilience and performance. Between 2011 and 2023, the tourism sector showed strong growth. Tourism Receipts (TR) had a steady average annual growth rate (AAGR) of 9% (median: 7%). Stay-over visitor arrivals also grew by an AAGR of 10% (median: 6%). Revenue per Available Room (RevPAR), a crucial hotel metric, increased by an AAGR of 11% (median: 8%) over the 2011-2023 period. Cruise visitor arrivals stood out with a high AAGR of 24%, although the median growth rate was lower at 3%. This discrepancy between average and median growth rates indicates the influence of outliers, likely attributable to the swift recovery post COVID-19 pandemic.

According to the World Travel and Tourism Council (WTTC) in Aruba, the total contribution of travel and tourism to GDP is projected to reach 74% in 2023.

Key Performance Indicators (KPIs) – Recovery 2019 - 2023

Aruba has directed its efforts toward gradually restoring its tourism industry's key performance indicators (KPIs). The overview below outlines the recovery levels achieved from 2020 to 2023 for each KPI compared to 2019, the benchmark year.

Recovery vs 2019	2020 Actual	2021 Actual	2022 Actual	2023 Target	2023 Actual
 Stay-over Visitor Arrivals	33%	72%	98%	105%	111%
 Tourism Receipts	51%	85%	118%	117%	134% ¹
 Hotel Performance RevPAR	38%	64%	100%	100%	114%
 Cruise Visitor Arrivals	31%	16%	73%	90%	98%

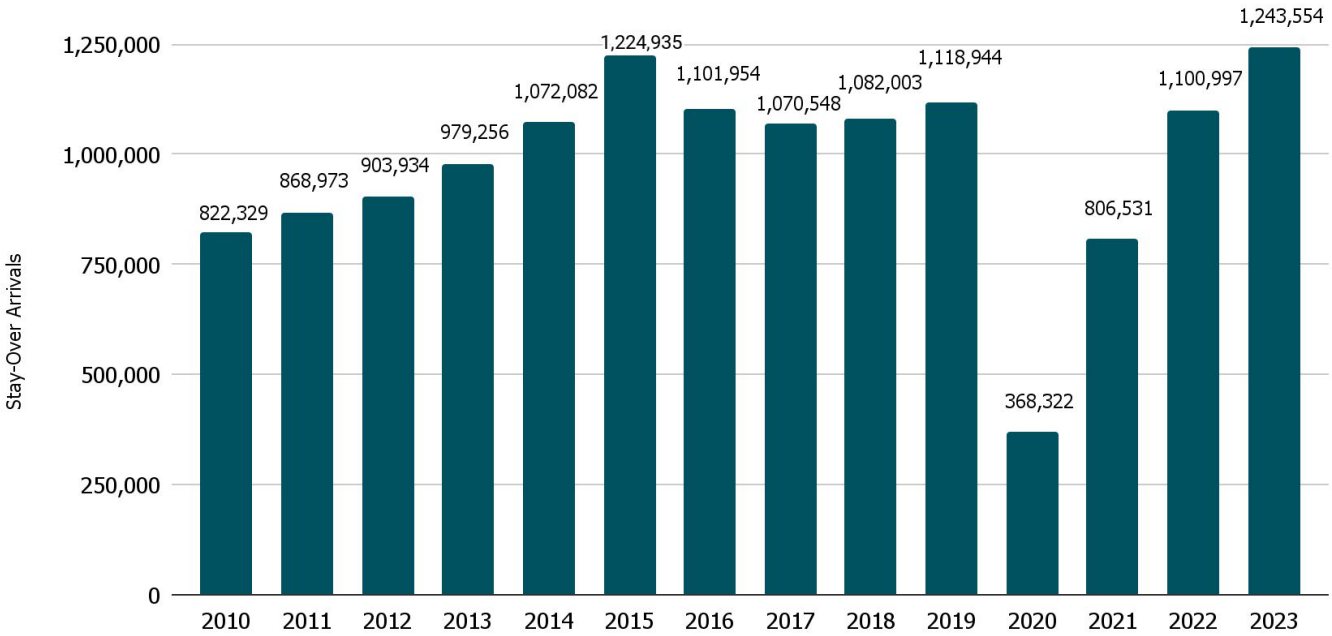
Source: A.T.A.

¹Estimated Final.

Stay-Over Visitor Arrivals

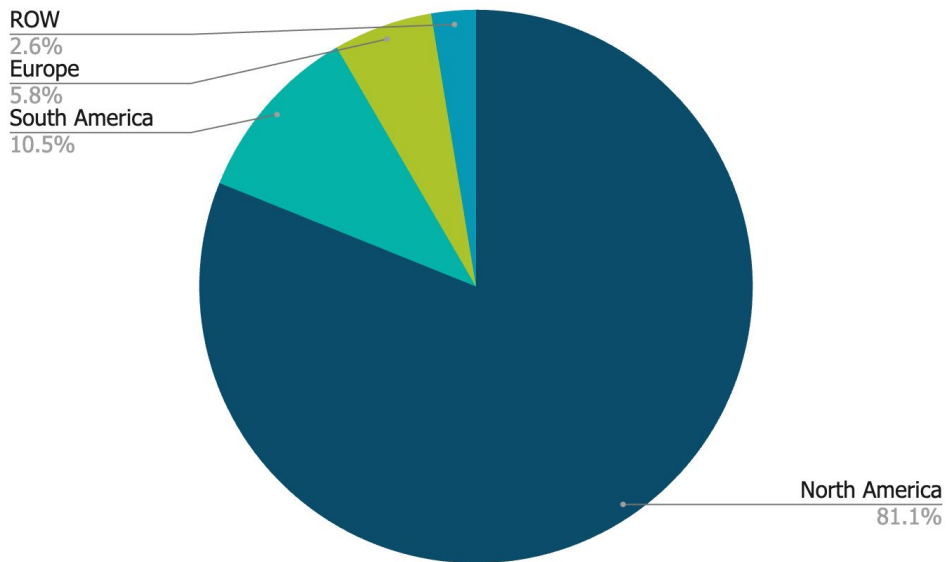
ACTUAL 2023
 vs 2019: +11%
 vs 2022: +13%

Aruba closed 2023 with a 111% recovery compared to the 2019 stay-over visitor arrivals level.



Stay-Over Visitor Arrivals

In 2023, the market share of stay-over visitor arrivals by region was dominated by North America at 81.1%, followed by Latin America at 10.5%, and Europe at 5.8%.



Source: A.T.A.

Tourism Receipts 2013-2023

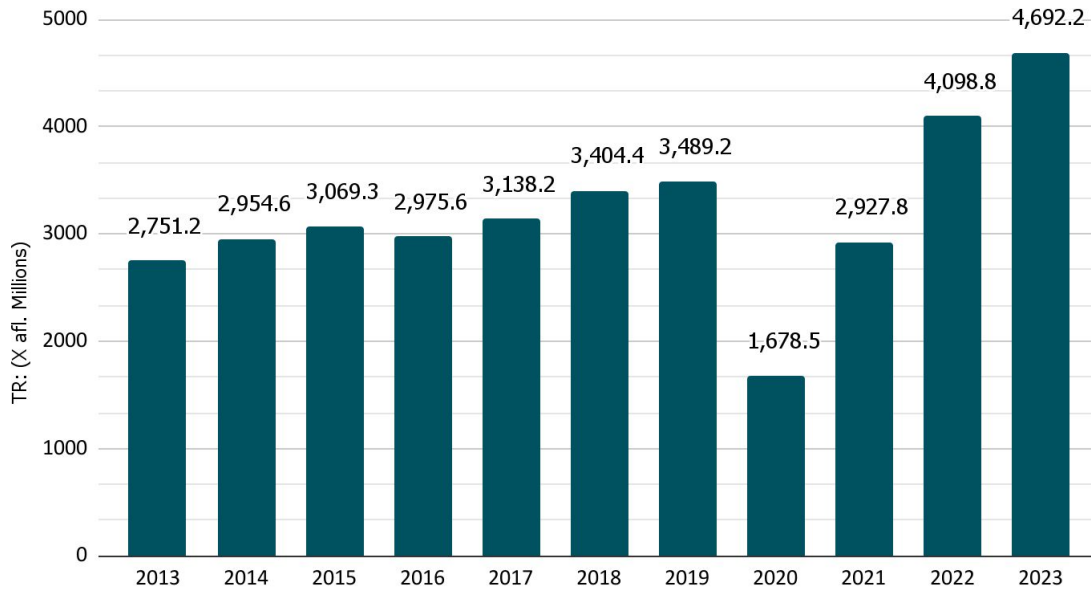
ESTIMATED FINAL 2023

vs 2019: +34%

vs 2022: +21%

Tourism receipts, which encompasses the total on-island expenditures during the trip, recovered consistently.

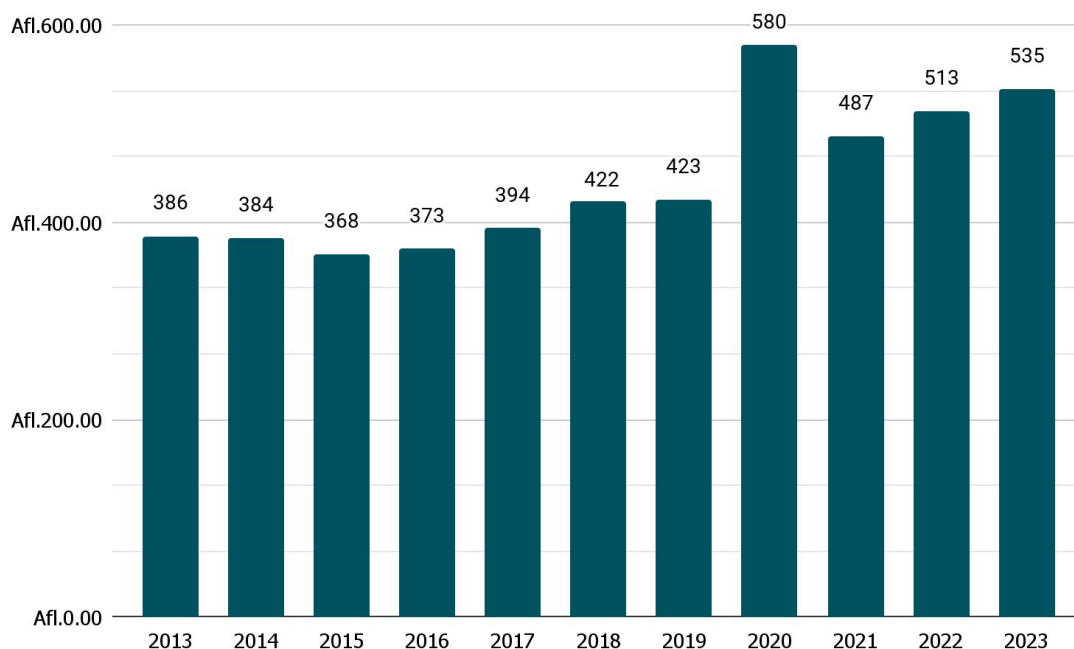
The estimated final for the full year 2023 is Afl. 4.7 billion, a 134% growth in comparison to 2019.



Source: CBA
2023 is Estimated Final

Average Daily Tourist Spending (ADTS) 2013-2023

In the past three years, the average daily tourist spending (ADTS) has steadily increased, with a visitor spending of an average of Afl. 535 per day in 2023, which is a 4.2% growth compared to 2022.



Source: CBA/ A.T.A.

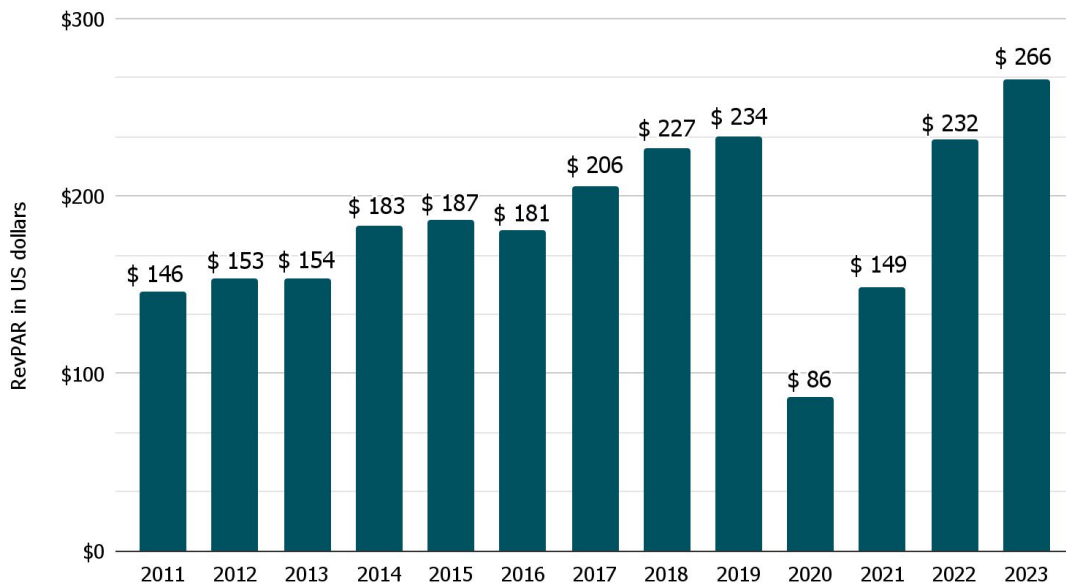
Hotel Performance 2011-2023 | Revenue Per Available Room (RevPAR)

RESULTS 2023

vs 2019: +14%

vs 2022: +15%

In 2023, the Revenue Per Available Room (RevPAR) surpassed the 2019 levels by an impressive 14%, propelled by robust hotel rates and a gradual rebound in occupancy. Average Daily Rates (ADR) experienced a substantial growth of 24% compared to 2019 and a notable 10.4% when compared to 2022. Hotel occupancy showed a progressive recovery, reaching 56% in 2021, 75% in 2022, and further advancing to 78% in 2023. Before the onset of COVID-19, the occupancy rate stood at 85% in 2019.



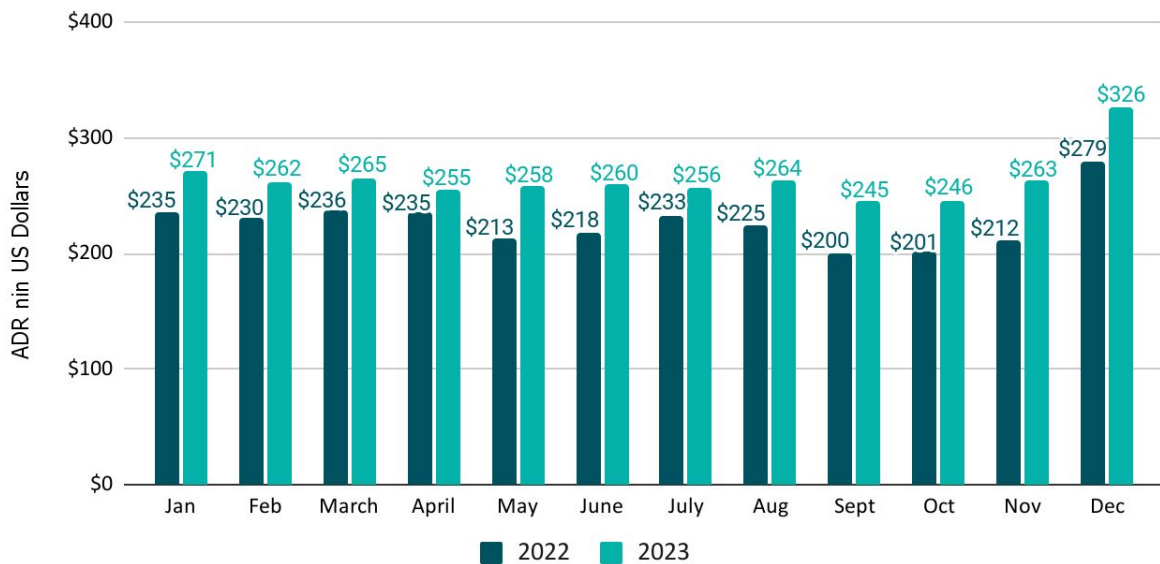
Source: Aruba Hotel & Tourism Association (AHATA)

Short Term Vacation Rental | ADR

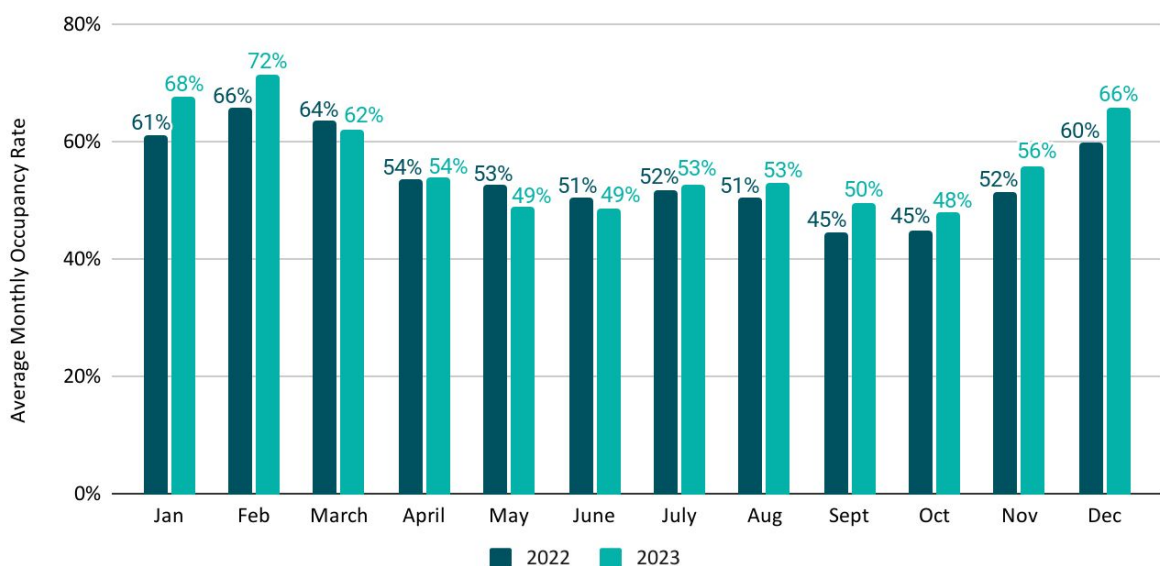
RESULTS 2023

vs 2022: +17%

Through the Transparent platform, which analyzes and collects data from 35 million vacation rental listings worldwide, including those from Airbnb, Vrbo, and Booking.com, the A.T.A. tracks the performance of the Short Term Vacation Rentals (STVRs) on island. In 2023, this accommodation category saw a significant growth in Aruban, with an increase of 55% in the Average Daily Rate (ADR) when compared to 2019 and a 17% increase when compared to 2022. The average occupancy level increased from 49% in 2019, to 54% in 2022, and to 57% in 2023.



