OCTOBER 2024

Monthly Report

ARUBA TOURISM AUTHORITY

SNAPSHOT YTD OCT 2024/2023

HOW MANY ARRIVALS?

1,186,508

15.7%

HOW LONG DID THEY STAY?

30 DAY

9,022,271

9.5%

WHAT DID THEY SPEND?**

Central Bank Aruba (2023)

Awg. **4,671.0** min

13.5%

2022: 4,114.60 min

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

WHERE DID THEY STAY?

EP	ALL INCLUSIVE	TIMESHARE	OTHERS
1,900,497 NIGHTS	1,265,555 NIGHTS	2,570,589 NIGHTS	3,285,630 NIGHTS
21.1%	14.0%	28.5%	36.4%

ARRIVALS
YTD OCTOBER 2024/2023

1,186,508 ARRIVALS

15.7% GROWTH

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
USA	783,951	110,586	894,537	14.1%	76.5%	75.4%
Canada	45,535	7,837	53,372	17.2%	4.4%	4.5%
NA	**829,486**	**118,423**	**947,909**	**14.3%**	**80.9%**	**79.9%**
Venezuela	2,334	616	2,950	26.4%	0.2%	0.2%
Colombia	40,570	13,589	54,159	33.5%	4.0%	4.6%
Brazil	11,160	1,877	13,037	16.8%	1.1%	1.1%
Argentina	16,029	6,991	23,020	43.6%	1.6%	1.9%
Chile	6,973	5,336	12,309	76.5%	0.7%	1.0%
Ecuador	6,010	3,560	9,570	59.2%	0.6%	0.8%
Peru	5,028	11,323	16,351	225.2%	0.5%	1.4%
Paraguay	967	54	1,021	5.6%	0.1%	0.1%
Uruguay	1,705	1,676	3,381	98.3%	0.2%	0.3%
Mexico	2,698	502	3,200	18.6%	0.3%	0.3%
Others	10,729	699	11,428	6.5%	1.0%	1.0%
SA	**104,203**	46,223	**150,426**	**44.4%**	**10.2%**	**12.7%**
Netherlands	32,089	-2,362	29,727	-7.4%	3.1%	2.5%
UK	5,954	548	6,502	9.2%	0.6%	0.5%
Germany	4,579	-870	3,709	-19.0%	0.4%	0.3%
Italy	5,741	-233	5,508	-4.1%	0.6%	0.5%
Sweden	1,856	-1,141	715	-61.5%	0.2%	0.1%
Belgium	1,647	-321	1,326	-19.5%	0.2%	0.1%
Austria	559	-46	513	-8.2%	0.1%	0.0%
Switzerland	1,490	157	1,647	10.5%	0.1%	0.1%
Others	7,560	**424**	7,984	5.6%	**0.7%**	**0.7%**
Europe	**61,475**	**-3,844**	**57,631**	**-6.3%**	**6.0%**	**4.9%**
ROW	**29,989**	553	**30,542**	**1.8%**	2.9%	2.6%
Total	**1,025,153**	161,355	**1,186,508**	**15.7%**		
W/O Ven.	**1,022,819**	**160....**	**1,183,558**	**15.7%**		

ARRIVALS USA
YTD OCTOBER 2024/2023

894,537 ARRIVALS

14.1% GROWTH

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
New York	154,428	27,177	181,605	17.6%	19.7%	20.3%
Massachusetts	99,254	6,706	105,960	6.8%	12.7%	11.8%
New Jersey	93,011	20,899	113,910	22.5%	11.9%	12.7%
Pennsylvania	46,256	6,669	52,925	14.4%	5.9%	5.9%
Illinois	19,719	990	20,709	5.0%	2.5%	2.3%
Connecticut	29,487	5,029	34,516	17.1%	3.8%	3.9%
Florida	42,618	5,522	48,140	13.0%	5.4%	5.4%
Ohio	22,184	3,472	25,656	15.7%	2.8%	2.9%
Maryland	24,577	4,454	29,031	18.1%	3.1%	3.2%
Michigan	14,722	22	14,744	0.1%	1.9%	1.6%
Virginia	21,642	3,759	25,401	17.4%	2.8%	2.8%
Georgia	19,403	732	20,135	3.8%	2.5%	2.3%
North Carolina	22,852	3,345	26,197	14.6%	2.9%	2.9%
Texas	24,537	2,340	26,877	9.5%	3.1%	3.0%
California	15,015	1,980	16,995	13.2%	1.9%	1.9%
Other	134,246	17,490	151,736	13.0%	17.1%	17.0%
Total	**783,951**	**110,586**	**894,537**	**14.1%**		

NIGHTS
YTD OCTOBER 2024/2023

9,022,271
ARRIVALS

9.5%
GROWTH

	2023	Growth	2024	% Growth	ALOS 2023	ALOS 2024
USA	5,950,575	470,073	6,420,648	7.9%	7.6	7.2
Canada	474,874	53,975	528,849	11.4%	10.4	9.9
NA	**6,425,449**	**524,048**	**6,949,497**	**8.2%**	7.7	7.3
Venezuela	26,651	7,467	34,118	28.0%	11.4	11.6
Colombia	283,612	66,690	350,302	23.5%	7.0	6.5
Brazil	69,857	15,757	85,614	22.6%	6.3	6.6
Argentina	147,191	56,927	204,118	38.7%	9.2	8.9
Chile	54,899	38,496	93,395	70.1%	7.9	7.6
Ecuador	29,469	15,412	44,881	52.3%	4.9	4.7
Peru	35,621	57,032	92,653	160.1%	7.1	5.7
Paraguay	6,712	228	6,940	3.4%	6.9	6.8
Uruguay	13,255	13,734	26,989	103.6%	7.8	8.0
Mexico	16,196	11,739	27,935	72.5%	6.0	8.7
Others	78,056	10,076	88,132	12.9%	7.3	7.7
SA	**761,519**	293,558	**1,055,077**	**38.5%**	7.3	7.0
Netherlands	553,759	-34,922	518,837	-6.3%	17.3	17.5
UK	57,101	7,958	65,059	13.9%	9.6	10.0
Germany	43,413	-2,669	40,744	-6.1%	9.5	11.0
Italy	48,593	-4,880	43,713	-10.0%	8.5	7.9
Sweden	22,751	-15,720	7,031	-69.1%	12.3	9.8
Belgium	21,557	-1,759	19,798	-8.2%	13.1	14.9
Austria	5,595	-480	5,115	-8.6%	10.0	10.0
Switzerland	13,571	2,803	16,374	20.7%	9.1	9.9
Others	80,329	-3,697	76,632	-4.6%	10.6	9.6
Europe	**846,669**	**-53,366**	**793,303**	**-6.3%**	13.8	13.8
ROW	**206,319**	18,075	**224,394**	**8.8%**	6.9	7.3
Total	**8,239,956**	782,315	**9,022,271**	**9.5%**	8.0	7.6

ACCOMMODATIONS YTD OCTOBER 2024/2023

1,186,508 ARRIVALS

15.7% GROWTH

ARRIVALS BY ACCOMMODATION

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
EP	277,900	32,555	310,455	11.7%	27.1%	26.2%
All Inclusive	182,499	9,897	192,396	5.4%	17.8%	16.2%
Timeshare	278,264	20,448	298,712	7.3%	27.1%	25.2%
Others	286,490	98,455	384,945	34.4%	27.9%	32.4%
Total	**1,025,153**	161,355	**1,186,508**	**15.7%**		

NIGHTS BY ACCOMMODATION

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
EP	1,796,286	104,211	1,900,497	5.8%	21.8%	21.1%
All Inclusive	1,249,906	15,649	1,265,555	1.3%	15.2%	14.0%
Timeshare	2,496,913	73,676	2,570,589	3.0%	30.3%	28.5%
Others	2,696,851	588,779	3,285,630	21.8%	32.7%	36.4%
Total	**8,239,956**	782,315	**9,022,271**	**9.5%**		

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

VISITORS BY AGE
YTD OCTOBER 2024/2023

1,186,508 ARRIVALS

15.7% GROWTH

	2023	Growth	2024	% Growth
0 - 11	67,051	16,108	83,159	24.0%
12-19	68,691	15,916	84,607	23.2%
20 - 29	122,252	24,309	146,561	19.9%
30 - 39	162,273	28,035	190,308	17.3%
40 - 49	168,866	28,242	197,108	16.7%
50 - 59	198,184	18,863	217,047	9.5%
60 - 69	156,695	19,256	175,951	12.3%
70 +	81,080	10,659	91,739	13.1%
Not Stated	61	-33	28	-54.1%
Total	**1,025,153**	161,355	**1,186,508**	**15.7%**

GENERATIONS
YTD OCTOBER 2024/2023

1,186,508 VISITORS

15.7% GROWTH

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
Gen A	52,769	12,645	65,414	24.0%	5.1%	5.5%
Gen Z	147,179	33,700	180,879	22.9%	14.4%	15.2%
Millennials	256,263	43,580	299,843	17.0%	25.0%	25.3%
Gen X	273,597	37,509	311,106	13.7%	26.7%	26.2%
Baby Boomers	266,685	29,716	296,401	11.1%	26.0%	25.0%
Silent Generations	28,599	4,238	32,837	14.8%	2.8%	2.8%
Age not specified	61	-33	28	-54.1%	0.0%	0.0%
Total	**1,025,153**	161,355	**1,186,508**	**15.7%**		

GENERATIONS
YTD OCTOBER 2024/2023

1,186,508 VISITORS

15.7% GROWTH

PURPOSE OF VISIT YTD OCTOBER 2024

	2024	Mkt Share	2023	Mkt Share	% Growth
Sun, Sand, Sea	989,504	83.4%	834,865	81.4%	18.5%
Business	20,022	1.7%	19,348	1.9%	3.5%
Conference	6,591	0.6%	6,754	0.7%	-2.4%
Honeymoon	33,133	2.8%	32,483	3.2%	2.0%
Diving	3,666	0.3%	3,457	0.3%	6.0%
Incentive	9,448	0.8%	9,839	1.0%	-4.0%
Meeting	7,020	0.6%	7,026	0.7%	-0.1%
Not specified	86,454	7.3%	79,023	7.7%	9.4%
Shopping	7,007	0.6%	6,918	0.7%	1.3%
Wedding	23,663	2.0%	25,440	2.5%	-7.0%
Total	**1,186,508**	**100.0%**	**1,025,153**	**100.0%**	**15.7%**

CONVINCING REASONS FOR VISIT YTD OCT 2024

Reasons for Choice	YTD OCT 2024	Market Share
Adventure activities	49,184	4%
Direct flights	45,323	4%
Ease/comfort	78,304	7%
Familiarity	104,762	9%
Family friendly destination	308,225	26%
Not specified	12,400	1%
Other	138,529	12%
Outside hurricane belt	41,908	4%
Points redemption	17,154	1%
Reliable weather	156,475	13%
Word of mouth	210,040	18%
(blank)	24,204	2%
Total	**1,186,508**	

