



APRIL 2025

Monthly Report

# SNAPSHOT YTD APR 2025/2024



HOW MANY  
ARRIVALS?

518,840

3.0%



HOW MANY  
CRUISE TOURISM?

423,852

-8.95%

Compared to 2024



HOW LONG  
DID THEY STAY?

3,614,469

0.3%



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

Avg. 4,030.9 min

16%

YTD Q3 2023: 3,470.1

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

## WHERE DID THEY STAY?



783,288

NIGHTS

21.7%

% Share

ALL INCLUSIVE



445,192

NIGHTS

12.3%

% Share

TIMESHARE



955,013

NIGHTS

26.4%

% Share

OTHERS



1,430,976

NIGHTS

28.1%

% Share





# ARRIVALS YTD APRIL 2025/2024

518,840  
ARRIVALS

3.0%  
GROWTH

|                 | 2024           |               | Growth        | 2025           | % Growth     | Marketshare 2024 | Marketshare 2025 |
|-----------------|----------------|---------------|---------------|----------------|--------------|------------------|------------------|
| USA             | 381,549        |               | 2,471         | 384,020        | 0.6%         | 75.7%            | 74.0%            |
| Canada          | 33,428         |               | 864           | 34,292         | 2.6%         | 6.6%             | 6.6%             |
| <b>NA</b>       | <b>414,977</b> |               | <b>3,335</b>  | <b>418,312</b> | <b>0.8%</b>  | <b>82.3%</b>     | <b>80.6%</b>     |
| Venezuela       | 1,038          |               | 4             | 1,042          | 0.4%         | 0.2%             | 0.2%             |
| Colombia        | 18,140         | -1,039        |               | 17,101         | -5.7%        | 3.6%             | 3.3%             |
| Brazil          | 5,148          |               | 5,143         | 10,291         | 99.9%        | 1.0%             | 2.0%             |
| Argentina       | 8,944          |               | 7,150         | 16,094         | 79.9%        | 1.8%             | 3.1%             |
| Chile           | 4,822          | -177          |               | 4,645          | -3.7%        | 1.0%             | 0.9%             |
| Ecuador         | 3,570          | -129          |               | 3,441          | -3.6%        | 0.7%             | 0.7%             |
| Peru            | 6,024          |               | 834           | 6,858          | 13.8%        | 1.2%             | 1.3%             |
| Paraguay        | 343            |               | 171           | 514            | 49.9%        | 0.1%             | 0.1%             |
| Uruguay         | 785            |               | 483           | 1,268          | 61.5%        | 0.2%             | 0.2%             |
| Mexico          | 1,062          | -198          |               | 864            | -18.6%       | 0.2%             | 0.2%             |
| Others          | 4,314          |               | 424           | 4,738          | 9.8%         | 0.9%             | 0.9%             |
| <b>SA</b>       | <b>54,190</b>  |               | <b>12,666</b> | <b>66,856</b>  | <b>23.4%</b> | <b>10.8%</b>     | <b>12.9%</b>     |
| Netherlands     | 12,828         | -439          |               | 12,389         | -3.4%        | 2.5%             | 2.4%             |
| UK              | 2,588          | -829          |               | 1,759          | -32.0%       | 0.5%             | 0.3%             |
| Germany         | 1,564          |               | 45            | 1,609          | 2.9%         | 0.3%             | 0.3%             |
| Italy           | 1,091          |               | 74            | 1,165          | 6.8%         | 0.2%             | 0.2%             |
| Sweden          | 398            | -30           |               | 368            | -7.5%        | 0.1%             | 0.1%             |
| Belgium         | 655            | -10           |               | 645            | -1.5%        | 0.1%             | 0.1%             |
| Austria         | 246            | -15           |               | 231            | -6.1%        | 0.0%             | 0.0%             |
| Switzerland     | 741            | -131          |               | 610            | -17.7%       | 0.1%             | 0.1%             |
| Others          | 3,594          |               | 302           | 3,896          | 8.4%         | 0.7%             | 0.8%             |
| <b>Europe</b>   | <b>23,705</b>  | <b>-1,033</b> |               | <b>22,672</b>  | <b>-4.4%</b> | <b>4.7%</b>      | <b>4.4%</b>      |
| <b>ROW</b>      | <b>11,066</b>  | <b>-66</b>    |               | <b>11,000</b>  | <b>-0.6%</b> | <b>2.2%</b>      | <b>2.1%</b>      |
| <b>Total</b>    | <b>503,938</b> |               | <b>14,902</b> | <b>518,840</b> | <b>3.0%</b>  |                  |                  |
| <b>W/O Ven.</b> | <b>502,900</b> |               | <b>14,898</b> | <b>517,798</b> | <b>3.0%</b>  |                  |                  |

Note: The 2024 figures have been adjusted to reflect a recent correction and may no longer align with the numbers previously published.



# ARRIVALS USA

## YTD APRIL 2025/2024

**384,020**  
ARRIVALS

**0.6%**  
GROWTH

|                | 2024           | Growth       | 2025           | % Growth    | Marketshare 2024 | Marketshare 2025 |
|----------------|----------------|--------------|----------------|-------------|------------------|------------------|
| New York       | 76,642         | -4,092       | 72,550         | -5.3%       | 20.1%            | 18.9%            |
| Massachusetts  | 53,880         | 176          | 54,056         | 0.3%        | 14.1%            | 14.1%            |
| New Jersey     | 43,912         | -3,127       | 40,785         | -7.1%       | 11.5%            | 10.6%            |
| Pennsylvania   | 21,947         | -860         | 21,087         | -3.9%       | 5.8%             | 5.5%             |
| Illinois       | 9,681          | 631          | 10,312         | 6.5%        | 2.5%             | 2.7%             |
| Connecticut    | 15,339         | -696         | 14,643         | -4.5%       | 4.0%             | 3.8%             |
| Florida        | 17,872         | -1,562       | 16,310         | -8.7%       | 4.7%             | 4.2%             |
| Ohio           | 11,410         | -155         | 11,255         | -1.4%       | 3.0%             | 2.9%             |
| Maryland       | 10,355         | -568         | 9,787          | -5.5%       | 2.7%             | 2.5%             |
| Michigan       | 8,797          | -12          | 8,785          | -0.1%       | 2.3%             | 2.3%             |
| Virginia       | 9,641          | 343          | 9,984          | 3.6%        | 2.5%             | 2.6%             |
| Georgia        | 6,941          | 376          | 7,317          | 5.4%        | 1.8%             | 1.9%             |
| North Carolina | 9,779          | -232         | 9,547          | -2.4%       | 2.6%             | 2.5%             |
| Texas          | 7,835          | 2,582        | 10,417         | 33.0%       | 2.1%             | 2.7%             |
| California     | 5,687          | -50          | 5,637          | -0.9%       | 1.5%             | 1.5%             |
| Other          | 71,831         | 9,717        | 81,548         | 13.5%       | 18.8%            | 21.2%            |
| <b>Total</b>   | <b>381,549</b> | <b>2,471</b> | <b>384,020</b> | <b>0.6%</b> |                  |                  |

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# NIGHTS YTD APRIL 2025/2024

3,614,469  
ARRIVALS

0.3%  
GROWTH

|               | 2024             | Growth         | 2025             | % Growth     | ALOS 2024   | ALOS 2025   |
|---------------|------------------|----------------|------------------|--------------|-------------|-------------|
| USA           | 2,565,974        | -48,213        | 2,517,761        | -1.9%        | 6.7         | 6.6         |
| Canada        | 321,907          | -3,644         | 318,263          | -1.1%        | 9.6         | 9.3         |
| <b>NA</b>     | <b>2,887,881</b> | <b>-51,857</b> | <b>2,836,024</b> | <b>-1.8%</b> | <b>7.0</b>  | <b>6.8</b>  |
| Venezuela     | 10,972           | -650           | 10,322           | -5.9%        | 10.6        | 9.9         |
| Colombia      | 117,947          | -12,556        | 105,391          | -10.6%       | 6.5         | 6.2         |
| Brazil        | 30,303           | 31,207         | 61,510           | 103.0%       | 5.9         | 6.0         |
| Argentina     | 80,921           | 59,526         | 140,447          | 73.6%        | 9.0         | 8.7         |
| Chile         | 36,788           | -2,066         | 34,722           | -5.6%        | 7.6         | 7.5         |
| Ecuador       | 15,503           | -373           | 15,130           | -2.4%        | 4.3         | 4.4         |
| Peru          | 33,595           | 3,600          | 37,195           | 10.7%        | 5.6         | 5.4         |
| Paraguay      | 2,185            | 1,155          | 3,340            | 52.9%        | 6.4         | 6.5         |
| Uruguay       | 6,020            | 3,486          | 9,506            | 57.9%        | 7.7         | 7.5         |
| Mexico        | 10,901           | -4,499         | 6,402            | -41.3%       | 10.3        | 7.4         |
| Others        | 29,238           | -444           | 28,794           | -1.5%        | 6.8         | 6.1         |
| <b>SA</b>     | <b>374,373</b>   | <b>78,386</b>  | <b>452,759</b>   | <b>20.9%</b> | <b>6.9</b>  | <b>6.8</b>  |
| Netherlands   | 182,134          | -13,663        | 168,471          | -7.5%        | 14.2        | 13.6        |
| UK            | 22,849           | -6,645         | 16,204           | -29.1%       | 8.8         | 9.2         |
| Germany       | 15,549           | -565           | 14,984           | -3.6%        | 9.9         | 9.3         |
| Italy         | 9,458            | 629            | 10,087           | 6.7%         | 8.7         | 8.7         |
| Sweden        | 4,031            | -9             | 4,022            | -0.2%        | 10.1        | 10.9        |
| Belgium       | 9,185            | 54             | 9,239            | 0.6%         | 14.0        | 14.3        |
| Austria       | 2,588            | -702           | 1,886            | -27.1%       | 10.5        | 8.2         |
| Switzerland   | 6,524            | -1,198         | 5,326            | -18.4%       | 8.8         | 8.7         |
| Others        | 30,507           | 3,307          | 33,814           | 10.8%        | 8.5         | 8.7         |
| <b>Europe</b> | <b>282,825</b>   | <b>-18,792</b> | <b>264,033</b>   | <b>-6.6%</b> | <b>11.9</b> | <b>11.6</b> |
| <b>ROW</b>    | <b>58,378</b>    | <b>3,275</b>   | <b>61,653</b>    | <b>5.6%</b>  | <b>5.3</b>  | <b>5.6</b>  |
| <b>Total</b>  | <b>3,603,457</b> | <b>11,012</b>  | <b>3,614,469</b> | <b>0.3%</b>  | <b>7.2</b>  | <b>7.0</b>  |

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# ACCOMMODATIONS

## YTD APRIL 2025/2024














518,840  
ARRIVALS

3.0%  
GROWTH

### ARRIVALS BY ACCOMMODATION

|               | 2024           |        | Growth   | 2025           | % Growth    | Marketshare 2024  | Marketshare 2025  |
|---------------|----------------|--------|--|----------------|-------------|---|---|
| EP            | 137,661        |        |  3,624  | 141,285        | 2.6%        |  27.3% |  27.2% |
| All Inclusive | 76,146         | -3,211 |         | 72,935         | -4.2%       |  15.1% |  14.1% |
| Timeshare     | 119,531        | -2,176 |         | 117,355        | -1.8%       |  23.7% |  22.6% |
| Others        | 170,600        |        |  16,665 | 187,265        | 9.8%        |  33.9% |  36.1% |
| <b>Total</b>  | <b>503,938</b> |        |  14,902 | <b>518,840</b> | <b>3.0%</b> |   |   |

### NIGHTS BY ACCOMMODATION

|               | 2024             |         | Growth   | 2025             | % Growth    | Marketshare 2024  | Marketshare 2025  |
|---------------|------------------|---------|--|------------------|-------------|---|---|
| EP            | 781,765          |         |  1,523    | 783,288          | 0.2%        |  21.7%   |  21.7%   |
| All Inclusive | 472,580          | -27,388 |         | 445,192          | -5.8%       |  13.1% |  12.3% |
| Timeshare     | 1,000,436        | -45,423 |         | 955,013          | -4.5%       |  27.8% |  26.4% |
| Others        | 1,348,676        |         |  82,300 | 1,430,976        | 6.1%        |  37.4% |  39.6% |
| <b>Total</b>  | <b>3,603,457</b> |         |  11,012 | <b>3,614,469</b> | <b>0.3%</b> |   |   |

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

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# VISITORS BY AGE YTD APRIL 2025/2024

**518,840**  
ARRIVALS

**3.0%**  
GROWTH

|              | 2024           |        | Growth | 2025           | % Growth    |
|--------------|----------------|--------|--------|----------------|-------------|
| 0 - 11       | 36,800         |        | 1,509  | 38,309         | 4.1%        |
| 12-19        | 34,168         |        | 2,779  | 36,947         | 8.1%        |
| 20 - 29      | 55,339         | -115   |        | 55,224         | -0.2%       |
| 30 - 39      | 77,042         | -1,105 |        | 75,937         | -1.4%       |
| 40 - 49      | 81,328         |        | 2,423  | 83,751         | 3.0%        |
| 50 - 59      | 92,661         |        | 1,808  | 94,469         | 2.0%        |
| 60 - 69      | 82,765         |        | 4,260  | 87,025         | 5.1%        |
| 70 +         | 43,814         |        | 3,354  | 47,168         | 7.7%        |
| Not Stated   | 21             | -11    |        | 10             | -52.4%      |
| <b>Total</b> | <b>503,938</b> |        | 14,902 | <b>518,840</b> | <b>3.0%</b> |

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# GENERATIONS

## YTD APRIL 2025/2024

518,840  
VISITORS

3.0%  
GROWTH

|                    | 2024           |        | Growth  | 2025           | % Growth    | Marketshare 2024  | Marketshare 2025  |
|--------------------|----------------|--------|---|----------------|-------------|---|---|
| Gen A              | 28,928         |        |  1,182   | 30,110         | 4.1%        |  5.7%  |  5.8%  |
| Gen Z              | 71,210         |        |  3,794   | 75,004         | 5.3%        |  14.1% |  14.5% |
| Millennials        | 120,248        | -1,638 |          | 118,610        | -1.4%       |  23.9% |  22.9% |
| Gen X              | 129,521        |        |  3,164   | 132,685        | 2.4%        |  25.7% |  25.6% |
| Baby Boomers       | 138,270        |        |  6,691   | 144,961        | 4.8%        |  27.4% |  27.9% |
| Silent Generations | 15,740         |        |  1,720   | 17,460         | 10.9%       |  3.1%  |  3.4%  |
| Age not specified  | 21             | -11    |   | 10             | -52.4%      |  0.0%  |  0.0%  |
| <b>Total</b>       | <b>503,938</b> |        |  14,902 | <b>518,840</b> | <b>3.0%</b> |   |   |

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# CARRIERS YTD APRIL 2025/2024

518,840  
VISITORS

3.0%  
GROWTH

|                       | 2024           | Growth        | 2025           | % Growth    | Marketshare 2024 | Marketshare 2025 |
|-----------------------|----------------|---------------|----------------|-------------|------------------|------------------|
| JETBLUE               | 118,323        | -9,312        | 109,011        | -7.9%       | 23.5%            | 21.0%            |
| AMERICAN AIRLINES     | 93,162         | -2,302        | 90,860         | -2.5%       | 18.5%            | 17.5%            |
| DELTA AIRLINES        | 72,303         | 2,282         | 74,585         | 3.2%        | 14.3%            | 14.4%            |
| UNITED AIRLINES       | 61,221         | 7,098         | 68,319         | 11.6%       | 12.1%            | 13.2%            |
| SOUTHWEST AIRLINES    | 22,423         | -1,062        | 21,361         | -4.7%       | 4.4%             | 4.1%             |
| COPA AIRLINES         | 20,302         | 1,021         | 21,323         | 5.0%        | 4.0%             | 4.1%             |
| AVIANCA               | 18,386         | 1,219         | 19,605         | 6.6%        | 3.6%             | 3.8%             |
| WESTJET AIRLINES      | 13,303         | 3,727         | 17,030         | 28.0%       | 2.6%             | 3.3%             |
| KLM ROYAL DUTCH       | 10,149         | 2,347         | 12,496         | 23.1%       | 2.0%             | 2.4%             |
| LATAM AIRLINES / PERU | 6,468          | 5,626         | 12,094         | 87.0%       | 1.3%             | 2.3%             |
| AIR CANADA            | 9,885          | 396           | 10,281         | 4.0%        | 2.0%             | 2.0%             |
| WINGO                 | 8,995          | -1,120        | 7,875          | -12.5%      | 1.8%             | 1.5%             |
| SPIRIT AIRLINES       | 13,146         | -5,714        | 7,432          | -43.5%      | 2.6%             | 1.4%             |
| CHARTER/NON-SCHEDULED | 1,139          | 5,775         | 6,914          | 507.0%      | 0.2%             | 1.3%             |
| DIVI DIVI AIR         | 6,000          | 647           | 6,647          | 10.8%       | 1.2%             | 1.3%             |
| GOL                   | 0              | 4,947         | 4,947          | -           | 0.0%             | 1.0%             |
| SUNWING AIRLINES      | 6,190          | -1,692        | 4,498          | -27.3%      | 1.2%             | 0.9%             |
| PRIVATE               | 3,776          | 692           | 4,468          | 18.3%       | 0.7%             | 0.9%             |
| SUN COUNTRY AIRLINES  | 2,888          | 1,475         | 4,363          | 51.1%       | 0.6%             | 0.8%             |
| EZ AIR                | 3,541          | 656           | 4,197          | 18.5%       | 0.7%             | 0.8%             |
| TUI FLY NL            | 4,830          | -1,389        | 3,441          | -28.8%      | 1.0%             | 0.7%             |
| WINAIR                | 1,876          | 1,546         | 3,422          | 82.4%       | 0.4%             | 0.7%             |
| SURINAM AIRWAYS       | 1,806          | 157           | 1,963          | 8.7%        | 0.4%             | 0.4%             |
| BRITISH AIRWAYS       | 1,824          | -1,112        | 712            | -61.0%      | 0.4%             | 0.1%             |
| ARAJET                | 696            | -71           | 625            | -10.2%      | 0.1%             | 0.1%             |
| AIR CENTURY           | 277            | -60           | 217            | -21.7%      | 0.1%             | 0.0%             |
| Others                | 1,029          | -875          | 154            | -85.0%      | 0.2%             | 0.0%             |
| <b>Total</b>          | <b>503,938</b> | <b>14,902</b> | <b>518,840</b> | <b>3.0%</b> |                  |                  |

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# CARRIERS YTD APRIL 2025/2024