Short Term Vacation Rental | Occupancy Rate



Note: Amount of properties reported by Transparent December: 5271 | The amount might include offline listings

Source: A.T.A.

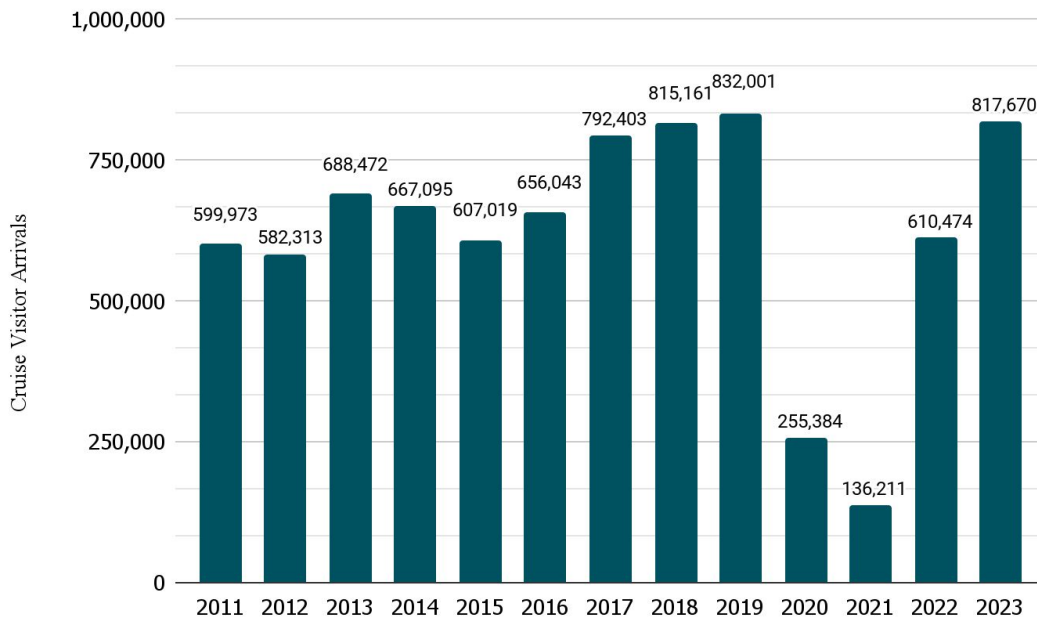
Cruise Visitors Arrivals 2011-2023

RESULTS 2023

vs 2019: 98% recovery
vs 2022: +34%

Cruise operations cautiously resumed in June 2021 but faced challenges once more in the first half of 2022 due to the resurgence of COVID-19 Omicron variant. Despite these setbacks, the industry displayed resilience, achieving a 73% recovery of the 2019 cruise levels in 2022 and an impressive 98% recovery in 2023 of the 2019 level.

Anticipated progress continues into 2024, with an expected total of 876 thousand cruise visitors, marking a 7% increase compared to 2023.

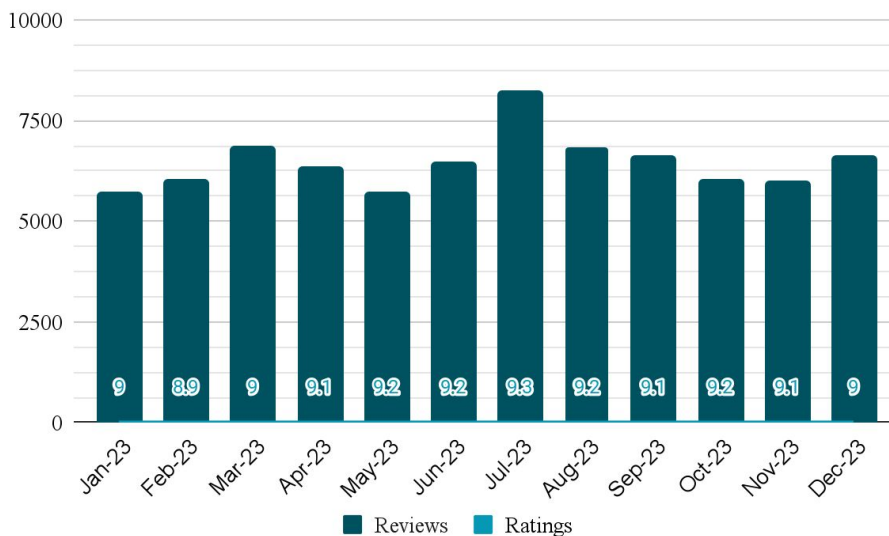


Source: Aruba Port Authority (APA)

Visitor Satisfaction

Regarding visitor satisfaction, Aruba maintained an impressive record in 2023, boasting a monthly average satisfaction score of 9 out of 10.

This score highlights Aruba's success in providing a gratifying experience for its visitors, contributing to the positive trajectory of the tourism industry.



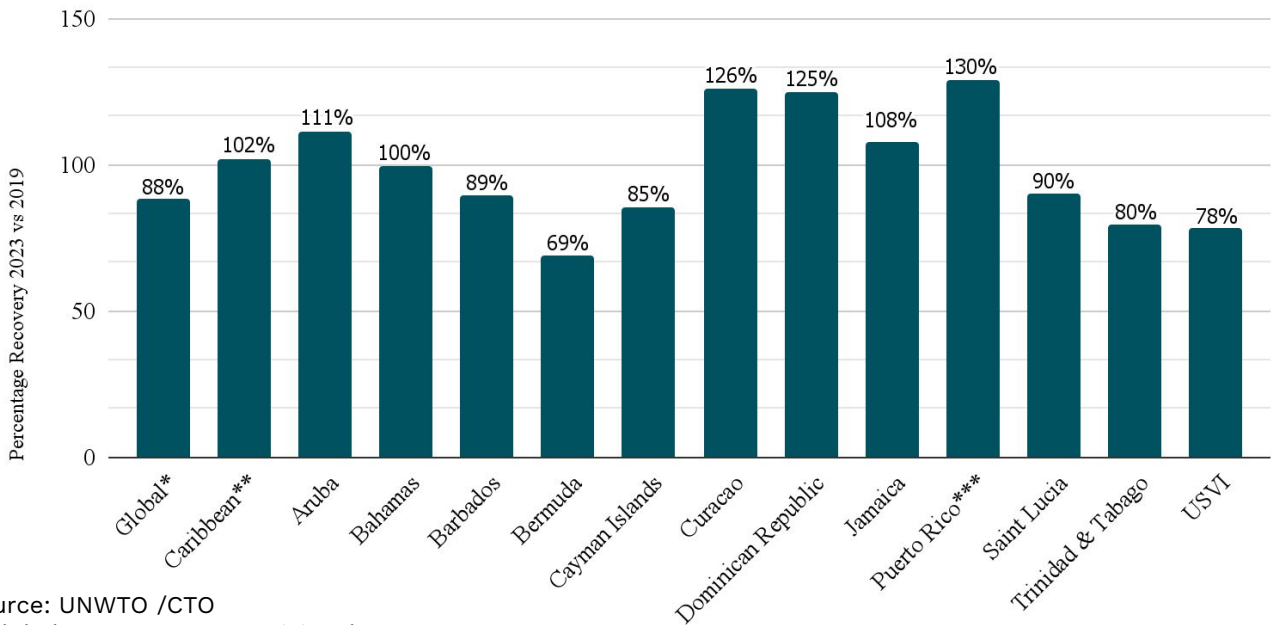
Source: A.T.A.

Caribbean Performance - Visitor Arrivals 2023

Compared to other Caribbean destinations, Aruba was in the top 10 destinations with the strongest recovery rates. When comparing the rate of recovery of stay-over arrivals in 2023 with 2019, Turks and Caicos recovered by 136%, Cancun by 127%, Curacao by 126%, the Dominican Republic by 125%, and the USVI recovered by 122%.

When comparing the year-over-year growth 2023 vs. 2022, the Cayman Islands grew with 51% in stay-over visitor arrivals, the Bahamas with 24%, the Dominican Republic with 13%, however the USVI experienced a decline of 1% in stay-over visitor arrivals.

Recovery 2023 vs. 2019



Source: UNWTO /CTO

* Global UNWTO 2023 provisional

** Tourism Analytics

*** Air stopovers and cruise visitors

Chapter 6

MARKETING AND PROMOTIONS



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- 6.1 North America
- 6.2 Latin America
- 6.3 Europe
- 6.4 Public Relations
- 6.5 Mice
- 6.6 Digital Marketing

6.1

North America



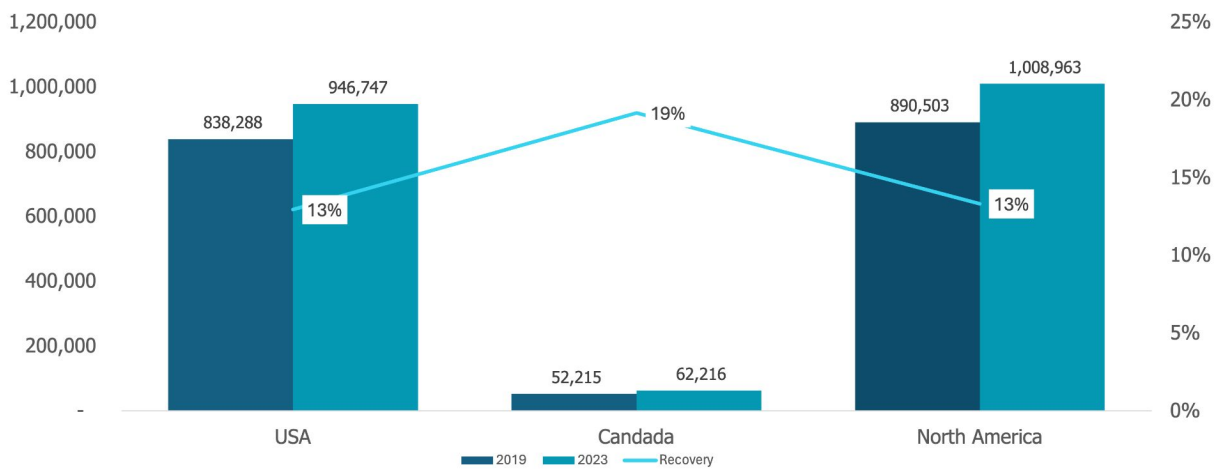
Situational Analysis

USA

In 2023, the USA market marked a historic milestone, registering 947,747 tourist arrivals. This figure represented a 10.3% increase compared to 2022, adding to the USA's dominance with a market share of 76.1%. While this represented a slight decrease of 1.9% compared to 2022, can be attributed to the continued strengthening of other markets such as Canada and Latin America post pandemic. Notably, the core markets in the Northeast maintained their prominence, capturing 54.1% of the USA market share, albeit with a slight reduction of 2.9% from 2022. Despite this, visitation numbers from these key markets saw a 4.4% increase compared to the previous year, fueled primarily by strong growth in Massachusetts and Pennsylvania, contrasting with New York and New Jersey.

Encouragingly, all other USA markets saw an 18% increase in visitation, signaling the success of the A.T.A.'s geographic diversification strategy.

Arrivals 2023 vs 2019



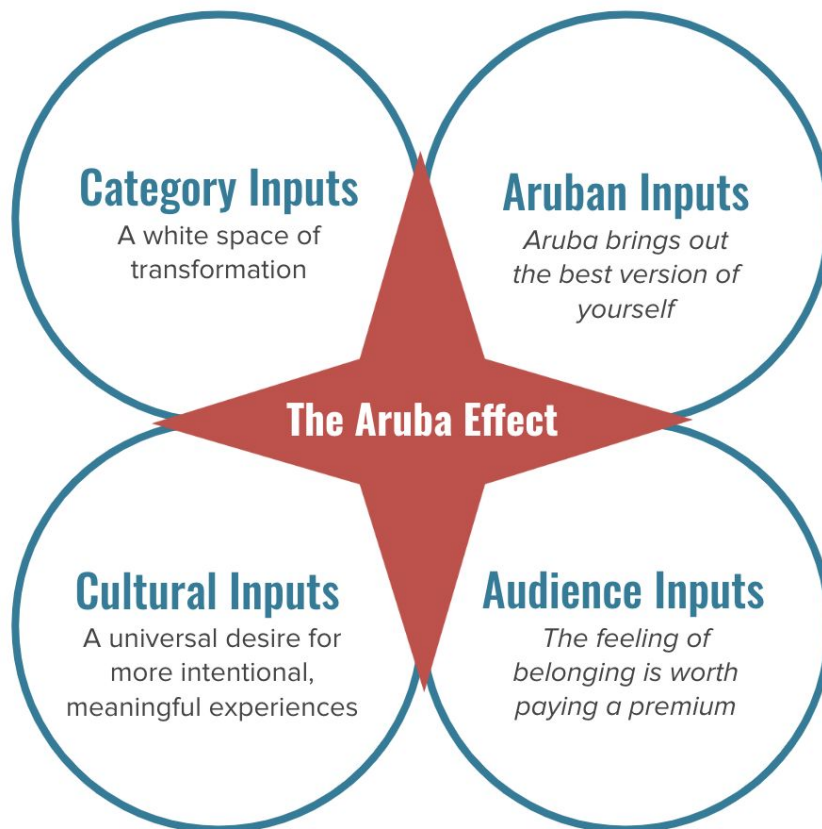
Airlift

The enduring collaboration and partnerships forged among the A.T.A., A.A.A., AHATA, Ministry of Tourism, and airlines have remained pivotal to the destination's ongoing success. Despite occasional airline scheduling adjustments and equipment availability challenges impacting seat capacity throughout the year, offset by additional airline rotations from Ft. Lauderdale, Atlanta, Baltimore, and Charlotte, overall seat capacity saw a commendable 2.2% increase compared to 2022, this resulted in an additional 23,537 seats. The unwavering strength of the Aruba brand, coupled with the A.T.A.'s destination and partnership marketing efforts, contributed significantly to achieving a remarkable combined annual load factor for all airlines, reaching 94%. This marks a notable increase of 7% over the previous record results of 87% in 2017 and 2019.

Branding & Advertising

Brand Strategy

In 2023, while there were no changes to the core strategic foundation introduced in 2022, a concentrated effort was undertaken to optimize and evolve the strategic approach and subsequent creative execution. To accomplish this, consultation and research were undertaken from many input sources to uncover new opportunities for relevance and differentiation. Synthesizing these learnings and identifying overarching themes pointed to strategic opportunities to pursue in 2023.



Communications Framework

The Communications Framework unifies the yearly plan by providing a blueprint for all marketing channels (paid media, public relations (PR), influencer, email, etc.) and the messaging decisions at distinct moments of the target consumers' purchase journey. Subsequently, the framework provides informed choices about the investment of time, budget and guides the measurement of overall marketing effectiveness.

THE ARUBA EFFECT HAS 3 MESSAGING PILLARS

1

The ON-ISLAND causes of The Aruba Effect

The **experiences** that transforms visitors' moods and perspectives.

2

The lasting effects AFTER YOU LEAVE

The inner-happiness that **stays with you** when you return home.

3

The positive GLOBAL IMPACT

The export of Aruban values that lead to **positive change** in the world.

Creative Platform

The Aruba Effect (TAE) embodies a unique sense of harmony with oneself, others, and nature, lingering long after departing the One Happy Island and thus spreading happiness globally.

Initially, our focus in 2022 to identify and highlight on the on-island contributors of TAE. In 2023, the campaign evolved to seize strategic opportunities to enhance differentiation. This evolution highlighted the lasting effects of Aruba after our visitors departed, employing a modular storytelling device that emphasized various Aruban attributes staying with visitors.

Emphasizing key destination drivers—beaches, water, and weather—we strived to achieve a delicate balance, showcasing Aruba's diverse landscapes while avoiding the sea of sameness prevalent in Caribbean destinations.

Turning attention to luxury travel, we targeted high-value audiences by accentuating Aruba's premium experiences. Every detail of our campaign production, from locations to talent and cuisine, was meticulously chosen to elevate The Aruba Effect further.

To complement the paid media campaign, innovative brand activations and initiatives provided impactful and impressive results.

Tattoovenirs

Tattoovenirs captured the emotional impact of Aruba’s visitors – “the feeling that stays with you.” This campaign was executed in partnership with six local artists, creating 17 Aruban tattoos earning 1.78 million video views and promoted through a mix of media outreach, a satellite media tour (SMT), and creator partnerships resulting in 22 earned placements garnering 38M+ media impressions and four creator posts that resulted in 599K impressions.