CARRIERS
YTD OCTOBER 2024/2023

1,186,508 VISITORS

15.7% GROWTH

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
JETBLUE	243,407	52,961	296,368	21.8%	23.7%	25.0%
AMERICAN AIRLINES	226,914	-946	225,968	-0.4%	22.1%	19.0%
UNITED AIRLINES	133,352	22,965	156,317	17.2%	13.0%	13.2%
DELTA AIRLINES	117,761	19,179	136,940	16.3%	11.5%	11.5%
SOUTHWEST AIRLINES	49,805	6,558	56,363	13.2%	4.9%	4.8%
AVIANCA	46,881	8,259	55,140	17.6%	4.6%	4.6%
COPA AIRLINES	38,089	14,693	52,782	38.6%	3.7%	4.4%
WINGO	18,073	7,781	25,854	43.1%	1.8%	2.2%
SPIRIT AIRLINES	15,021	10,481	25,502	69.8%	1.5%	2.1%
KLM ROYAL DUTCH	27,717	-3,402	24,315	-12.3%	2.7%	2.0%
WESTJET AIRLINES	15,837	8,478	24,315	53.5%	1.5%	2.0%
LATAM AIRLINES / PERU	0	17,678	17,678	-	0.0%	1.5%
DIVI DIVI AIR	16,364	-732	15,632	-4.5%	1.6%	1.3%
TUI FLY NL	12,852	-1,615	11,237	-12.6%	1.3%	0.9%
SUNWING AIRLINES	11,491	-702	10,789	-6.1%	1.1%	0.9%
AIR CANADA	10,640	-252	10,388	-2.4%	1.0%	0.9%
EZ AIR	9,900	-211	9,689	-2.1%	1.0%	0.8%
PRIVATE	8,278	-905	7,373	-10.9%	0.8%	0.6%
SURINAM AIRWAYS	5,359	-477	4,882	-8.9%	0.5%	0.4%
WINAIR	1,869	2,819	4,688	150.8%	0.2%	0.4%
BRITISH AIRWAYS	4,259	244	4,503	5.7%	0.4%	0.4%
SUN COUNTRY AIRLINES	2,256	632	2,888	28.0%	0.2%	0.2%
CHARTER	3,104	-755	2,349	-24.3%	0.3%	0.2%
ARAJET	900	736	1,636	81.8%	0.1%	0.1%
JET AIR CARIBBEAN	1,717	-810	907	-47.2%	0.2%	0.1%
SKY HIGH AVIATION	778	115	893	14.8%	0.1%	0.1%
OTHERS	2,529	-1,417	1,112	-56.0%	0.2%	0.1%
Total	**1,025,153**	161,355	**1,186,508**	**15.7%**		

CARRIERS
YTD SEPTEMBER 2024/2023

1,082,471 VISITORS

16.4% GROWTH

City	APO Code	JAN-OCT '24	Mkt Share	JAN-OCT'23	Mkt Share	24 vs 23
JFK NY	JFK	196,391	16.6%	182,583	17.8%	7.6%
Boston	BOS	135,691	11.4%	123,816	12.1%	9.6%
Newark	EWR	138,001	11.6%	95,704	9.3%	44.2%
Miami	MIA	87,996	7.4%	83,798	8.2%	5.0%
Charlotte	CLT	83,519	7.0%	87,210	8.5%	-4.2%
Atlanta	ATL	64,560	5.4%	51,357	5.0%	25.7%
Bogota	BOG	60,996	5.1%	56,883	5.5%	7.2%
Panama City	PTY	52,860	4.5%	38,125	3.7%	38.6%
Philadelphia	PHL	44,393	3.7%	45,658	4.5%	-2.8%
Toronto	YYZ	45,543	3.8%	37,996	3.7%	19.9%
Orlando	MCO	40,386	3.4%	39,819	3.9%	1.4%
G.Bush DC	IAD	34,527	2.9%	23,767	2.3%	45.3%
Amsterdam	AMS	35,487	3.0%	39,970	3.9%	-11.2%
Curacao	CUR	29,553	2.5%	31,622	3.1%	-6.5%
Fort Lauderdale	FLL	26,016	2.2%	15,628	1.5%	66.5%
Lima, Peru	LIM	17,678	1.5%	0	0.0%	—
Baltimore	BWI	16,116	1.4%	10,045	1.0%	60.4%
Chicago	ORD	14,335	1.2%	11,515	1.1%	24.5%
Medellin	MDE	14,539	1.2%	6,518	0.6%	123.1%
Houston International	IAH	8,205	0.7%	8,281	0.8%	-0.9%
Cali, Alfonso Bonilla Aragon	CLO	5,619	0.5%	1,683	0.2%	233.9%
Dallas Fort Worth Int Airport	DFW	4511	0.4%	4,603	0.4%	-2.0%
LaGuardia Airport, NY	LGA	4,355	0.4%	4,233	0.4%	2.9%
Sint Maarten	SXM	4,692	0.4%	1,849	0.2%	153.8%
Gatwick Airport , UK	LGW	4,504	0.4%	4,149	0.4%	8.6%
	Others	16,035	1.4%	18,341	1.8%	-12.6%
Total		**1,186,508**	**100.0%**	**1,025,153**	**100.0%**	**15.7%**

OCTOBER RESULT 2024

NORTH AMERICA

79,551

76.5%

SOUTH AMERICA

14,554

14.0%

EUROPE

6,244

6.0%

OTHERS

3,688

3.5%

TOTAL ARRIVALS

104,037

100%

ARRIVALS
OCTOBER 2024/2023

104,037 ARRIVALS

9.5% GROWTH

	2023	Growth		2024	% Growth	Marketshare 2023	Marketshare 2024
USA	69,139		5,703	74,842	8.2%	72.8%	71.9%
Canada	3,998		711	4,709	17.8%	4.2%	4.5%
NA	**73,137**		**6,414**	**79,551**	**8.8%**	**77.0%**	**76.5%**
Venezuela	216		15	231	6.9%	0.2%	0.2%
Colombia	5,202		110	5,312	2.1%	5.5%	5.1%
Brazil	1,020	-38		982	-3.7%	1.1%	0.9%
Argentina	1,565		612	2,177	39.1%	1.6%	2.1%
Chile	634		286	920	45.1%	0.7%	0.9%
Ecuador	1,021	-39		982	-3.8%	1.1%	0.9%
Peru	655		1,382	2,037	211.0%	0.7%	2.0%
Paraguay	117		3	120	2.6%	0.1%	0.1%
Uruguay	213		126	339	59.2%	0.2%	0.3%
Mexico	233		65	298	27.9%	0.2%	0.3%
Others	1,117		39	1,156	3.5%	1.2%	1.1%
SA	**11,993**		2,561	**14,554**	**21.4%**	**12.6%**	**14.0%**
Netherlands	3,403		88	3,491	2.6%	3.6%	3.4%
UK	686	-104		582	-15.2%	0.7%	0.6%
Germany	465	-12		453	-2.6%	0.5%	0.4%
Italy	507	-51		456	-10.1%	0.5%	0.4%
Sweden	119	-4		115	-3.4%	0.1%	0.1%
Belgium	178	-60		118	-33.7%	0.2%	0.1%
Austria	61		6	67	9.8%	0.1%	0.1%
Switzerland	158		37	195	23.4%	0.2%	0.2%
Others	605		**162**	767	26.8%	**0.6%**	**0.7%**
Europe	**6,182**		62	**6,244**	**1.0%**	**6.5%**	**6.0%**
ROW	**3,684**		**4**	**3,688**	**0.1%**	3.9%	3.5%
Total	**94,996**		9,041	**104,037**	**9.5%**		
W/O Ven.	**94,780**		**9,026**	**103,806**	**9.5%**		

ARRIVALS USA
OCTOBER 2024/2023

74,842
ARRIVALS

8.2%
GROWTH

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
New York	13,548	1,939	15,487	14.3%	19.6%	20.7%
Massachusetts	8,119	535	8,654	6.6%	11.7%	11.6%
New Jersey	8,142	1,260	9,402	15.5%	11.8%	12.6%
Pennsylvania	3,683	346	4,029	9.4%	5.3%	5.4%
Illinois	1,646	-274	1,372	-16.6%	2.4%	1.8%
Connecticut	2,785	78	2,863	2.8%	4.0%	3.8%
Florida	4,383	-442	3,941	-10.1%	6.3%	5.3%
Ohio	2,189	-317	1,872	-14.5%	3.2%	2.5%
Maryland	2,112	-86	2,026	-4.1%	3.1%	2.7%
Michigan	1,225	-166	1,059	-13.6%	1.8%	1.4%
Virginia	1,715	310	2,025	18.1%	2.5%	2.7%
Georgia	1,702	-26	1,676	-1.5%	2.5%	2.2%
North Carolina	1,867	396	2,263	21.2%	2.7%	3.0%
Texas	2,084	272	2,356	13.1%	3.0%	3.1%
California	1,283	91	1,374	7.1%	1.9%	1.8%
Other	12,656	1,787	14,443	14.1%	18.3%	19.3%
Total	**69,139**	**5.703**	**74,842**	**8.2%**		

NIGHTS
OCTOBER 2024/2023

764,600 NIGHTS

-2.6% GROWTH

	2023	Growth	2024	% Growth	ALOS 2023	ALOS 2024
USA	558,826	-35,877	522,949	-6.4%	8.1	7.0
Canada	44,199	-11	44,188	0.0%	11.1	9.4
NA	**603,025**	-35,888	**567,137**	**-6.0%**	8.2	7.1
Venezuela	3,121	-402	2,719	-12.9%	14.4	11.8
Colombia	30,793	630	31,423	2.0%	5.9	5.9
Brazil	6,033	-100	5,933	-1.7%	5.9	6.0
Argentina	14,214	3,686	17,900	25.9%	9.1	8.2
Chile	4,621	1,683	6,304	36.4%	7.3	6.9
Ecuador	4,299	71	4,370	1.7%	4.2	4.5
Peru	3,569	6,599	10,168	184.9%	5.4	5.0
Paraguay	673	76	749	11.3%	5.8	6.2
Uruguay	1,594	1,001	2,595	62.8%	7.5	7.7
Mexico	1,622	545	2,167	33.6%	7.0	7.3
Others	8,472	926	9,398	10.9%	7.6	8.1
SA	**79,011**	14,715	**93,726**	**18.6%**	6.6	6.4
Netherlands	50,796	1,534	52,330	3.0%	14.9	15.0
UK	7,128	-945	6,183	-13.3%	10.4	10.6
Germany	4,595	472	5,067	10.3%	9.9	11.2
Italy	5,453	-2,354	3,099	-43.2%	10.8	6.8
Sweden	1,537	-523	1,014	-34.0%	12.9	8.8
Belgium	2,387	-671	1,716	-28.1%	13.4	14.5
Austria	614	-175	439	-28.5%	10.1	6.6
Switzerland	1,541	671	2,212	43.5%	9.8	11.3
Others	7,267	**1,107**	8,374	15.2%	12.0	10.9
Europe	**81,318**	**-884**	**80,434**	**-1.1%**	13.2	12.9
ROW	**21,699**	1,604	**23,303**	**7.4%**	5.9	6.3
Total	**785,053**	-20,453	**764,600**	**-2.6%**	8.3	7.3