518,840  
VISITORS

3.0%  
GROWTH

| City                                  | APO Code | 2025    | Mkt Share | 2024    | Mkt Share | 25 vs 24 |
|---------------------------------------|----------|---------|-----------|---------|-----------|----------|
| Boston                                | BOS      | 76,355  | 14.7%     | 73,305  | 14.5%     | 4.2%     |
| JFK NY                                | JFK      | 70,716  | 13.6%     | 69,100  | 13.7%     | 2.3%     |
| Newark                                | EWB      | 50,830  | 9.8%      | 56,941  | 11.3%     | -10.7%   |
| Miami                                 | MIA      | 33,353  | 6.4%      | 34,145  | 6.8%      | -2.3%    |
| Toronto                               | YYZ      | 31,810  | 6.1%      | 29,411  | 5.8%      | 8.2%     |
| Atlanta                               | ATL      | 31,781  | 6.1%      | 32,151  | 6.4%      | -1.2%    |
| Charlotte                             | CLT      | 30,513  | 5.9%      | 32,422  | 6.4%      | -5.9%    |
| Bogota                                | BOG      | 22,416  | 4.3%      | 21,672  | 4.3%      | 3.4%     |
| Philadelphia                          | PHL      | 22,212  | 4.3%      | 21,578  | 4.3%      | 2.9%     |
| Panama City                           | PTY      | 21,372  | 4.1%      | 20,370  | 4.0%      | 4.9%     |
| Orlando                               | MCO      | 16,484  | 3.2%      | 17,008  | 3.4%      | -3.1%    |
| Amsterdam                             | AMS      | 15,941  | 3.1%      | 14,984  | 3.0%      | 6.4%     |
| G.Bush DC                             | IAD      | 13,097  | 2.5%      | 11,711  | 2.3%      | 11.8%    |
| Lima, Peru                            | LIM      | 12,094  | 2.3%      | 6,468   | 1.3%      | 87.0%    |
| Curacao                               | CUR      | 11,999  | 2.3%      | 10,895  | 2.2%      | 10.1%    |
| Chicago                               | ORD      | 10,054  | 1.9%      | 9,012   | 1.8%      | 11.6%    |
| Minneapolis St. Paul Inter Airp       | MSP      | 8,857   | 1.7%      | 2,544   | 0.5%      | 248.2%   |
| Fort Lauderdale                       | FLL      | 7,599   | 1.5%      | 13,464  | 2.7%      | -43.6%   |
| Sao Paolo                             | GRU      | 4,947   | 1.0%      | 9       | 0.0%      | 54866.7% |
| Baltimore                             | BWI      | 4,895   | 0.9%      | 5,431   | 1.1%      | -9.9%    |
| Medellin                              | MDE      | 4,436   | 0.9%      | 3,770   | 0.7%      | 17.7%    |
| Sint Maarten                          | SXM      | 3430    | 0.7%      | 1,873   | 0.4%      | 83.1%    |
| Houston International                 | IAH      | 2,753   | 0.5%      | 1,860   | 0.4%      | 48.0%    |
| Dallas Fort Worth Int Airport         | DFW      | 1,865   | 0.4%      | 1,656   | 0.3%      | 12.6%    |
| Johan A. Pengel Int Airport, Suriname | PBM      | 1,863   | 0.4%      | 1,691   | 0.3%      | 10.2%    |
|                                       | Others   | 7,168   | 1.4%      | 10,467  | 2.1%      | -31.5%   |
| Total                                 |          | 518,840 | 100.0%    | 503,938 | 100.0%    | 3.0%     |

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# CRUISE COMPARISON



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



# CRUISE YTD APRIL 2025 / 2024



2024



CRUISE PAX  
**465,521**

CRUISE CALLS  
**173**



2025



CRUISE PAX  
**423,852**

-8.95%

CRUISE CALLS  
**170**

-1.73%

ABSOLUTE GROWTH PAX YTD APRIL

**-41,669**  
-8.95%

ABSOLUTE GROWTH CALLS YTD APRIL

**-3**  
-1.73%



# APRIL RESULT 2025

## NORTH AMERICA



100,375

79.4%

## SOUTH AMERICA



16,951

13.4%

## EUROPE



6,066

4.8%

## OTHERS



3,027

2.4%

## TOTAL ARRIVALS

126,419

100%





# ARRIVALS

## APRIL 2025/2024

126,419  
ARRIVALS

4.3%  
GROWTH

|             | 2024    |      | Growth | 2025    | % Growth | Marketshare 2024 | Marketshare 2025 |
|-------------|---------|------|--------|---------|----------|------------------|------------------|
| USA         | 94,183  |      | 329    | 94,512  | 0.3%     | 77.7%            | 74.8%            |
| Canada      | 5,957   | -94  |        | 5,863   | -1.6%    | 4.9%             | 4.6%             |
| NA          | 100,140 |      | 235    | 100,375 | 0.2%     | 82.6%            | 79.4%            |
| Venezuela   | 192     |      | 155    | 347     | 80.7%    | 0.2%             | 0.3%             |
| Colombia    | 3,753   |      | 912    | 4,665   | 24.3%    | 3.1%             | 3.7%             |
| Brazil      | 1,276   |      | 642    | 1,918   | 50.3%    | 1.1%             | 1.5%             |
| Argentina   | 1,882   |      | 1,756  | 3,638   | 93.3%    | 1.6%             | 2.9%             |
| Chile       | 1,200   | -409 |        | 791     | -34.1%   | 1.0%             | 0.6%             |
| Ecuador     | 1,240   | -41  |        | 1,199   | -3.3%    | 1.0%             | 0.9%             |
| Peru        | 1,359   |      | 276    | 1,635   | 20.3%    | 1.1%             | 1.3%             |
| Paraguay    | 70      |      | 99     | 169     | 141.4%   | 0.1%             | 0.1%             |
| Uruguay     | 271     |      | 189    | 460     | 69.7%    | 0.2%             | 0.4%             |
| Mexico      | 366     | -92  |        | 274     | -25.1%   | 0.3%             | 0.2%             |
| Others      | 1,096   |      | 759    | 1,855   | 69.3%    | 0.9%             | 1.5%             |
| SA          | 12,705  |      | 4,246  | 16,951  | 33.4%    | 10.5%            | 13.4%            |
| Netherlands | 3,303   |      | 20     | 3,323   | 0.6%     | 2.7%             | 2.6%             |
| UK          | 620     | -220 |        | 400     | -35.5%   | 0.5%             | 0.3%             |
| Germany     | 314     |      | 167    | 481     | 53.2%    | 0.3%             | 0.4%             |
| Italy       | 211     |      | 107    | 318     | 50.7%    | 0.2%             | 0.3%             |
| Sweden      | 81      | -32  |        | 49      | -39.5%   | 0.1%             | 0.0%             |
| Belgium     | 158     |      | 72     | 230     | 45.6%    | 0.1%             | 0.2%             |
| Austria     | 36      |      | 3      | 39      | 8.3%     | 0.0%             | 0.0%             |
| Switzerland | 173     |      | 28     | 201     | 16.2%    | 0.1%             | 0.2%             |
| Others      | 677     |      | 348    | 1,025   | 51.4%    | 0.6%             | 0.8%             |
| Europe      | 5,573   |      | 493    | 6,066   | 8.8%     | 4.6%             | 4.8%             |
| ROW         | 2,797   |      | 230    | 3,027   | 8.2%     | 2.3%             | 2.4%             |
| Total       | 121,215 |      | 5,204  | 126,419 | 4.3%     |                  |                  |
| W/O Ven.    | 121,023 |      | 5,049  | 126,072 | 4.2%     |                  |                  |

Note: The 2024 figures have been adjusted to reflect a recent correction and may no longer align with the numbers previously published.



# ARRIVALS USA

## APRIL 2025/2024

94,512  
ARRIVALS

0.3%  
GROWTH

|                | 2024          | Growth     | 2025          | % Growth    | Marketshare 2024 | Marketshare 2025 |
|----------------|---------------|------------|---------------|-------------|------------------|------------------|
| New York       | 18,481        | -1,709     | 16,772        | -9.2%       | 19.6%            | 17.7%            |
| Massachusetts  | 14,749        | -980       | 13,769        | -6.6%       | 15.7%            | 14.6%            |
| New Jersey     | 11,785        | 1,331      | 13,116        | 11.3%       | 12.5%            | 13.9%            |
| Pennsylvania   | 4,500         | 678        | 5,178         | 15.1%       | 4.8%             | 5.5%             |
| Illinois       | 1,678         | -137       | 1,541         | -8.2%       | 1.8%             | 1.6%             |
| Connecticut    | 6,061         | -1,261     | 4,800         | -20.8%      | 6.4%             | 5.1%             |
| Florida        | 4,477         | -125       | 4,352         | -2.8%       | 4.8%             | 4.6%             |
| Ohio           | 2,000         | 151        | 2,151         | 7.6%        | 2.1%             | 2.3%             |
| Maryland       | 2,470         | 375        | 2,845         | 15.2%       | 2.6%             | 3.0%             |
| Michigan       | 1,374         | 166        | 1,540         | 12.1%       | 1.5%             | 1.6%             |
| Virginia       | 2,376         | 247        | 2,623         | 10.4%       | 2.5%             | 2.8%             |
| Georgia        | 2,047         | 268        | 2,315         | 13.1%       | 2.2%             | 2.4%             |
| North Carolina | 2,356         | 236        | 2,592         | 10.0%       | 2.5%             | 2.7%             |
| Texas          | 2,058         | 111        | 2,169         | 5.4%        | 2.2%             | 2.3%             |
| California     | 1,602         | -92        | 1,510         | -5.7%       | 1.7%             | 1.6%             |
| Other          | 16,169        | 1,070      | 17,239        | 6.6%        | 17.2%            | 18.2%            |
| <b>Total</b>   | <b>94,183</b> | <b>329</b> | <b>94,512</b> | <b>0.3%</b> |                  |                  |

Note: The 2024 figures have been adjusted to reflect a recent correction and may no longer align with the numbers previously published.



# NIGHTS

## APRIL 2025/2024

804,986  
NIGHTS

2.1%  
GROWTH

|             | 2024    |         | Growth             | 2025    | % Growth | ALOS 2024        | ALOS 2025        |
|-------------|---------|---------|--------------------|---------|----------|------------------|------------------|
| USA         | 582,771 | -8,906  | <div></div>        | 573,865 | -1.5%    | <div></div> 6.2  | <div></div> 6.1  |
| Canada      | 46,743  | -1,732  | <div></div>        | 45,011  | -3.7%    | <div></div> 7.8  | <div></div> 7.7  |
| NA          | 629,514 | -10,638 | <div></div>        | 618,876 | -1.7%    | <div></div> 6.3  | <div></div> 6.2  |
| Venezuela   | 2,133   |         | <div></div> 702    | 2,835   | 32.9%    | <div></div> 11.1 | <div></div> 8.2  |
| Colombia    | 23,609  |         | <div></div> 4,394  | 28,003  | 18.6%    | <div></div> 6.3  | <div></div> 6.0  |
| Brazil      | 7,427   |         | <div></div> 3,710  | 11,137  | 50.0%    | <div></div> 5.8  | <div></div> 5.8  |
| Argentina   | 16,334  |         | <div></div> 13,783 | 30,117  | 84.4%    | <div></div> 8.7  | <div></div> 8.3  |
| Chile       | 9,043   | -3,397  | <div></div>        | 5,646   | -37.6%   | <div></div> 7.5  | <div></div> 7.1  |
| Ecuador     | 5,056   |         | <div></div> 239    | 5,295   | 4.7%     | <div></div> 4.1  | <div></div> 4.4  |
| Peru        | 6,860   |         | <div></div> 1,446  | 8,306   | 21.1%    | <div></div> 5.0  | <div></div> 5.1  |
| Paraguay    | 416     |         | <div></div> 646    | 1,062   | 155.3%   | <div></div> 5.9  | <div></div> 6.3  |
| Uruguay     | 1,961   |         | <div></div> 1,404  | 3,365   | 71.6%    | <div></div> 7.2  | <div></div> 7.3  |
| Mexico      | 3,337   | -1,526  | <div></div>        | 1,811   | -45.7%   | <div></div> 9.1  | <div></div> 6.6  |
| Others      | 9,139   |         | <div></div> 2,441  | 11,580  | 26.7%    | <div></div> 8.3  | <div></div> 6.2  |
| SA          | 85,315  |         | <div></div> 23,842 | 109,157 | 27.9%    | <div></div> 6.7  | <div></div> 6.4  |
| Netherlands | 40,812  | -1,180  | <div></div>        | 39,632  | -2.9%    | <div></div> 12.4 | <div></div> 11.9 |
| UK          | 4,796   | -1,173  | <div></div>        | 3,623   | -24.5%   | <div></div> 7.7  | <div></div> 9.1  |
| Germany     | 2,663   |         | <div></div> 1,484  | 4,147   | 55.7%    | <div></div> 8.5  | <div></div> 8.6  |
| Italy       | 1,836   |         | <div></div> 294    | 2,130   | 16.0%    | <div></div> 8.7  | <div></div> 6.7  |
| Sweden      | 563     | -126    | <div></div>        | 437     | -22.4%   | <div></div> 7.0  | <div></div> 8.9  |
| Belgium     | 1,855   |         | <div></div> 560    | 2,415   | 30.2%    | <div></div> 11.7 | <div></div> 10.5 |
| Austria     | 297     |         | <div></div> 71     | 368     | 23.9%    | <div></div> 8.3  | <div></div> 9.4  |
| Switzerland | 1,623   | -69     | <div></div>        | 1,554   | -4.3%    | <div></div> 9.4  | <div></div> 7.7  |
| Others      | 5,255   |         | <div></div> 2,043  | 7,298   | 38.9%    | <div></div> 7.8  | <div></div> 7.1  |
| Europe      | 59,700  |         | <div></div> 1,904  | 61,604  | 3.2%     | <div></div> 10.7 | <div></div> 10.2 |
| ROW         | 13,772  |         | <div></div> 1,577  | 15,349  | 11.5%    | <div></div> 4.9  | <div></div> 5.1  |
| Total       | 788,301 |         | <div></div> 16,685 | 804,986 | 2.1%     | <div></div> 6.5  | <div></div> 6.4  |

Note: The 2024 figures have been adjusted to reflect a recent correction and may no longer align with the numbers previously published.


















# ACCOMMODATIONS

## MAY 2023/2022














126,419  
ARRIVALS

4.3%  
GROWTH

### ARRIVALS BY ACCOMMODATION

|               | 2024           |        | Growth  | 2025           | % Growth    | Marketshare 2024  | Marketshare 2025  |
|---------------|----------------|--------|---|----------------|-------------|---|---|
| EP            | 33,327         |        |  2,012 | 35,339         | 6.0%        |  27.5% |  28.0% |
| All Inclusive | 20,135         | -1,130 |        | 19,005         | -5.6%       |  16.6% |  15.0% |
| Timeshare     | 31,383         | -724   |        | 30,659         | -2.3%       |  25.9% |  24.3% |
| Others        | 36,370         |        |  5,046 | 41,416         | 13.9%       |  30.0% |  32.8% |
| <b>Total</b>  | <b>121,215</b> |        |  5,204 | <b>126,419</b> | <b>4.3%</b> |   |   |

### NIGHTS BY ACCOMMODATION

|               | 2024           |        | Growth   | 2025           | % Growth    | Marketshare 2024  | Marketshare 2025  |
|---------------|----------------|--------|--|----------------|-------------|---|---|
| EP            | 179,999        |        |  8,138    | 188,137        | 4.5%        |  22.8%   |  23.4%   |
| All Inclusive | 119,386        | -8,625 |          | 110,761        | -7.2%       |  15.1%  |  13.8%  |
| Timeshare     | 228,762        | -9,144 |         | 219,618        | -4.0%       |  29.0% |  27.3% |
| Others        | 260,154        |        |  26,316 | 286,470        | 10.1%       |  33.0% |  35.6% |
| <b>Total</b>  | <b>788,301</b> |        |  16,685 | <b>804,986</b> | <b>2.1%</b> |   |   |

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

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# VISITORS BY AGE

## APRIL 2025/2024

126,419  
ARRIVALS

4.3%  
GROWTH

|              | 2024           |        | Growth | 2025           | % Growth    |
|--------------|----------------|--------|--------|----------------|-------------|
| 0 - 11       | 9,733          |        | 2,134  | 11,867         | 21.9%       |
| 12-19        | 7,567          |        | 3,548  | 11,115         | 46.9%       |
| 20 - 29      | 12,275         | -564   |        | 11,711         | -4.6%       |
| 30 - 39      | 20,301         | -1,062 |        | 19,239         | -5.2%       |
| 40 - 49      | 21,090         |        | 2,268  | 23,358         | 10.8%       |
| 50 - 59      | 21,882         |        | 4      | 21,886         | 0.0%        |
| 60 - 69      | 19,124         | -1,158 |        | 17,966         | -6.1%       |
| 70 +         | 9,241          |        | 34     | 9,275          | 0.4%        |
| Not Stated   | 2              |        |        | 2              | 0.0%        |
| <b>Total</b> | <b>121,215</b> |        | 5,204  | <b>126,419</b> | <b>4.3%</b> |

Note: The 2024 figures have been adjusted to reflect a recent correction and may no longer align with the numbers previously published.























# GENERATIONS

## APRIL 2025/2024

**126,419**  
ARRIVALS

**4.3%**  
GROWTH

|                    | 2024           | Growth   | 2025           | % Growth    | Marketshare 2024  | Marketshare 2025  |
|--------------------|----------------|--|----------------|-------------|---|---|
| Gen A              | 7,586          |  1,440  | 9,026          | 19.0%       |  6.3%  |  7.1%  |
| Gen Z              | 15,376         |  4,259  | 19,635         | 27.7%       |  12.7% |  15.5% |
| Millennials        | 31,566         | -1,466  | 30,100         | -4.6%       |  26.0% |  23.8% |
| Gen X              | 32,004         |  2,244  | 34,248         | 7.0%        |  26.4% |  27.1% |
| Baby Boomers       | 31,518         |  | 30,111         | -4.5%       |  26.0% |  23.8% |
| Silent Generations | 3,163          |  134    | 3,297          | 4.2%        |  2.6%  |  2.6%  |
| Age not specified  | 2              |  | 2              | 0.0%        |  0.0%  |  0.0%  |
| <b>Total</b>       | <b>121,215</b> |  5,204  | <b>126,419</b> | <b>4.3%</b> |   |   |

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# CARRIERS

## APRIL 2025/2024

126,419  
ARRIVALS

4.3%  
GROWTH

|                       | 2024           | Growth       | 2025           | % Growth    | Marketshare 2024 | Marketshare 2025 |
|-----------------------|----------------|--------------|----------------|-------------|------------------|------------------|
| JETBLUE               | 32,115         | -12          | 32,103         | 0.0%        | 26.5%            | 25.4%            |
| AMERICAN AIRLINES     | 21,155         | 1,091        | 22,246         | 5.2%        | 17.5%            | 17.6%            |
| DELTA AIRLINES        | 16,950         | -440         | 16,510         | -2.6%       | 14.0%            | 13.1%            |
| UNITED AIRLINES       | 16,684         | -1,196       | 15,488         | -7.2%       | 13.8%            | 12.3%            |
| AVIANCA               | 4,395          | 1,123        | 5,518          | 25.6%       | 3.6%             | 4.4%             |
| SOUTHWEST AIRLINES    | 5,318          | 179          | 5,497          | 3.4%        | 4.4%             | 4.3%             |
| COPA AIRLINES         | 5,259          | -118         | 5,141          | -2.2%       | 4.3%             | 4.1%             |
| WESTJET AIRLINES      | 2,556          | 1,221        | 3,777          | 47.8%       | 2.1%             | 3.0%             |
| LATAM AIRLINES / PERU | 1,342          | 1,743        | 3,085          | 129.9%      | 1.1%             | 2.4%             |
| KLM ROYAL DUTCH       | 2,410          | 641          | 3,051          | 26.6%       | 2.0%             | 2.4%             |
| AIR CANADA            | 1,860          | -157         | 1,703          | -8.4%       | 1.5%             | 1.3%             |
| WINGO                 | 2,006          | -356         | 1,650          | -17.7%      | 1.7%             | 1.3%             |
| SPIRIT AIRLINES       | 2,083          | -435         | 1,648          | -20.9%      | 1.7%             | 1.3%             |
| DIVI DIVI AIR         | 1,245          | 373          | 1,618          | 30.0%       | 1.0%             | 1.3%             |
| PRIVATE               | 415            | 753          | 1,168          | 181.4%      | 0.3%             | 0.9%             |
| EZ AIR                | 726            | 419          | 1,145          | 57.7%       | 0.6%             | 0.9%             |
| TUI FLY NL            | 1,361          | -322         | 1,039          | -23.7%      | 1.1%             | 0.8%             |
| GOL                   | 0              | 1,036        | 1,036          | -           | 0.0%             | 0.8%             |
| WINAIR                | 418            | 430          | 848            | 102.9%      | 0.3%             | 0.7%             |
| SURINAM AIRWAYS       | 488            | 347          | 835            | 71.1%       | 0.4%             | 0.7%             |
| SUNWING AIRLINES      | 972            | -437         | 535            | -45.0%      | 0.8%             | 0.4%             |
| CHARTER/NON-SCHEDULED | 211            | 152          | 363            | 72.0%       | 0.2%             | 0.3%             |
| ARAJET                | 174            | 12           | 186            | 6.9%        | 0.1%             | 0.1%             |
| SUN COUNTRY AIRLINES  | 221            | -81          | 140            | -36.7%      | 0.2%             | 0.1%             |
| AIR CENTURY           | 79             | -25          | 54             | -31.6%      | 0.1%             | 0.0%             |
| SKY HIGH AVIATION     | 78             | -43          | 35             | -55.1%      | 0.1%             | 0.0%             |
| OTHERS                | 694            | -694         | 0              | -100.0%     | 0.6%             | 0.0%             |
| <b>Total</b>          | <b>121,215</b> | <b>5,204</b> | <b>126,419</b> | <b>4.3%</b> |                  |                  |