World’s Easiest Job

The “World’s Easiest Job” activation highlighted Aruba’s great weather, where potential visitors were invited to submit videos of themselves doing the Aruban weather report for a chance to win the official role of Aruba’s weather person. The results were impressive, with 147 placements and 3.5B+ media impressions, six posts from at-home creators garnering over 213,600 organic impressions, 1.8M views from paid social and 86K Aruba.com page visits. This integrated campaign included earned media outreach, a press release announcement, paid TV segments syndicated nationwide, a trip giveaway, and creator partnerships.

Aruba I Do

In its 5th year, the growing popularity of Aruba I Do, the Caribbean’s largest Vow Renewal Ceremony, was the biggest vow renewal ceremony yet, with over 300 couples participating, a 65% increase over 2022. Key travel writers, journalists and influencers were invited to attend and cover the event. This activation generated extensive press coverage, including 42 media placements, 24 pieces of celebrity content, and over 1.5 billion earned and created impressions with an ad value of \$15.2M. We also partnered with a celebrity couple (The Bachelor) to renew their vows, who upon their return, did multiple interviews and appearances with several popular entertainment outlets, including Access Hollywood and Us Weekly.

Paid Media Strategy

All strategic decisions for 2023 were grounded in the Communications Framework, which included vendor selection and audience targeting. Brand awareness tactics were increased throughout the year to support heavier periods of travel intent and reach new potential visitors.

Targeting Strategy

The strategy focused on the six high-value audience segments where Aruba has the best opportunity to capture travel demand. These six segments were used to help prioritize paid media investment, media mix, and the messaging strategy.

Measurement

The measurement approach was optimized and expanded to provide a more holistic view of marketing performance. The 2023 brand equity tracking study was undertaken to monitor key audience sentiment towards Aruba and competitive destinations since the launch of TAE. In late 2023, a marketing mix model was developed, with deployment scheduled for early 2024. This tool will allow the A.T.A. to evaluate individual marketing channel contributions toward marketing performance goals. It will also guide budget optimization opportunities across all channels and tactics.

Results & Tactical Summary

Aruba.com Website Performance and Traffic

The US site achieved 4.3M sessions during 2023, which is 38% lower than in 2022, with the highest traffic period during the first three months of the year. However, it's crucial to contextualize these results within the transition from Universal Google Analytics (UGA) in 2022 to Google Analytics 4 (GA4) in 2023, as outlined in the digital marketing site performance section. This transition brought about significant changes in tracking methodologies. Unlike UGA, which relied on sessions and page views, GA4 adopts an event-based tracking model. It emphasizes a user-centric approach by incorporating predictive metrics, potentially leading to discrepancies in reported numbers compared to UGA.

Top traffic sources for the year included direct, paid search, organic search, and paid social media. Direct traffic overtook paid search as the top traffic source; otherwise, all top sources remained consistent with the previous year. Paid media drove 1.7M sessions, approximately 40% of total traffic to the website.

Website Performance & Traffic		
Channel	2023 GA4	2022 UGA
Direct	33%	
Paid Search	26%	33%
Display	2%	6%
Organic Search	21%	24%*
Paid Social	11%	N/A

*Travel Health Requirement (THR) Pages and Non-THR pages

Market Delivery and Performance

Budget allocations and delivery of ad impressions to individual markets remained consistent from previous years.

The top five markets (New York, Boston, Philadelphia, Atlanta, and Chicago) accounted for 44% of the overall budget allocation, with New York remaining at the top with 19% of total spending. Boston was the best-performing of the top-spending markets, with higher efficiency metrics and lower cost per conversion.

Paid Social Media

Paid social media continued to play an essential strategic role for the TAE campaign, reaching Aruba's high-value audiences and creating awareness to encourage more bookings.

Campaign optimizations focused on improving delivery accuracy to high-value audiences, refining retargeting parameters, and further integrating data from Aruba's customer database to enhance look-alike targeting. Budget efficiency created by these optimizations allowed the paid social media campaign to expand the reach to target audiences throughout the year, evidenced by a 30% increase in unique audience reach (19M) over the previous year. The additional reach to the high-value audiences drove over 650,000 visits to Aruba.com, a decrease of 11% compared to 2022. In 2023, there was more awareness-driving media rather than traffic-driving media.

Paid Search

The Paid Search strategy was the key tactic to capture interest and demand generated by other marketing tactics. Paid search keywords were purchased, and search ads were distributed across Google and Microsoft search engines. With significant adjustments within Google Analytics (GA4) and forecasting and initial improvements of key metric categories (2022 vs 2023), conversions were up 24%, the conversion rate was up 31%, and cost-per-conversion was down 9%. These adjustments allowed for more efficient budget utilization throughout the year on both search engines, resulting in an improved Paid Search performance. Key optimizations, including incorporating additional headlines and description copy, were implemented to earn higher-quality impressions.

Video

Over 199M video impressions were served while prioritizing premium video ad inventory with streaming platform partners, including HBO Max, Hulu, Discovery+, and online video placements via Facebook, YouTube, and programmatic video partners. These partners showcased Aruba with high-impact placements in relevant streaming content and delivered ads to a high-value audience. Additional video placements were activated with new partners, Netflix, NBCU, and Disney+, to increase audience reach and contextual alignment.

The Online Travel Agencies (OTA) and Metasearch strategy prioritized ad placements during key booking time frames across Expedia, Priceline, Booking.com, Kayak, and TripAdvisor. Video, homepage, and sponsorship units were deployed using high household income targeting to reduce wasted impressions and intercept Caribbean travel interest. Performance variations across partners were again evident as consumer habits continued to evolve with increased preference for direct booking and cross-platform shopping.

New and expanded media partnerships were added in support of the TAE campaign, providing impactful awareness in key markets and delivering the “It Stays With You” message.

A Q4 partnership with NBC Sports used the excitement of live sports to attract new audiences leading up to a key booking period. Ad placements were delivered on NBC digital properties and within live coverage of Big 10 (college) football and NFL Sunday Night Football games.

Weather-triggered digital out-of-home ads allowed Aruba to reach travel intenders in key feeder markets at various time intervals throughout the day. These ad placements used local weather indicators to dynamically serve ads to digital screens and billboards, comparing less-than-ideal weather conditions (snow, rain, cold) to the warmth and sunshine in Aruba.

Custom partnerships with Vogue and The Knot provided well-recognized and highly trusted editorial and social support for wedding-focused content. These partners captured an affluent and tasteful audience seeking destination wedding inspiration.

Aruba became the first destination to sponsor Lonely Planet’s website. This innovative and first-to-market opportunity showcased the “It stays with you” message on a trusted travel inspiration and research website.

Public Relations

In 2023, North American PR initiatives resulted in 10,385,544,697 media impressions and \$96,066,288.44 in PR value, in addition to 14,205,076 social impressions and \$2,234,944.43 in I Value. Paid social media activations resulted in an additional 9,030,639 paid social impressions and 112,654 landing page views.

Compared to 2022, these results increased by 22% YOY, driven by the large volumes of coverage garnered through the World’s Easiest Job, Aruba I Do, Tattoovenirs, and Paradise on Tap brand activations.

As for creator results, social impressions decreased by 12% while I Value increased by 32%. This decrease in impressions results from the A.T.A. strategically entering into slightly fewer partnerships in 2023. However, the strong content and subsequent results allowed for an increase in I Value. These creator partners performed well above the new industry standard. Creator content garnered an average of 79% Instagram (IG) Reel video view rate (VVR) compared to the industry average of ~25%. The ability to maintain a high volume of impressions per deliverable resulted in a higher I Value through the number of engagements. Additionally, paid social impressions increased by 33%, and the average Click Through Rate (CTR) skyrocketed by 70.83% due to a 30% increase in YOY social media spend.

Additional key 2023 initiatives included:

- Partnership with Paradise on Tap to educate travelers on Aruba’s potable and delicious tap water through an integrated campaign, including a media dinner in New York City, a press trip featuring journalists from Travel Noire, Well + Good, and Parade, widespread earned media outreach, creator partnerships, paid social amplification, and creative assets for earned and social media.
- Leveraging seasonal moments throughout the year embracing Valentine’s Day, spring break, sober October, and Black Friday & Cyber Monday. Also highlighted were business developments to trade media including North America’s new Area Director, 2023 Product Developments, and the Aruba One Happy Pass. These efforts drove headlines and garnered 2B+ impressions.
- Luxury creator couple Jeremy Austin and Angie Villa were among the top performers last year. They are a Texas-based bucket-list travel couple focusing on romance and high-end destinations. They created over 70 pieces of content during their time in Aruba, surpassing their contracted deliverables of 20 pieces of content, with their in-feed posts garnering the highest engagement rate amongst our 2023 partners, reaching an average of 8.54%.

The A.T.A. hosted six individual press trips and six group press trips throughout the year. Individual-themed trips centered on Aruba I Do, couple’s romance, wellness & adventure, “What’s New in Aruba,” and overall on-island experiences, with several of the group press trip participants being representative of our key audience segments. Media represented throughout the trips included BuzzFeed, Women’s Health, Thrillist, Parade, Well + Good, and Matador Network, among others. In total, press trips resulted in 33 placements, garnering over 2.6B+ media impressions.

From a creator perspective, the A.T.A. worked with 19 partners to showcase the One Happy Island in 2023. In total, 301 posts from content creators were shared, resulting in 14.2M+ social impressions. As for paid social, 11 creators had their content amplified through media. Utilizing a combination of their photo and video assets, this amplified content resulted in 9M paid social impressions and over 112.6K Aruba.com views.

Marketing Partnerships

In 2023, the A.T.A.'s collaboration with 30 US and Canadian strategic wholesale partners, has continued to be an integral part of Aruba's success in executing COOP marketing programs in driving demand. These partnerships remain vital in maintaining a robust distribution channel for Aruba, serving as the intermediary between suppliers, airlines, consumers, and travel agencies.

Through targeted campaigns and promotions, these partnerships encompassed diverse initiatives such as Aruba's "Destination of the Month" features and Caribbean-wide campaigns spotlighting Aruba and positioning the destination as a top choice for travelers. This proactive partnership marketing approach helps mitigate the impact of seasonality on tourism revenues as travel demand continues to out-pace pre-pandemic levels. New in 2023 was a test marketing campaign with Hopper, the 3rd largest online travel agency in the U.S. whose audience comprises over 50% of millennial and Generation Z travelers. This campaign yielded exceptional results with a 56% increase in room night production via Hopper and, with 80% of that business traveling mid-week demonstrating a promising avenue for tapping into midweek travel demand.

2023 emerged as a record-breaking period for tour operators, witnessing unprecedented room nights and revenue growth. Despite the challenges of rising inflation and airfares, consumer demand for travel remained robust with our wholesaler partners producing over 575,000 room nights, a 3.6% increase over 2022. The consumer's continued reliance on and trust in booking travel with a wholesaler and/or travel advisor underscores the relevance and influence these channels have in shaping travel preferences and facilitating a seamless travel experience to Aruba.

Our strategic airline support marketing partnerships continue to be a cornerstone of our efforts to enhance airline route awareness and to attract travelers from the respective customer bases of our partner airlines.

All airlines reported improved key metrics in increased brand awareness and booking conversions compared to previous years. Leveraging the marketing reach of our airlines allows Aruba to enhance its destination exposure complemented by our customized campaigns which have proven to resonate with their clientele boosting load factors and sustaining the various routes.

Sales

The North American sales team has continued to successfully adapt to the post-pandemic travel industry, finding innovative ways to connect with travel advisors and consumers alike. With travel advisors experiencing a record-breaking sales year, the team's strategic approach to accommodating the limited time available for advisors by organizing more multi-supplier and unique dedicated niche-focused events has proven effective.

A committed and engaged sales team executed 1,208 activities for both trade and consumers. A growth of 3% in 2023 of new Aruba Travel Experts Facebook members to over 7,000 is a testament to its value as an educational resource and a platform for networking among travel advisors.

The commitment to firsthand knowledge through educational FAM trips for 31 advisors continues to be an important initiative. As a complement to these trips, the offering of incentives for processing reservations within a specific timeframe is a creative way to motivate advisors to promote and actively sell Aruba as a destination.

The success of the Aruba Certified Expert (ACE) certification program, with 1,951 travel advisors completing it in 2023, is a positive indicator of the continued interest and expertise in promoting Aruba as a destination. With the certification of 1,951 travel advisors in 2023, the total number of ACE advisors has reached 21,082, showcasing the growing community of knowledgeable professionals.

Situational Analysis

Canada

After a slower market recovery from the pandemic in 2021 and 2022, Canadian visitation results rebounded tremendously by 50.4% with 62,216 visitors, registering a record performance for the market in 2023. Recognizing the increase in demand, our key airline partners added the seats required and experienced record load factors. These impressive results represented the market's highest level of global market share at 5% and positioned Canada as Aruba's second-largest market behind the USA.

Sales

The A.T.A. continued to provide full coverage in Canada, primarily in the provinces of Ontario and Quebec with an increased focus on British Columbia. The sales action plan for 2023 included primarily the continued building of brand awareness and travel advisor education. Canada's 2023 action plan also focused on the luxury market and Destination Weddings and Honeymoon segment.

In addition to the rebound from the slower recovery from the pandemic, the tremendous growth in demand in the Canadian market can be attributed to the increased sales activities in the market. These efforts included 382 sales calls interacting with over 850 travel advisors, 49 group presentations and webinars attracting nearly 300 advisors, coordination of multiple activities through the Spoiled Agent partnership, three dedicated ACE events, 10 Trade Conferences, one Dedicated Destination Wedding Trade Show, one major tour operator show, one Canadian Travel Advisor Destination Fam trip and the first ever Aruba dedicated Virtual Conference and Showcase. These activities enabled engagement education and information sharing with over 6,000 Canadian travel advisor specialists.

Additionally, we maintained our presence at four major consumer-focused shows which included two dedicated to Destination Weddings plus two General travel shows in Toronto and Ottawa.

Spoiled Agent

Our partnership with Spoiled Agent (SA) continued to flourish in 2023. This platform offers a one-stop shop for Advisor programs, email blasts, education, twice-monthly virtual sales calls, and webinars (French and English). With a database of over 16,000 Canadian advisors and a dedicated Facebook page of 5,000 advisor followers, SA provides a dedicated Aruba page and the partner's library, which now features 24 destination partners. New to the partnership in 2023 was the Aruba 2023 Virtual Conference which included participation from 24 on-island partners and 750 advisors attended. Additionally, the collaboration included four A.T.A. dedicated e-blasts to the advisor database to be delivered primarily in promoting the ACE program.

Aruba was featured in its Destination Wedding (DW) Magazine which was then inserted with the Today's Bride publication and distributed to 12,000 romance-focused Canadian advisors through our partnership with Canada's Travelweek, the largest travel trade publication.

Aruba Certified Expert

There were 161 new Travel Advisor certifications in 2023, with the total number of Canadian ACE advisors certified totaling 3323. In addition to three dedicated ACE advisor events, the promotion of the ACE program has continued to be an integral part of the information provided at all sales calls, webinars, and dedicated presentations. Our continued collaboration with the Association of Canadian Travel Agencies (ACTA) includes the ACE program being linked to the ACTA website, providing an easy vehicle for travel agents to enroll and be communicated with. In addition to the Spoiled Agent partnership, promotion of the platform has continued through our partnership with Travelweek, whose website hosts the ACE Program as part of its education program.

Media Strategy

The 2023 TAE Canada campaign launched in November and delivered 14M total impressions with video, Paid Social Media, and Paid Search tactics. The campaign focused on reaching the greater Toronto area, guided by the same Communications Framework used in the US portion of the campaign.

Video tactics included streaming platforms and YouTube ad placements, reaching high-value audiences with compelling storytelling leading into a key booking window. Paid Social media ad placements were deployed on Facebook and Instagram, connecting specific TAE messages to each of the high-value audience targets, and integrating look-a-like audiences from Aruba's customer database. Paid Search was used to capture the attention of audiences seeking Caribbean information on Google.

The objective for the campaign was at the Feel It level to deliver targeted awareness via efficient communications across audience groupings to pique interest. This delivered 14 million impressions through Meta, Google Search, YouTube and Zeta video.

6.2

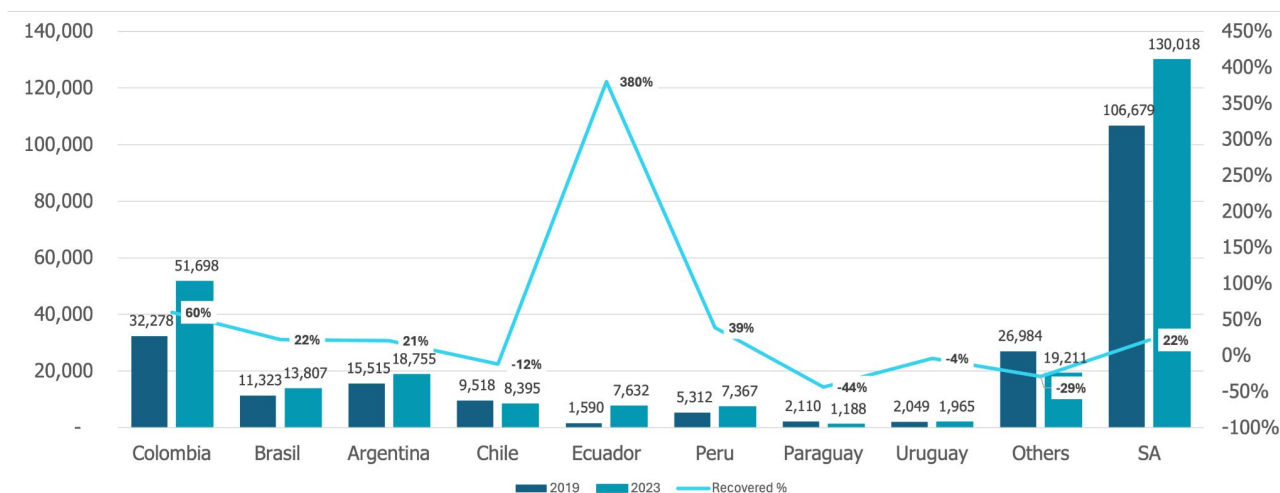
Latin America



Situation Analysis LATAM

During 2023, the Latin American countries experienced the “revenge travel” effect. A high interest in travel was created, especially to the Caribbean, giving the opportunity also for airlines to capitalize on this demand to and add new routes or additional frequencies from the Latin American region towards Aruba. In 2023, the Latin American market grew significantly with 55.5% when compared to 2022 and 21.9% when compared to 2019, with a market share of 10.5%, representing a total of 126,907 visitors from Latin America (excluding Venezuela). When including Venezuela this amounts to a total of 130,018 visitors. This result obtained during 2023 is record-breaking, with significant increases in markets such as Colombia, Argentina, Brazil, Ecuador and Peru, contributing directly to the diversification strategy.