ACCOMMODATIONS OCTOBER 2024/2023

104,037 ARRIVALS

9.5% GROWTH

ARRIVALS BY ACCOMMODATION

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
EP	24,846	1,410	26,256	5.7%	26.2%	25.2%
All Inclusive	17,904	136	18,040	0.8%	18.8%	17.3%
Timeshare	26,431	813	27,244	3.1%	27.8%	26.2%
Others	25,815	6,682	32,497	25.9%	27.2%	31.2%
Total	**94,996**	9,041	**104,037**	**9.5%**		

NIGHTS BY ACCOMMODATION

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
EP	165,188	-14,126	151,062	-8.6%	21.0%	19.8%
All Inclusive	131,070	-14,744	116,326	-11.2%	16.7%	15.2%
Timeshare	251,461	-20,683	230,778	-8.2%	32.0%	30.2%
Others	237,334	29,100	266,434	12.3%	30.2%	34.8%
Total	**785,053**	-20,453	**764,600**	**-2.6%**		

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

VISITORS BY AGE
OCTOBER 2024/2023

104,037 ARRIVALS

9.5% GROWTH

	2023	Growth	2024	% Growth
0 - 11	4,203	1,190	5,393	28.3%
12-19	2,566	569	3,135	22.2%
20 - 29	10,664	1,026	11,690	9.6%
30 - 39	16,461	1,842	18,303	11.2%
40 - 49	14,545	1,622	16,167	11.2%
50 - 59	19,262	846	20,108	4.4%
60 - 69	17,969	1,009	18,978	5.6%
70 +	9,324	939	10,263	10.1%
Not Stated	2	-2	0	-100.0%
Total	**94,996**	9,041	**104,037**	**9.5%**

GENERATIONS
OCTOBER 2024/2023

104,037 ARRIVALS

9.5% GROWTH

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
Gen A	3,523	913	4,436	25.9%	3.7%	4.3%
Gen Z	7,741	1,311	9,052	16.9%	8.1%	8.7%
Millennials	26,019	2,685	28,704	10.3%	27.4%	27.6%
Gen X	24,378	2,048	26,426	8.4%	25.7%	25.4%
Baby Boomers	29,970	1,705	31,675	5.7%	31.5%	30.4%
Silent Generations	3,363	381	3,744	11.3%	3.5%	3.6%
Age not specified	2	-2	0	-100.0%	0.0%	0.0%
Total	**94,996**	9,041	**104,037**	**9.5%**		

GENERATIONS
OCTOBER 2024/2023

104,037 ARRIVALS

9.5% GROWTH

PURPOSE OF VISIT
OCT 2024

	2024	Market share 2024	2023	Market share 2023	% Growth
Sun, Sand, Sea	83,223	80.0%	74,630	78.6%	11.5%
Business	2,034	2.0%	2,435	2.6%	-16.5%
Conference	502	0.5%	905	1.0%	-44.5%
Honeymoon	4,832	4.6%	5,252	5.5%	-8.0%
Diving	319	0.3%	350	0.4%	-8.9%
Incentive	640	0.6%	909	1.0%	-29.6%
Meeting	654	0.6%	797	0.8%	-17.9%
Not specified	7,923	7.6%	6,349	6.7%	24.8%
Shopping	591	0.6%	672	0.7%	-12.1%
Wedding	3,319	3.2%	2,697	2.8%	23.1%
Total	**104,037**	**100.0%**	**94,996**	**100.0%**	**9.5%**

CONVINCING REASONS FOR VISIT
OCT 2024

Reasons for Choice	Oct 2024	Market Share
Adventure activities	4,031	4%
Direct flights	3,270	3%
Ease/comfort	6,869	7%
Familiarity	10,090	10%
Family friendly destination	22,052	21%
Not specified	1,050	1%
Other	13,882	13%
Outside hurricane belt	8,023	8%
Points redemption	1,411	1%
Reliable weather	13,585	13%
Word of mouth	18,111	17%
(blank)	1,663	2%
Total	**104,037**	

CARRIERS
OCTOBER 2024/2023

104,037 ARRIVALS

9.5% GROWTH

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
JETBLUE	23,407	4,988	28,395	21.3%	24.6%	27.3%
AMERICAN AIRLINES	17,933	-643	17,290	-3.6%	18.9%	16.6%
UNITED AIRLINES	12,334	718	13,052	5.8%	13.0%	12.5%
DELTA AIRLINES	8,666	1,901	10,567	21.9%	9.1%	10.2%
COPA AIRLINES	4,175	986	5,161	23.6%	4.4%	5.0%
AVIANCA	5,752	-706	5,046	-12.3%	6.1%	4.9%
SOUTHWEST AIRLINES	4,884	-564	4,320	-11.5%	5.1%	4.2%
KLM ROYAL DUTCH	2,881	259	3,140	9.0%	3.0%	3.0%
WESTJET AIRLINES	1,868	1,135	3,003	60.8%	2.0%	2.9%
LATAM AIRLINES / PERU	0	2,235	2,235	-	0.0%	2.1%
WINGO	1,823	160	1,983	8.8%	1.9%	1.9%
DIVI DIVI AIR	1,710	59	1,769	3.5%	1.8%	1.7%
SPIRIT AIRLINES	3,153	-1,456	1,697	-46.2%	3.3%	1.6%
EZ AIR	1,285	-54	1,231	-4.2%	1.4%	1.2%
TUI FLY NL	1,341	-217	1,124	-16.2%	1.4%	1.1%
PRIVATE	464	497	961	107.1%	0.5%	0.9%
SUNWING AIRLINES	886	-234	652	-26.4%	0.9%	0.6%
SURINAM AIRWAYS	625	-53	572	-8.5%	0.7%	0.5%
AIR CANADA	359	144	503	40.1%	0.4%	0.5%
WINAIR	344	105	449	30.5%	0.4%	0.4%
BRITISH AIRWAYS	565	-238	327	-42.1%	0.6%	0.3%
ARAJET	93	130	223	139.8%	0.1%	0.2%
CHARTER	218	-53	165	-24.3%	0.2%	0.2%
SKY HIGH AVIATION	67	46	113	68.7%	0.1%	0.1%
AIR CENTURY	33	26	59	78.8%	0.0%	0.1%
JET AIR CARIBBEAN	130	-130	0	-100.0%	0.1%	0.0%
OTHERS	0		0	-	0.0%	0.0%
Total	**94,996**	9,041	**104,037**	**9.5%**		

CARRIERS
OCTOBER 2024/2023

104,037 ARRIVALS

9.5% GROWTH

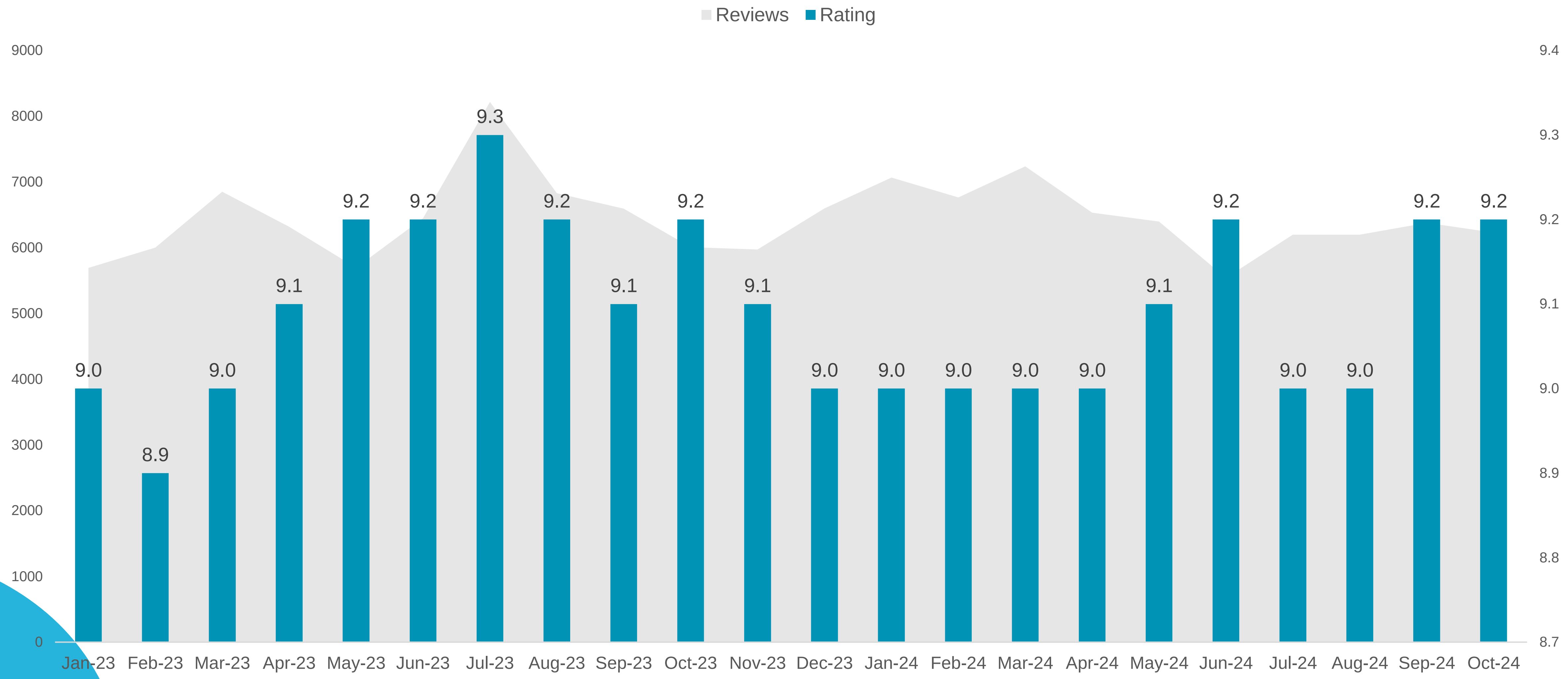
City	APO Code	OCT '24	Mkt Share	OCT'23	Mkt Share	24 vs 23
JFK NY	JFK	18,793	18.1%	16,840	17.7%	11.6%
Newark	EWR	13,851	13.3%	11,044	11.6%	25.4%
Boston	BOS	11,273	10.8%	9,196	9.7%	22.6%
Miami	MIA	8,396	8.1%	8,328	8.8%	0.8%
Charlotte	CLT	8,249	7.9%	8,907	9.4%	-7.4%
Bogota	BOG	6,061	5.8%	6,920	7.3%	-12.4%
Atlanta	ATL	5,252	5.0%	5,120	5.4%	2.6%
Panama City	PTY	5,166	5.0%	4,175	4.4%	23.7%
Amsterdam	AMS	4,264	4.1%	4,224	4.4%	0.9%
Toronto	YYZ	4,158	4.0%	3,113	3.3%	33.6%
Curacao	CUR	3,643	3.5%	3,193	3.4%	14.1%
Orlando	MCO	3,279	3.2%	3,850	4.1%	-14.8%
Lima, Peru	LIM	2,235	2.1%	5	0.0%	44600.0%
G.Bush DC	IAD	1,831	1.8%	1,534	1.6%	19.4%
Fort Lauderdale	FLL	1,762	1.7%	3,268	3.4%	-46.1%
Baltimore	BWI	1,046	1.0%	1,037	1.1%	0.9%
Houston International	IAH	1,018	1.0%	624	0.7%	63.1%
Medellin	MDE	973	0.9%	659	0.7%	47.6%
Philadelphia	PHL	726	0.7%	734	0.8%	-1.1%
Johan A. Pengel Int Airport, Suriname	PBM	576	0.6%	596	0.6%	-3.4%
Sint Maarten	SXM	434	0.4%	317	0.3%	36.9%
Gatwick Airport , UK	LGW	327	0.3%	565	0.6%	-42.1%
Las Americas Int. Airport, Sto Dgo	SDQ	318	0.3%	180	0.2%	76.7%
Bonaire, Flamingo Int. Airport	BON	197	0.2%	258	0.3%	-23.6%
La Isabela , SDQ	JBQ	43	0.0%	17	0.0%	152.9%
	Others	166	0.2%	292	0.3%	-43.2%
Total		**104,037**	**100.0%**	**94,996**	**100.0%**	**9.5%**