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# CARRIERS APRIL 2025/2024

126,419  
ARRIVALS

4.3%  
GROWTH

| City                                  | APO Code | April 2025     | Mkt Share     | April 2024     | Mkt Share     | 25 vs 24    |
|---------------------------------------|----------|----------------|---------------|----------------|---------------|-------------|
| Boston                                | BOS      | 21,105         | 16.7%         | 18,298         | 15.1%         | 15.3%       |
| JFK NY                                | JFK      | 16,272         | 12.9%         | 18,408         | 15.2%         | -11.6%      |
| Newark                                | EWR      | 14,888         | 11.8%         | 15,016         | 12.4%         | -0.9%       |
| Miami                                 | MIA      | 7,802          | 6.2%          | 6,981          | 5.8%          | 11.8%       |
| Charlotte                             | CLT      | 7,654          | 6.1%          | 8,082          | 6.7%          | -5.3%       |
| Atlanta                               | ATL      | 7,053          | 5.6%          | 8,280          | 6.8%          | -14.8%      |
| Bogota                                | BOG      | 6,280          | 5.0%          | 4,953          | 4.1%          | 26.8%       |
| Toronto                               | YYZ      | 6,015          | 4.8%          | 5,406          | 4.5%          | 11.3%       |
| Philadelphia                          | PHL      | 5,846          | 4.6%          | 5,045          | 4.2%          | 15.9%       |
| Panama City                           | PTY      | 5,153          | 4.1%          | 5,296          | 4.4%          | -2.7%       |
| Orlando                               | MCO      | 4,342          | 3.4%          | 4,201          | 3.5%          | 3.4%        |
| Amsterdam                             | AMS      | 4,090          | 3.2%          | 3,771          | 3.1%          | 8.5%        |
| Curacao                               | CUR      | 3,304          | 2.6%          | 2,360          | 1.9%          | 40.0%       |
| Lima, Peru                            | LIM      | 3,085          | 2.4%          | 1,342          | 1.1%          | 129.9%      |
| G.Bush DC                             | IAD      | 3,058          | 2.4%          | 4,034          | 3.3%          | -24.2%      |
| Fort Lauderdale                       | FLL      | 1,682          | 1.3%          | 2,158          | 1.8%          | -22.1%      |
| Chicago                               | ORD      | 1,179          | 0.9%          | 1,429          | 1.2%          | -17.5%      |
| Baltimore                             | BWI      | 1,155          | 0.9%          | 1,120          | 0.9%          | 3.1%        |
| Sao Paolo                             | GRU      | 1,036          | 0.8%          | 0              | 0.0%          | -           |
| Medellin                              | MDE      | 908            | 0.7%          | 708            | 0.6%          | 28.2%       |
| Sint Maarten                          | SXM      | 850            | 0.7%          | 421            | 0.3%          | 101.9%      |
| Johan A. Pengel Int Airport, Suriname | PBM      | 835            | 0.7%          | 461            | 0.4%          | 81.1%       |
| Dallas Fort Worth Int Airport         | DFW      | 547            | 0.4%          | 546            | 0.5%          | 0.2%        |
| Minneapolis St. Paul Inter Airp       | MSP      | 458            | 0.4%          | 221            | 0.2%          | 107.2%      |
| LaGuardia Airport, NY                 | LGA      | 443            | 0.4%          | 580            | 0.5%          | -23.6%      |
|                                       | Others   | 1,379          | 1.1%          | 2,098          | 1.7%          | -34.3%      |
| <b>Total</b>                          |          | <b>126,419</b> | <b>100.0%</b> | <b>121,215</b> | <b>100.0%</b> | <b>4.3%</b> |

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# CRUISE COMPARISON



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





## CRUISE APRIL 2025



CRUISE PAX  
**96,060**

2024



CRUISE CALLS  
**30**



CRUISE PAX  
**88,040**

-8.35%

2025



CRUISE CALLS  
**34**

13.3%

ABSOLUTE GROWTH PAX **APRIL**

**-8,020**  
-8.35%

ABSOLUTE GROWTH CALLS **APRIL**

**4**  
13.3%





# GUEST SATISFACTION

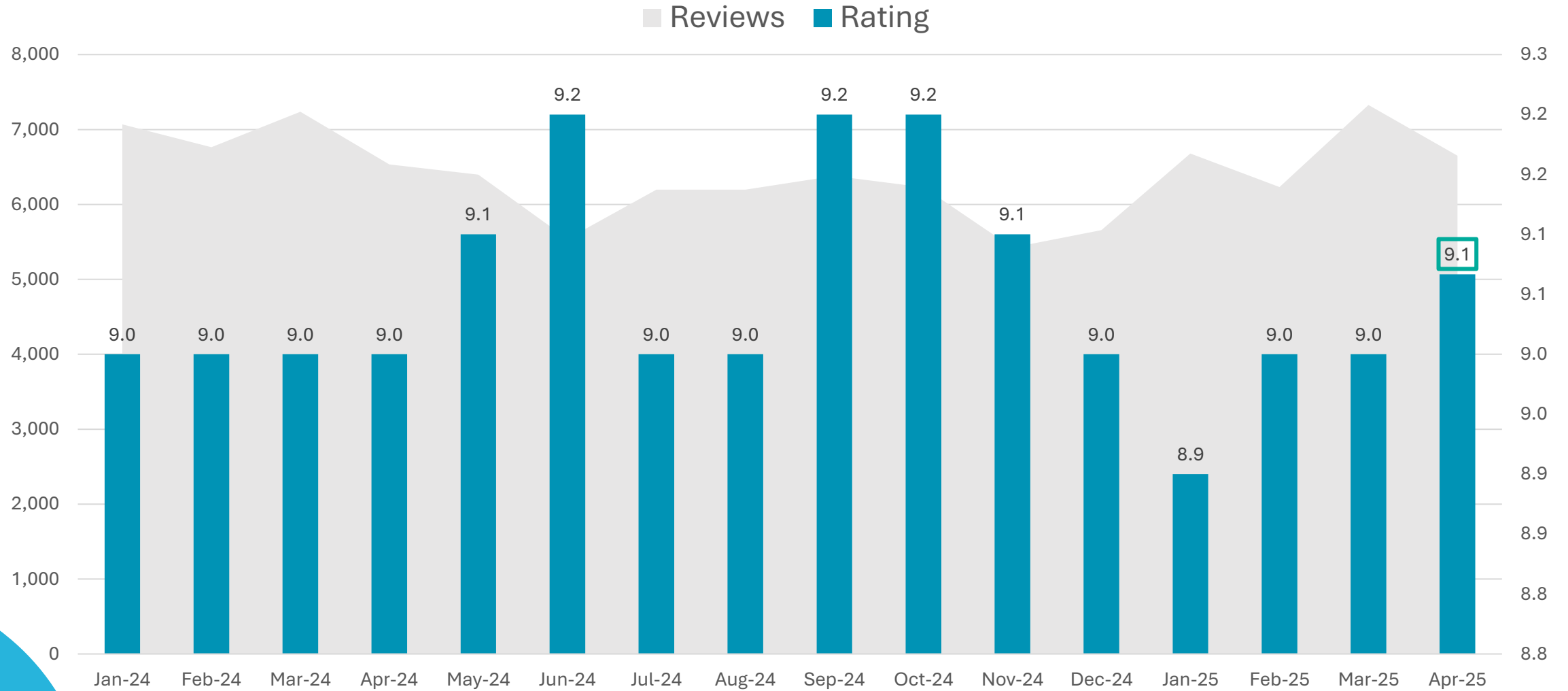






# GUEST EXPERIENCE INDEX (GEI)

*Monthly results*



# VACATIONS RENTALS

 **Transparent**  
an OTA INSIGHT company



# INTRODUCTION

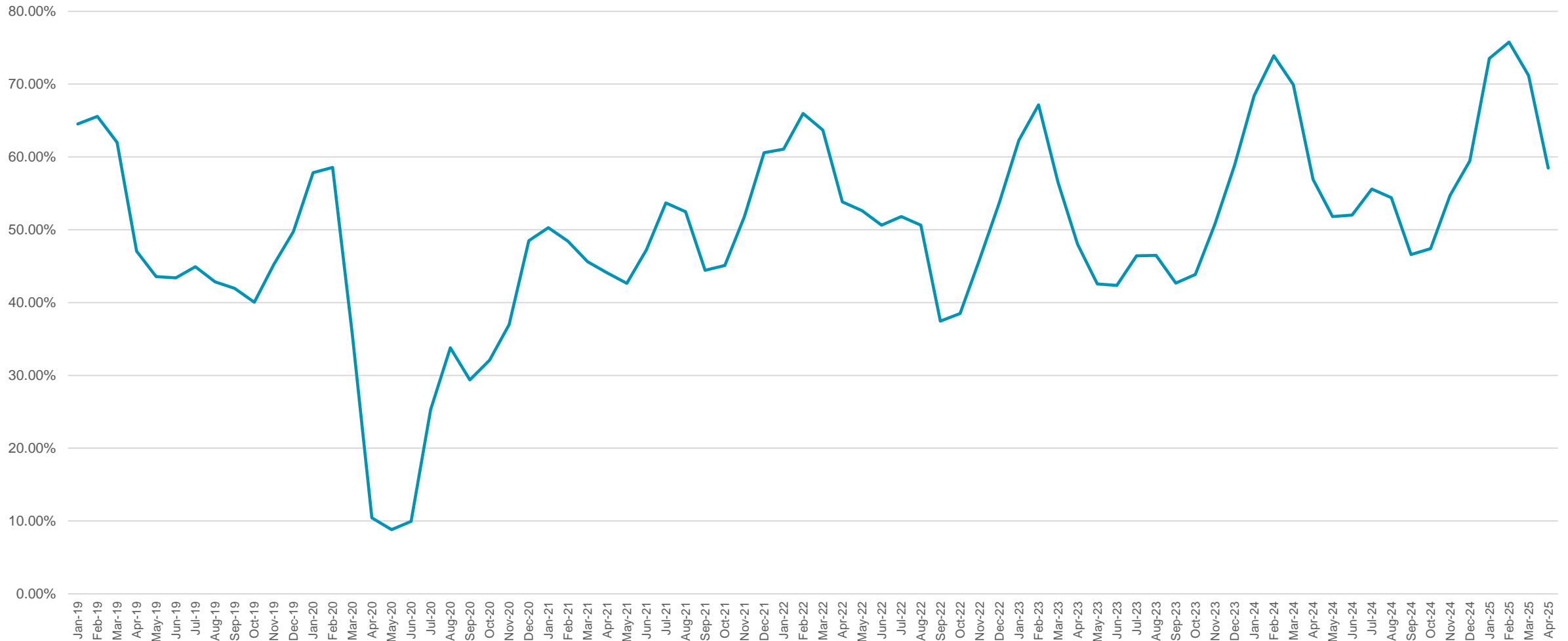
- ▶ In 2023, A.T.A. started working with Lighthouse, formerly Transparent Insights. Lighthouse tracks short-term rentals at the property level through their dashboard.
- ▶ With Lighthouse, A.T.A. is able to do the following:
  - Measure the economic impact of short-term rental, track (ADR) and occupancy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