Arrivals 2023 Vs 2019



In 2023, Colombia demonstrated an outstanding performance, by welcoming 51,698 visitors, and as a result achieving a remarkable 60% growth compared to 2019 and a substantial 55% growth compared to 2022. This success can be attributed to various factors, including introducing new frequencies and routes (Bogota, Medellin, and Cali), strategic COOP initiatives, and a robust brand presence in the market.

Argentina (18,755 visitors) and Brazil (13,807 visitors) emerged as the second and third top-performing markets, boasting growth rates of 21% and 22% against 2019, respectively—and surpassing the targets set for 2023. This achievement is a result of increased investment in both markets towards both trade and consumer levels.

Peru showcased impressive year-over-year growth, with a notable 39% increase, attracting 7,367 visitors. The introduction of a direct flight with LATAM Airlines further boosted interest and travel to Aruba. In December 2023 alone, a remarkable growth of 463% was achieved compared to the same month in 2019.

Furthermore, the Ecuadorian market achieved unprecedented growth compared to 2019, with a historic 380% increase, hosting 7,632 stayover visitors and solidifying its position as the fifth-largest market in the region. This remarkable accomplishment is mainly attributed to strategic trade and consumer investments made at the beginning of 2023, producing rapid and impactful results.

In contrast, Chile welcomed 8,395 visitors, displaying a recovery rate of 88% compared to 2019. Despite this positive trajectory, Chile has not yet reached 2019 levels, mainly attributed to the limited availability of air seats from this market on an international scale.

The average length of stay (ALOS) of Latin American travelers in 2023 was 7.0 days. Argentina had the highest ALOS with a total of 8.9 days, followed by Chile with 7.8 days, Colombia with 6.7 days, Brazil with a total of 6.3, and Peru with 6.2 days.

Regarding Visa Credit Card spending, the average on-island spend for markets such as Brazil and Chile scored the highest, reaching up to \$1,000 per Visa Credit Card holder for visitors from Chile and up to \$843 per Visa Credit Card holder for visitors from Brazil. Making these markets attractive for further growth and expansion.

Airlift

In 2023, the Latin American market saw substantial growth, adding an estimated 180,000 seats, marking a 6% increase compared to 2019 and a 29% increase compared to the previous year, 2022. This growth was fueled by additional frequencies from Avianca and Copa, as well as new routes introduced by Wingo. LATAM Airlines' initiation of the Lima-Aruba route in December 2023 contributed significantly to potential new travels to Aruba.

Avianca, now part of the Abra group, continued its low-cost-carrier (LCC) approach in 2023, impacting its traditional high-service level. Despite not reaching 2019 seat capacity levels, Avianca maintained its leading position with a 40.1% market share for Aruba from the Latin American market.

In 2023, Copa Airlines increased its weekly flight frequency to 9X and sustained high load factors throughout the year, while indicating that further growth in frequencies is expected. Remaining the second-largest carrier for Aruba, Copa held a strong position in long-haul flights, with 20% ethnic travel and 80% tourist travel, maintaining a 21.4% share in 2023.

Wingo significantly increased its frequency in 2023, operating 3X weekly during the low season and 4x weekly during the high season from Bogota. Positive load factors of up to 90% were achieved on the MED-AUA route, introduced in October of 2022. Testing a new seasonal route, CALI-AUA, yielded positive results, confirming its continuation for the full 2024 year-round, starting April 2024. Wingo's market share surged from 3.4% in 2019 to 15.8% in 2023.

In 2023, LATAM Airlines was introduced as a new airline serving the LIMA-AUA route starting December 2023. Following a lot of pre-work and investments, the inaugural month of December 2023 proved to be successful, setting high expectations for increased frequency and rise in long-haul visitors.

	2019		2023		Delta %
AIRLINES	FREQUENCY	SEATS	FREQUENCY	SEATS	2023 vs. 2019
Avianca BOG	14	95,916	9	77,760	19%
Avianca MDE					
COPA	11	59,482	7/9	48,880	-18%
Wingo BOG	2	6,774	2/3*	21,576	219%
Wingo MDE			2/3*	21,576	
Wingo CLO			3 high	8,928	
LATAM	2 (Jan-Jun)	8,562	3 (Dec)	2,088	-76%
Sarpa MDE					
Sarpa BAQ					
	Total Seats 170,734		Total Seats 180,808		6%

Venezuela still experienced border closure throughout the year, and as such, flights between Aruba and Venezuela continued to be indefinitely suspended.

Latin America Strategy 2023

In 2023, The A.T.A. refined its marketing strategy, maintaining the Big Play approach with a central focus on sales-driven activations. Remarkable results were achieved, with 104,543 outbound clicks from Aruba.com towards partner pages, showcasing a substantial 85% increase compared to the 2019 figures of 56,534 outbound clicks. Additionally, the implementation of Mini Big Plays (MBP) as targeted market-focused campaigns was initiated.

In Brazil, the emphasis was on deals and offers, while in Argentina and Chile, the marketing efforts concentrated on awareness-oriented initiatives, demonstrating flexibility to meet localized market requirements.

The Mini Big Plays and campaigns were:

- March | “Felicidad Extendida”
- April | Mini Big Play Chile
- June - July | Mini Big Play Argentina and Brazil
- August | “Amor a primera visita”
- November | Black Friday

In Latin America, the A.T.A. emphasized on sales-oriented initiatives and strategic brand positioning through various activities such as Big Play campaigns, Always-On, and Equity activities. The overarching umbrella strategy for all campaigns centered around "Cumplelo en Aruba."

Additionally, outdoor investments returned in 2023, as DOOH (Digital Out Of Home) formats mainly, investing in key markets such as Colombia, Argentina, Chile, and Brazil. This strategy is aimed at maximizing the impact on brand presence in the primary markets.

Branding & Advertising

The Latin American markets strategically focused on outbound campaigns and brand positioning, tailoring their approach to affluent first-time travelers with high Caribbean travel intent.

The segmentation further personalized content for distinct niches, such as romance, family, and/or friends, ensuring targeted engagement in each market. The results of this strategy can be observed in key indicators of the Latin America 2023 profile, where 69% of Latin America visitors were first-timers.

High-Value First Timers

Interest: Travel and Tourism + Aruba.

Search: In-Market Caribbean + In-Market Aruba.

Romance	Couples on anniversary trips or romantic getaways. Interests: In a relationship. Searches: Honeymoon, destination wedding (beach), beach trips (couple).
Family	Couples with small children or multi-generational families. Interests: With children. Searches: Family vacations, family trip.
Friends	Groups of friends, that share good moments and experiences. Interests: beach and adventure, culture explorer, food/culinary and luxury travel enthusiasts. Searches: best Caribbean beach, luxury resorts, local cuisine recommendations, etc.

Latin America primarily focused its marketing investments on long-haul markets for digital communications while allocating 30% of the total budget to Digital outdoor/billboard advertising in primary markets. This included strategic investments in malls, key affluent streets, airports, TV, magazines, and consumer events.

Always On & Big Play Model

In 2023, our campaigns were tailored to different stages of the traveler's journey. High-reach formats attracted prospects in the awareness stage, inviting them to discover the island. During the planning stage, our retargeting strategy delivered a second message showcasing island activities, encouraging travel consideration with personalized messages for each market, and the journey culminated with an irresistible offer, the Big Plays deal, designed to entice potential travelers to materialize their visit to the island.

Equity campaigns had a strategic shift towards more prolonged and cohesive communications. By targeting various niches and on-island attractions every three months, the goal was to boost brand consideration and secure consistent conversions. The focus was on personalized messaging tailored to each market for a more effective and engaging campaign.

The communication of the umbrella campaign "Cumplelo" showcased compelling reasons to explore Aruba, ensuring a focused and impactful strategy that resonates with evolving consumer interests throughout the year. A.T.A. LATAM combined successful strategies from past Big Plays campaigns and incorporated exclusive deals from partners.

In 2023, Big Plays campaigns significantly increased outbound deals by 85% and reduced Cost Per Outbound (CPO) by over 90% compared to 2019. Key digital channels included Google, Meta, Kayak, Pinterest, and Vidoomy, optimizing targeting for the right audience.

The new Mini Big Plays campaigns, enabled personalized campaigns tailored to each market's needs, aligning to boost visitor interest.

For Argentina and Chile, the focus was on brand positioning and destination appeal, while in Brazil, the emphasis shifted to promotional offers.

Utilizing a Customer Data Platform (CDP) to improve the audience strategy, using past visitor data and creating new lookalike audiences. This enhanced user targeting and segmentation, yielded better year-over-year results.

Marketing activities

Aruba.com

The sessions surged to 6 million, a 261% increase from 2019, with paid media as the primary source showings a 200% increase over the established KPIs for the year. However, this impacted traffic quality, increasing the bounce rate by 12% vs 2019 and the average session duration improved to 00:01:32. Top visiting countries included Colombia, Argentina, Ecuador, Peru, and Chile. This positive trend aligns with an uptick in new users.

Portuguese Website Traffic

In Brazil, the strategy prioritized enhancing user quality rather than quantity, increasing sessions by 22% compared to 2022. A.T.A. Brazil focused on Big Plays to significantly increase outbound numbers by 94% compared to 2019.

The cookie consent LGPD (the Brazil version of the General Data Protection Regulation) has affected the number of sessions and events on the new Google Analytics 4 version.

Social Media

In 2023, the social media strategy was focused on creating valuable content for travelers that were looking for a destination where they could fulfill their dreams. By showcasing natural wonders, activities, culture, and gastronomy, the A.T.A. successfully captured their attention.

Video content on Tik Tok and through Instagram reels was the focus, using trends to increase engagement and reach on both platforms.

On Facebook, carousels took center stage, performing exceptionally well due to their alignment with the age demographic and content interaction habits of our followers.

In terms of engagement, Facebook and Instagram @arubabonbini achieved an annual average of 3.2% and 2.5% of engagement, respectively, and in TikTok, a total of 7.3%. These results are above the organic average in the tourism category (IG: 1.45% and FB: 0.88%, TT: 0.58%)*.

For the Brazilian market, the strategy centered around locally developed content to generate engagement. Facebook, Instagram and TikTok also positioned over the global tourism averages with 1,58%, 5,4%, and 7.7% engagement rates. The Brazil Instagram page gained an 18.3% increase in followers compared to 2022, acquiring over 9,000 new followers. Reach grew substantially by 453% compared to 2022, and the engagement rate saw a 50% boost from the previous year.

In 2023, TikTok @arubabonbini witnessed a substantial growth in followers, skyrocketing from 2,794 to 207,429—an astonishing 7300% increase, gathering 8.8 million views. Similarly, TikTok Aruba_BR surged from 3,774 to 46,209 followers—a remarkable 1124% increase, reaching more than 370K visualizations.

ECRM

The eCRM channel remained a vital direct communication avenue with consumers. The A.T.A. maintained three key lists: past visitors, leads, and trade, with a good quality list and with an Open Rate of 35.4%. Monthly eCRM campaigns consisted of product updates, special deals, and market insights, a Global Newsletter managed by HQ was implemented in regards to new on-island developments.

Public Relations

In 2023, Latin America PR accomplished a PR Value of \$49,916,150.51, a remarkable growth of 93.14% compared to 2019 (PR Value of \$25,844,231.05). When compared with 2022 (\$27,493,792.49), this achievement reflected an impressive increase of 81.55%. Aruba made a substantial impact by generating 1,837 impressions across Latin America's media outlets. Regarding press & i-trips, the A.T.A. hosted 30 media professionals & influencers.

PR Value 2023	
Country	PR Value
Argentina	\$ 6,287,185
Brazil	\$ 38,761,807.91
Chile	\$ 647,508.81
Colombia	\$ 3,737,128.80
Perú	\$ 482,520
TOTAL	\$ 49,916,150.51

The approach to Influencer Value was centered on quality rather than quantity. In 2023, Aruba hosted 37 Latin American influencers, marking a decline of -10% and -12% compared to 2022 and 2019, respectively. Despite the decrease in the number of influencers, their collective reach extended to 44 million people. The Influencer Value (I-value) amounted to \$24 million, showcasing a 5% increase from 2019. Despite a -18% decline compared to 2022, the influencers generated 1,216 posts tagged @arubabonini and @aruba_br.

Influencers Value 2022 *Info from Klear

Influencers	37
Post	1,216
Engagement	2,700,000
Reach	44,100,000
I-Value	\$ 24,000,000.00

The key highlights of PR in 2023 were:

- **Argentina:** A notable achievement in 2023 was the feature on "Resto del Mundo," a highly-watched program on "Canal 13", one of the top TV channels. This exposure reached over 15 million people, generating a PR Value of \$1,500,200.
- **In Brazil:** The "Desafio de Craques" project by TV Globo contributed significantly, generating approximately \$14.4 million in PR Value and potentially reaching 81.7 million viewers over five Sundays that this was aired.
- **For Colombia:** Co-branding initiatives and press trips focused on influencer marketing and media impact, which resulted in three major activities – Sajú sunglasses, Bogotá Eats culinary event with chef Urvin Croes and, Bilbi recycled bags. These initiatives collectively generated a PR Value of \$1,024,228 and an I-Value of \$2,500,000.
- **Peru:** The Peruvian market was fully reactivated in 2023, with the Area Director's visit announcing the launch of the direct flight Lima-Aruba in August, followed by the actual visit during the launch with multiple interviews conducted with the CEO. Interviews on radio and television channels, including PBO with Chema Salcedo and RPP TV, reached an audience of over 1.6 million and achieved a PR value of \$ 100,000.
- **Chile:** The inclusion of influencers such as Dani Urrizola and María Gracia Subercaseaux had a significant impact on the I-Value, surpassing US\$ 950,000.
- **Regional:** Forbes magazine generated more than \$ 250,000 in PR Value.

During 2023, A.T.A. Latin America consolidated PR offices with local trade offices in all markets. This strategic move resulted in closer contacts and better alignment leveraging trade, marketing and sales activities as a result.

Trade

Regarding trade actions, the strategy was to continue sales training and developing relationships with travel agents, wholesalers, and the tourism industry. Additionally, some new initiatives were introduced, such as opening up commercial activities in Ecuador, resuming MICE actions in the Colombian and Brazilian markets, and participating in trade events and fairs. These efforts were carried out in collaboration with an Aruba delegation, resulting in a total of 862 sales actions in the region.

Commercial Calendar 2023



Some of the most significant trade fairs and events in Latin America included: Vitrina Turística de ANATO and MICE week in Colombia; WTM and MICE events in Brazil; Event to launch the destination in Ecuador, FIT and ECTU in Argentina; and the launch of the LATAM Airlines flight in Peru and Chile, which was the closing event of the year for Latin America.



Events and Sponsorships

In 2023, the A.T.A. took part in exclusive events that drew a large number of high-value visitors in Latin America:

- Colombia: participation in A Cielo Abierto showcasing Aruban cuisine, reaching over 48,000 people.
- Argentina: Golf tournament sponsorship with 146 participants. It impacted 5,000 people.

Marketing Partnerships

In 2023, 56 COOP agreements were signed with TOs (Tour Operators) and OTAs (Online Travel Agencies), doubling the number of agreements compared to the previous year. These efforts contributed to an increase in approximately 46,566 visitors for the market, which represented 37% of total passengers for the year. The main focus of these actions was on direct clients through online and offline advertising. Other important initiatives included training for the main travel agents of the tour operators, branding offices, and sales incentives.

During the year, the A.T.A. organized seven FAM trip groups for the Brazilian, Chilean, Colombian, and Peruvian markets. In the second half of the year, we had two excellent opportunities with the “COPA Vacation” and “Encuentro de ANATO Mayorista,” both of which brought 98 people to visit the destination. Additionally, in the first edition of the Global Tourism Conference, A.T.A. Latin America had a delegation of 23 wholesalers from its main markets present.