GUEST SATISFACTION

Aruba Tourism Authority

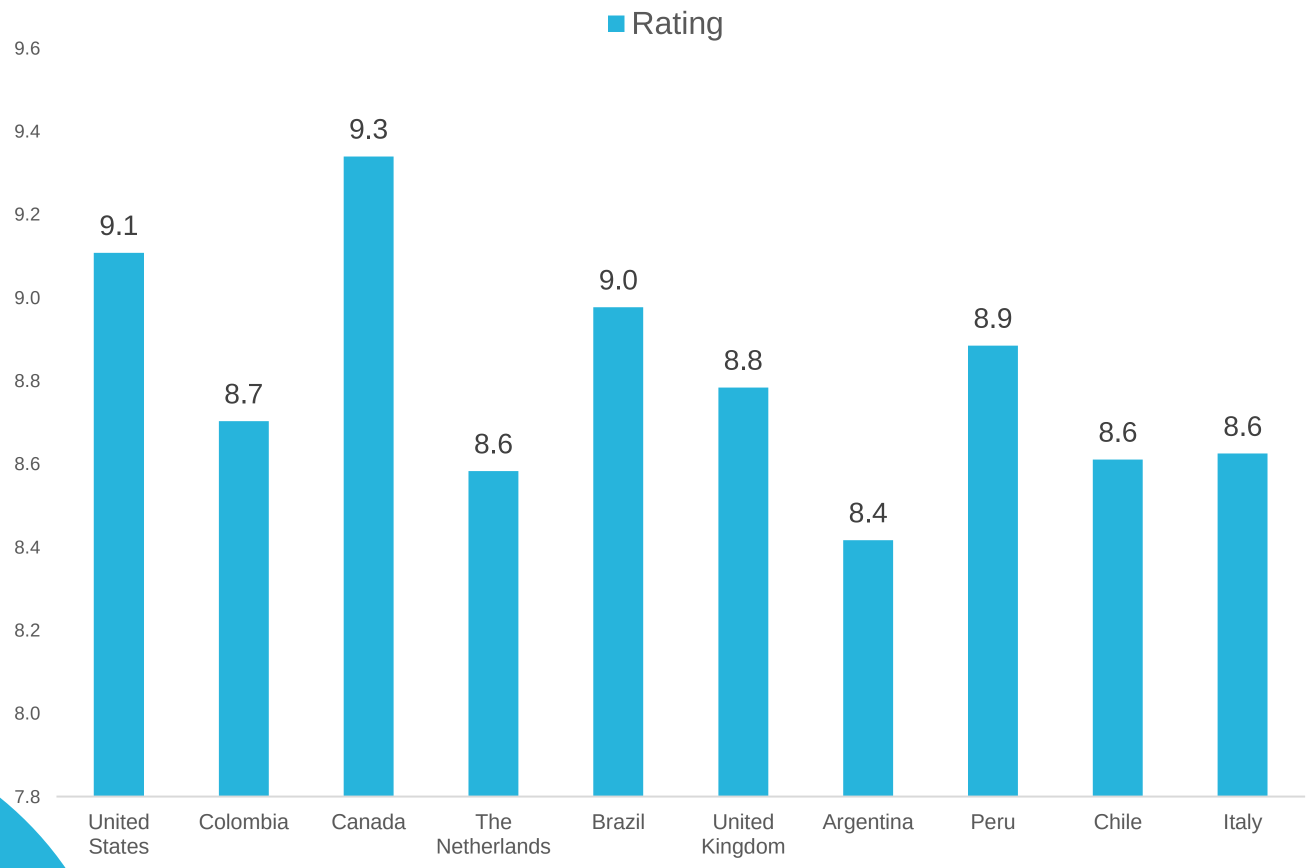
GUEST EXPERIENCE INDEX (GEI)