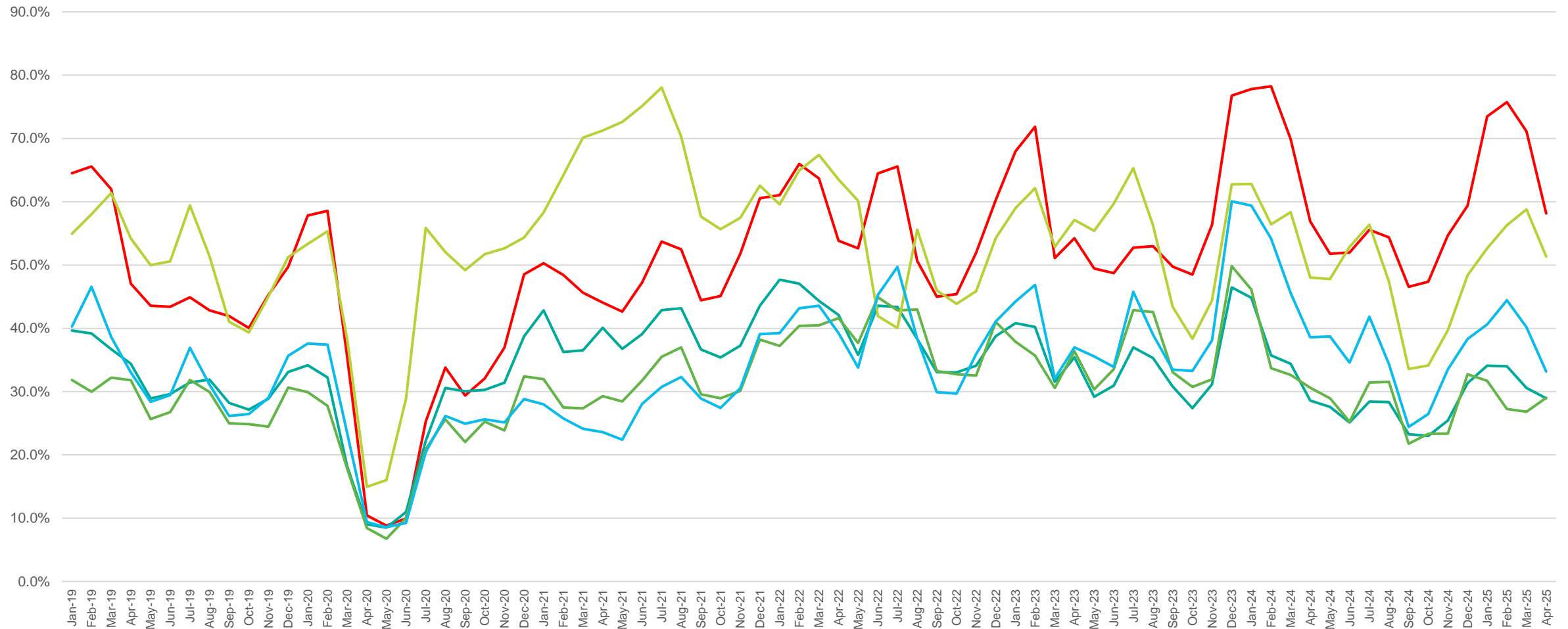
# OCCUPANCY

APRIL 2024 Occupancy: 57% | APRIL 2025 Occupancy: 59%



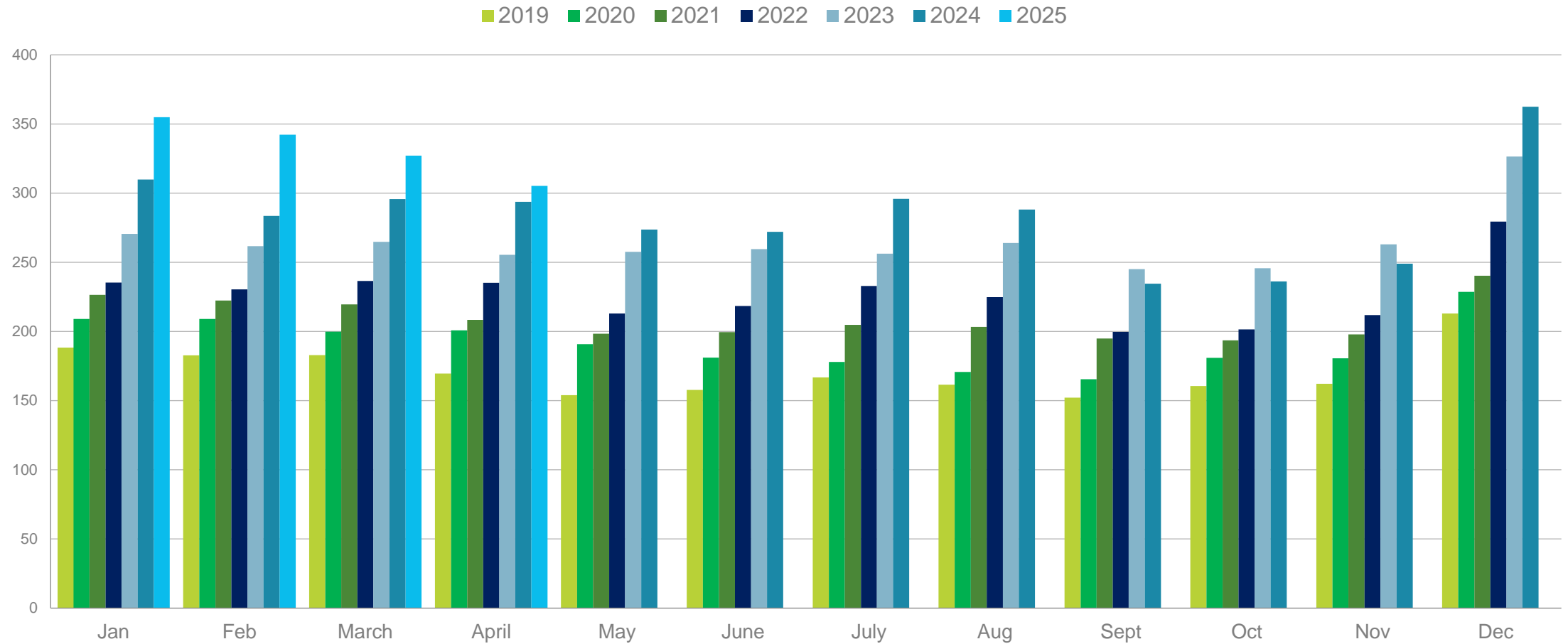
# OCCUPANCY BENCHMARK

— Aruba — DR — Jamaica — Puerto Rico — Saint Lucia



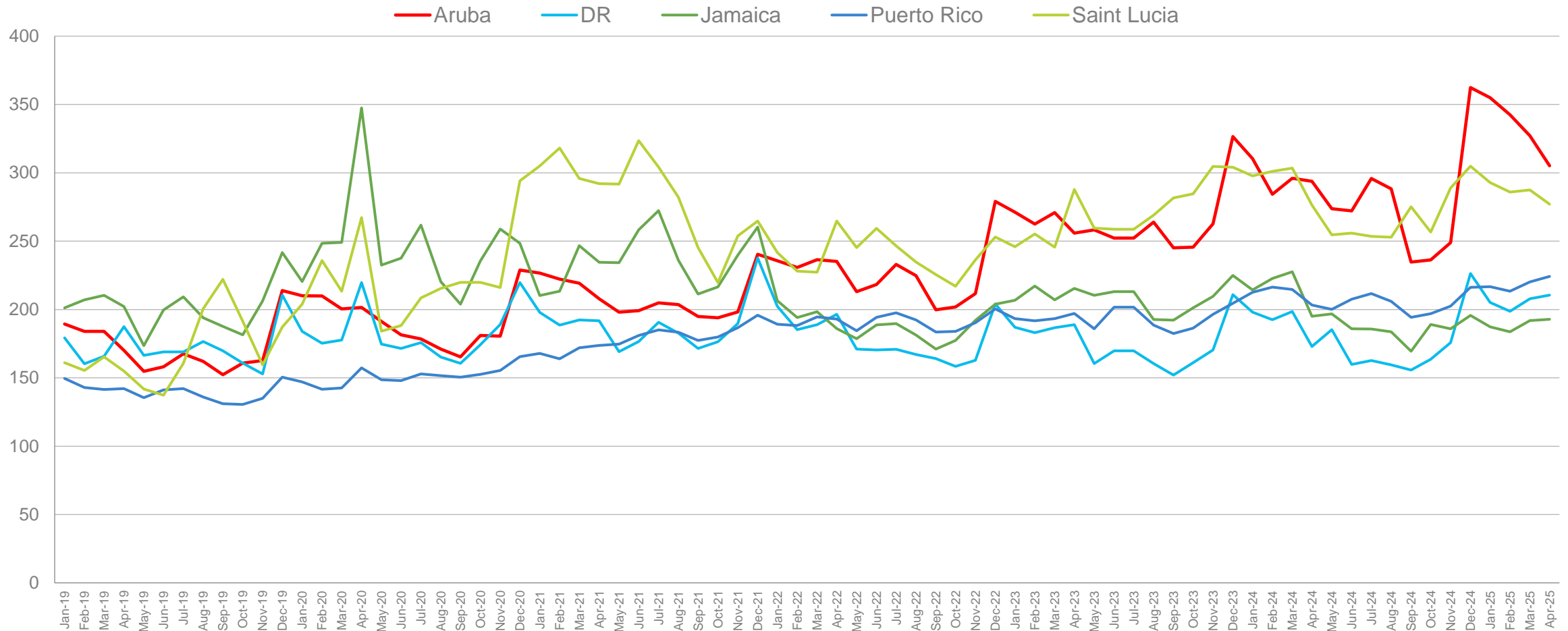
# ADR

APRIL 2024 ADR: \$294 | APRIL 2025 ADR: \$305



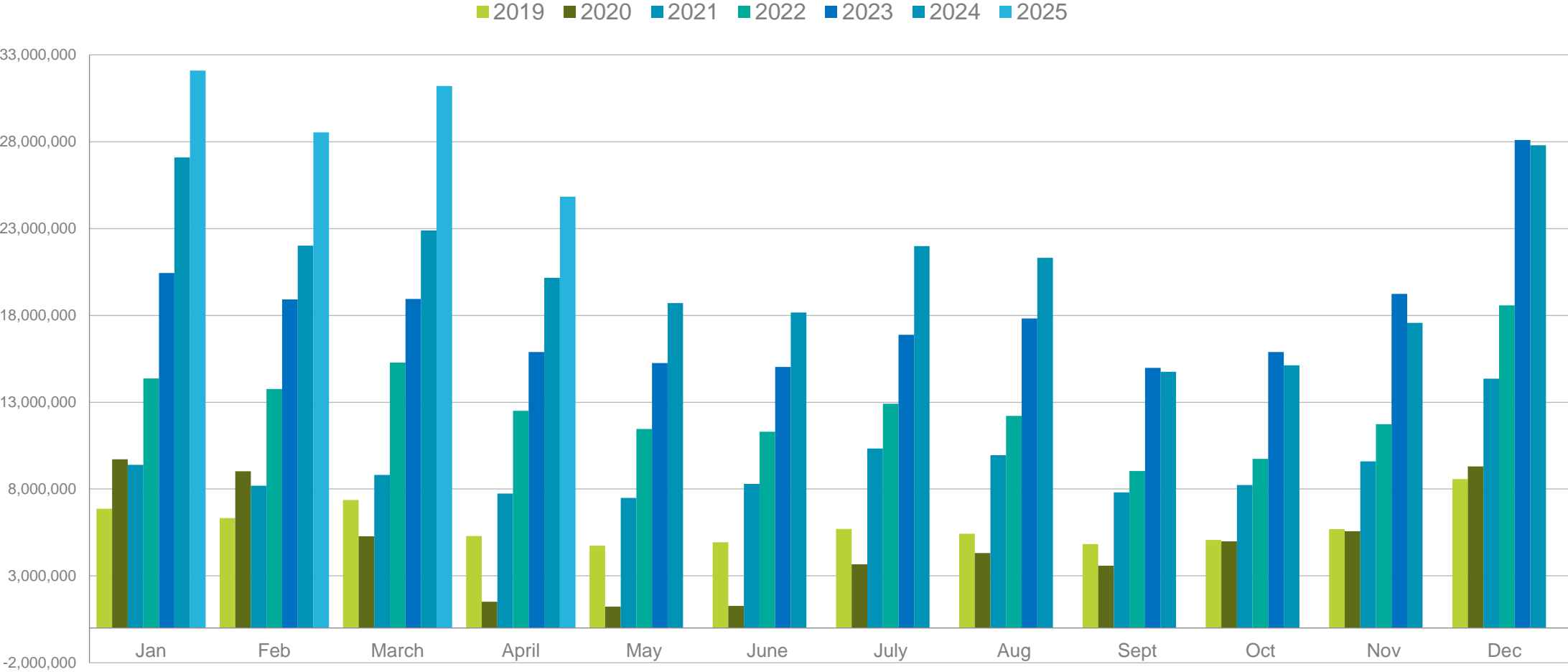


# ADR BENCHMARK



# REVENUE

Total Revenue YTD APRIL 2024: USD\$ 92,152,563 | Total Revenue YTD APRIL 2025: USD\$ 116,675,259



2025

# T I D B I T S

## ATA Research



Prepared by: Aruba Tourism Authority  
Department: Strategy, Planning, and Research  
Field research conducted in January-April 2025





# Background

In 2024, ATA restarted the face-to-face survey at the Airport. The airport exit survey measures the spending behavior of Aruba visitors. It is conducted face-to-face monthly with departing visitors.

The airport survey includes, among other things, the Net Promoter Score (NPS), which measures the likelihood of visitors recommending and returning to Aruba and their overall satisfaction. This, along with data on spending, first-time vs. repeat visitors, Travel group composition, Nights, Accommodation type, Accommodation satisfaction, and Household income, provides a comprehensive understanding of visitor behavior.

In this report, we focused on presenting the total results of first-time and first-time visitors with an HHI of \$150,000 or more. We can provide various data cuts. The spending results are presented in a more comprehensive manner.

A total of 3,060 surveys were collected, of which 3,056 were deemed valid and usable after the data cleaning process.

Data was collected in the months of January to April 2025.



# Methodology

The survey participants are selected using the Time-Location Sampling (TLS) method, where individuals are randomly chosen within specific time periods and locations to ensure representative data collection when a complete sampling frame is unavailable.

Data collectors are assigned a specific week, based on a predetermined schedule set by the AAA, during which they are permitted to gather data. During this designated week, all visitors have an equal chance of being selected for the study.

Using the sample size formula:  $n = \left(\frac{ZS}{E}\right)^2$ ,

at a 95% confidence level, with a standard deviation of 0.5 (commonly used in surveys) and a 5% margin of error, a sample size of 3,457 is required. Reducing the error margin to 2.5% increases the required sample size to 6,147 for the entire year. This figure is then adjusted based on the market share of different regions.

In 2024, the target sample size was modified to ensure more representation from smaller markets. This adjustment applied an error margin ranging from 2% to 15%, depending on the population size of each market. Smaller markets were assigned a higher error margin (15%), while larger markets had a lower error margin to maintain accuracy and balance in the survey results.

The collected data underwent a rigorous cleaning process, which included checking for missing or inconsistent responses, detecting and handling outliers, and standardizing open-ended inputs. To analyze visitor spending patterns, the reported total trip expenditure was transformed into a per person per day metric by dividing the total amount spent by the length of stay.



## Methodology (cont.)

The collected data underwent a rigorous cleaning process, which included checking for missing or inconsistent responses, detecting and handling outliers, and standardizing open-ended inputs.

To analyze visitor spending patterns, the reported total trip expenditure was transformed into a per person per day metric by dividing the total amount spent by the length of stay and size of travel party.

For respondents who purchased a vacation package, an adjustment was made to exclude airfare costs, assuming airfare accounted for 30% of the total package price. The remaining 70% was proportionally redistributed between lodging and food & beverage, following the expenditure patterns of non-package visitors.



01

# Demographics

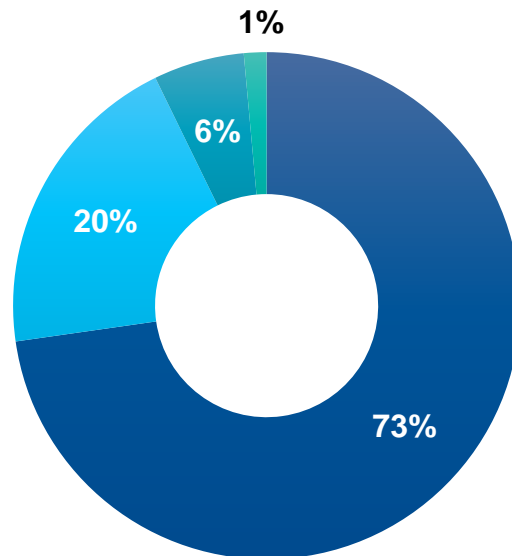
# Demographics of Respondents

## Country



**62.3%**  
**USA**

## Region



■ North America ■ Latin America ■ Europe ■ Other

n =3056

## Average Age

**48**

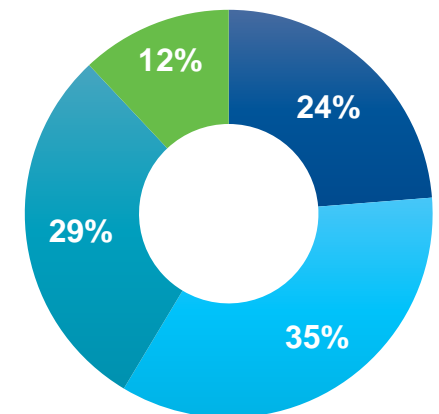
## Age Group



**63%**

Between 28-59  
years old

## Generations



■ Baby Boomers ■ Gen X ■ Millennials ■ Gen Z

n =3041



# Demographics of Respondents

## Number of Visits



**60.4%**

First-time visitors

n= 3056 (1845 First Timers and 1211 Repeaters)

## Income



**44.9%**

Have an annual household income of 150k or higher

\* Based on n= 1989 (34.9% of the 3056 respondents did not indicate their household income)

## First Timers

**42.4%**

Have an annual household income of 150k or higher

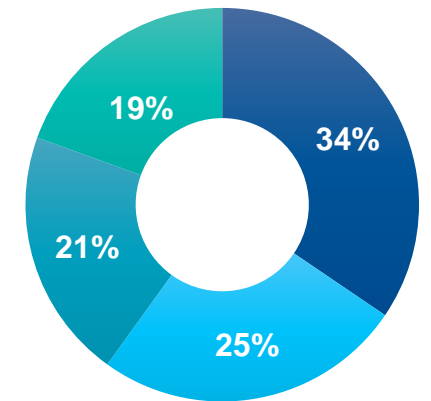
## Repeaters

**48.6%**

Have an annual household income of 150k or higher

n= 1989 (1192 First Timers and 797 Repeaters)

## Visits and Income



■ First Timers HHI < 150k   ■ First Timers HHI = 150k+  
■ Repeaters HHI < 150k   ■ Repeaters HHI = 150k+

n= 1989 (1192 First Timers and 797 Repeaters)

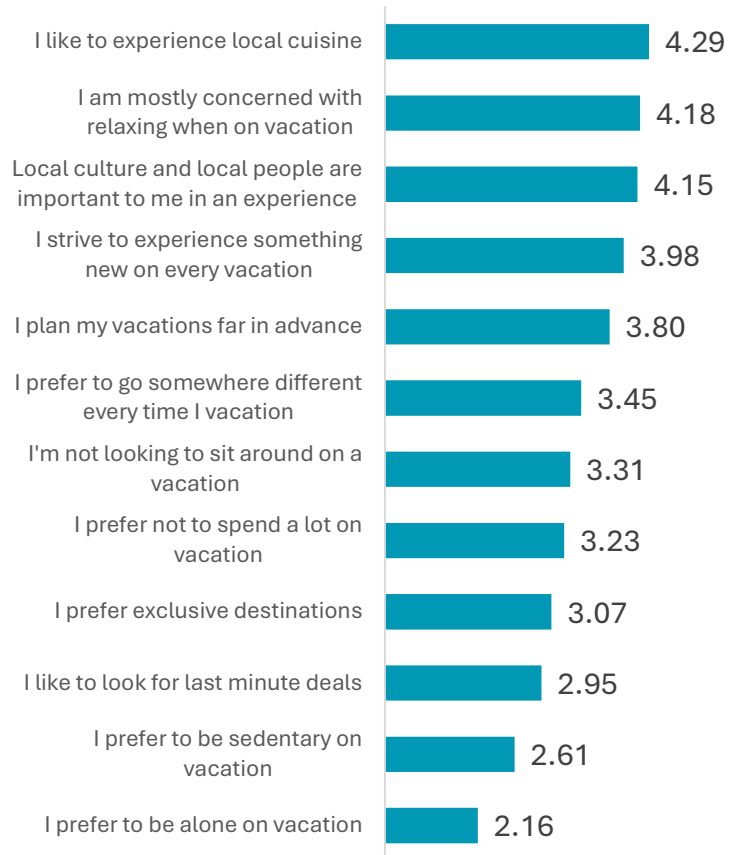
02

# Destination Decisions: What Visitors Value and Choose

## Total

## First Timers

## First Timers HHI 150K+



n= 1845



n= 506



03

# Spending



# Overview of Spending

## Average Party Size



**3.1**

n =3004

## Average Package Spending per trip



**\$ 4,983**

Per Trip including  
airfare

n =873

## Average Spending per trip



**\$5,610**

Including visitors who  
indicated to have  
purchased a package  
(excluding airfare)

n =2922

## Average Spending per day



**\$325**

Per person per day

n =2922

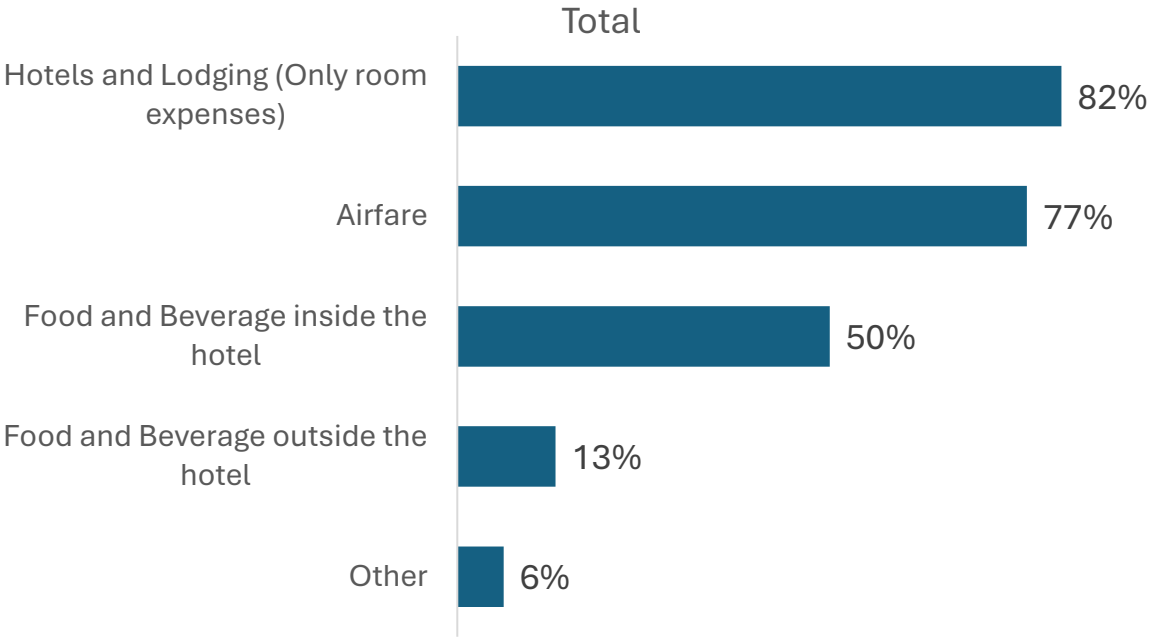
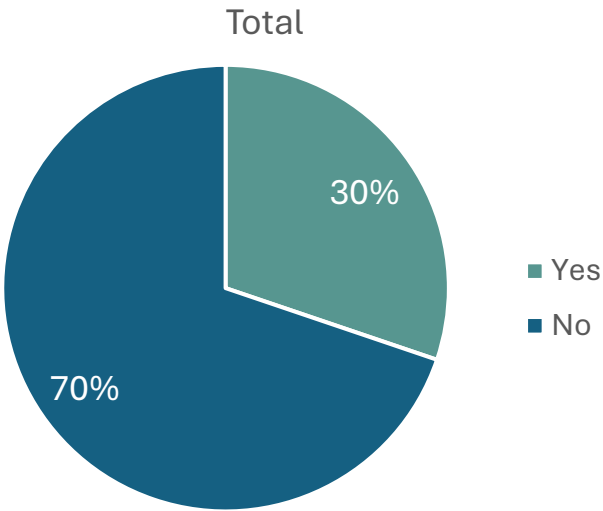


# Vacation Package

About 30% of respondents traveled with a vacation package, including 35% of first-timers and 35% of first-timers with an HHI of 150K+ (the latter data is not displayed).

The majority of visitors' package tours in Aruba include hotels and lodging (82%) and airfare (77%), while fewer visitors have food and beverage options (50% inside the hotel, 13% outside) or other components (6%).