6.3

Europe



Situation Analysis Europe

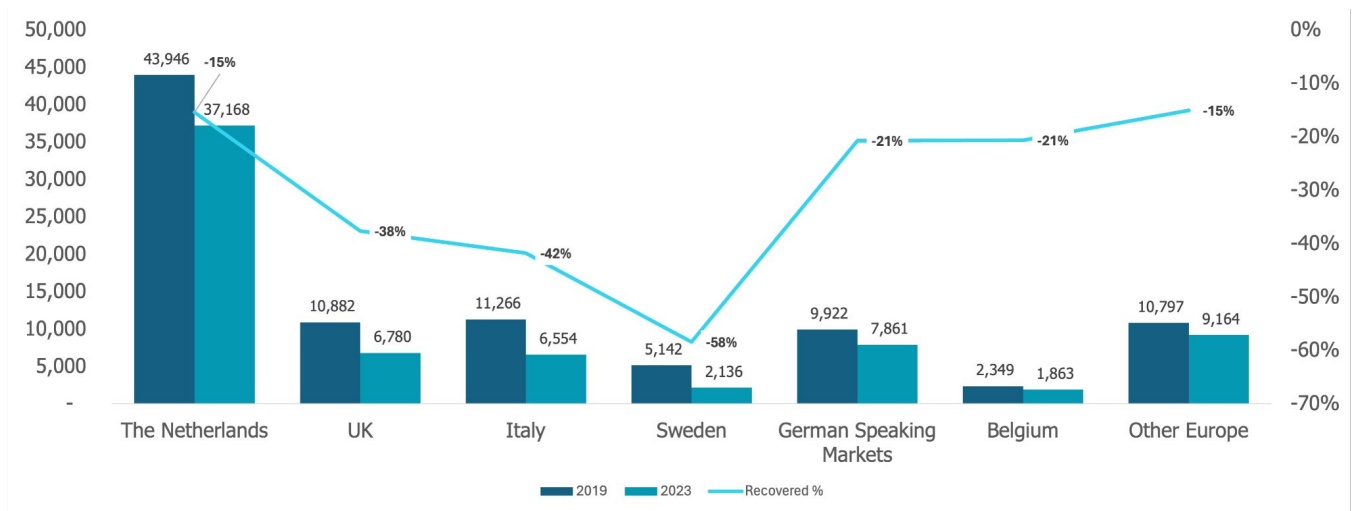
In 2023, Europe experienced its first "normal" year without any travel restrictions, allowing the A.T.A. to compare its results with 2019, the pre-pandemic benchmark year. For this year, the EU market registered a total of 71,526 tourist arrivals. This figure represented 19% fewer visitors than in 2022 and 23% fewer than in 2019, resulting in an overall market share of 5.8%.

While European travel initially rebounded, with many destinations opening up without any restrictions, this resurgence was quickly dampened by several factors. The ongoing conflict between Ukraine and Russia led to escalating energy prices, coupled with high inflation in the Eurozone. These developments introduced uncertainty among consumers, impacting their daily spending habits. Consequently, vacation planning shifted to become a last-minute decision for many travelers. Specifically, regarding Aruba, there was a noticeable decline in European travel to Aruba in 2023. This decline can be attributed to a combination of factors, including a change in available air service, a robust North American market leading to compression in inventory on island, heightened inflation in Europe, and a growing preference for last-minute bookings which did not always allow for availability on island.

Despite facing challenges throughout the year, the demand for Aruba from Europe remained notably high. This affirmation came from our various travel trade partners, including tour operators and travel agents. Consequently, Aruba secured a larger share of seats on shared flights than initially anticipated. Specifically, on KLM, Aruba claimed 55% of all seats, surpassing Bonaire's 45%. Additionally, on TUI Netherlands flights, Aruba secured a 49% share of seats, compared to 51% for Bonaire or Curacao (TUI-adjusted destinations based on demand).

Notably, there was a rise in the share of the accommodation type labeled as "other" and vacation rentals, attributed to increased availability in this category. In light of these circumstances, and considering the broader context, Europe performed reasonably well.

Arrivals 2023 Vs 2019



Airlift

The Netherlands, the primary market, experienced a decline of 21.2%, with total arrivals reaching 42,946 compared to 46,255 in 2022. KLM's reduction of air seats by 20% contributed to this decrease, as many of the KLM Boeing 777 aircrafts were replaced with smaller Airbus 330 planes.

The second-largest market, the UK, saw a significant drop of 39% in 2023, with arrivals totaling 6,780 compared to 11,149 in the previous year. While British Airways' new bi-weekly service replaced the TUI charter and performed well in higher-class seats, it struggled to maintain satisfactory load factors in economy seats.

Italy, Europe's third market, also experienced a decrease of 20.6%. The cancellation of American Airlines' direct connection from Milan to Miami, contributed to Italy receiving a total of 6,654 visitors in 2023, compared to 8,255 in the previous year.

Germany witnessed a slight decrease of 3.3% in 2023 compared to 2022, primarily due to the reduction of seats on KLM. On the positive side, Sweden was the only market to show an increase of 9.1% in arrivals, despite the cancellation of the Ving charter in line with a less stronger Swedish Krona.

Norway, however, experienced a decrease of 11.7%, attributed to KLM's reduction in air seats. Smaller European markets, including Belgium, Switzerland, and Denmark, also saw decreases of 26.4%, 10.4%, and 3.2%, respectively. Another secondary market, Austria, saw a 1.7% increase.

Branding & Advertising

In 2023, A.T.A. Europe executed a structural digital media campaign for Aruba, utilizing the "Aruba effect" concept. This included Search ads (SEA) and Social Ads on the META network (Facebook & Instagram) for Italy, Germany, Belgium, and in The Netherlands, Google ad network (DV360 and Youtube), Display advertising, and Digital out of home (Digital Billboards).

In 2023, the A.T.A. hired an advertising agency in the UK to support with the positioning of the brand amongst the high-value audiences. The UK ran its first advertising campaign in over a decade. This integrated advertising campaign ran from September to October, coinciding with the British Airways sales period. It involved digital advertising, meta targeting, OOH advertising in highly strategic locations reaching high-value audiences, and a partnership with The Times for in-depth brand awareness. The campaign highlighted Eagle Beach as the #1 Beach in the Caribbean and featured messaging supporting British Airways flights, with positive consumer research results. Approximately nine out of ten individuals who were exposed to the campaign with the intention to take future action. The numbers further increased for those who remembered the campaign.



In August 2023, A.T.A. Europe strategically increased awareness in The Netherlands through out-of-home advertising, utilizing print and digital billboards nationwide. The campaign aimed to encourage early bookings for summer vacations in 2024 and reached over six million consumers, generating nearly 90 million impressions across 2908 screens and billboards.



Marketing Partnerships

In Europe the travel trade is still important for Aruba to generate sales. Over the years, consolidation in Europe has led to larger tour operators acquiring smaller ones, narrowing the marketplace to a smaller number of major players.

Notably, in Europe, the TUI group holds a prominent position, operating in The Netherlands, UK, Belgium, Germany, and Switzerland. In Italy, the Alpitour group, managing three brands (Alpitour, Turisanda, and Eden Viaggi), dominates the market. Meanwhile, for the German-speaking markets, the REWE group, comprising DER, Meiers Weltreisen, and Kuoni, stands as the largest partner for Aruba.

A.T.A-UK's collaboration with British Airways resulted in partnerships with numerous new tour operators and travel agencies in the UK, leading to the execution of 12 COOP marketing campaigns. These campaigns included collaborations with Lime Travel Solution, the exclusive flight consolidator for British Airways, mainstream tour operators, a dedicated B2B tour operator, and the UK's largest independent travel agency, Hays Travel. As part of the British Airways agreement, five marketing campaigns were conducted, featuring both tactical and awareness-focused initiatives.

On an airline level, the A.T.A. has marketing partnerships with KLM and British Airways. British Airways marketing campaign is executed with their tour operating division British Airways Holidays, focusing on promoting packaged sales. While with KLM the campaign is focused on mainly selling tickets/seats. Both partnerships ran year-round.

A highlight in 2023 was the co-branded tram campaigns in Rome and Milan in collaboration with Turisanda and Alidays. These branded trams navigated popular routes in both cities running for about 2 weeks each.



Sales

The travel trade continues to hold a significant role in Europe. The A.T.A. remains focused on promoting Aruba to travel agents, providing training and incentives to boost sales. With all restrictions lifted, the demand for trade events and travel agents seeking destination updates reached an all-time high. Supported by the private sector, the strategy to enhance demand through travel agents resulted in a packed sales calendar throughout the year. A.T.A. successfully trained and engaged with a total of 4,800 travel agents across all markets, marking a 71% increase compared to 2022. Standout markets included the UK with 1,563 agents and The Netherlands with 1,130 agents.

The notable increase in the UK was a deliberate tactic, where A.T.A. hired a sales representative to target travel agencies and tour operators, particularly to promote the British Airways flight. A total of 165 events, comprising sales calls, training sessions, roadshows, and webinars, were conducted, training approximately 1,563 sales staff.

Key sales events per market included:

- Netherlands: D-Reizen Connecting Worlds – 300 Travel Agents (with one Fam Trip spot giveaway)
- Belgium: KLM-Air France Aruba summer party – Reached 130 travel agents
- Germany: KINO (cinema) roadshow – Reached 160 travel agents
- UK: Caribtours (B2B & B2C luxury tour operator) training event – Reached 150 travel agents
- Italy: WTG Roadshow – Reached 235 travel agents in four cities



Tourism Board of The Year in the Netherlands
& Team Member of the Year (by sales team member)

Public Relations

The media landscape in Europe has undergone significant changes, with a notable decline in traditional print media in 2023, as media houses and newsrooms merge or disappear. This shift impacts the Media Value and Reach, crucial Key Performance Indicators used by A.T.A. to measure the Return on Investment for PR efforts. It's worth noting that this trend is not universal, with some countries, like Germany, maintaining a considerable media landscape due to their more traditional approach.

Overall, the Media Value for the European market increased by 17% to a total of \$32,581,809 US Dollars. This growth was driven by substantial contributions from the UK (+37%) and Germany (+54%), while The Netherlands and Italy experienced declines.

Starting in 2023, A.T.A. began measuring the value of investing in content creators visiting the island using the I-Value metric. Despite the inability to compare with 2022, the results remain encouraging, with A.T.A. Europe measuring an I-Value of more than \$10 million US Dollars.

PR activations that stood out include:

The Netherlands - Culinary Veggie Brunch - Aruba Style

In September, A.T.A. organized a press and influencer culinary event in Amsterdam's Utrechtse Straat. Renowned culinary entrepreneur and chef Jacky Lopez crafted a unique vegetarian and plant-based brunch with a Caribbean twist. The event featured a demo by Kunuku Spices, showcasing their Caribbean spice mix, and entertainment by Aruban artist Aymar Torres. Over 30 journalists and influencers attended, extensively sharing their experiences.

UK - Launch of British Airways to Aruba

Alongside the coverage of the inaugural flight in the UK, seven national UK press members embarked on a British Airways VIP press trip to the island, including coverage by the Telegraph during the inaugural flight. A.T.A. UK also sent a glossy travel magazine, 'Amazing Destinations,' influencing The Globetrotter Guys to target the affluent LGBTQ+ community. TV celebrity Scarlett Douglas, traveling as an Aruba Ambassador, secured a substantial feature in Hello magazine.

Special Events

Throughout the year, the various teams in Europe organized and executed several noteworthy events:

Netherlands - PRIDE Event

In August, a remarkable event was organized at the prestigious Sofitel Legend The Grand Amsterdam, a 5-star hotel in the heart of the city. The event aimed to celebrate and showcase Aruba as a safe and welcoming destination for the LGBTQ+ community within the Caribbean. The event successfully gathered more than 450 people from the LGBTQ+ community and even turned into an Aruba event, where the A.T.A. exclusively used Aruban artists and entertainment.

Italy - Feel The Aruba Effect Day

A.T.A. Italy organized an immersive event in Milan to strengthen ties with the tourism industry. 'Casa Aruba' offered a sensory experience with Aruban recipes, carnival glitters, Caribbean music, and branded beauty cases. The event drew 30 tour operators and journalists at lunch and over 80 participants, including travel agents, tour operators, and influencers, at dinner.

Germany – Aruba Dushi Juice Launch

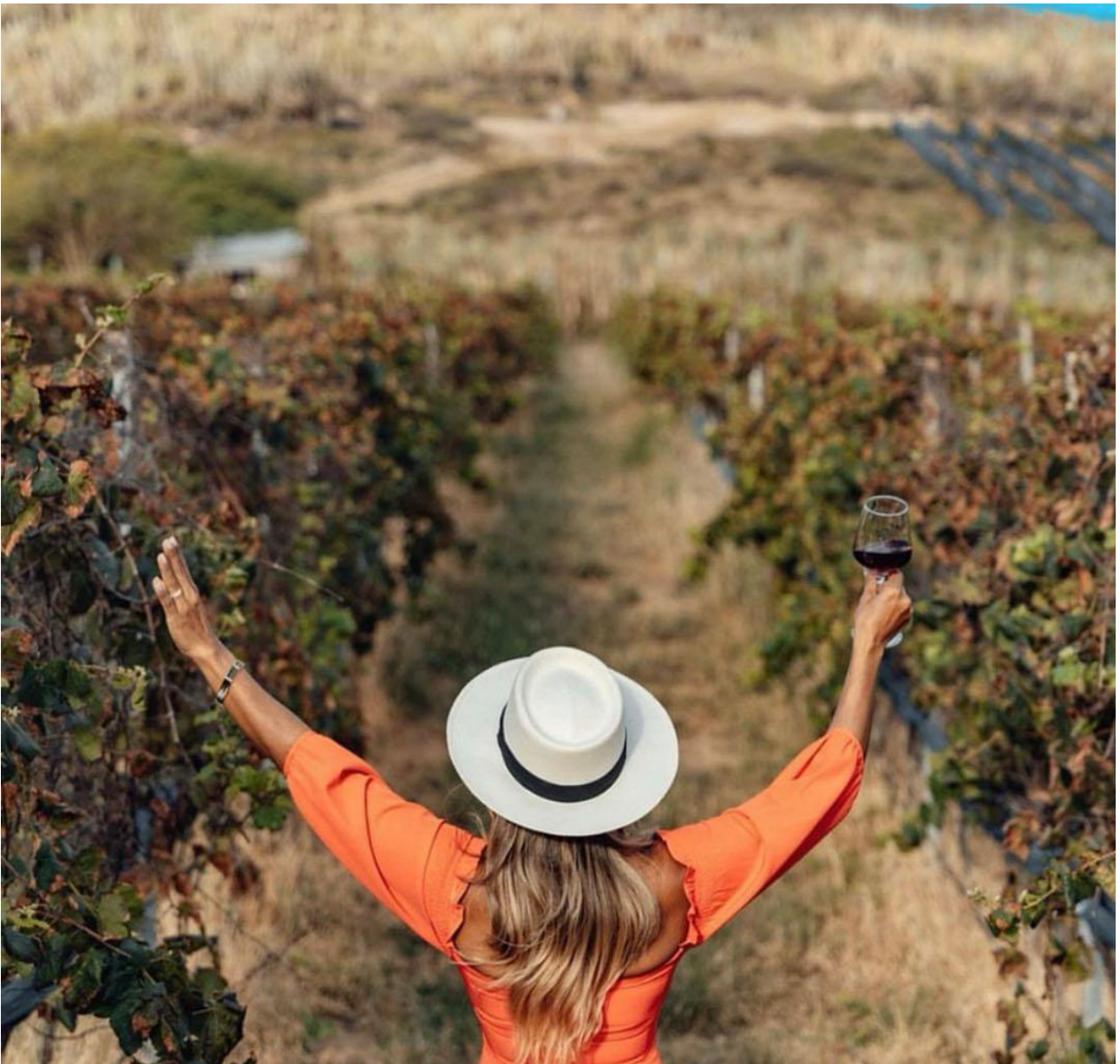
In Hamburg, Germany, a media and influencer event introduced the "Aruba Dushi" smoothie collaboration with "MAD about juice." Sold at three locations, the superfood smoothie brought Aruban vibes to Hamburg. The launch event included a destination presentation, networking, and a buffet, attended by 25 guests, reaching around 2.3 million through media partners.

UK – Appreciation Dinner and BA Event

An Aruba Appreciation Dinner onboard the Prince Regent canal boat hosted longstanding and new partners, including British Airways, BA Holidays, TUI, and more. The relaxing evening thanked trade partners and built excitement for 2024, with 24 attendees. The BA Event in Newcastle involved hotel representatives and A.T.A.-UK engaging with 16 agents through a champagne reception, training, a three-course meal, and a quiz, generating keen interest in Aruba and the new airline route.

6.4

Public Relations



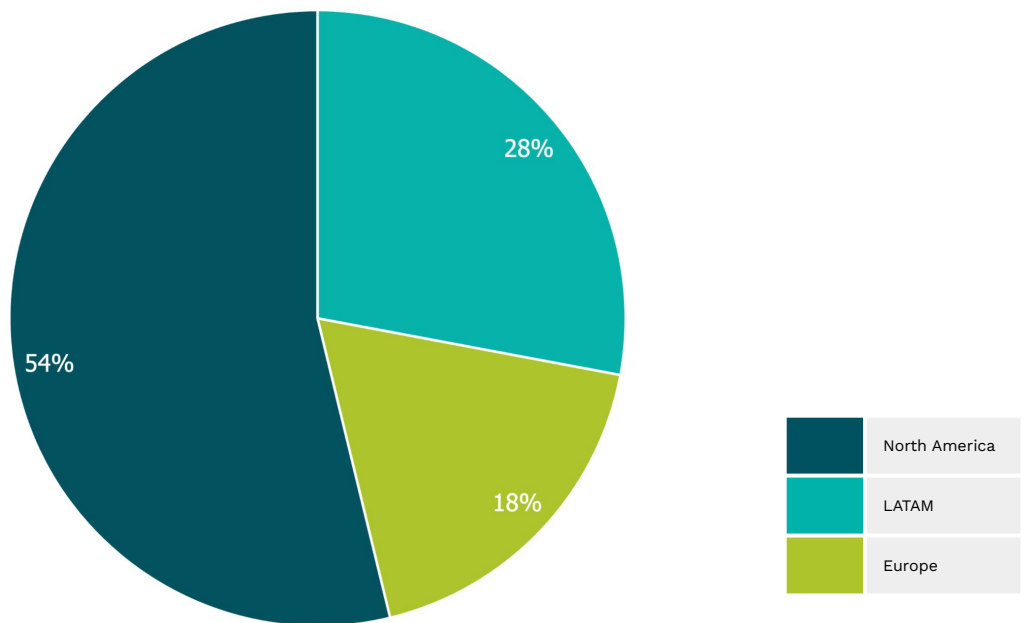
PR & Communications 2023

To ensure alignment with A.T.A.'s strategic priorities on a global level, the PR engine is led by A.T.A. HQ as part of a more effective integrated approach.