Reviews and Ratings

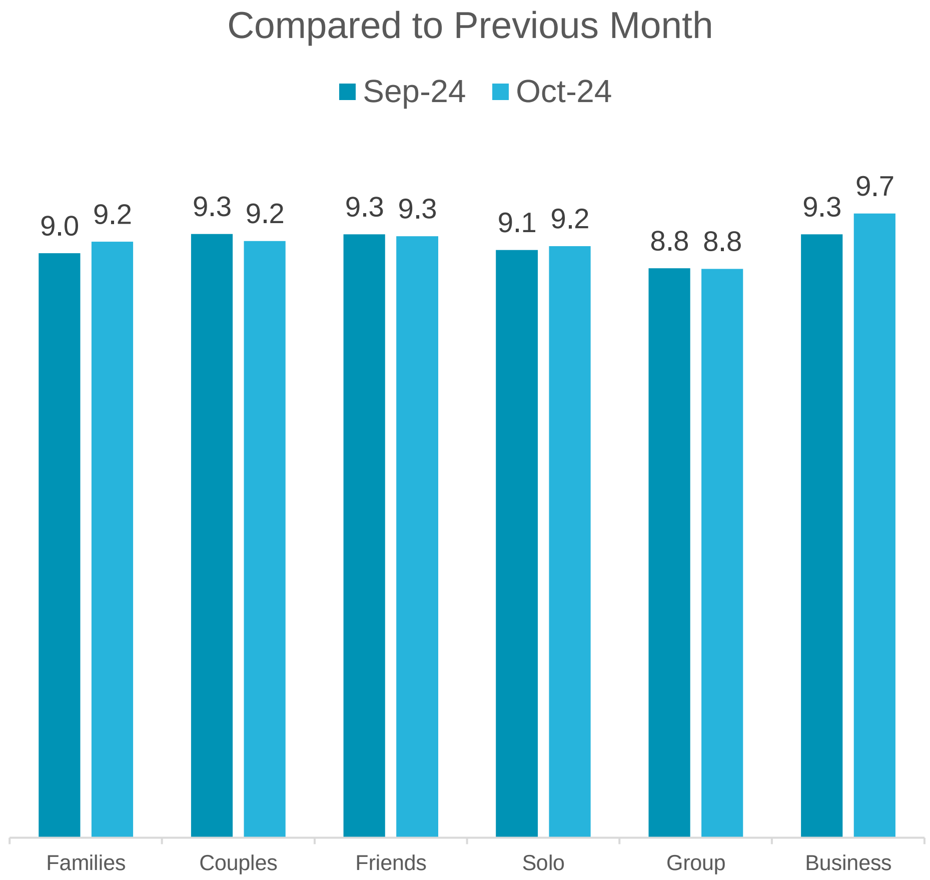


GEI AUGUST 2024

MARKETS

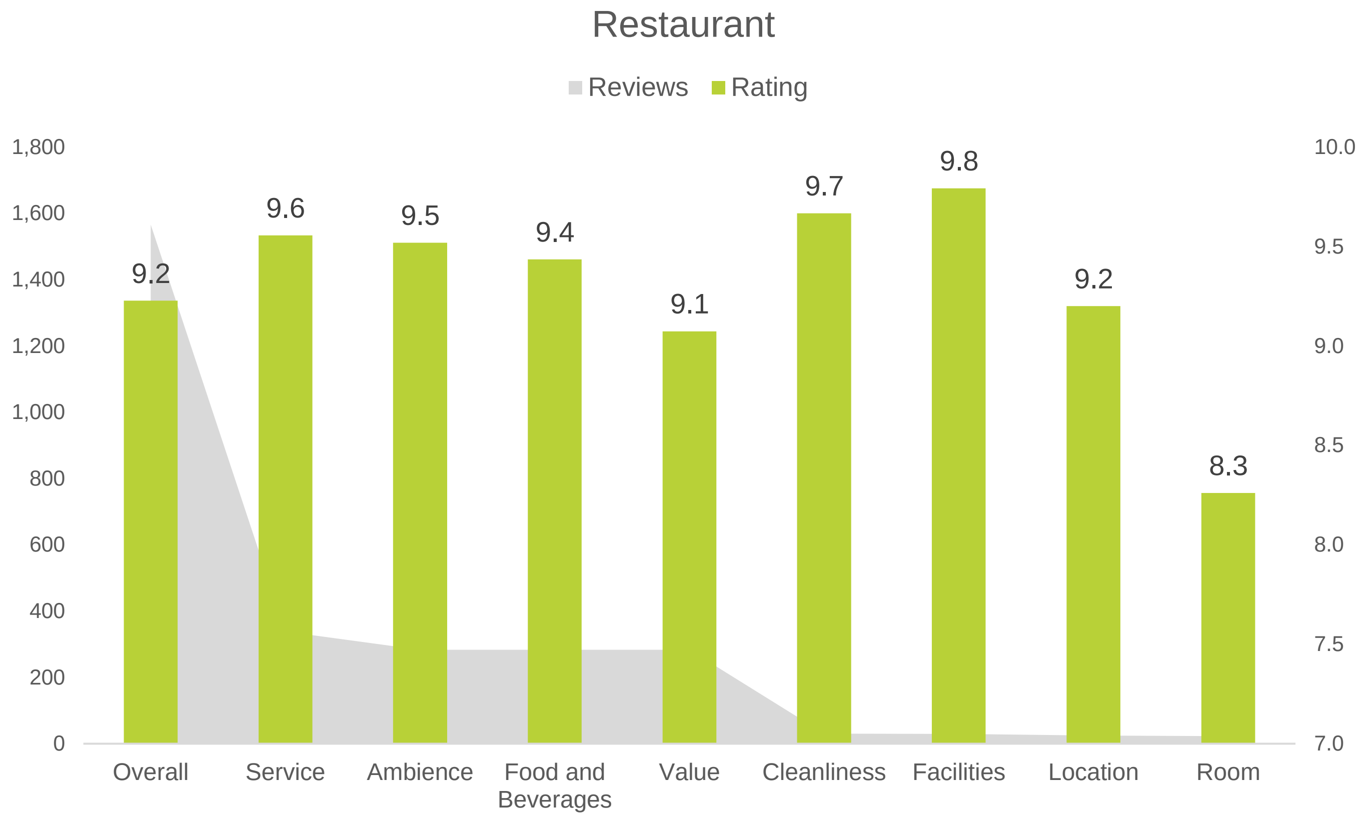


TRAVEL PARTY



GEI OCTOBER 2024

RESTAURANT GEI AUGUST 2024



Aruba Tourism Authority

VACATIONS RENTALS

Transparent

an OTA INSIGHT company

INTRODUCTION

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

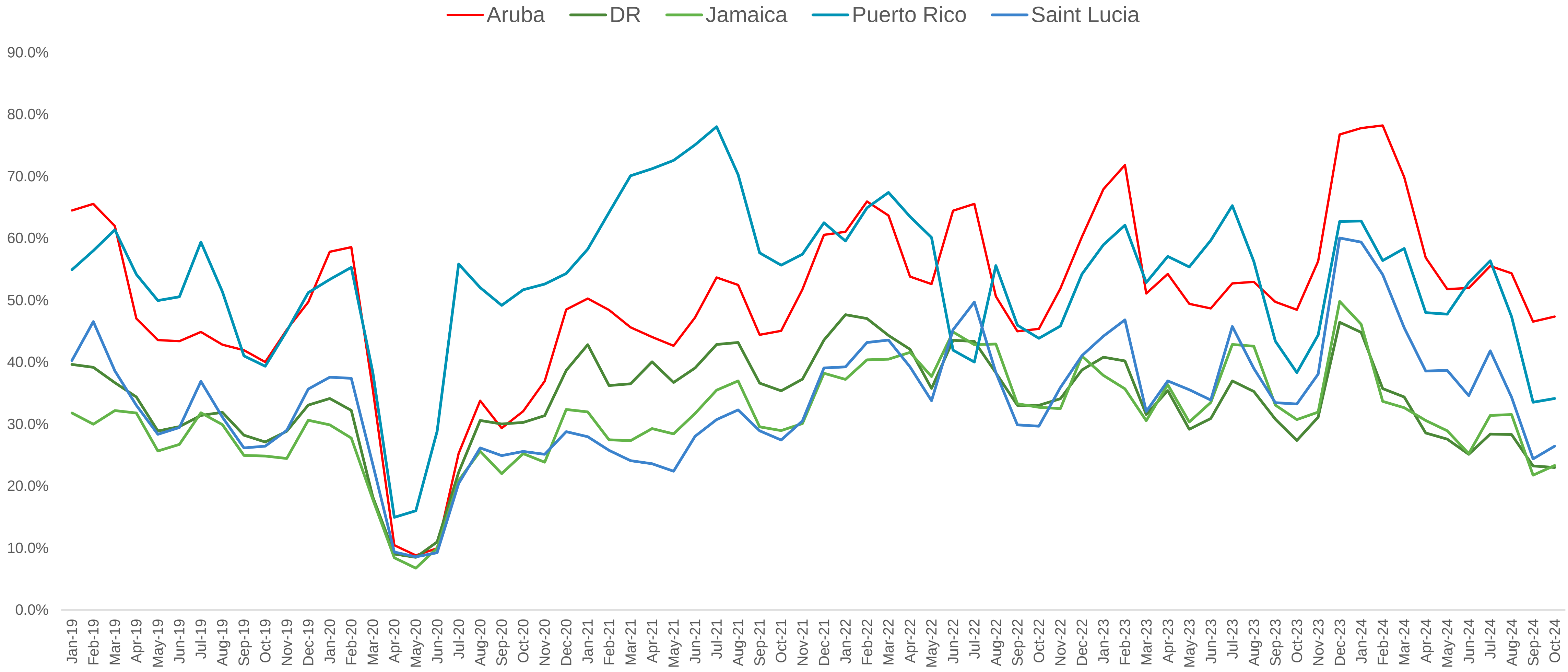
- With Lighthouse, A.T.A. is able to do the following:

  - Measure the economic impact of short-term rental, track (ADR) and occupancy and analyse the booking window.
  - The above data points are also forward-looking making it possible to make demand and revenue predictions based on the current status of property calendars and advertised rates.
  - Track visitors' origin and accommodation size.
  - The dashboard also provides the ability to make a direct comparison with similar, contrasting, or competing markets to compare data on occupancy rates, ADR, and booking window.

OCCUPANCY

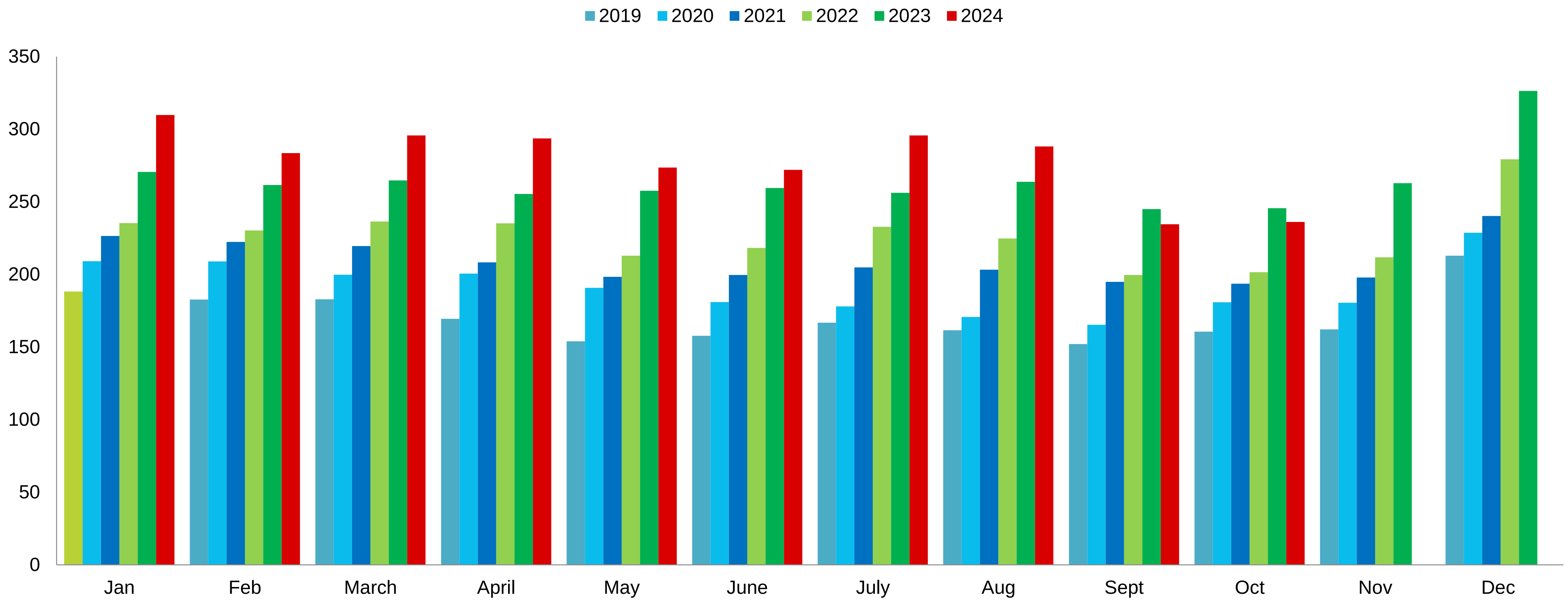
OCT 2023 Occupancy: 43.9% | OCT 2024 Occupancy: 47.6%