## Vacation Package Components



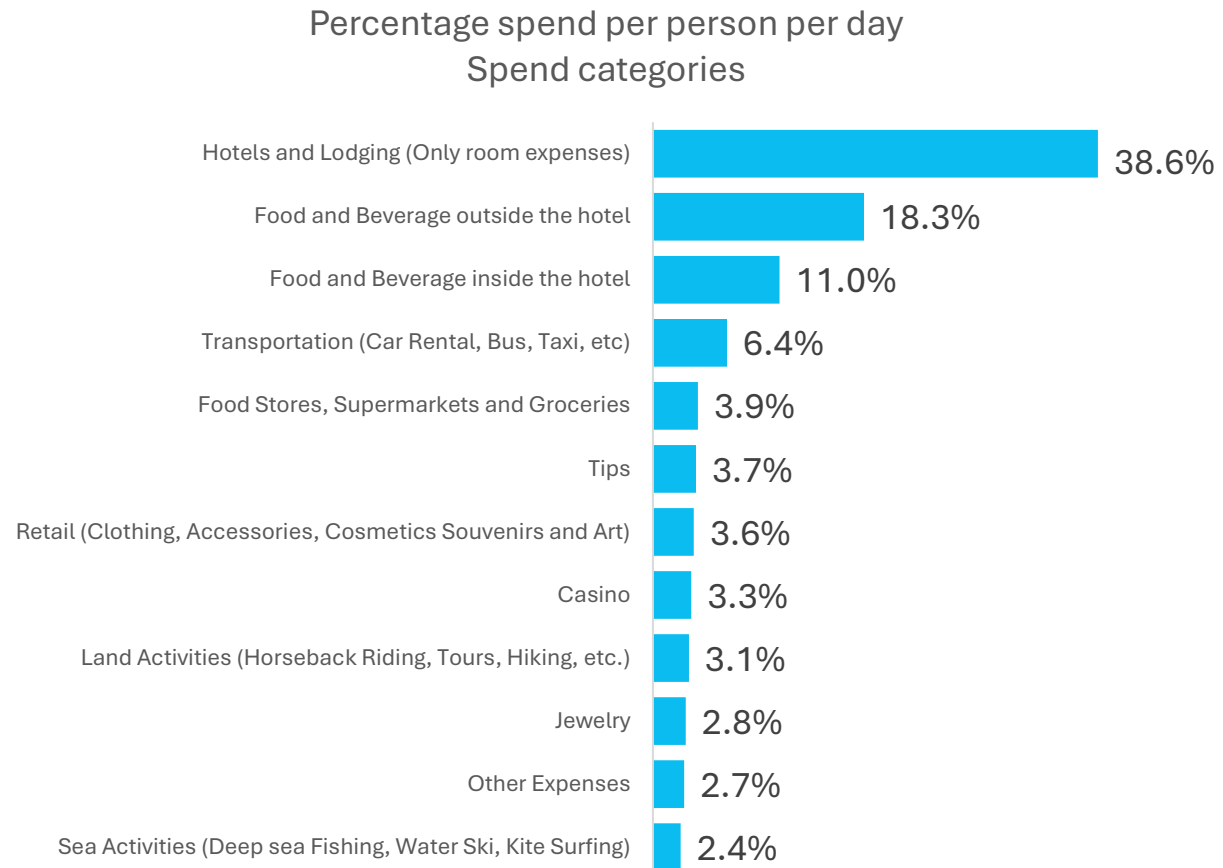
Q: Did you purchase a vacation package? A packaged vacation means paying one price for a combination of 2 or more of lodging, travel to and from Aruba, or transport within Aruba  
n = 3056 total

Q: What components were part of your package tour? Please check all answers that apply  
n = 923



# Spending on Non-Vacation Package

## Spending Categories

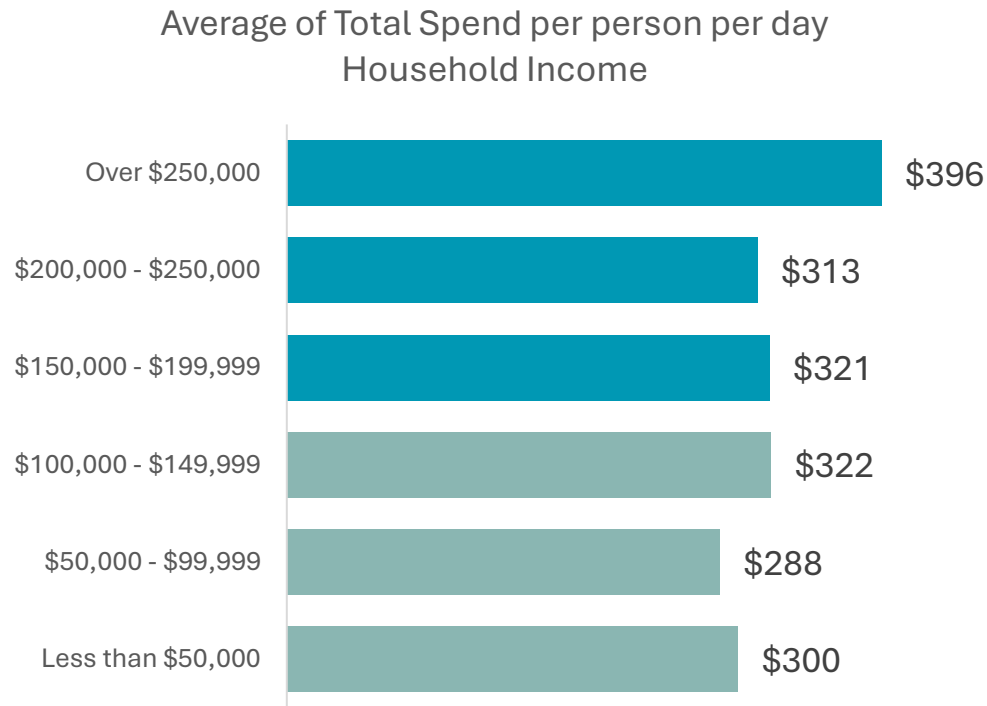


# Spending on Non-Vacation Package

Affluent travelers with an HHI over \$250,000 spend \$396 per day, while those earning less than \$50,000 spend \$300, demonstrating that although the highest earners spend the most, mid-income travelers have varied spending habits, and lower-income visitors still allocate a significant budget to their Aruba trip.

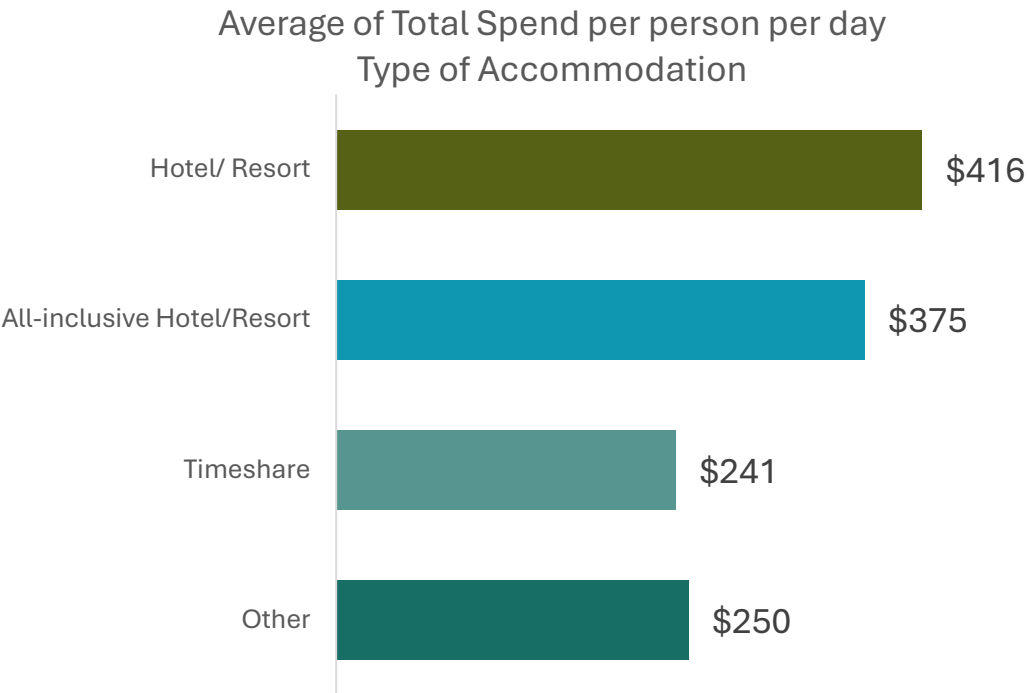
Hotel and resort guests spend the most, timeshare visitors are the most budget-conscious, and alternative accommodation travelers fall in between with moderate spending.

## Household Income



Q: Can you please indicate your household income? Please check ☒ one answer only  
n= 1361

## Spending by Accommodation



Q: What was the main type of accommodation used during your visit to Aruba? Please check ☒ one answer only  
n= 2038

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# Spending on Non-Vacation Package

Affluent travelers spend slightly more, but Non-Affluent visitors still allocate a significant budget, keeping overall spending levels relatively close.

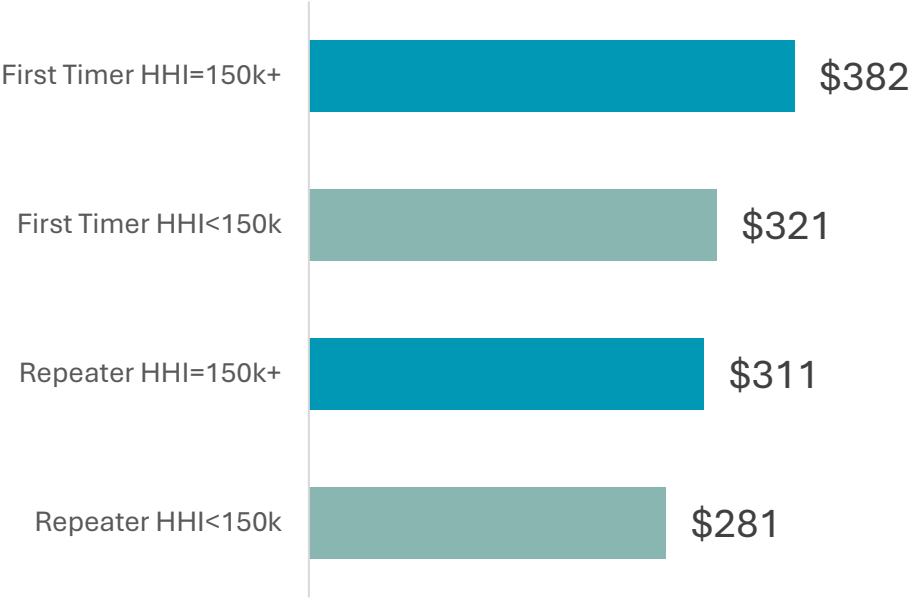
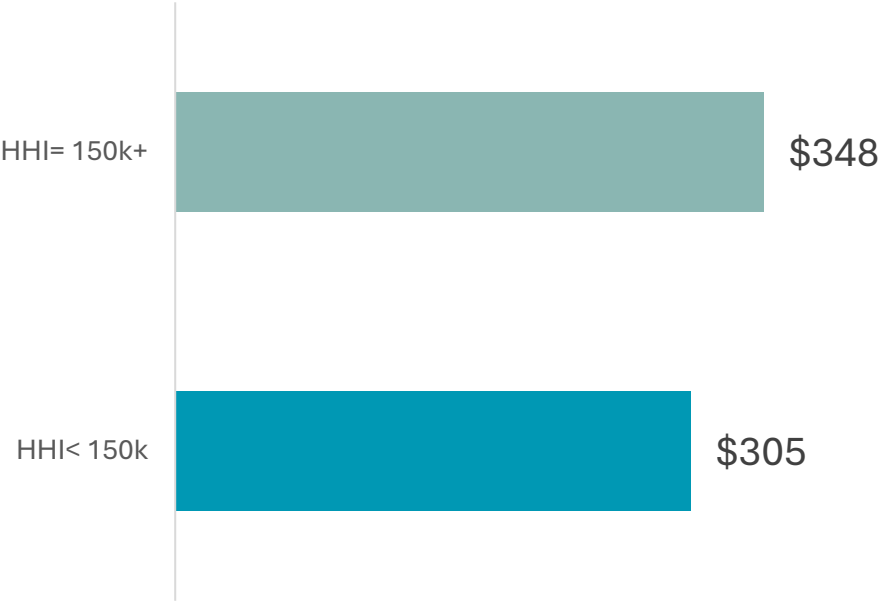
First-time visitors spend more than repeat travelers regardless of income, but higher earners consistently allocate a larger budget to their trips.

## Affluent vs Non-Affluent

## Affluent vs Non-Affluent First Timers vs. Repeaters

Average of Total Spend per person per day  
Household Income: HHI< 150k vs HHI =150k+

Average of Total Spend per person per day  
First Timers vs Repeaters vs HHI<150k vs HHI=150k+



n= 1361

n= 1361



04

# Key Drivers of Destination Choice



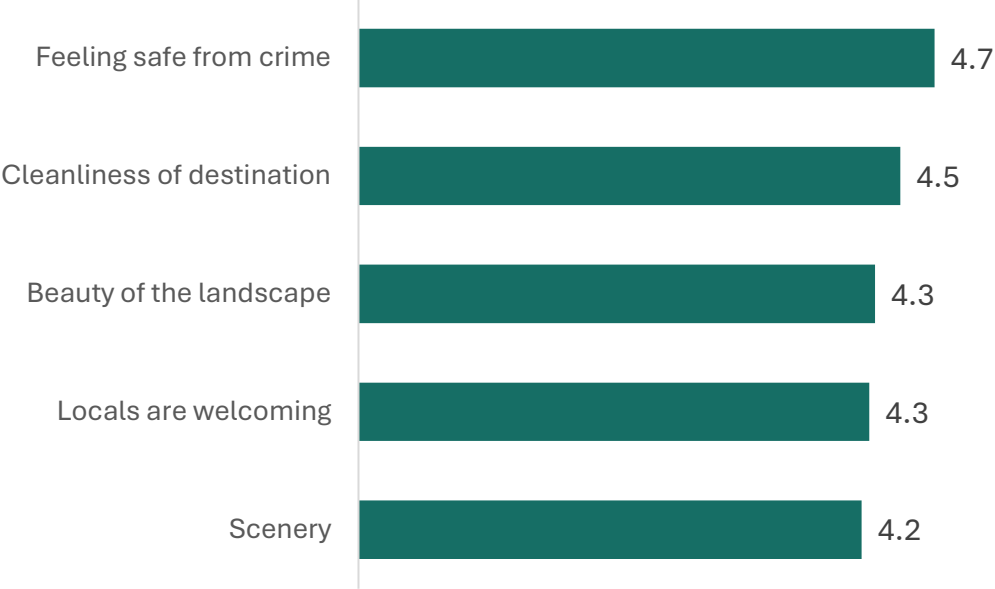


# Important Key Drivers and Low-Impact Factors in Destination Choice

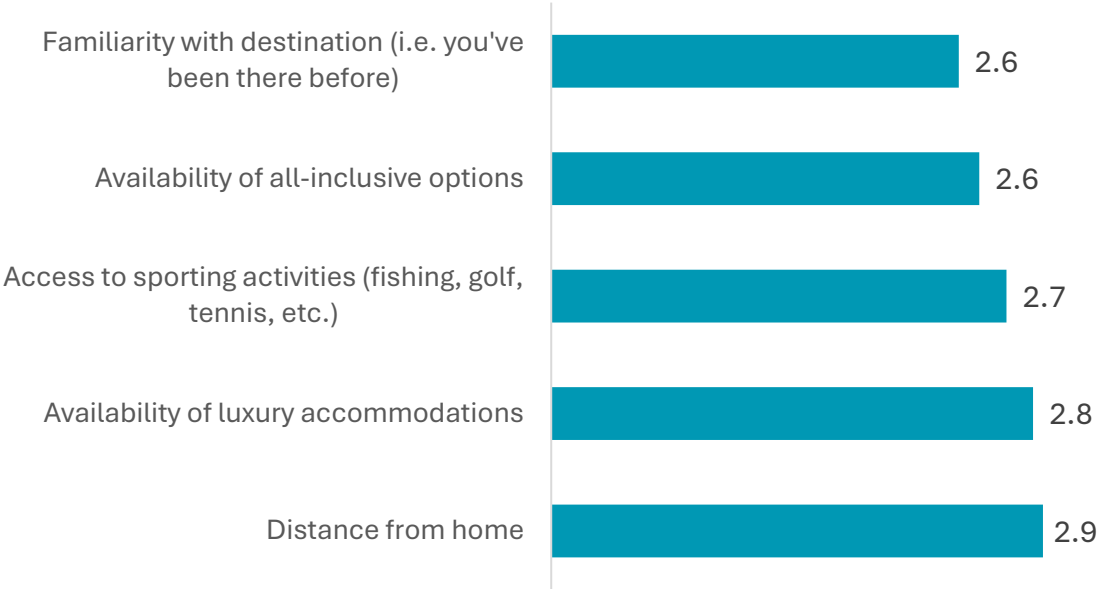
## Drivers

## Low Impact Factors

Total 5 most important

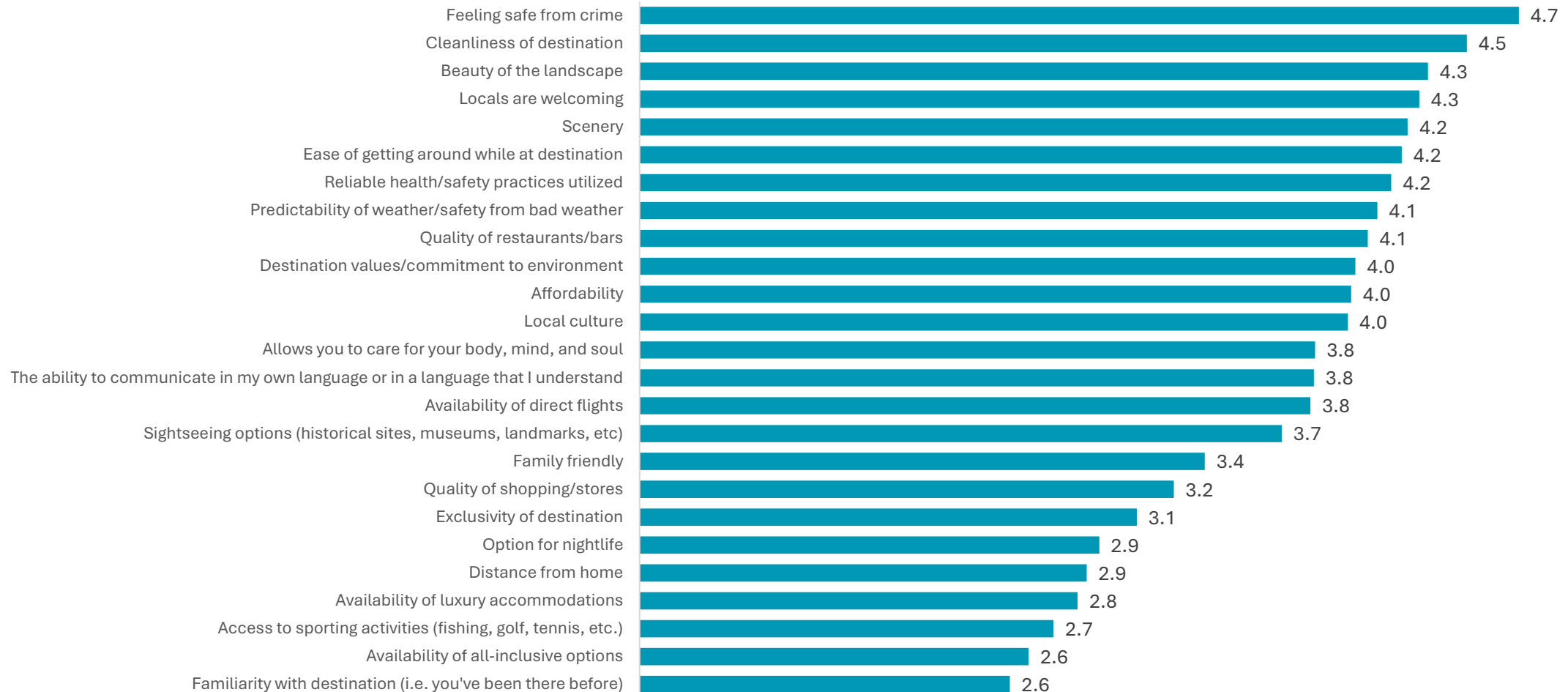


Total 5 least important



# Important Key Drivers and Low-Impact Factors in Destination Choice

## Overview of all results



Q: How important are the following features when choosing a vacation destination? (Select one for each). Answer possibilities: not at all important, slightly, moderately, very and extremely important  
n = 3056