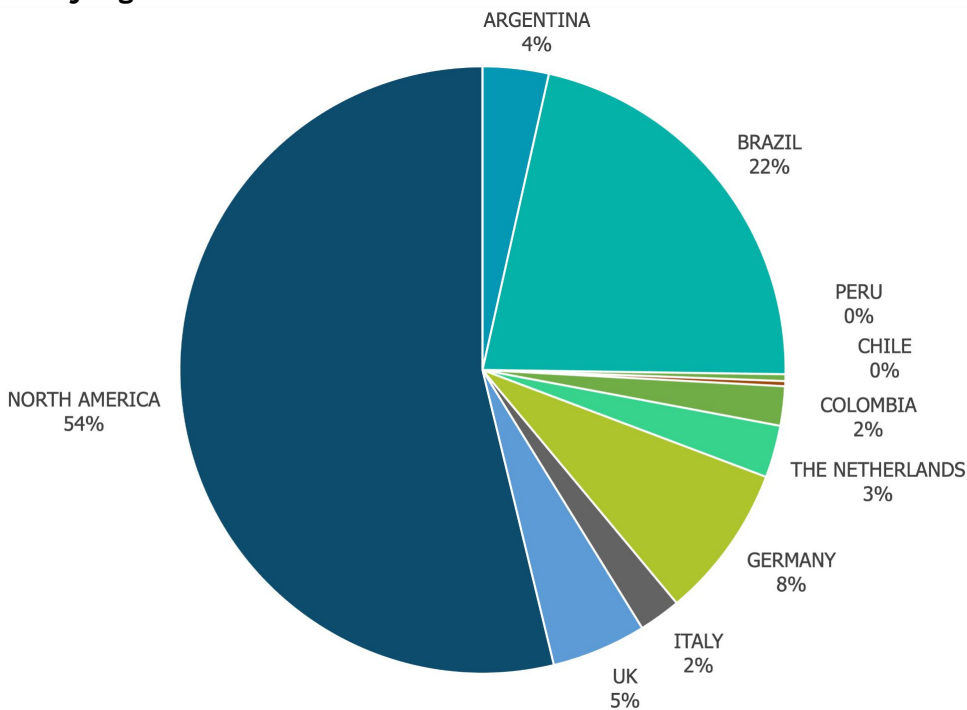
Press and influencer trips remain the most crucial tactic to produce high-yielding publicity. These media experiences allow the destination to be positioned positively and experientially from the perspective of travel writers, creators, TV crews, photographers, and more. Additionally, in-market activations and on-island events help generate our PR value numbers.

Globally, the total PR value for all markets in 2023 was \$178.6M, an increase of 34% and almost \$45M, compared to 2022, the highest global PR value year.

PR Value Regional Market Share



PR Value 2023 by region



Key 2023 PR & Communications initiatives

The aggregate of the PR value targets for all markets was \$117,8M. The actual PR value, as mentioned at the beginning of the section, was \$178.6M. The aggregate targets were surpassed with 51.7%. Italy and the Netherlands reached 99.8% and 99.3% of their targets, respectively. For Latin America, in addition to the individual market targets, there are regional targets whereby joint activations on a regional level are tracked. During 2023, these activations were attributed to the markets where they belonged, leaving the regional LATAM target unused.

Argentina, Brazil, Chile, Peru, Colombia, Germany, the United Kingdom, and North America showed record-breaking PR value numbers. Once again, the outstanding work of constant PR pitching and distribution of press releases, together with press trips with a-list media and the right influencers, are the results of this record-breaking year.

On a regional level, North America Surpassed its targets by 74.7%, Latin America by 32.2% and Europe by 30.5%. 80 press and creator trips were hosted locally by our Trade Relations Liaisons in addition to individual trips from the different markets where the TRL supported with itineraries or where no TRL involvement was needed.

In addition to these trips, there were different activations in the markets and on-island which garnered headlines and were able to help the A.T.A. reach the above-mentioned targets.

A few specific trips and/or activations will be shared per market:

North America

USA*

The World's Easiest Job campaign, the Aruba I Do event, Tattoovenirs, Paradise on Tap, content creators like Jeremy Austin and Roamaroo, and celebrity couple Lauren and Arie Luyendyk who attended Aruba I Do.

*For more information please refer to the NA PR Section on page #35

Latin America

Argentina

The TV program "Resto del Mundo" recorded an episode in Aruba, and celebrities Catherine Fulop, a Venezuelan model and actress, and her husband Osvaldo Sabatini came to explore Aruba. Sandra Borghi, a TV presenter, and her husband earned coverage for their vow renewal during Aruba I Do.

Brazil

The "Desafio de Craques" project by TV Globo recorded in Aruba, featuring a special IG live about Happiness Day with Dani Calabresa, co-branding with Track & Field, the announcement of the new flight with LATAM, and the presence of the newspapers O Globo and O Estado de São Paulo at the destination (coverage by two of the top three newspapers in the country).

Colombia

Collaborations with Sajú sunglasses, Bogotá Eats culinary event, content production featuring chef Urvin Croes, the direct route from Cali – Aruba with Wingo, the celebration of Aruba's 40 years within the Colombian market, and the co-branding with the recycled bag brand Bilbi, making bags with promotional banners that are no longer used.

Peru

The Latin American Area Director's visit announcing the launch of the direct flight Lima-Aruba, included freelance journalist Manolo Bonilla, who published in Touring and Refugio, two magazines aimed at exclusive and high purchasing power audiences, Maca Bustamante, known as Maca Wellness on social media who participated in the KLM Aruba marathon.

Chile

Travel Content Creators such as Dani Urrizola and María Gracia Subercaseaux, in addition to press trips and creator trips focused on Wellness, Culinary, Romance, Family, and Live like a Local which effectively integrate with the content delivery strategy to the media.

Regional

An editor from Forbes LATAM visited the island to interview influential women holding key positions locally and within the tourism sector. These interviews were featured in an article published by Forbes in Argentina, Brazil, Colombia, Chile, and Peru.

Europe**United Kingdom**

The BA inaugural flight coverage to the island, British Airways VIP press trip, and celebrity Scarlett Douglas, as an Aruba Ambassador.

Netherlands

The individual content creator trip of Snacksperit, Quote magazine's article (Dutch Forbes) on culinary Aruba, a feature article on Aruba and wellness in the oldest luxury female magazine Elegance & health and wellness magazine Happy in Shape (online).

Italy

Articles in Io Donna, Gambero Rosso, BEEF, GQ, Grazia, and Sale & Pepe. Content creator trips of HumanSafari as well as Giorgia Crivello & Stefano Laudoni, who renewed their vows during Aruba I do 2023.

Germany

Press trips, groups of content creators, and a German A-list actor were part of the activities. Additionally, two marathon-focused content creators came to the island for the KLM marathon, and a collaboration was formed with The Juicery, known as Mad About Juice, within the local market.

HQ's PR & Communications department continued working with the Trade Department in 2023 to ensure all press and influencer trip participants had unique and memorable experiences. With the ICC established in 2022, new content was created to tell the Aruba story better and ensure that angles were updated and new angles focused on. The Aruba Product Update received more content from partners, and the first part of its redesign took place.

6.5

MICE



The MICE segment demonstrated a robust recovery, surpassing pre-pandemic levels, despite challenges such as reduced staff in North America and limited room inventory at the Hilton. This segment’s successful rebound significantly contributed to the positive outcomes highlighted in the annual report.

The report underscores an all-time high demand, indicative of a thriving market for the destination. Notably, successful lead generation in North America stands out, while gradual growth is observed in LATAM and Europe year-over-year.

In summary, the 2023 annual report paints a picture of a thriving organization and, most importantly, the success of the destination.

North America

Sales Targets and strategy

North America

1. Leads / Leads assist

Grow the leads and leads assist room nights with 10%, compared to 2022 year-end results.

1.1 Goal

The Lead/Lead assist target was set in 2022 to grow by 20% (+36K room nights) over the 2019-year-end results. This was an ambitious goal, considering 2019 was one of the best years yet with a total of 248K room nights while previous goals were set around 15-17% YOY growth. This was maintaining the average expected total to be in the mid 200K. With the industry recovering from the pandemic and with Aruba Convention Bureau’s (ABC) second sales director the goal seemed justified. However, results showed a 5% increase vs 20% target. Considering these calculations and other industry trends, the 2023 target was set at 10% growth of the previous year (2022), presenting a target of 273,530 total room nights.

1.2 Results

In 2023, ACB NA registered a total of 780 RFP’s representing 310,708 total room nights.

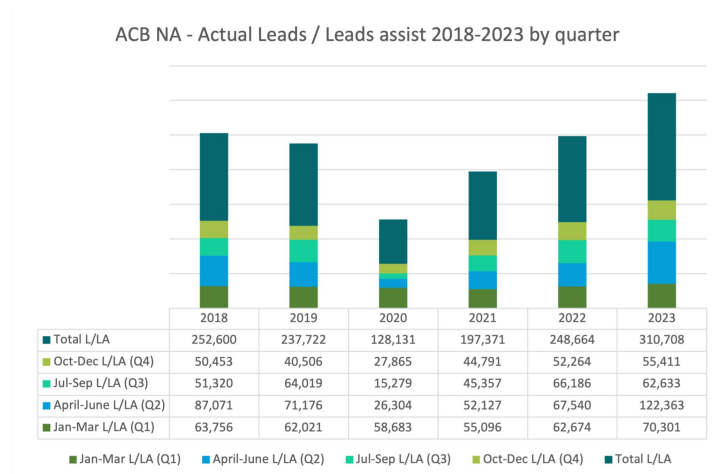
Out of the total 780 leads:

- 17% was in the year for the year (ITYFTY) 2023, 51% for 2024, 25% for 2025 and 7% for 2026 and 2027.

ACB Lead Assist 2023	
2022 Actual Lead/Lead Assist	248,664 RN
2023 target 10% increase	24,866 RN
2023 Target	273,530 RN
End Result 780 RFP’s representing	310,708 RN

In 2023, ACB experienced its most successful year in lead volume. Traditionally, Q2 has always been the quarter with the highest lead influx, and in 2023, Q2 registered almost double the leads compared to the same period in 2022. Moreover, there was a substantial increase in inquiries requesting ITYFTY compared to 2022. This indicates a heightened interest in last-minute programs that could be converted for the same year.

The 2023 year-end numbers show a 62,044 room nights growth YOY.



Source: ACB Lead / Lead assist historical data, January 2023

2. Definite Conversion

Reach a definite conversion of 17% of room nights, compared to total lead/lead assist room nights of 2023

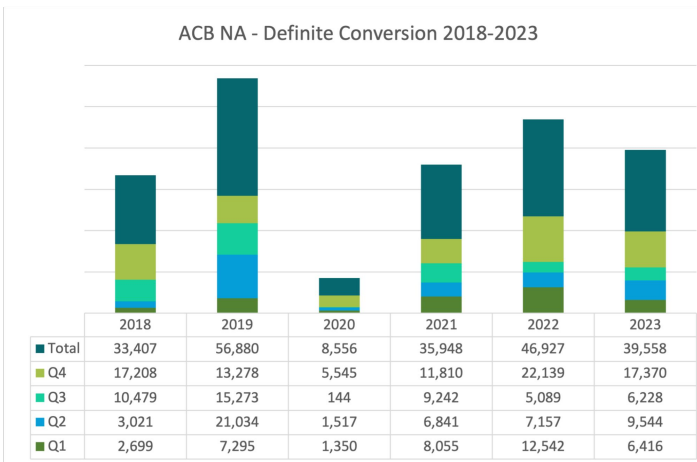
2.1 Goal

The definite conversion target is consistently measured against the lead performance of the same year. While the target was traditionally set at a 15% conversion rate, the past two years have seen an increase to 17% due to expanded opportunities (more hotels, airlift, and an additional sales director). Given the previously mentioned actual total lead room nights in 2023, this translates into a conversion target of 52,820 room nights to be definitely booked in 2023 for any future year.

2.2 Results

In 2023, ACB recorded a total of 122 groups that turned definite, resulting in 39,558 total room nights and a 12% conversion rate. While this is slightly behind the annual goal of 17% conversion rate, it reflects a -25% deviation and -13,262 fewer room nights versus target. The primary factor contributing to this negative result was the limited room inventory at Hilton Aruba, impacted by renovations until Q2 of 2025, resulting in a decline of almost -10K in room nights year over year.

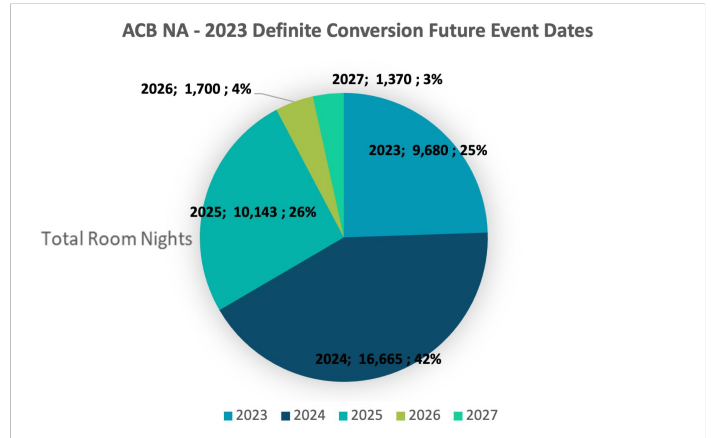
Hilton conversion		
Year	Groups	Total RN
2022	23	14,091 RN
2023	15	4,222 RN



Source: ACB Definite Conversion Analysis, January 2023

When looking at all the definite conversion room nights in 2023:

- 25% of the room nights were converted “ITYFTY”
- 42% for 2024
- 26% for 2025
- 4% for 2026
- 3% for 2027

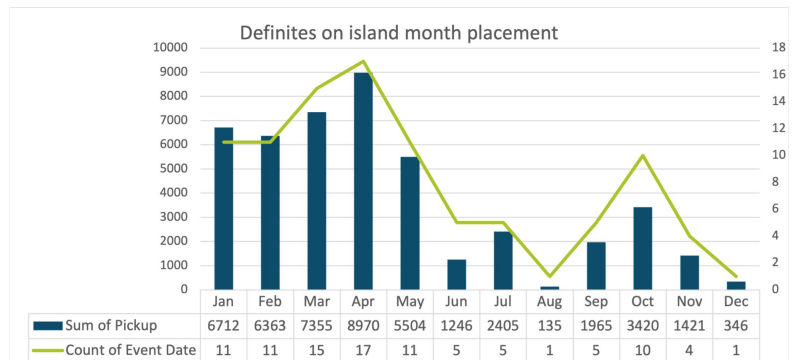


This indicates that ACB continues building a solid base up to 4 years ahead, with over 29,000 secured room nights converted in 2023 alone for the future years.

3. Definites on-island

In 2023 ACB NA registered 96 groups on the island, representing 45,842 total room nights. These groups contributed to an estimated economic impact of approximately \$34,384,250 *Calculation based on the STR Report Groups ADR of \$750.06 per room night.

The total ACB registered definite groups for 2023 represented \$469,910 USD in cash incentive sponsorship (making use of 94% of our total budget for cash incentives).



Strategy

ACB's primary strategic objective in 2023 was to surpass 2022 figures in all aspects. Despite facing strong competition from destinations with lower overall costs, such as Mexico and the Dominican Republic, Aruba's established reputation remains a significant advantage. We actively position the destination as highly desirable for MICE groups, particularly targeting segments with robust budgets, including Technology, Financial, Insurance, Medical/Legal Education, etc. As 2023 concluded, Aruba emerged as a top contender in the MICE market, celebrating a successful year with positive results in our tracked segments.

ACB positioned itself for success with the addition of a second North American Sales Director in August 2023. This contributed to our robust annual lead volume of 780 new RFPs processed for the year (representing 310,708 room nights). By comparison, we processed 601 new RFPs in 2022 (representing 248,664 room nights). These figures illustrate an increase of 30% in new RFPs and 25% in room nights, year over year.

Focus Areas

MICE Tradeshows and Events

In line with hotel partner recommendations, ACB focused on attending selected tradeshows, industry events, and sales calls to drive conversion of existing leads, and to capture new leads into the sales funnel. All sales activities were vetted for their potential for short-term conversion and ROI.

Despite only having one Sales Director for the first seven months of the year, ACB participated in the following 2023 industry events: Site Global, SMU International, Atlanta St. Patrick's Day Client Luncheon, Egroup River X-Change, Incentive Live, IRF Invitational, Egroup Land X-Change, ConferenceDirect Top Producers Trip, Destination Caribbean, IMEX America, Global Incentive Summit & FICP Annual Conference.

ACB also organized and conducted three 2023 sales call trips:

- February: New York & New Jersey
- August: New York, New Jersey & Pennsylvania
- September: Minnesota, Iowa & Illinois

On-island events

ACB continued to host on-island events in 2023 such as its bi-annual Destination Review and Familiarization trips. Both events were highly successful, with confirmed bookings for 2023 and beyond. Displaying the destination first-hand to clients has proven to be a very successful approach to drive conversion, making it a key area of focus to ensure business continuation for the destination. In fact, ACB's Destination Reviews have historically yielded the highest return on investment of all organized sales initiatives annually. ACB also assisted with the organization of an on-island industry event: Conference Direct Top Producers Trip (in partnership with Marriott Global Sales & the Ritz Carlton team).

Planner Resources and Rewards

In 2023, ACB prioritized enhancing engagement with the MICE planners by improving planner resources and rewards.