OCCUPANCY BENCHMARK

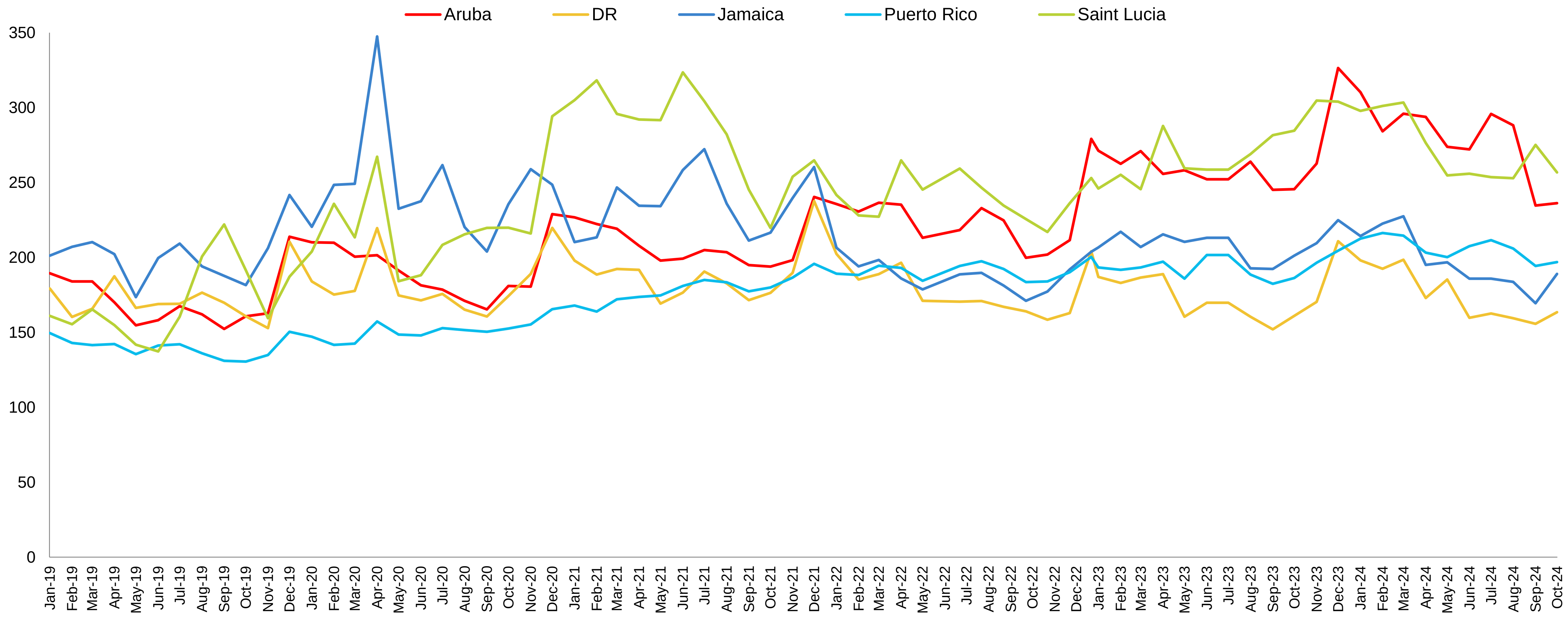


ADR

OCT 2023 ADR: $246 | OCT 2024 ADR: $236

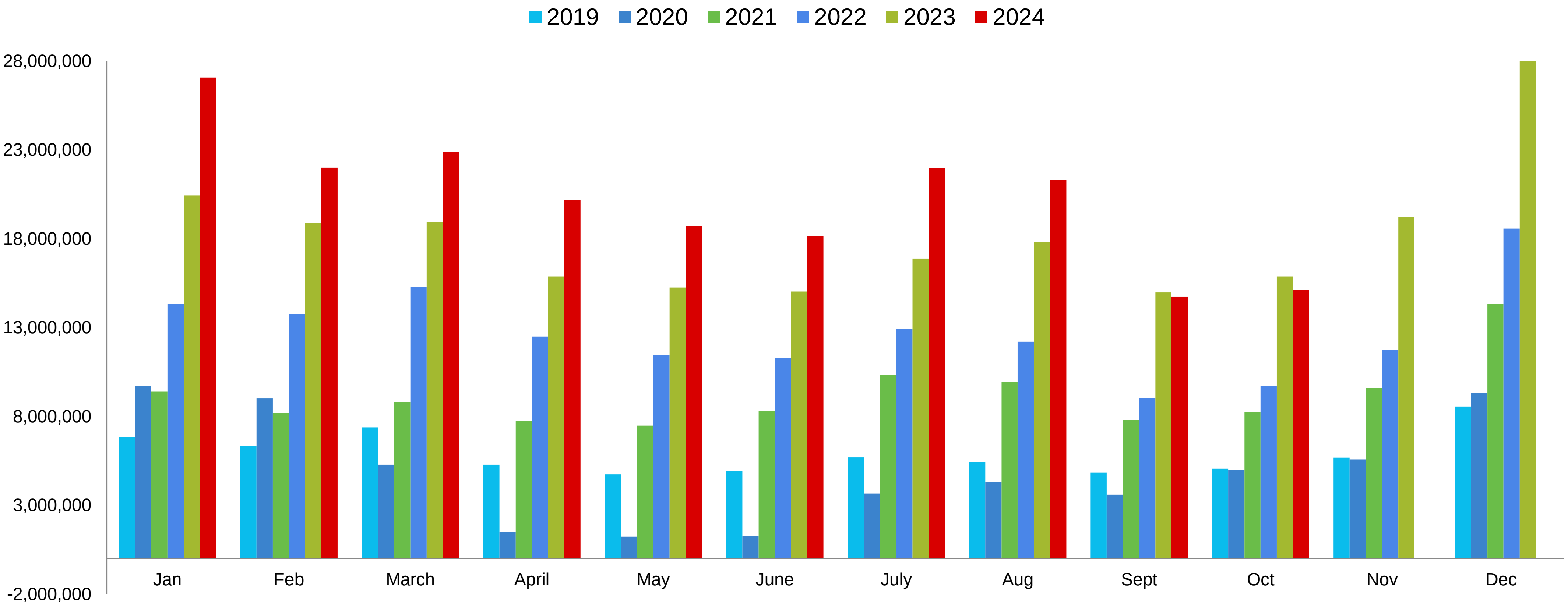


ADR BENCHMARK



REVENUE

Total Revenue YTD OCT 2024: USD$ 202,127,333 | Total Revenue YTD OCT 2023: USD$ 170,021,642
OCT 2024: USD$15,108,946 | OCT 2023: USD$ 15,881,147



TIDBITS

ARUBA Aruba Tourism Authority

Aruba Culinary Roadmap Study

resonance

OUR STARTING POINT

CULINARY TOURISM IS BIG BUSINESS

Forbes

"Food Tourism Is Big Business For The Travel Industry"

VIRTUOSO

"+70% of our customers report an increase in culinary travel"

miles PARTNERSHIP

52% of all U.S. travelers are self-described "foodie travelers" who prioritize food, dining and cuisine in their travel planning. That number goes up to 71% for a·uent foodies,
The State of the American Traveler, 2023

Zion Market Research

The size of the [global culinary tourism market]() was valued at $820 billion in 2023 and is projected to reach $2,934 billion by the end of 2032, exhibiting a strong compound annual growth rate (CAGR) of approximately 18% from 2024 to 2032.
Zion Market Research

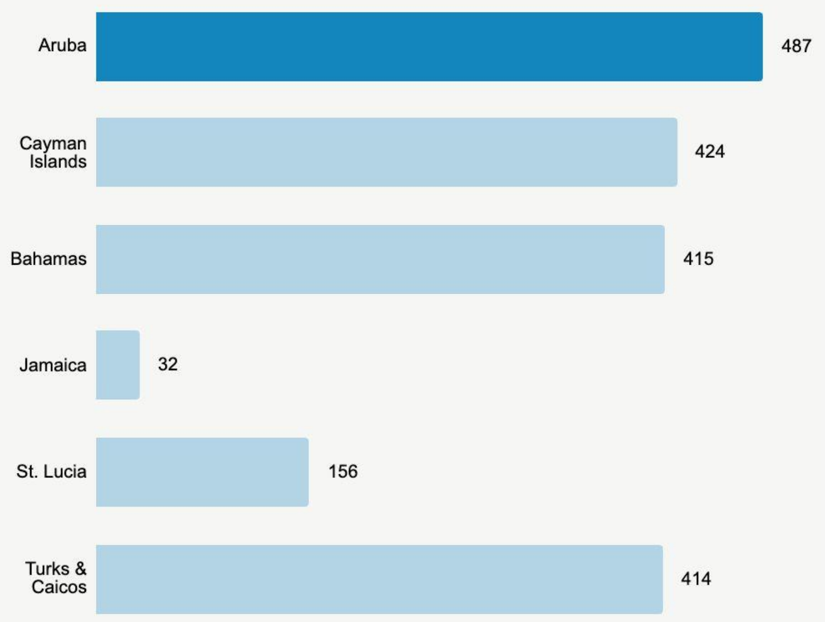
Future Partners

Dining ranks #1in travelers decision to take an overnight trip, at almost 40%

ARUBA IS A CULINARY DESTINATION

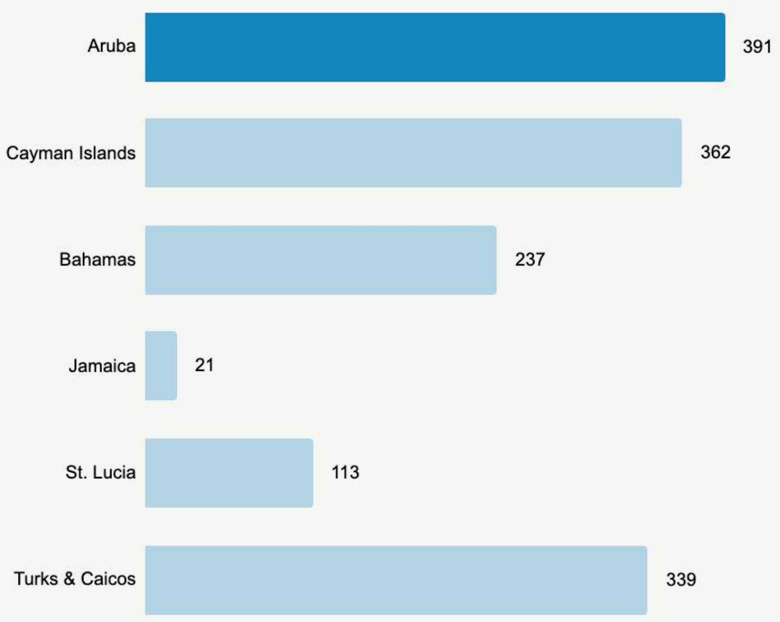
Aruba leads in the Relative Number of Restaurants And Relative # of Quality Restaurants