05

# Culinary Experiences



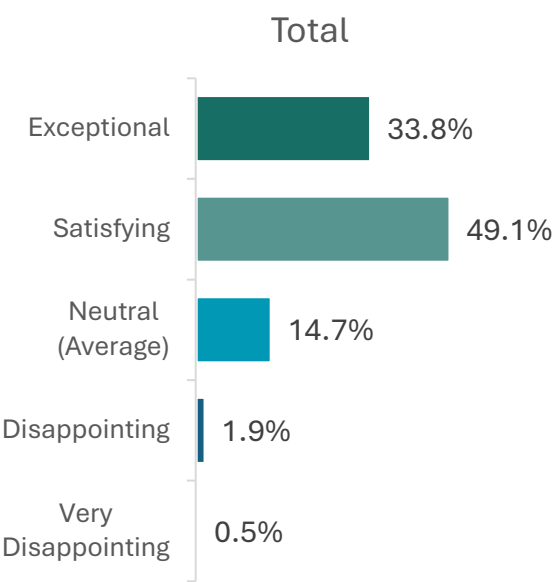
# Ranking Culinary Experience



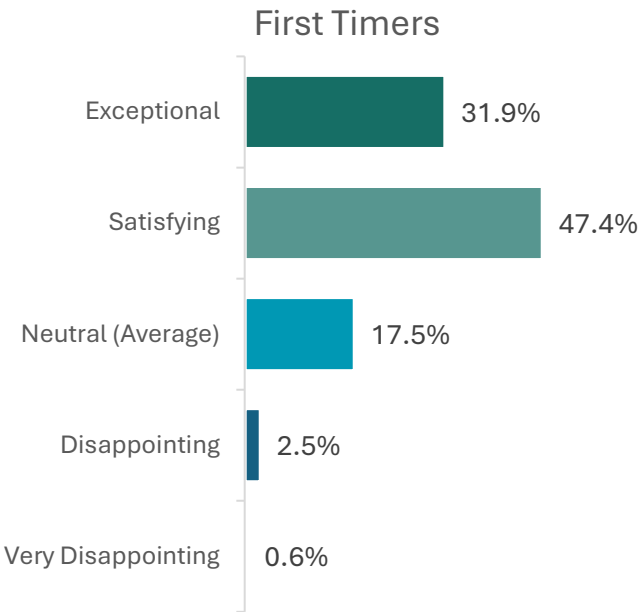
## Total

## First Timers

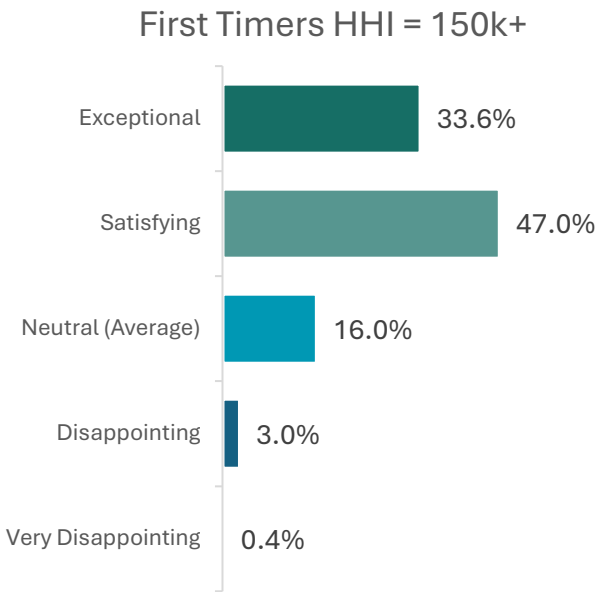
## First Timers HHI 150K+



n= 3056



n= 1845



n= 506

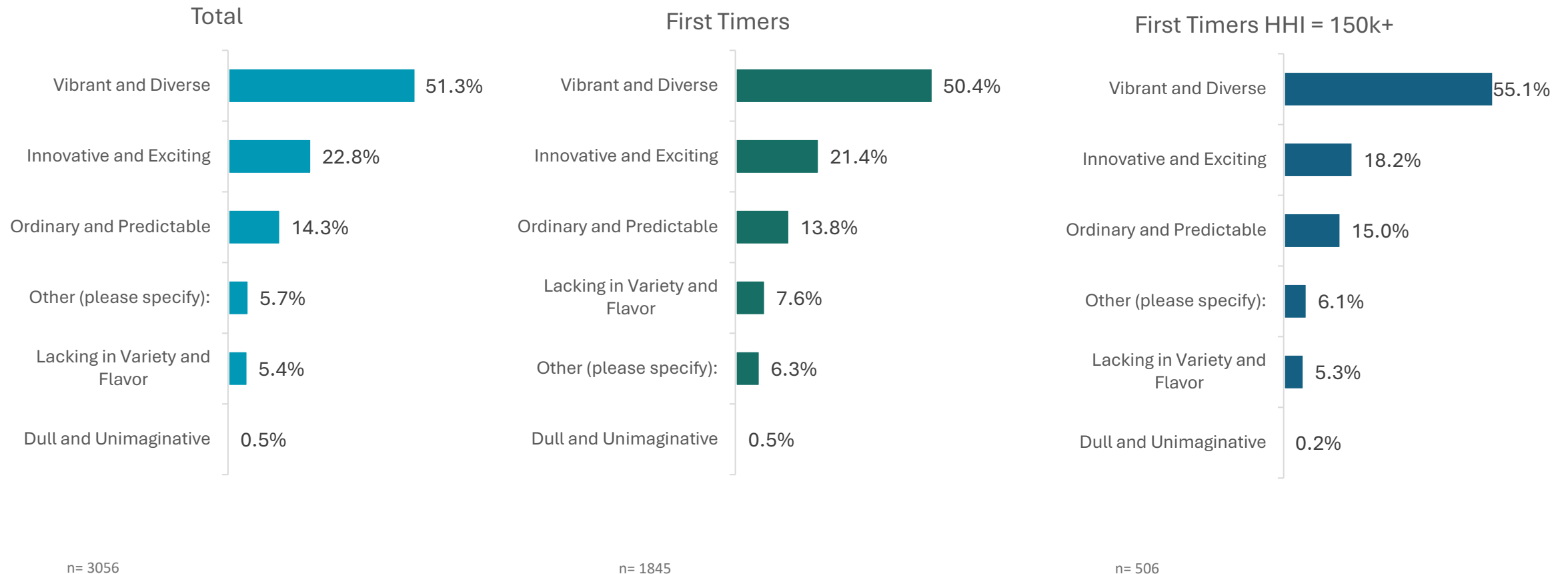


# Description Culinary Experience

## Total

## First Timers

## First Timers HHI 150K+



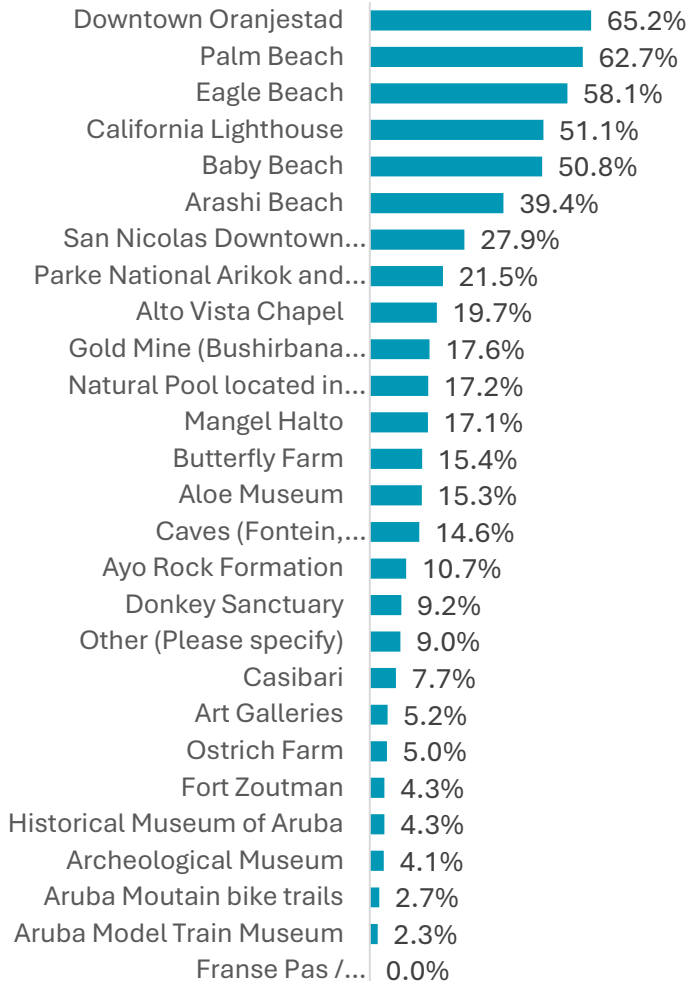


06

# Places visited during the Vacation and Cultural Experiences

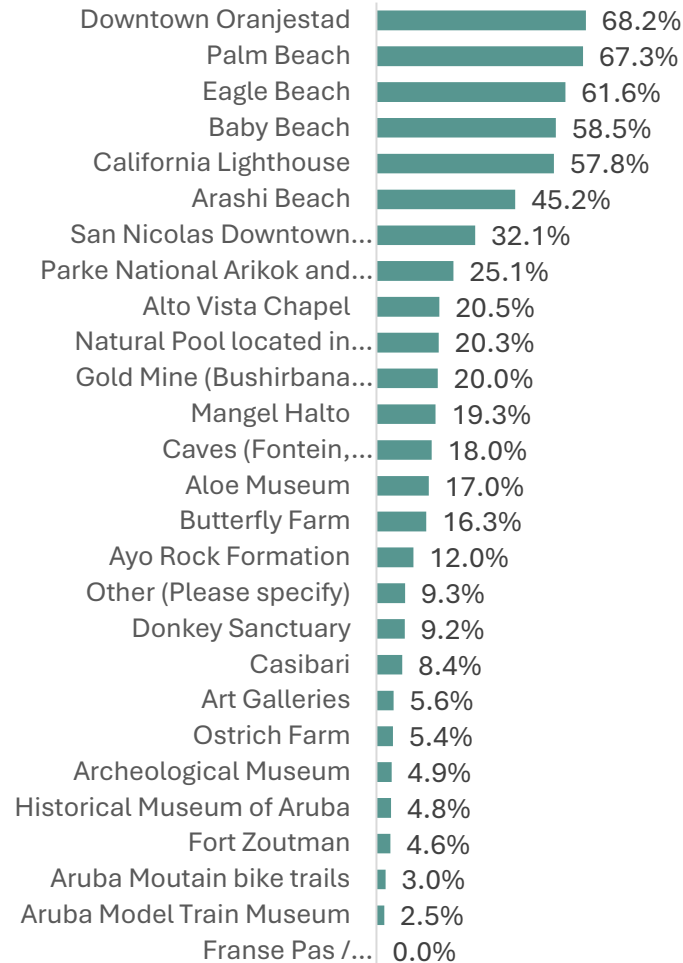
# Cultural activities/attractions during trip

## Total



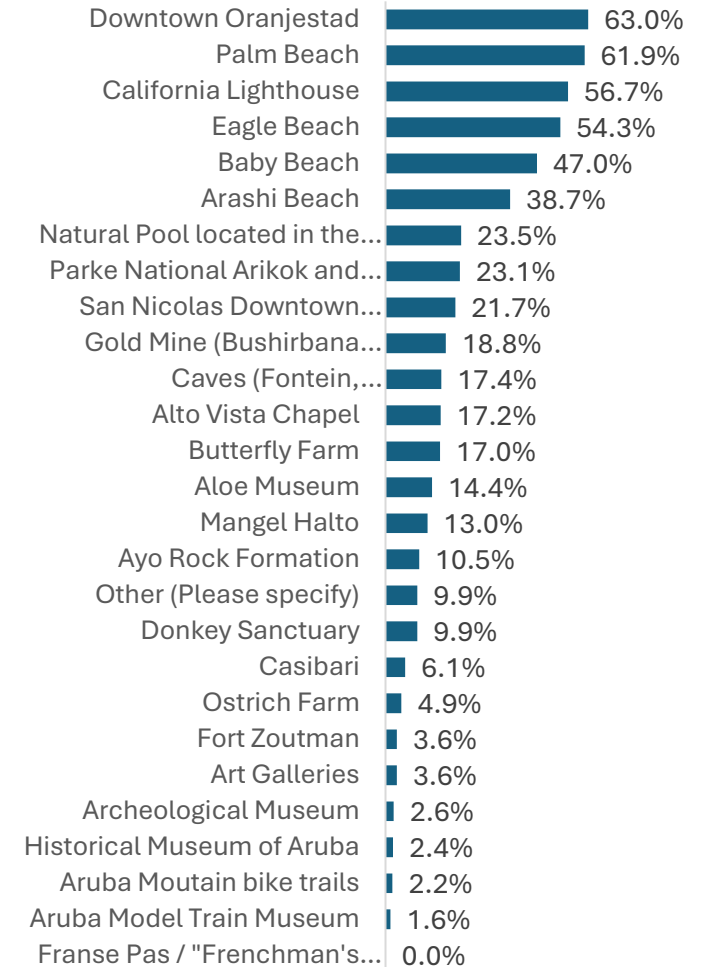
n= 3056

## First Timers



n= 1845

## First Timers HHI 150K+



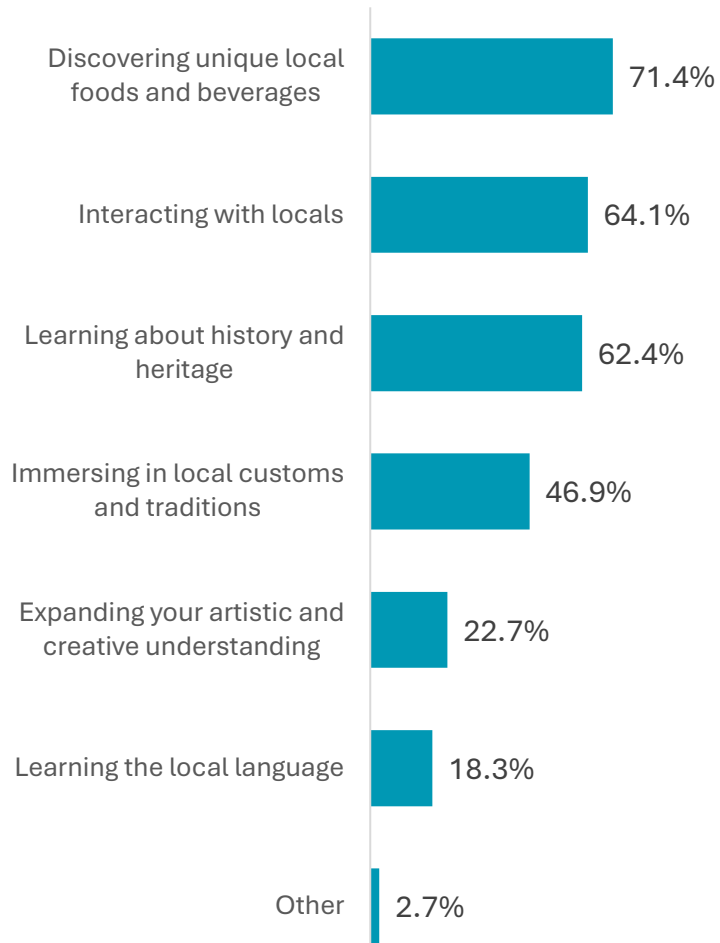
n= 506

Q: Which of the following cultural activities/attractions did you participate in/visit during your stay in Aruba?