Towards the end of the year, ACB launched the "One Happy Planner Tool Kit" providing easy access to high-quality presentations containing key Aruba information. The aim is to facilitate inclusion of materials in presentations to final decision-makers. The Tool Kit incorporates our Meeting Planner Guide, Destination Presentation, Flight Information, Cash Incentive Flyer, and Destination Video, which are easily accessible from one document. Furthermore the ACB introduced different meeting planner rewards such as the First Class Airport Escort Service for key Meeting Planners conducting site visits on the island, with the aim of providing a rewarding experience for planners further minimizing any potential frustration with extended waiting times during airport departure.

Latin America and Europe

Targets & Results

Exploring opportunities to broaden the destination's geographical portfolio and contingent upon the recovery of source markets, ACB strategically evaluated sales and marketing prospects on a case-by-case basis to launch group travel initiatives in upcoming years. With a focus on maintaining a presence in the market and building relationships have always been important, ACB executed a total of three targeted MICE actions in Brazil, Colombia, and Peru. Additionally, ACB also attended 3 Tradeshows such as IMEX Frankfurt, The Meetings Show UK, and IBTM World.

1. Lead volume

ACB recorded 18,695 total room nights for the LATAM market in 2023, indicating a 44% growth over 2022 but falling short by -33% compared to pre-pandemic numbers (2019). For the European market, ACB registered 5,146 total room nights, marking 2023 as the best-performing year in lead volume for this region. Overall, these results indicate that we are no longer talking about recovery, as 2023 has shown a healthy lead volume in the pipeline for group conversion opportunities.

2. Definite on island

In 2023, ACB recorded 15 groups from the LATAM region, representing 2,462 room nights, and 3 out of European markets, representing 232 room nights. These diverse groups ranging from incentive programs, including military, pharmaceuticals, and insurance companies, to sports and social groups. These programs were key to filling need periods for the destination in traditional off-peak periods.

The cash incentive program significantly contributed to the conversion of these groups, with ACB allocating almost 80% of its \$44,444.44 budget to influence LATAM and EU groups to choose Aruba.

Marketing strategy and results

By continuously understanding our campaign performance, target audience, industry trends, and unique/new selling points of the destination, ACB develops different marketing pieces to:

- (1) Build brand awareness through consistent messaging
- (2) Cultivate interest in Aruba by creating compelling MICE content and fostering engagement.
- (3) Converting users to take action

The successful implementation of targeted campaigns and innovative outreach strategies continues to yield positive results for all social media platforms and eCRM. Comparing 2022 to 2023, our engagement results increased by 60%, indicating improved Open Rate, CTR, and Opens/impressions. The banner ads and email content across various distribution channels included Aruba's culinary experiences, The Aruba Effect, upcoming hotels, and unique venues.

6.6

Digital Marketing



Aruba.com

In 2023, a strategic priority was placed towards crafting inspirational content, with a heightened emphasis on showcasing Aruba's unique selling points (USPs), particularly our culinary offerings, and spotlighting our on-island partners. Another pivotal focus was on optimizing the content hosted on Aruba.com to enhance our visibility and performance on Google's Search Engine Results Page (SERP). This involved meticulous attention to elements such as the "People also ask" section and adapting to Google's evolving updates to create a more visually captivating SERP.

The revised SERP now boasts enhanced visual appeal, featuring supplementary rich snippets that furnish users with comprehensive information directly within the search engine interface, thereby minimizing the need to navigate away from it. For instance, a Google search for "Aruba" from the United States yields a dynamic display encompassing captivating photos, up-to-date weather forecasts, flight details, essential information about the capital city, languages spoken, currency, and more, sourced from Aruba.com. Consequently, ensuring the accuracy and clarity of this information assumes paramount importance as Google continues to introduce refinements.

Of notable significance, The Aruba Effect (TAE) page has maintained its status as the most frequented destination on Aruba.com. To further enrich the user experience. Updates were made to the content and images on the page in order to improve the user experience further.

The Aruba Effect

The goal of TAE campaign is to demonstrate how Aruba's people and culture impact our visitors on a personal and potentially global level. The campaign focuses on how the island improves well-being, drops defenses, and reveals a happier version of each visitor that stays with them even when they return home.

Various placements and a dedicated page for TAE were strategically integrated into Aruba.com to capture consumers' attention at different stages of their journey. The primary focus was on inspirational videos showcasing families, couples, solo travelers, and friends experiencing "The Aruba Effect."

However, in 2023, the traffic contribution of this page decreased by 25% compared to 2022. Overall, nearly all paid channels experienced a decline in traffic in 2023, with the most significant decrease seen in organic social.

The A.T.A. identified an opportunity to do a pilot program for one of the email journeys since the consumer needed to provide the travel dates. The email journey, called Arrival Journey, is a series of emails that are triggered based on the travel dates and provide the visitor with timely and relevant information regarding their upcoming trip.

The arrival journey pilot was a great success, exceeding the expected performance, and laid the foundation for future journeys.

The Lose you baggage campaign generated a total of 4,975 entries. It brought a total of 17,693 sessions to the site, of which the majority came from a mobile device.

myAruba Assistant (AI)

In December of 2023, the A.T.A. launched Aruba's AI Travel Assistant: myAruba Assistant. This AI-powered travel advisor was initially introduced within a closed group for testing purposes, marking the initial phase of its deployment. Leveraging the popularity and convenience of WhatsApp, users were provided with a familiar and user-friendly platform for interaction.

As we transition into Q1 of 2024, the A.T.A is gearing up for the organic launch of myAruba Assistant through Aruba.com. The incorporation of this AI travel tool aligns with A.T.A.'s commitment to enhance the overall travel experience for our users.

Furthermore, as part of our progressive rollout strategy, myAruba Assistant is scheduled to be incorporated through various other channels in the subsequent phases. This strategic expansion will ensure that users can access and benefit from the AI-powered travel advisory service across multiple platforms, catering to diverse preferences and user habits.

Site Performance

2023 was a year with many transitions and changes. First, 2023 was the first year we reported from Google Analytics 4 (GA4), compared to 2022 where Universal Google Analytics (UGA) was used historically. The table below indicates numbers pulled from Universal Google Analytics for 2022 and Google Analytics 4 for 2023. There are some key differences between the two, making comparison a bit challenging. The main differences are that Google Analytics 4 primarily uses an event-based tracking model while Universal Google Analytics relies on sessions and pageviews. Google Analytics 4 focuses on a user-centric approach and incorporates more predictive metrics to provide insights that might lead to variations in reported numbers compared to Universal Google Analytics.

In 2023, we also noted a significant change in the traffic patterns of Aruba.com. The Spanish site became the main source of traffic, accounting for 53%, surpassing the historically dominant North American region, which contributed 37%.

Aruba.com receives traffic from various sources, some of which we control directly, while others depend on specific marketing strategies in different markets. While the volume has increased for the Spanish site, we also observed a decrease in engagement compared to 2022. The increase in traffic to the Spanish site was mainly pushed by paid media and their strategy was focused on outbound links, which could explain the decrease in engagement. On the other hand, the decrease in traffic for North America can be attributed to reduced efforts in paid media and a decline in organic search.

More detailed information on the organic search aspect can be found in the SEO section, and additional insights on North American Paid Media are available in the dedicated North America section.

Metrics

Sessions	2022 UGA	2023 GA4	% Change
Global	12,066,524	11,365,302	-6%
US	6,830,910	4,229,409	-38%
ES	3,575,807	6,039,206	69%
BR	240,732	327,920	36%
NL	441,254	356,923	-19%
IT	150,030	106,938	-29%
DE	128,091	127,725	0%
UK	175,774	177,181	1%

Technical Maintenance

Thanks to the continued investment in technical maintenance of Aruba.com, the website has been able to meet customers' increased demand for more information successfully. In 2022 these investments continued with a focus on improving page speed, making content creation easier, and allowing us to integrate with third-party platforms.

SEO

Aruba.com experienced significant fluctuations in organic traffic and organic search KPI's during 2023, caused primarily by major updates in Google algorithms with a notable impact on Aruba's visibility. In April, Aruba Forum, which accounted for 10% of organic traffic, was deprecated. During the first quarter, efforts were focused on minimizing the impact of this deprecation by redirecting users to other relevant pages on the site.

Commencing in March, a significant decline in organic traffic prompted a comprehensive analysis of the situation. This led to the identification of new content opportunities, resulting in adjustments to the SEO content plan. Concurrently, ongoing SEO efforts included routine tasks, technical audits to ensure the site's foundational elements remained SEO compliant, continuous monitoring for early issue detection, authority checks, and optimizing content for local markets.

As a result of these efforts, a gradual recovery was observed from August onwards. By the close of the year, the visibility of Aruba.com had surpassed its initial state, boasting nearly 3% increase in the number of ranking keywords YOY and an approximate 16% increase in keywords ranking in the top 10 positions.

In 2023, a significant development occurred as Google Universal Analytics ceased data collection. Despite the A.T.A adhering to all guidelines and being prepared for the transition to Google Analytics 4, it became evident that Google Analytics 4 still faced reliability issues in analyzing organic traffic, as it lacked alignment with other SEO metrics such as keyword rankings and clicks on Google. Consequently, comparing traffic data for 2023 with previous years became particularly challenging.

Social Media

Our social mission is to cultivate a content destination that consistently embodies the distinct and unique spirit of Aruba. Through the dissemination of value-added messaging, our objective is to stimulate booking intent, enhance engagement, and ignite curiosity about experiencing the essence of the happy island. Furthermore, we aim for Aruba to remain top of mind long after visitors depart by offering a unique, thought-provoking, and delightful holiday experience. Our ultimate goal is for visitors to depart feeling harmoniously connected with nature, others, and themselves, spreading joy from Aruba to every corner of the globe, popularly known as TAE, which served as a cornerstone for our social media content creation.

To achieve this, we ensured that our feed was immersive, our content appealing and dynamic, and that it naturally fits each distinct social platform. Throughout the year, we fine-tuned our approach based on recorded results, discerning what works and what doesn't. We have gathered over 329 million impressions across all our Facebook pages. Specifically, our US Facebook page garnered 91 million impressions in 2023, aligning with the previous year, while experiencing an 11.6% increase in followers. Notably, our engagement rates have consistently surpassed industry standards in similar categories. Instagram stands as the A.T.A.'s most significant and fastest-growing platform, witnessing a 10.4% rise in followers in 2023.

Global Lead Generation

In Q1 of 2023 the A.T.A introduced a Global Lead Generation Toolkit in an effort to facilitate the collection of 0 and 1st party data, considering that the restrictions on user data continue to endure. This toolkit empowers our teams to identify and capitalize on lead capture opportunities, and assist with the conversion of unknown users into known users. The conversion of unknown to known users involves capturing and enriching data in a seamless and user-friendly manner. While the Global Lead Generation Toolkit primarily focuses on lead capture, it is equally crucial to engage with these users in a personalized and meaningful way to continually enhance this data. To achieve this, we also implemented targeted email journeys that maximize opportunities for data enrichment.

eCRM / Marketing Automation

In 2023, we significantly improved efficiency by automating a large part of the A.T.A.'s global newsletter process. This automation has not only increased the A.T.A.'s efficiency but also enhanced brand consistency across markets. With the implementation of our new content strategy and redesigned email templates, we have achieved a global average email open rate of 47% for our newsletter journey. Given that the newsletter journey was activated in September 2023, we are unable to make direct comparisons with previous years.

Email marketing remains a powerful communication tool for the A.T.A.'s communications and should continue to be leveraged with more marketing automations in other areas such as interest-based journeys to capture the users' interests, and low-funnel journeys to encourage bookings.

Metrics for the North American Market

In 2023, the A.T.A. underwent a transformative shift in its email communication strategy, prioritizing operational efficiency and enhancing the overall customer experience. This involved transitioning from ad hoc email sends to a structured and automated approach, particularly focusing on B2C communications. Central to this transformation was the incorporation of numerous email journeys, designed to streamline operations and deliver timely, relevant messaging. One notable success was the implementation of email journeys for on-island events, such as the vow renewal event.

The arrival journey pilot for this event proved highly effective, boasting a notable high click-through rate and engagement, enhancing attendee experience and event awareness. These automated journeys have demonstrated exceptional success in engaging our audience and driving desired outcomes. The success of the vow renewal journey underscores the impact of targeted, timely, and relevant email communications on consumer engagement.

In 2023, we witnessed an increase in our open rate, reaching 59% compared to the previous year's 56%. However, the click rate slightly decreased to 3.1% from the previous year's 3.5%. Despite this, the unsubscribe rate for the North American market improved compared to 2022, indicating positive progress in our email communication strategies.

Metrics	2023
Open Rate (OR)	59%
Click-to-open rate (CTOR)	5.3%
Click-through Rate (CTR)	3.1%
Unsubscribe Rate	0.06%
Deliverability Rate	99.2%

2023	Delivered	Open %	Click %	Unsub %
Regular emails	937,596	59%	3.1%	0.06%
Automated Newsletter Journeys	430,685	55%	2%	0.4%
Total 2023	1,360,871	57%	3%	0.2%
vs 2022	8%	1.5%	0.9%	

US	Avg Open Rate OR	Avg Click Through Rate CTR	Click-to-open Rate CTOR	Unsub Rate
Constant Contact	39%	0.9%		
A.T.A benchmark 2022	56%	3.5%	6%	0.33%
Get Response	29%	2%	7.6%	0.1%

In 2023, benchmark metrics within the North American travel industry varied across different sources. According to data from widely used email marketing platforms such as "Get Response," the open rate stood at 29%, with a click-through rate of 2% and a click-to-open rate of 7.6%. Conversely, "Constant Contact" reported a higher open rate of 39% alongside a click rate of 0.9%.

It is worth noting that historically, the A.T.A has surpassed industry benchmarks. In 2022, the A.T.A's own benchmark for regular emails was notably higher at 56%. As illustrated in the provided data, the North American open rate for regular emails in 2023 exceeded its own benchmark by 3% and stood at 59% and surpassed "Constant Contact" by a significant margin of 20%.

These figures underscore the A.T.A's consistent performance and effectiveness in engaging its audience through email communication channels, outpacing both industry norms and other prominent platforms like "Constant Contact."

Chapter 7

DESTINATION SERVICES

Contents

- 7.1 Destination Development
- 7.2 Cruise
- 7.3 Trade Relations
- 7.4 Events & Sponsorship

7.1

Destination Development



In 2023, A.T.A.'s Destination Services Unit (DSU) further focused on enhancing and implementing projects that benefited the overall visitor experience, satisfaction and awareness while elevating the value of tourism, and simultaneously encouraging sustainable tourism development.

The following are highlights of DSU's 2023 key accomplishments.

Destination Development

Infra-Tourism committee

As per the Ministry of Tourism Policy 2021-2025 an infra-tourism committee was formalized by Ministerial decree. Key members in this committee include the A.T.A., DOW, DIP, and TPEF. The goal of this committee is to foster collaboration amongst key members on the development, tender and initiation of various infrastructural projects intended for tourism or product enhancement funded by the A.T.A. or TPEF.

In addition to projects defined through the Ministry of Tourism Policy 2021-2025, the A.T.A. reactivated and initiated various destination development and enhancement programs, including cultural activities and events. Projects included the restart of the Bon Bini Festival following the necessary maintenance work at the Fort Zoutman property, the creation, maintenance and restoration of new and existing murals in San Nicolas as well as maintenance and upkeep of the Blue Horse sculptures in Oranjestad.

Niche Market Activations – Aruba Signature Experiences

The Aruba Signature Experiences (ASE) program was initiated in Q4 of 2021 in collaboration with Qredits to stimulate start-up companies in the tourism sector to cater to our niche markets with new and unique experiences.

In 2023, after successfully completing the “Small Business Academy” course by Qredits, which trains participants on creating a Business and a Financial Plan, participants had the opportunity to apply for micro-loans at Qredits.

Two companies were selected as winners of the second cycle of the ASE program, receiving marketing support, coaching, and a financial contribution from the A.T.A., as well as complete guidance to help set up and promote their products or services.

In October 2023 a third cycle of the ASE program was initiated.

Aruba Quality Seal

The A.T.A. voiced the importance of the Aruba Quality Seal (AQS) program in several national committee meetings, and strongly advocated for inclusion of the AQS as a prerequisite in various permitting processes, meetings and projects.

In preparation of the anticipated formal adoption of the AQS in permitting processes, the A.T.A. worked on improving the AQS program.

Destination Enhancement

The Destination Enhancement efforts involved implementing and supporting various projects and activations to enhance the overall visitor experience and satisfaction, while, also increasing on-island awareness to elevate the overall value of tourism, and simultaneously encourage sustainable tourism development. A short recap of these efforts follow below.

Awareness Campaign - Ban Serio!

The Ban Serio awareness campaign produced content, focusing on the pillars of culture, environment and hospitality. Highlights of these campaigns were the 'Scavenger Hunt' and 'Aruba Limpi' activations, which were under the pillars of hospitality and environment. The mentioned activities used the MyAruba App (Visit Widget) for on-island content and a guide to complete all tasks and the social media platforms for beach and on-island clean ups, which counted on participation from well over 50 people.

These activations were promoted through local media outlets, on social media platforms and productions by NextGen, a local company focusing on harnessing the power of social media algorithms and as such helping businesses navigate the digital landscape.

Furthermore, during the month of September a series of posts were created highlighting 'Nos Cordialidad' under the hospitality pillar in celebration of World Tourism Month, as a constant reminder of the beauty of our hospitality and the importance of conserving it. Through various social media posts Ban Serio continued to promote and create awareness of the importance of safeguarding and of protecting our natural environment, culture and hospitality.

Signage Ayo Rock Formation

The A.T.A. assisted the Aruba Amenities Committee with the enhancement of the Ayo Rock Formation park through the development of a welcome sign, a rules and regulations sign for the park, and the development of an experiential trails plan including text for signs along the trail. The informational signs resulting from this development are to be placed in 2024.