Number of Restaurants per 100k population



Source: Trip Advisor

Number of quality restaurants per 100k population



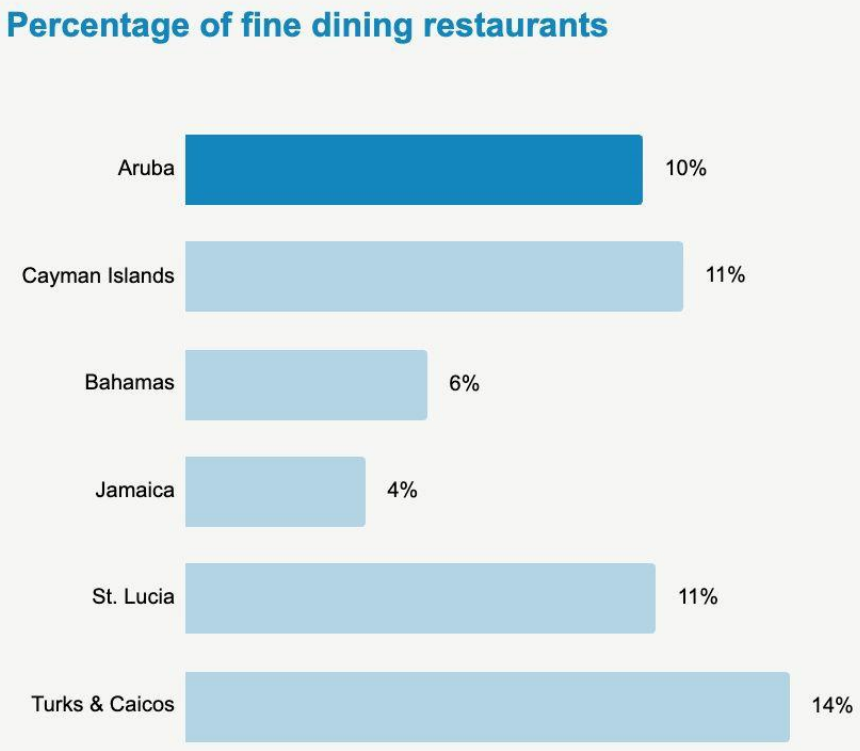
Source: Trip Advisor

SUPPLY-SIDE ANALYSIS

ARUBA IS LEADING IN FINE DINING

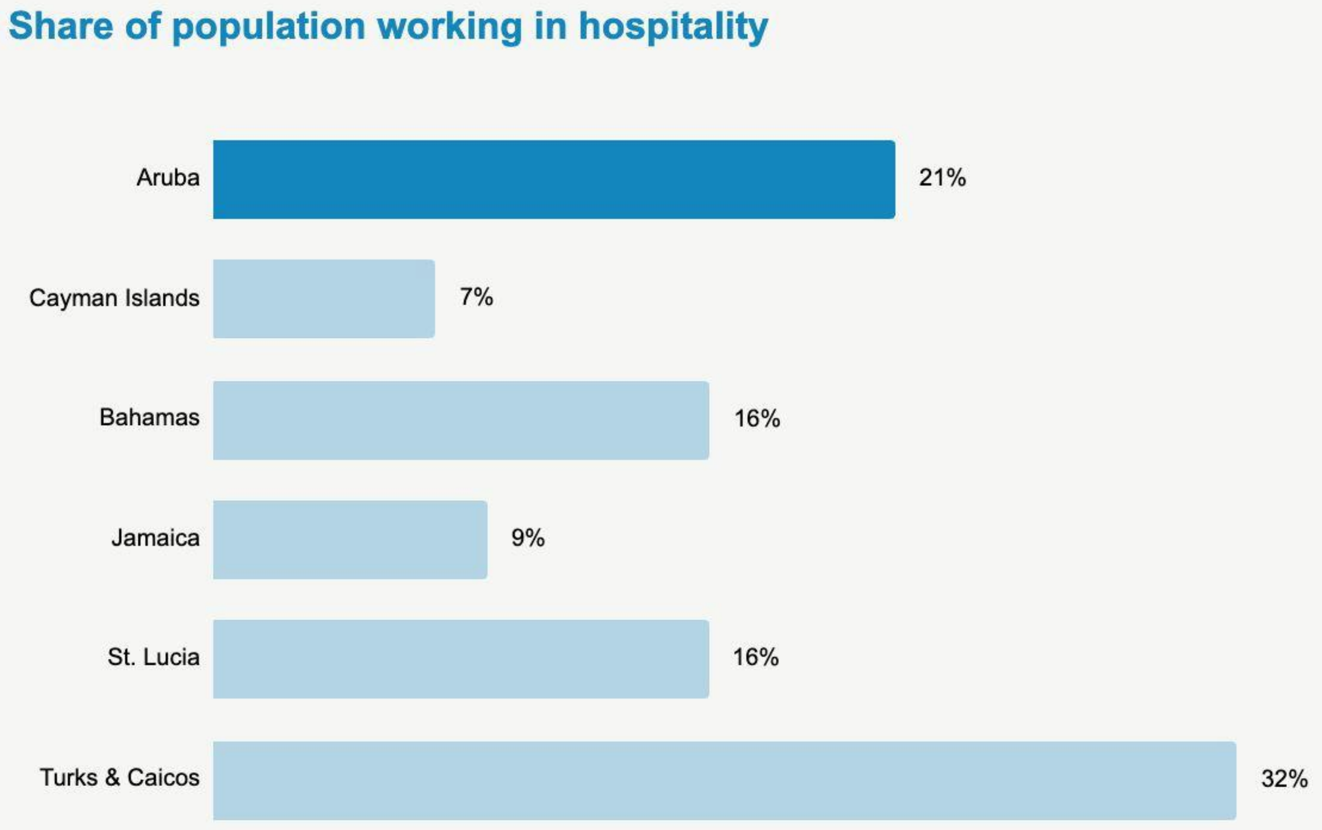
Aruba also leads in the fine dining category, ranking #2 with 54 fine dining restaurants, though this only represents 10% of our establishments

Source: Trip Advisor



Source: Trip Advisor

ARUBA IS #2 IN TERMS OF SHARE OF POPULATION WORKING IN HOSPITALITY



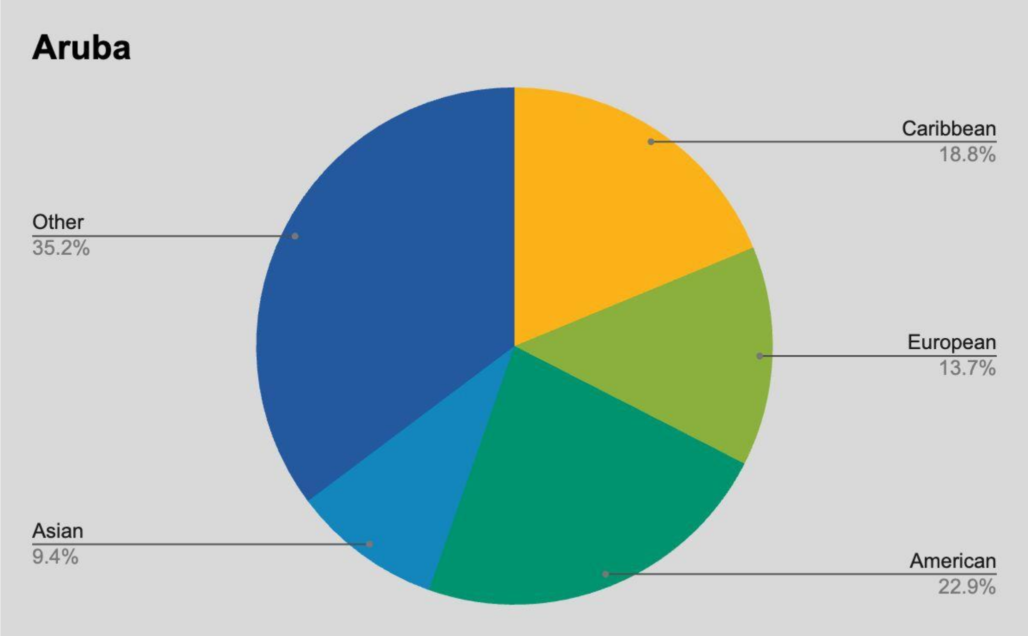
Source: Trip Advisor

CULINARY DIVERSITY ANALYSIS

ARUBA HAS THE MOST DIVERSE FOOD SCENE

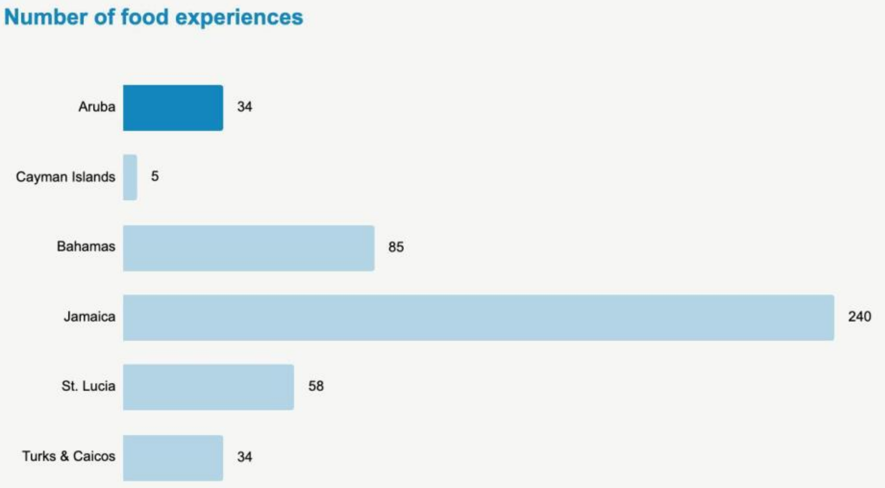
81% of Aruba’s cuisine is from outside of the Caribbean compared to:

- 72% of Cayman Island
- 50% of Jamaica
- 55% of St. Lucia
- 62% of Turks & Caicos
- 59% of The Bahamas

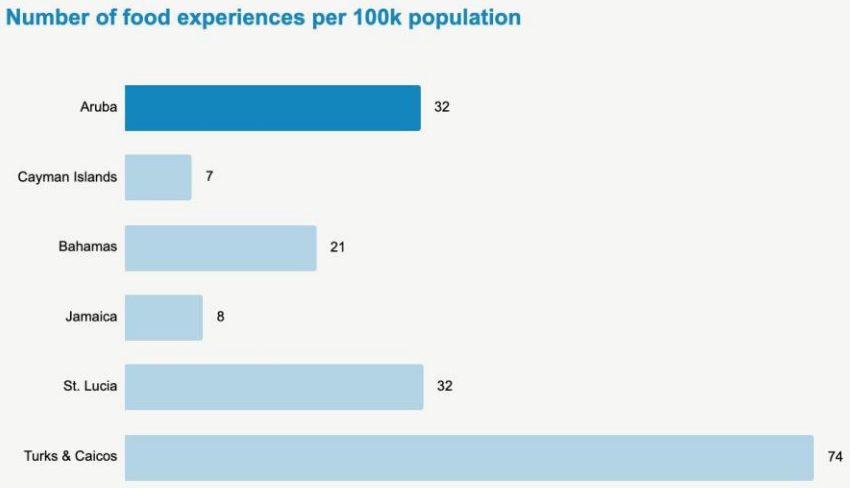


BUT ARUBA IS NOT CAPITALIZING ON THIS STRENGTH THROUGH EXPERIENCES

We have opportunity to grow the # of food experiences



Source: Viator



Source: Viator

Aruba Tourism Authority

A.T.A.'S MACS 2025-2035

Aruba Tourism Authority

Trends & Developments in Tourism

Trends & Developments in Tourism

A few perspectives towards 2035

Increasing Demand, Value and Impact of Tourism

The global tourism service market is expected to grow significantly by 2035, driven by a persistent desire to travel, evolving customer expectations, leading to growth in travel and tourism GDP. However, challenges such as concentrated overtourism and ongoing labor shortages are anticipated to pose hurdles, potentially weakening resident support for tourism.

Sustainable and Responsible Tourism

Advocating for tourism development that is inclusive and regenerative, supporting biodiversity conservation, cultural heritage, and the economic security of host countries and local communities. This involves integrating Environmental, Social and Governance (ESG) practices and reporting.

Shared National Vision on Tourism

Establishing the foundation for leading destinations to share a unified, long-term national vision for tourism, offering practical guidance for all stakeholders involved in the destination's tourism development.

Trends & Developments in Tourism

A few perspectives towards 2035

1 **Enhanced Tourism Governance:** Authority 2.0 and Integrated Destination Management

The coordinated effort to legally empower DMMOs to handle tourism-related issues and implement interconnected management strategies for sustainable tourism.