n = 1004

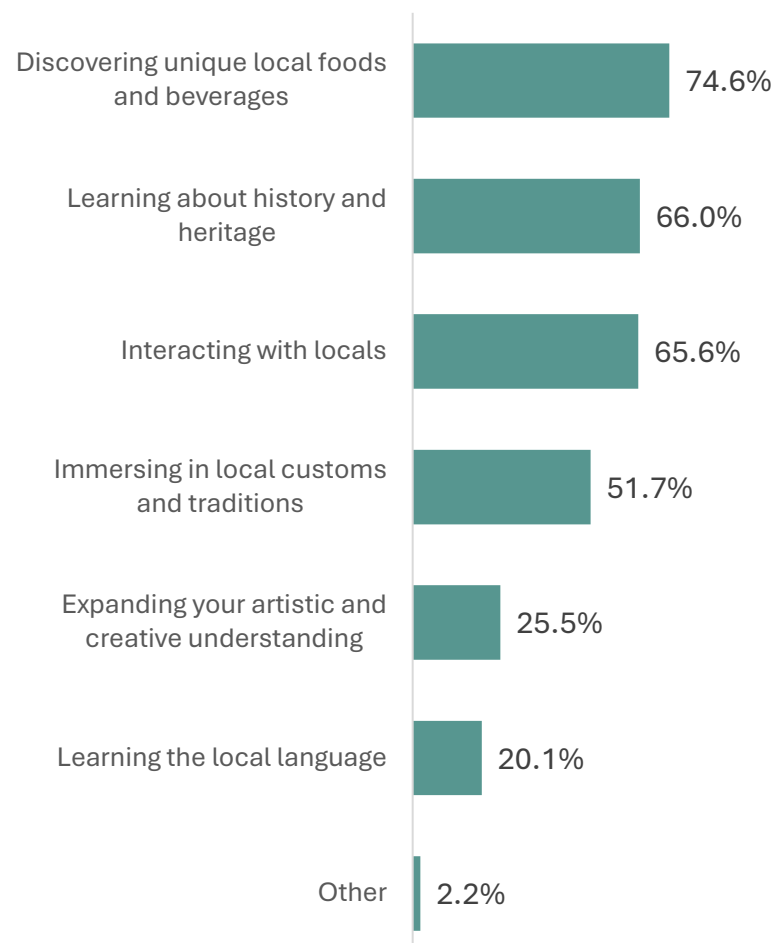
# Cultural Experiences

## Total



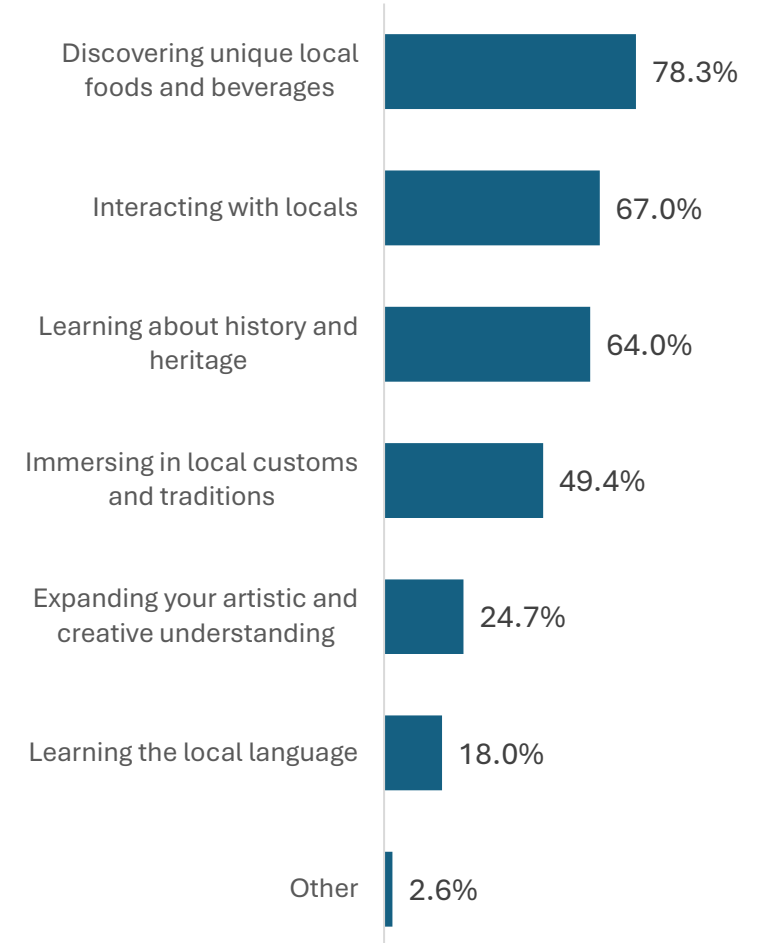
n= 3056

## First Timers



n= 1845

## First Timers HHI 150K+



n= 506

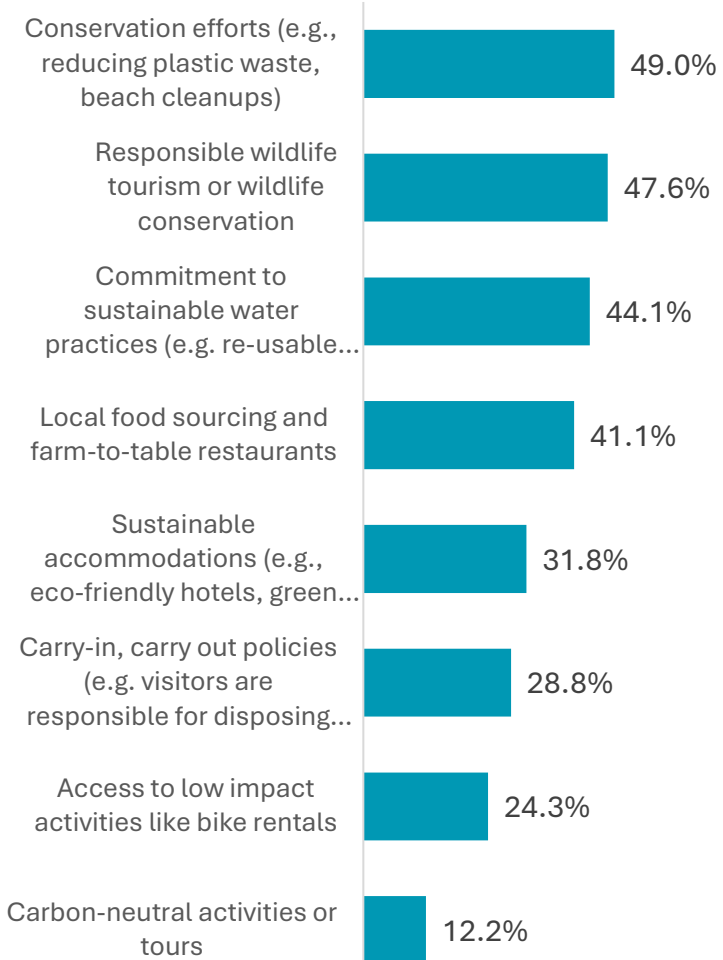


07

# Eco-conscious practices

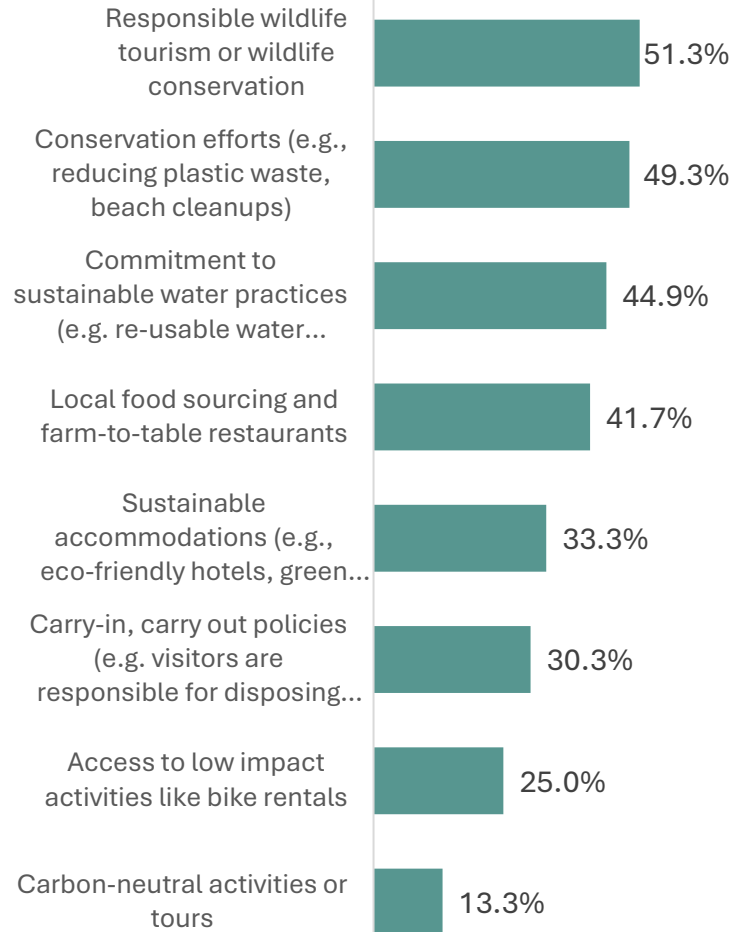
# Eco-conscious practices

## Total



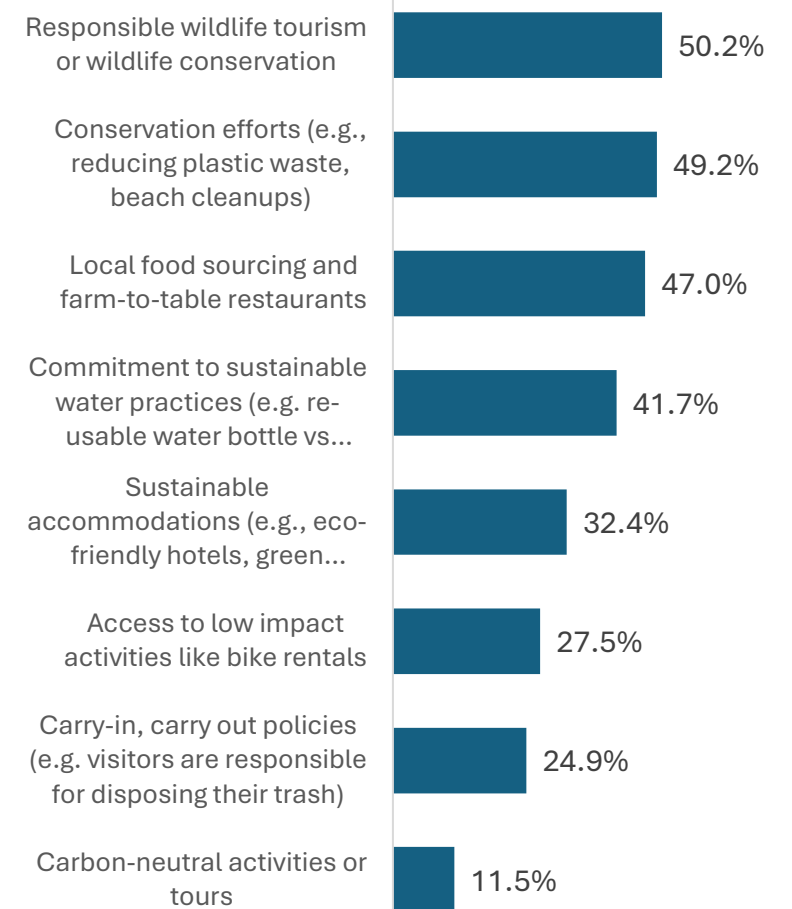
n= 3056

## First Timers



n= 1845

## First Timers HHI 150K+



n= 506



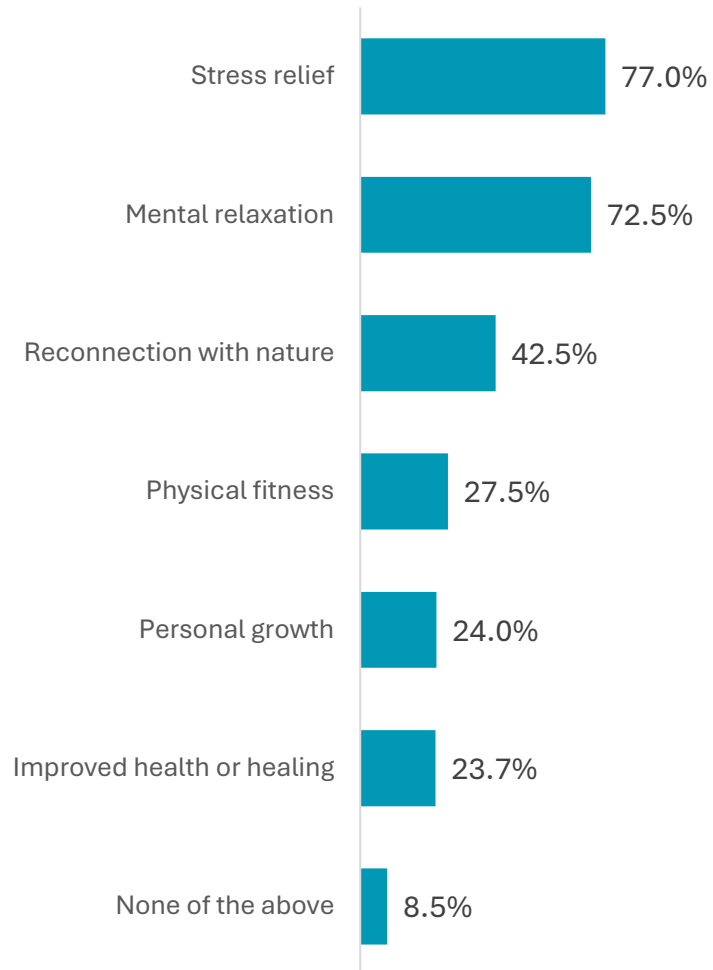
08

# Wellness Benefit and Activities



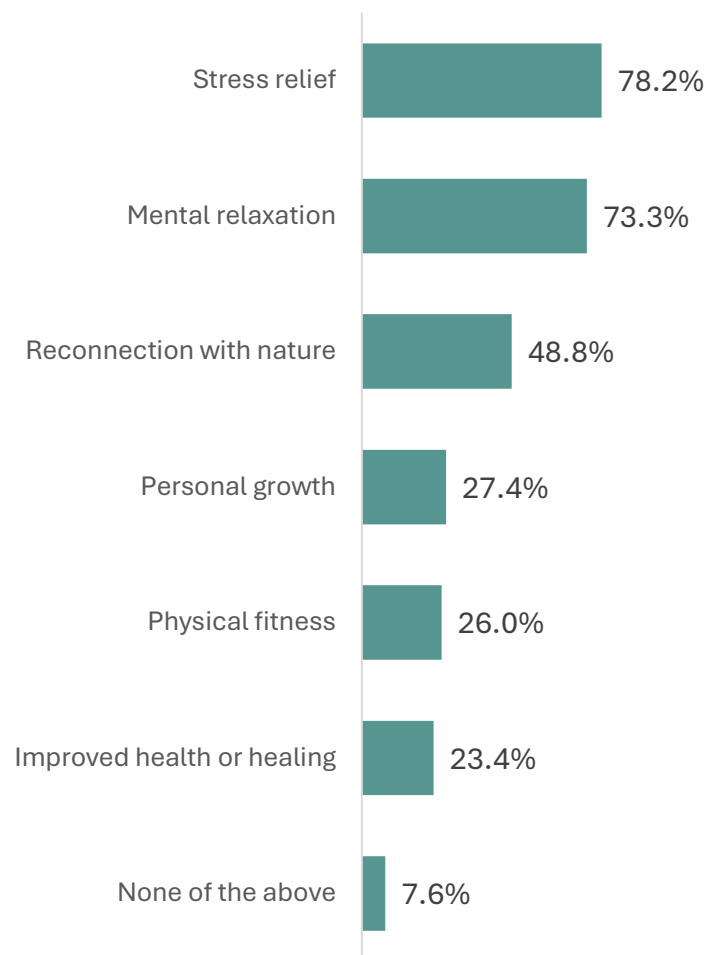
# Wellness Benefits

## Total



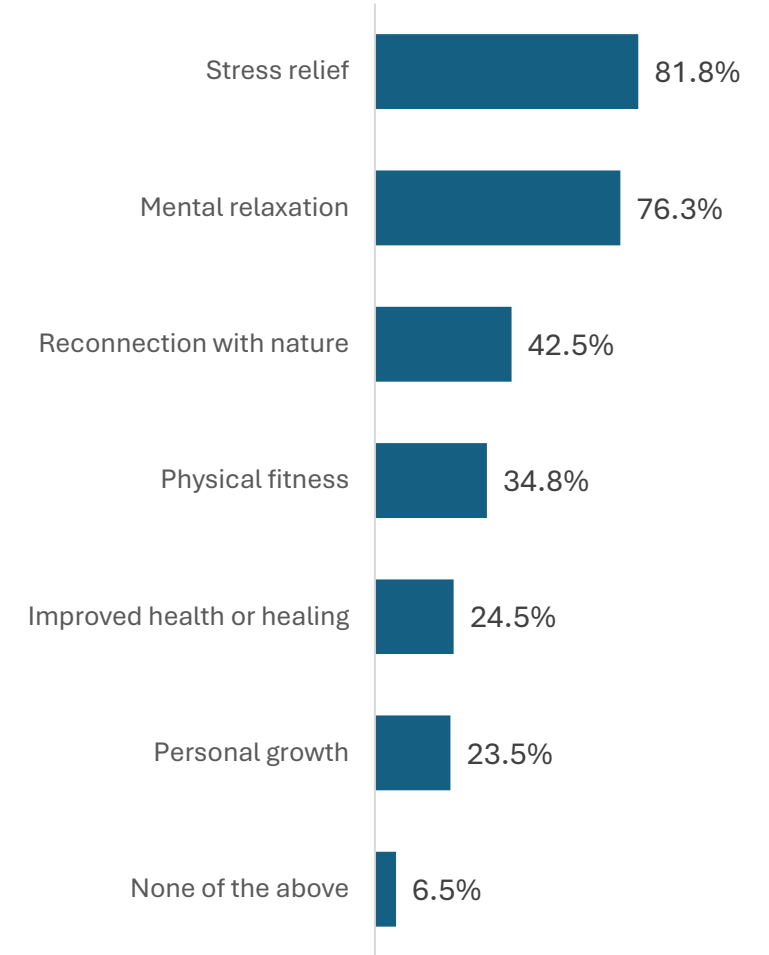
n= 3056

## First Timers



n= 1845

## First Timers HHI 150K+

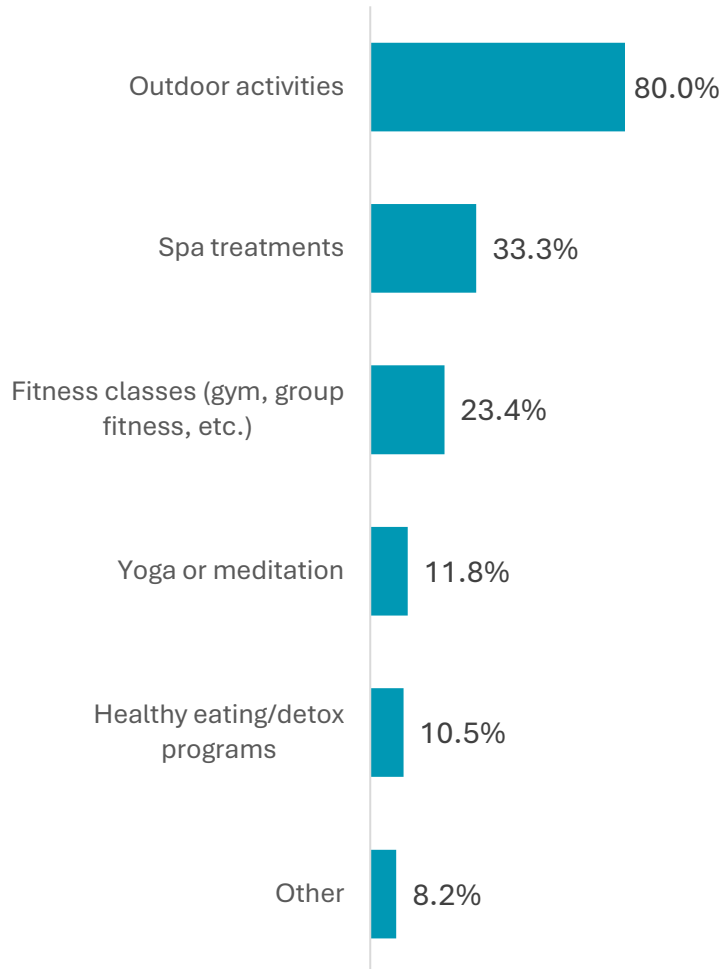


n= 506

Q: What wellness benefits, if any, are you looking for during a vacation? Please check all answers that apply

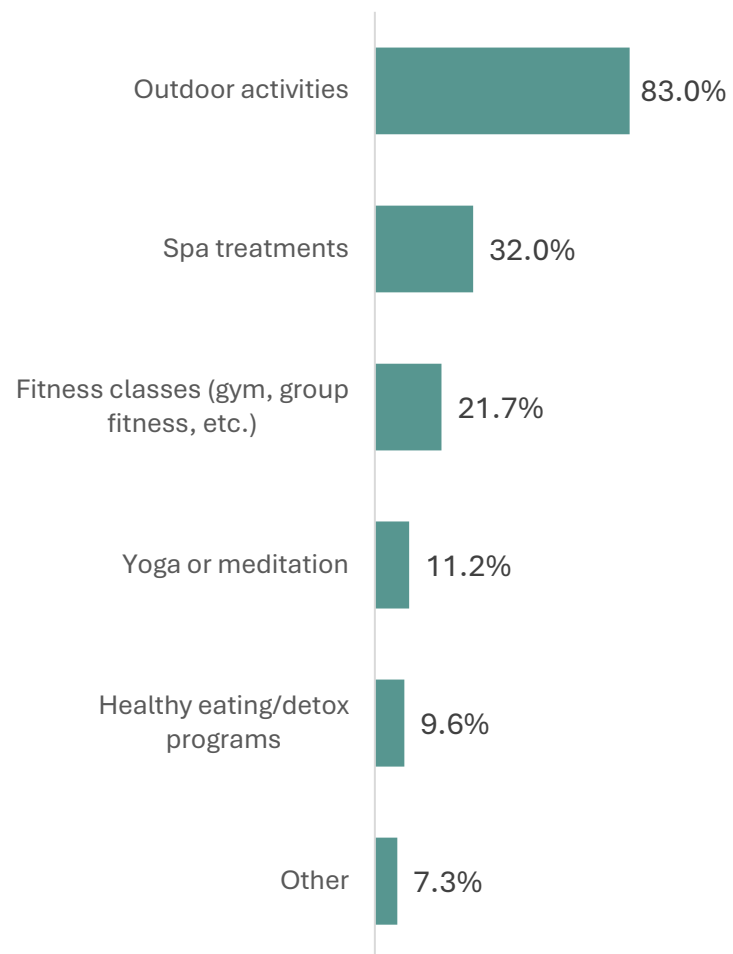
# Wellness Activities

## Total



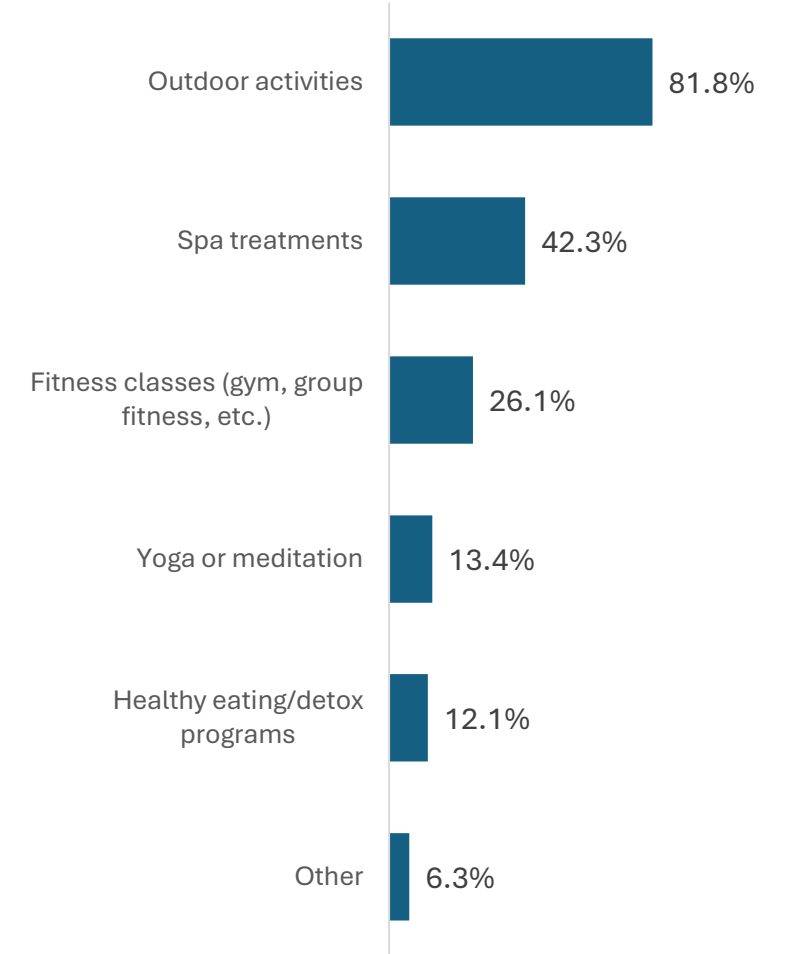
n= 3056

## First Timers



n= 1845

## First Timers HHI 150K+



n= 506

Q: What types of wellness activities have you participated in during past vacations? Please check all answers that apply