Visitor Information Center San Nicolas

The Visitor Information Center (VIC) in San Nicolas focused on providing visitors with comprehensive information on attractions and things to do in the city center and surrounding areas. VIC also offered maps and self-guided mural walking tours of the city of San Nicolas. Throughout the year, the VIC successfully served a diverse group of visitors, with 86% being first-timers to San Nicolas. Most of the visitors were interested in exploring the city center of San Nicolas with the murals.

Aruba Certification Program (ACP)

The year 2023 was dedicated to the professional development of the Aruba Excellence Foundation facilitators and the revamp process for the certification program, which took place between February and June.

The face-to-face certification classes resumed operations as of mid-June to mid-December with smaller pilot groups, as part of the test phase for the newly introduced and revamped material.

The ACP "on demand/online" program remained operational during the revamp period in 2023, and was dedicated to the educational sector (for EPI and EduCampus Aruba students).

Additionally, there was a transition & recruitment period for an A.E.F.'s Director function between the period of June 1 - September 30, 2023, a position that was filled in as per October 1, 2023.

These different circumstances led to the decrease in the participation rate for the Aruba Certification Program (A.C.P.) compared to the previous year (495 versus 1,557 in 2022).

High-Value Low-Impact Activations**Recycling Bins**

Trash collection and recycling in collaboration with the Metabolic Foundation to promote and educate on trash separation and recycling continued in 2023. Metabolic Foundation is responsible for constructing the bins, collecting and separating trash, and recycling the collected (plastic) materials. The 25 bins resulted in: seven tons of materials recycled, 140 tons of CO2 emission avoided, two full time jobs created, and a school recycling program initiated with UNESCO and Wings of Hope.

Hooiberg Stairs and Mirador Refurbishment Project

In collaboration with DOW, the A.T.A. initiated the Hooiberg stairs and Mirador refurbishment project to ensure the safety and enhance the experience of our visitors. Construction initiated in Q4 of 2022 and this project was successfully completed in 2023.

Product Development

Product Development efforts in 2023 included buoys maintenance, mooring management, mountain bike trails project, and beach focus projects stemming from the Tourism Policy 2021-2025. Below follows a brief description:

Buoys Maintenance & Mooring Management

The A.T.A. continued to support the maintenance of the swim area buoys (areas defined by the Beach Policy) with routine cleaning, maintenance and replacements following storms or acts of vandalism in the areas. Buoys maintenance remains crucial in complying with the beach policy, swimmers' safety, and to keep the swimming zones intact. Investments were made by the A.T.A. for the placement of new buoys marking the buffer zones following the swim zones, herewith supporting the enforcement efforts of the maritime police to keep order in the highly frequented waters at Palm Beach.

Mountain Bike Trails Project

The Mountain Bike trails project, initiated in 2022, represents a multi-year project expected to be completed in 2024 with a development of 54 km of mountain bike trails along the North coast in Aruba. The activities in 2023 included successfully completing the permitting processes of three (out of five) sections of the trail system and submission of the application for the fourth section for approval from DIP. Sections one and two were completed in 2023 followed by the initiation of section three in Q4.

Beach Focus Projects

The A.T.A. contributed with the development and initiation of various beach focus projects in collaboration with the Infra-Turismo Committee outlined in the Tourism Policy 2021-2025.

As such, several projects described in the Sero Colorado Master plan, a multi-year plan focusing on various enhancements and renovations in the area, were completed and/or approved. A shortlist of these projects include:

- Restoration of the Baby Beach staircase - completed;
- Creation of additional beach area by moving back a section of the turtle wall at Baby Beach - completed;
- Enhancement of the Baby Beach parking lot and infrastructure including landscaping - completed;
- Preparation of design and engineering for the Rodgers' Beach parking lot and its infrastructure enhancement project - approved;
- Refurbishment of Baby Beach tennis/sports courts - approved
- Completion of the design of a new restaurant at Baby Beach - approved.

Another project entailed Mangel Halto Beach, in close collaboration with "Fundacion Parke Nacional Aruba" (FPNA), for the placement of new gazebos on the beach, refurbishment of the first three palapas on the cliff, a new bridge for the water channel, and mayor maintenance on the entrance ramp.

Innovation Development

In line with the Tourism Policy 2021-2025 two innovation development projects continued their development with financial support and guidance of the A.T.A. in collaboration with the Ministry of Tourism.

The HORECA permitting process

In the year in review, Deloitte Dutch Caribbean delivered several scenarios to be considered for the new HORECA Permit Process and Operating Model Design. The HORECA permitting project seeks to streamline all necessary permits for these types of businesses under one entity, a 'sui generis' named Aruba Quality & Hospitality Authority, creating more transparency of processes and fees.

The Aruba Happy One Pass (AHOP)

In 2023, the Aruba Happy One Pass (AHOP) was launched, as a follow-up to the previously introduced "Aruba Happy Flow." AHOP's goal is to ensure a seamless travel experience for visitors coming to Aruba by leveraging digitalization and biometric technology. The initiative saw a successful initial pilot in October 2023, which included the implementation of biometric scanners at the airport. Moving forward, we are in the process of evaluating the next steps for further development and complete adoption of HOP.

Contributions – Aruba Hospitality & Security Foundation

Since 2011, the A.T.A. has been funding the Aruba Hospitality & Security Foundation (AH&SF), which is responsible for the organization, supervision and implementation of safety and security requirements/projects focused on the hotel, commercial and tourism sectors as well as the general public. Besides increased efforts on training and education of private and public security professionals, the main focus point of the foundation in 2023 was the RFP and implementation process of the 'Tourism Security Patrol Aruba' (TSPA), which was launched in early December of 2023. The TSPA, at its initiation consisting of eight officers, is mainly geared towards visibility in the main tourism areas and assistance of the police force (KPA).

Advocacy

The A.T.A. had a seat at the table of several government-initiated committees on issues regarding UTV/ATVs, watersports, amenities and infrastructure. The A.T.A. advocated for the incorporation/consideration of amongst others the Aruba Quality Seal (AQS) and higher standards for permitting processes, carrying capacity aspects, adequate supervision and enforcement.

The A.T.A. continued to advocate for adequate waste water management (RWZI), as the under-capacitated plant continued(/s) to pose a great risk to Aruba's tourism industry.

7.2

Cruise



In 2023, Aruba's cruise tourism experienced significant growth. The island welcomed 207,196 more cruise visitors compared to 2022, marking an increase of approximately 34%. Ship calls also increased by 11, reaching a total of 317 in 2023, compared to 306 in 2022. Commitment to sustainability and visitor experience enhancement remained steadfast as Aruba continued to solidify its position as a premier cruise destination in the Caribbean.

Throughout the year, the A.T.A. remained actively involved in various cruise conferences, trade shows, and international meetings, alongside conducting personalized sessions with several prominent cruise lines. These efforts were dedicated to reinforcing Aruba's position as a top-tier destination, ensuring sustained visibility and preference among travelers and industry stakeholders alike.

In addition, the A.T.A. worked closely with its main partner in the industry, the Aruba Ports Authority (APA) to establish and revise cruise scenarios based on industry trends and developments.

In terms of training initiatives, the A.T.A. collaborated with Aquila Center for Cruise Excellence to orchestrate an educational program aimed at enhancing the skills of tour guides and frontline staff within the industry. This comprehensive program consisted of three sessions, each dedicated to distinct topics: "Product Development," "Service Excellence," and "Vendor Excellence." A total of 72 participants successfully completed the program and obtained their certification.

Finally, the A.T.A. prioritized enhancing the overall guest experience upon arrival at the cruise terminal. This was achieved by creating a warm and inviting atmosphere through entertainment activities at the port during guest arrivals.

The Cruise unit continued to work closely with the Aruba Ports Authority and participated in the following activities:

- PAMAC Cruise, hosted by Virgin Voyages;
- Seatrade Cruise Global in March 2023;
- The travel professional show CLIA Cruise 360 promoting Aruba as a cruise destination among this trade community;
- PAMAC Destination Conference in Cayman Island in June 2023;
- Seatrade Europe in Hamburg, Germany, returning to the 'Caribbean Village' as this proved to have more value for Aruba's efforts in Europe;
- CLIA Port & Destination Dialogue in Hamburg, Germany;
- FCCA's Cruise Conference in October of 2023 in Mazatlan, Mexico.

In addition continued support was provided to the A.T.A.'s overall effort with the customer care for visitors throughout the year, as well as the "honorings" of guests visiting the island for 10, 20 or 35 consecutive years.

7.3

Trade Relations



Familiarization continues to be part of A.T.A.'s strategy to promote the island to travel advisors. In 2023, the Trade Department hosted a total of 24 familiarization trips from the markets of Europe, Latin America, and North America. Trade supported British Airways' inaugural flight by organizing several familiarization trips.

In the year in review, mainly between March and December, the Trade team hosted 80 press and influencer groups from various markets. They also contributed to various itinerary support groups, including arranging activities, providing car rental support, and organizing meal functions.

During the year, the team incorporated different niches in the itineraries, such as romance, wellness, culinary, and live-like-a-local trips, to strengthen A.T.A. marketing and niche efforts further.

There was consistent interest throughout the year from travel advisors who were keen on touring various properties in Aruba. A total of 28 independent travel advisors carried out individual site inspections. The majority of the requests came from agents based in the USA.

7.4

Event & Sponsorship



The A.T.A. remained dedicated to enhancing its marketing vision by supporting meaningful initiatives through various events and sponsorships, which bolstered the destination's brand visibility and awareness, fostered community engagement, and aligned with corporate values and mission. The most significant events for 2023 were:

Carnival

Carnival, the island's most significant cultural and economically driven event on the island, is a vibrant celebration that unites participants, viewers, visitors, residents, and supporters for an unforgettable experience. The 2023 celebration marked a triumphant return after a hiatus, achieving resounding success that reverberated across social media channels, effectively engaging international audiences.

Soul Beach Music Festival

The festival's 21st anniversary celebration attracted some 5,351 international attendees who traveled to Aruba specifically for the festival, reflecting an increase of over 600 unique visitors compared to the preceding year. Throughout the three-day festival 15,000 tickets were sold, indicating a combined economic impact of US\$14.8 million, showcasing the festival's significant contribution to Aruba's economy.

KLM Aruba Marathon

The 5th annual KLM Aruba Marathon took place on June 3rd and 4th, 2023, maintaining its tradition of excellence in the running community and attracted 2,547 participants (2450 in 2022) from 32 countries. The success of the marathon solidifies its place as a key event on Aruba's calendar, promoting health, fitness, wellness tourism, alongside the island's scenic beauty and hospitality.

Aruba Art Fair

The Aruba Art Fair, aimed at enriching Aruba as a culturally vibrant destination, successfully showcased new murals and artistic expressions, enhancing experiences for visitors and locals alike. The 2023 edition featured 11 Muralists (local and international), 60 exhibitors displaying their artwork and crafts, enriching the event's ambiance and preserving the island's cultural heritage and promoting arts tourism.

Aruba International Beach Tennis

The 13th edition, a week-long tournament featured lively festivities, parties, and live music, reflecting the vibrant Caribbean atmosphere and establishing Aruba as a top destination for beach tennis. With over 1,150 participants, a \$60,000 prize pool, the Aruba Cup attracted elite international players and garnered global attention, attracting approximately 700 international athletes from eight countries.

World Tourism Day Conference

The 2023 annual conference was host to industry partners and explored the complexities of the hospitality industry. Absolute highlight was best seller Will Guidara's presentation on "Unreasonable Hospitality," in which he emphasized the transformative power of hospitality, urging attendees to exceed expectations and innovate.

Voices of Tourism Conference

As an excerpt of the World Tourism Day celebrations, this conference aimed at providing insight and inspiration to our tourism-oriented students; the keynote address delivered by Trent Shelton, whose inspirational intervention transcended traditional motivational speech left a profound impact on attendees, and motivated future generations to actively engage in our hospitality labor force.

Chapter 8

STRATEGY, PLANNING & RESEARCH

In 2023, the Strategy, Planning, and Research (SPR) unit continued to collect visitor data and conduct research to provide critical insights and highlight key trends relevant to and for the Aruba tourism industry. In addition, SPR provided essential business intelligence to internal and external stakeholders.

Summary of activities

The following is a high-level overview of research and projects conducted in 2023.

Data Warehouse

At its core, the A.T.A. database is the heart of A.T.A.'s strategic and communications strategy. In 2023, A.T.A. continued to work on the CDP. The CDP contributes to A.T.A.'s strategic marketing evolution by amongst other combining online and offline visitor data, hereby creating a unified 360-degree customer profile.

Credit Card Visa study

The A.T.A. acquired Visa credit card data to measure the on-island spending of international credit card holders based on the following spend categories: restaurants & dining; retail, hotels & lodging, merchants, food & grocery, transportation, entertainment and casinos.

The Guest Experience Index (GEI)

The Guest Experience Index (GEI) dashboard monitored destination reviews through the collection and consolidation of online reviews of visitor experiences at accommodations, restaurants, and activities. The Guest Experience Index (GEI) is a crucial element in monitoring on-island visitor satisfaction.

Cruise Research

In 2023, A.T.A. restarted the Cruise Research. The data collection is monthly. This research provides information on the on-island spending pattern of Aruba's cruise visitors, their on-island experience, cruise travel habits and motivations, and the likelihood of our cruise visitors returning to Aruba as land-based visitors.

SBMF Event research

In May 2023, the economic impact research of the Soul Beach Music Festival was conducted, which included the creation of an economic impact model for the Aruba Soul Beach Music Festival and the assessment of the visitors' perception of the event.

Carrying Capacity Model including an update in Inventory

Vacation Rentals

In 2023, A.T.A. hired MGM Source to review and validate the carrying capacity model scenarios. As part of this update, the count of the room inventory for vacation rentals was also reviewed. This inventory is divided into two parts: an inventory of existing and upcoming condominium projects, and an inventory of "other accommodations," such as non-hotel rooms available for short-term rental.

Events Roadmap Research

A.T.A. commissioned CLS International to conduct an events roadmap study that focused on an assessment of the current events offering, evaluation of the economic impact of current events, and identifying market preparedness. Furthermore, the study also assessed Aruba's current event infrastructure and aimed to understand regulations and permits. Lastly, the market attractiveness of future events was also assessed. The investigation centered on which event type is the most sustainable and beneficial for Aruba, considering the A.T.A.'s niche framework and the expected economic impact the event portfolio will bring to the island.

Luxury Cruise Line Research

With this research, A.T.A. aims to acquire insights into the luxury cruise market, its specific demographics, and emerging trends. The focus is to evaluate Aruba's appeal as a destination for luxury cruise vessels. This study kicked off in 2023 and will provide valuable data and analysis to guide A.T.A.'s marketing and promotional strategies toward luxury cruise travelers. It will also assist the A.T.A. in comprehending the considerations Aruba should consider when targeting luxury cruise ships.

Cruise Intelligence Platform

The Cruise Intelligence Platform monitors several cruise indicators. It covers current and future global industry performance, such as insights on deployment, passenger volume, pricing to Aruba port, and the ability to benchmark with our competitors.

Online ED Card Redesign

In 2023, A.T.A. worked on the redesign of the online ED card. In this redesign the content will be updated and the look and feel of the website updated.

Visitor Sentiment

In 2018, the A.T.A. conducted Carrying Capacity Research. The study was based on several inputs, such as Local Sentiment and a Visitor Sentiment study at eight predefined, popular touristic sites. In 2023, the A.T.A. remeasured the visitor sentiment at 14 attraction sites in Aruba. The visitor sentiment study aims to understand how visitors' sentiments and perceptions of current conditions have changed. The study measures the relationship between the number of visitors in tourist areas and visitors' satisfaction and the quality of visitors' experience. It identifies the point at which the visitors' experience will negatively impact visitors' likelihood to repeat a visit to Aruba.

Brand Tracking Research USA and Latin American Market

In 2023, A.T.A. conducted a brand tracking study in the USA and Latin America (Colombia, Argentina, Brazil, Chile, and Peru). Both studies were conducted within the market, allowing A.T.A. to properly evaluate marketing, product, and visitor experience by measuring travelers' perceptions over time.

Dutch Segmentation

In 2023, A.T.A. worked with Whooz to gain a deeper understanding of the Dutch market, which provided more insight into the characteristics, interests, and behavior of the current Dutch Visitors.

Scenario Planning

As the official custodian of Aruba's tourism industry, one of A.T.A.'s objectives is to ensure preparedness for an effective response to emergencies from a tourism perspective. In 2023, A.T.A. continued to analyze tourism recovery and trends weekly. The A.T.A. participated in the regular economic forecast meetings organized by the Department of Economic Affairs, Commerce and Industry of Aruba (DEACI) and the "Coördinatie" Committee led by the Central Bank of Aruba.

Foster Local Strategic Alliances

The A.T.A. provided information and presentations to relevant local and international stakeholders, serving multiple purposes. The A.T.A. also formed part of the Sustainable Development Goals Indicators Working Group Committee.

Communicate Continuously Through Data-sharing and Reporting

In addition to the conducted research, the SPR produced the following reports:

- Monthly Statistical Snapshots, including Tidbits
- Annual Visitor Data Reports: USA (and USA DMA report), Latin America, and European
- Average Visitor Visa Spend Report by Month
- Market Demographics Reports
- Redesign Aruba Insight and new A.T.A. Dashboard



Aruba Tourism
Authority

**For more information
please contact:**

Dyane Vis - Escalona
Business Manager

Aruba Tourism Authority

L.G. Smith Blvd 8 | P.O. Box 1019

Oranjestad | Aruba

T: + (297) 582-3777 ext. 234

F.: + (297) 583-4702

www.aruba.com