2 **Next-Gen Tourism Management:** Harnessing Emerging technologies for Enhanced Travel Experiences

Technologies are revolutionizing how destinations are marketed, managed, and experienced by travelers. This trend encompasses the utilization of various technological innovations such as AI (including tools like ChatGPT), virtual and augmented reality, big data analytics, 5G connectivity, and robotics (room service robots).

3 **Beyond Bleisure:** The Rise of Extended Workcations and Digital Nomadism

The integration of remote work with lifestyle travel is leading to an increase in "workcations" and "digital nomad" lifestyles. This trend involves longer stays and a more integrated work-life balance, distinguishing it from traditional bleisure travel, which typically involves shorter trips.

4 **Transformational Travel:** The Rise of Immersive, Nature-Focused, Cultural and Authentic Experiences

An emerging trend in travel that deeply impacts travelers. Centered on nature, culture, and authenticity, it transcends mere sightseeing to spark personal growth and transformation. This trend encourages profound engagement with destinations, fostering connections with local communities and natural environments.

5 **The Ubiquitous Role of Social Media in Modern Tourism Marketing and Travel Decision-Making**

Social media platforms expose users to visually compelling content about destinations. It further influences travelers when selecting a destination and as such underscores its critical role in modern tourism marketing strategies. User-generated content (UGC) from creators is perceived as more authentic and trustworthy.

Trends & Developments in Tourism

A few perspectives towards 2035

6

Enhanced Tourism Governance

As consumers reckon with what it means to be human and green, a shift in values shows how people want to preserve the environment in their daily lives but are sick of the responsibility of the world being sustainable. They want brands to step up and lead the charge on sustainability, while they focus on ways they can take care of the environment around them in their everyday life.

7

Values-Driven Shift in Approach to Environmentalism

Where things made by technology were once considered top of the hierarchy, things and experiences that offer a human touch are becoming the new premium. People want to preserve their sense of place and self as technology continues to take over more of their tasks and day-to-day lives. People's desire for human connection grows stronger amid the global disconnection crisis.

8

The New Luxury Mindset: Shift from Brand-Centric to Human-Centric

New, younger, more adventurous luxury consumers are redefining what luxury means to them. Guided by a desire for personality, authenticity, and sustainability, Millennials will represent 50% of the global luxury market by 2025 and Gen Z is poised to take over by the decade's end. These younger consumers are uncompromising and unforgiving towards brands – they don't praise brands based on heritage and craftsmanship, rather they expect them to stand up for something and embody their values.

Overtourism

The term overtourism was first coined in 2016 as an expression to identify potential hazards to popular destinations worldwide and how the dynamic forces that power tourism often inflict unavoidable negative consequences if not managed well. In some countries, this can lead to a decline in tourism demand, if a sustainable framework is not implemented to cope with the economic, environmental, and socio-cultural factors. Consequently, impacting both the residents and visitors alike.

As we pursue our Aspiration, we will proactively align with our sustainability ambition, which aims to inspire, commit, and guide us all in making smart, sustainable choices together, benefiting both society and our destination.

How are other destinations approaching overtourism?

Destinations we looked into

Venice

Overtourism Strategy:

Higher entry fee for day trippers

In 2024 Venice began charging tourists that were not staying at hotels a 5 euro fee before entering Venice. Initially the entry fee only applied on selected 29 days between April and July.

Coming out of the success and acceptance of this entry tax, Venetians could expand this fee to 10 euros, and possibly for 100 days.

Other shifts Venice is making to encourage quality tourism

- Pushing hotel industries to reshape hotels with fewer rooms, but expanded and improved services.
- Capping the quantity of hotels that can open in the City Center.
- Implementing new regulations for Airbnb and short-term rentals.
- Reshaping cruise ship itineraries and building a smaller terminal outside of the Venice City Center to discourage day-trippers.
- Groups of tourists can't have more than 25 ppl or loudspeakers.
- Embracing high-end meetings, incentives, conferences and exhibitions.

Amsterdam

Overtourism Strategy:

Cruise stop cap & relocation of terminal

Amsterdam plans to start cutting the number of ships that can stop at its main port terminal over the coming years by:

- Starting in 2026, the number of sea cruises that can stop at the Passengers Terminal Amsterdam will be set at 100, down from 190.
- All cruise ships will be required to use shore power by 2027. This will require that all ships receive their electrical power from the shore while docked at the port, cutting the use of onboard diesel engines — a contributor to carbon emissions.
- Within a decade, cruise ships won't be able to stop at the main terminal.
- By 2035, the main terminal for cruise stops will be outside the city.

Overtourism strategy:

Use data to manage tourist flow

To combat overcrowding, sensitivities around nightlife, housing due to short-term rentals, and waste management, Amsterdam relied on data to find solutions and manage overcrowding.

These strategies include:

- Selling City Cards for public transportation and attractions that travelers use to 'check-in' at different sites. Through the cards, data is collected that shows movement patterns, allowing officials to anticipate crowds and advise alternative itinerary options.
- Adjusting marketing to promote less-visited parts of the city vs. just the Canal District.
- Gating high-traffic areas and charging fees to enter, providing the attraction with a source of revenue that can be used for taking care of its infrastructure.

Destinations we looked into

Hawaiian Islands

Overtourism Strategy:

Regenerative tourism legislation

The Hawaiian islands introduced a bill that is designed to regenerate tourism. This bill ensures that the visitor arrivals grows in a manner that respects and preserves cultural heritage while promoting economic diversification. The bill incorporates a regenerative framework into the Hawaii State Planning Act and the state's Tourism Functional Plan – by expanding objectives and policies for the visitor industry, which include:

- Shifting to a regenerative visitor industry that has a reduced ecological footprint by implementing policies such as decreasing the impacts on beaches, reefs and ocean life, and that aims to sustain and improve the quality of life for Hawaii's people.
- Supporting community efforts to protect the cultural and natural resources of the land, oceans, streams and skies, and to ensure that kapu (prohibited) and environmentally sensitive contexts are protected from visitor traffic.
- Engaging more of Hawaii's businesses by better positioning Hawaii's business owners and entrepreneurs in the economic value chain, and actively supporting other economic sectors to reduce the state's dependence on tourism.
- Empowering Hawaii's people by offering capacity-building opportunities, job training, and education for upward career mobility in the visitor industry.

Japan

Overtourism Strategy:

Implementation of new trail fees and limiting numbers of hikers

Mount Fuji Climbers must pay 2,000 yen ($12) and their numbers will be limited to 4,000 a day after complaints of litter, pollution and dangerously crowded trails flowed in the previous year.

Bahamas

Overtourism Strategy:

Domestic campaign to remind locals of the importance of tourism

"Tourism is Everybody's Business" is a domestic campaign aimed at enhancing public awareness of the nation's premier industry — tourism. The local campaign was developed as an integral part of the country's overall effort to highlight the positive image of Bahamas tourism and seeks to rekindle passion and pride in the Bahamian people for the industry that powers the economy of the island nation.

Destinations we looked into

New Zealand

Overtourism Strategy:

Campaign to deter visitors from traveling under the ‘social’ influence

New Zealand launched a campaign to discourage visitors from “traveling under the social influence’ deterring people from following influencers to the "popular spots" and encouraging them to explore and find their own special places.

The aim of the campaign is to illustrate the many incredible things to do in New Zealand beyond the social trends. It also highlights the dangers some people put themselves in trying to get an Insta-perfect shot.

The campaign also promotes the “Tiaki Promise” - the island’s effort to commit to act as a guardian. The protection and preservation of our home has also been included in key trend stories. Tiaki means to care for people, place and culture and the incorporation of the use of the island’s indigenous language in teaching that all have a responsibility to take care of the island - now and for future generations.

Aruba Tourism Authority

Key Strategic Shifts

We envision six strategic shifts that outline our aspirations for the visitor economy by 2035. These shifts offer valuable insights into the transformative potential of both the sector and the A.T.A. as a Destination Marketing and Management Organization, guiding us in establishing a strong strategic direction for the next five years.

A Change in Perspective

Moving from a Traditional Tourism Industry, towards a Responsible & Sustainable Visitor Economy

We turned the question around:”

From
“What can Aruba do for its visitors?”

To
“What can Aruba do for its guests
and what can our guests do for Aruba?”

STRATEGIC SHIFT	MOVING FROM	MOVING TO
Integrated Destination Management Approach to managing the destination	Focus and investments in destination marketing over destination development: • Focus on 'what can Aruba do for its visitors' with measurement of visitor quality (economic), resident sentiment	Balanced focus, coordination and investments in destination management: • Balanced focus: 'what can Aruba do for its guests and what can our guests do for Aruba with measurement of resident & visitor satisfaction, and impact (economic, environment, social) • Enhanced stakeholder engagement (strategic partnerships) for greater inclusiveness in destination management planning, decision-making, and implementation
Regenerative Tourism Model Approach to tourism, growth and its impact on our destination	Sustainable Tourism: maintaining and preserving resources for future generations - minimize negative impacts of tourism on environment, society, and economy while maximizing positive benefits.	• Regenerative Tourism: focus beyond sustainability which seeks to actively improve and rejuvenate destination (leave better behind than found) • Enhanced focus on conservation of culture, heritage and natural assets of Aruba, and integration of residents and communities in the tourism experience
High Value Visitors Approach aimed at maximizing value and contribution by visitors	Focus on Growth Strategy • Target how much, where and when visitors spend	Focus on a value-driven strategy: • Enhance the quality of our visitor economy, thereby increasing the share of total high value visitors • Appeal to the responsible and mindful guests who will contribute to our economy and respect our natural environment, culture and society. • Educate residents and guests on the desired sustainable behavior through messaging, product offering and ways to reduce footprint.
Protection of Destination Brand Changing role of Marketing and Communication	Promotion of destination to drive demand: visitation campaign	Promotion of destination to drive demand and change behaviour. Visitation plus education campaign,
Segmentation Approach to segmenting and targeting	Targeting approach based on geographics, demographics, and segments: • Segments grouped by similarities in vacation requirements • Diversified market portfolio • Attract high-value visitor within niche framework	Targeting approach based on geographics, demographics, and segments: • Segments grouped by similarities in vacation requirements • Diversified market portfolio • Further align segments with our niches, focusing on eco-conscious, culinary, weddings, and wellness.
The Way We Work How we work internally as DMMO	• Predominantly outward focused, performance driven organization • Functional organizational structure, high volume of projects	• People centric and purpose driven organization which is exemplary in, ethical, socially and environmentally responsible conduct, through role clarity, empowerment, collaboration and ESG commitment • Organizational structure enabling improved alignment between destination management and marketing and project-based way of working

MASHA DANKI

Thank You

For any questions related to the report and/or additional information requests, please contact

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Or

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Aruba Tourism Authority