09

# Emotions in Motion: Capturing Aruba's Traveler Sentiment

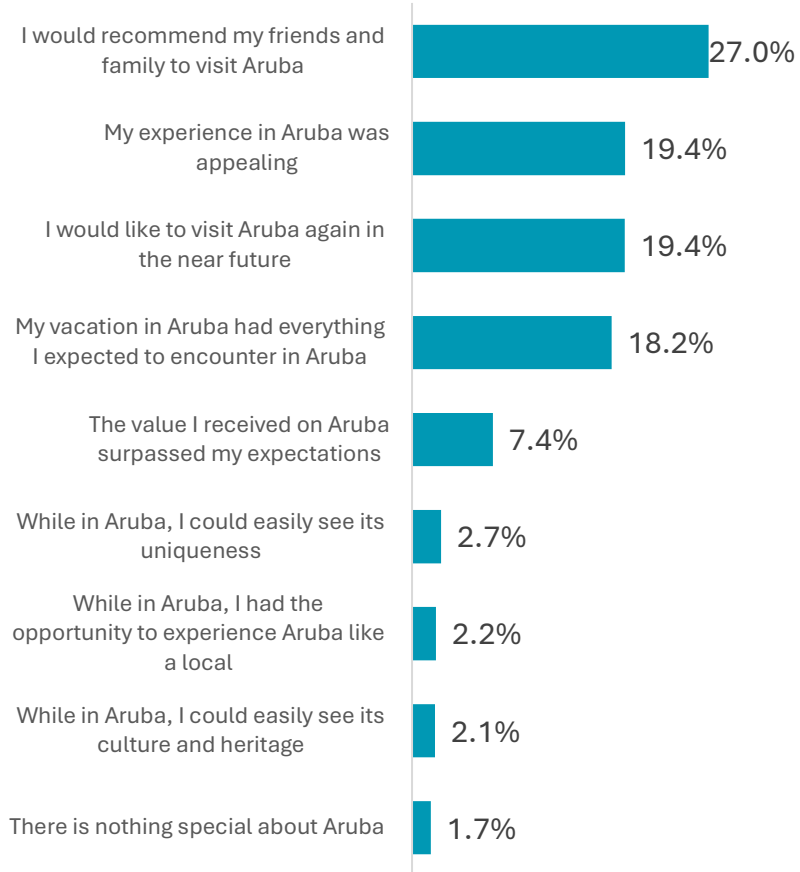


# Emotions in motion

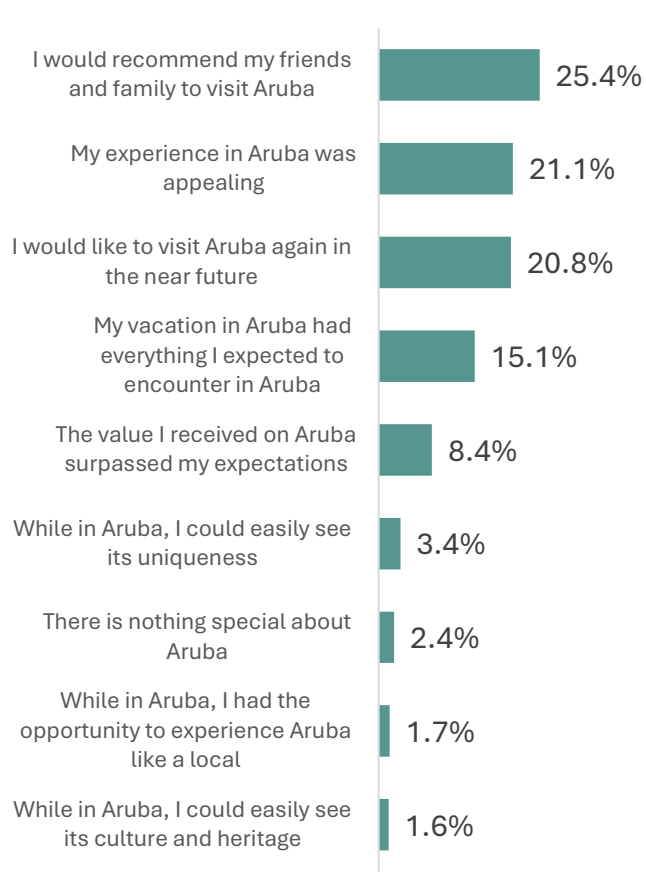
## Total

## First Timers

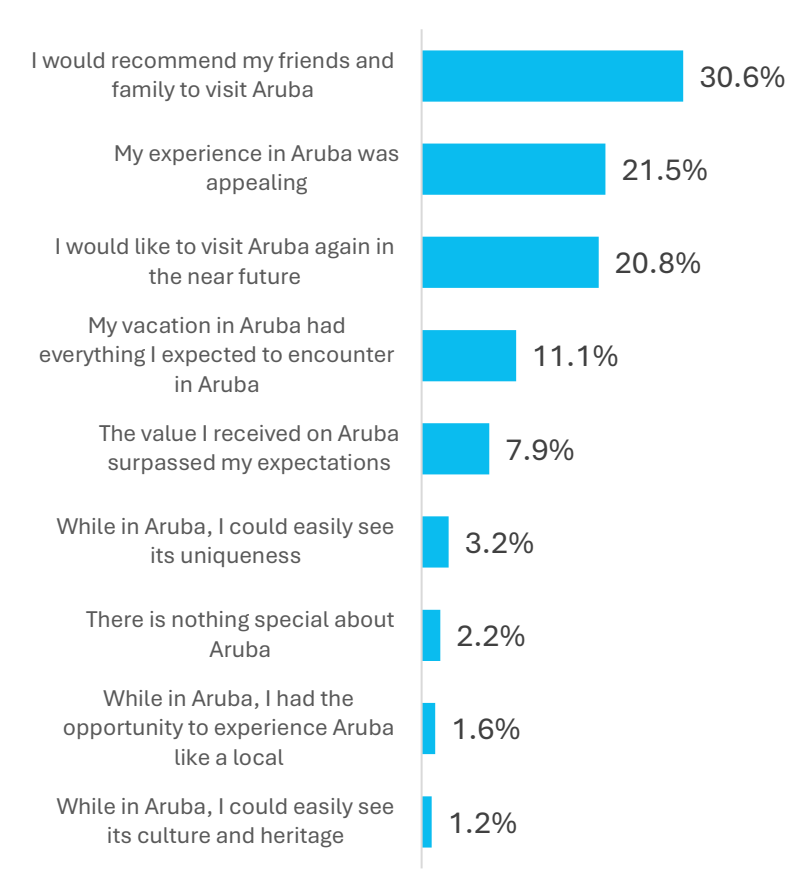
## First Timers HHI 150K+



n= 3056



n= 1845



n= 506

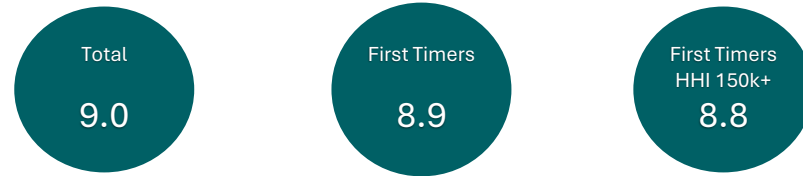


10

**Satisfaction, likelihood to  
recommend, and visit**



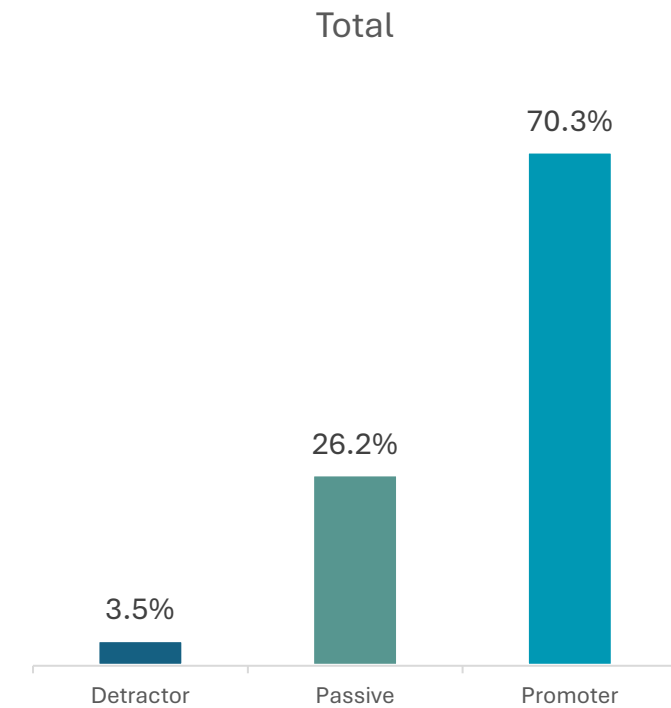
# Satisfaction



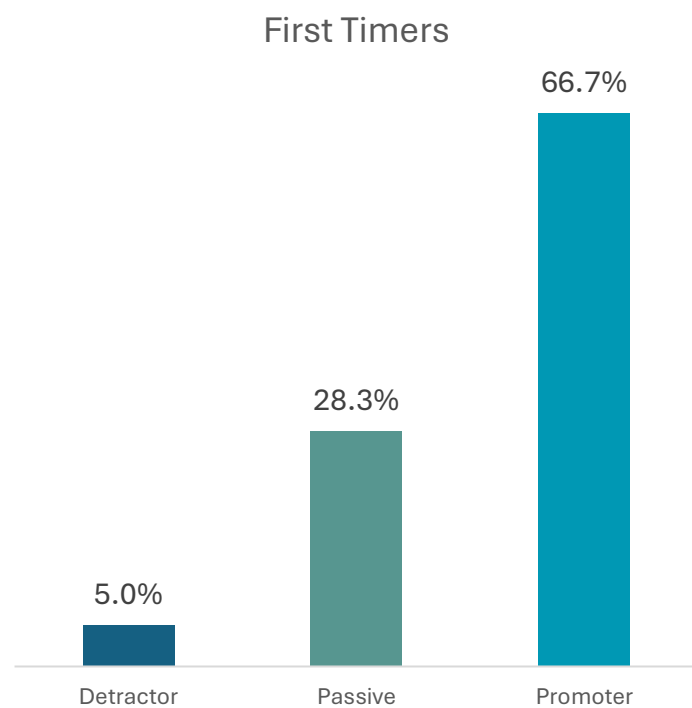
## Total

## First Timers

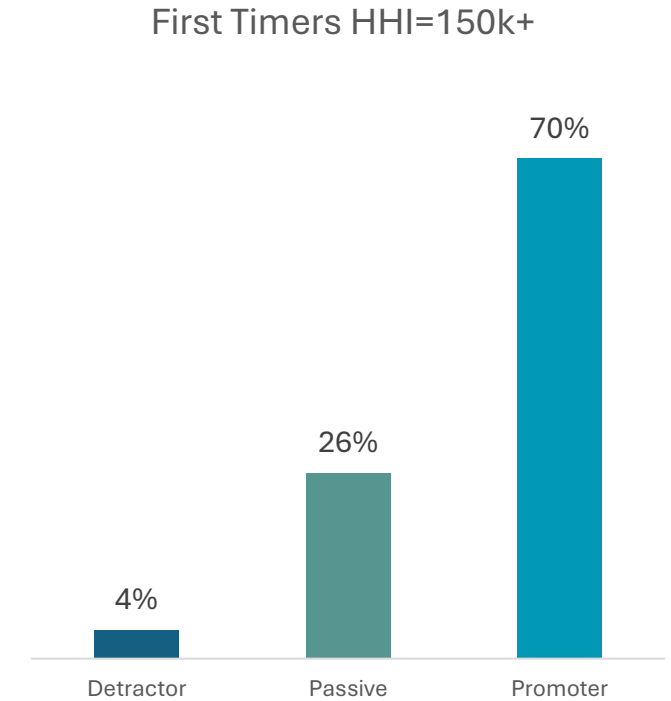
## First Timers HHI 150K+



n= 3056



n= 1845



n= 506





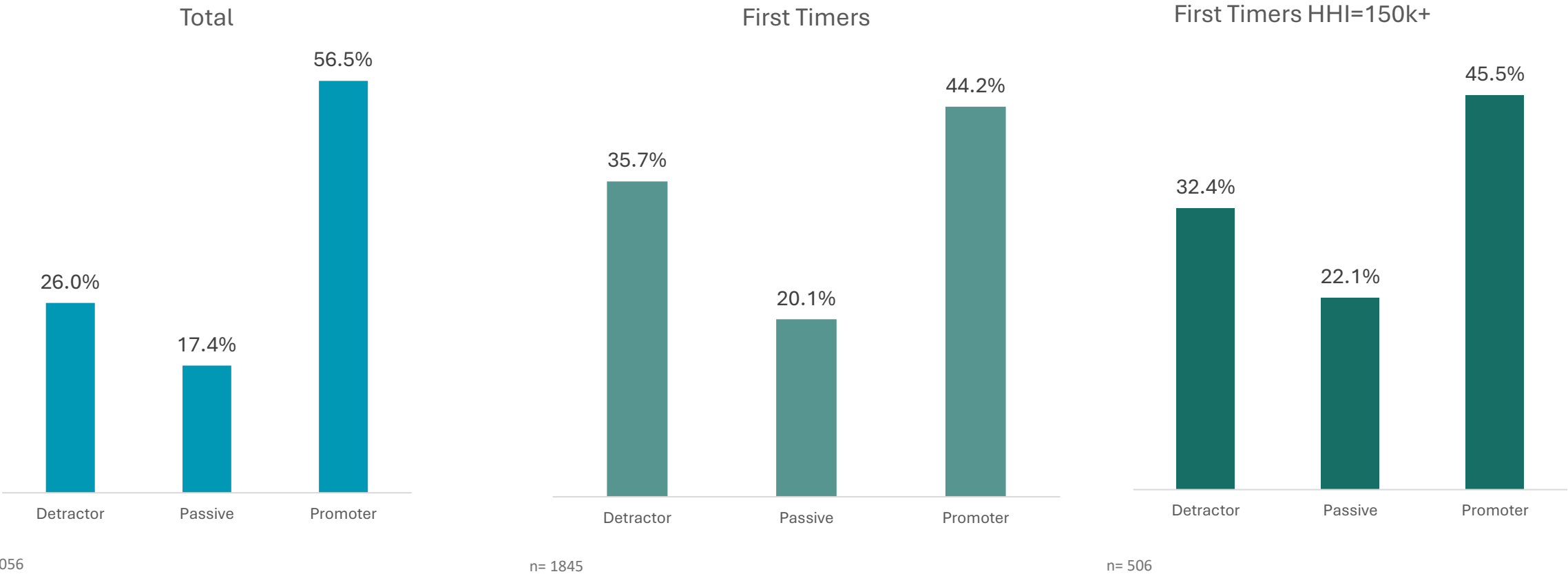
# Likelihood to visit in next 5 years



## Total

## First Timers

## First Timers HHI 150K+



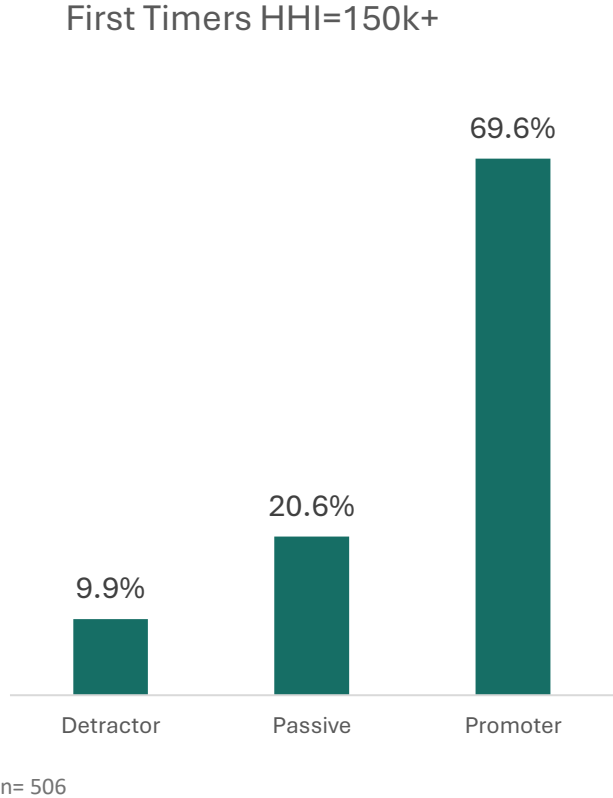
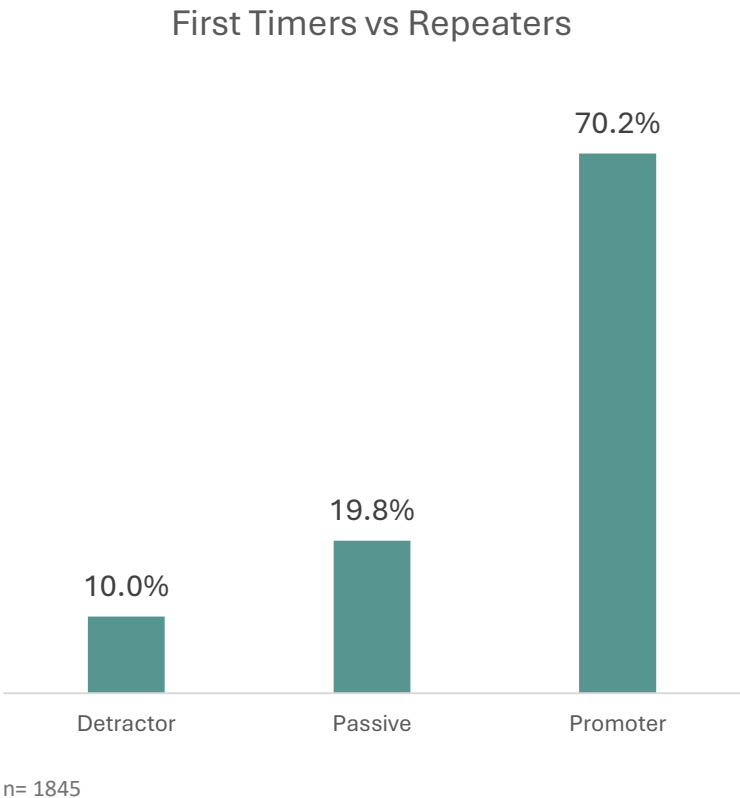
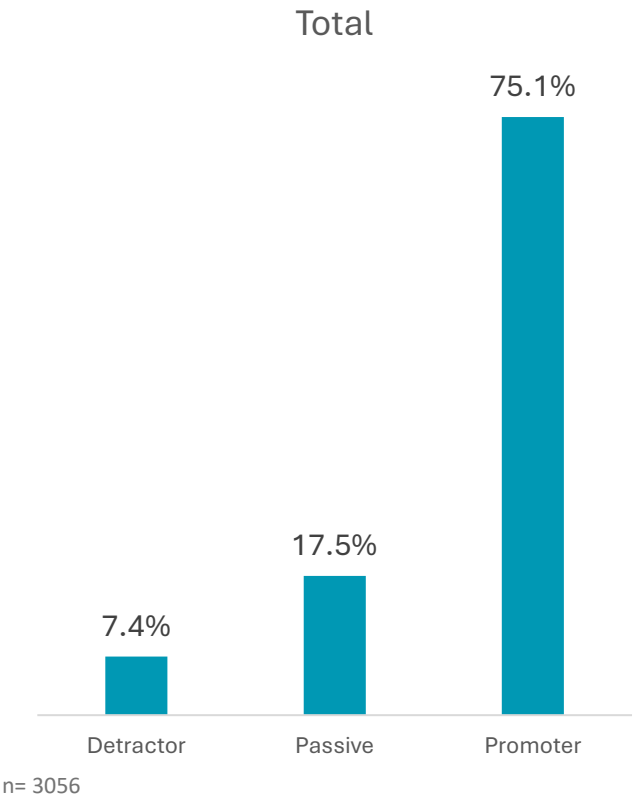
# Likelihood to recommend



Total

First Timers

First Timers HHI 150K+







# MASHA DANKI

## Thank You

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

Melanie Evans Kelly, Manager Strategy, Research, and Planning at [m.kelly@aruba.com](mailto:m.kelly@aruba.com)

Or

Visit our website [www.ata.aw](http://www.ata.aw)



Aruba Tourism  
Authority

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