



Annual Report

2024



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CHAPTER 1

From the CEO

In 2024, Aruba once again demonstrated consistent and positive performance in its tourism industry, solidifying its position as one of the top performers in the Caribbean region, characterized by robust demand and premium price positioning.

The A.T.A. recognized a significant shift in sentiment towards tourism. While this sentiment varies across countries, the message was unmistakable: Overtourism - a phenomenon marked by the detrimental impact of tourism on host communities and the natural environment - emerged as a pressing concern. In Aruba, the community is not immune to this rising tide of skepticism. Local voices increasingly expressed their worries about the sustainability of tourism practices.

Our residents are well aware of the importance of tourism, as reaffirmed by another local sentiment survey conducted in 2024. In this survey, 68% of the population indicated being happy with our tourism industry. Among those working in the hospitality sector, 75% expressed happiness with the industry. While these percentages remained high, it was essential to note that they were higher in the previous study conducted in 2018. When examining the percentage of the population that scored positively or extremely positively regarding the general impact of tourism, this totaled 68% in 2024 vs. 78% in 2018.

Guided by these insights an important milestone for the year was the development of our 4th Multi-Annual Corporate Strategy (MACS), which marked a significant journey of transformation and change. The strategy lays out concrete plans for the years to come, with a long-term aspiration extending all the way to 2035.

As part of our continuous evolution in tourism management, we committed to transitioning our destination towards creating net positive effects by enhancing the regenerative capacity of human societies and ecosystems. One of the primary shifts proposed last year entails a transition from responsible, to sustainable and ultimately to a regenerative tourism industry.

This endeavor carries great responsibility, determining the direction of not only how we contribute to the economic sustainability of Aruba but also necessitating a careful balance between the needs of our community, the experiences of our visitors, and the sustainability of our island for future generations. All of these factors lay at the core of our High-Value, Low-Impact tourism model, which continues to be our guiding principle.

In terms of tourism performance in 2024, Aruba welcomed a total of 1,421,616 stay-over visitors, marking a 13% increase compared to 2023.

North America and Latin America showed a strong performance, with North America experiencing an 11% rise in stay-over visitors and Latin America achieving a notable 38% increase from the previous year. In contrast, Europe concluded the year with a 6.5% decline, impacted by ongoing inflation and rising operational costs for airlines, attributed to high interest rates, elevated jet fuel prices, and increased labor expenses.

When reviewing the tourism results for 2024, Aruba surpassed critical benchmarks such as Tourism Receipts and Revenue Per Available Room (RevPAR), underscoring the destination's commitment to attracting high-value visitors. Notably, Tourism Receipts is projected to have reached an astounding Afl. 5.4 billion, the highest figure recorded since 2011.

In terms of airlift, the U.S. market experienced growth in seat capacity despite occasional airline scheduling adjustments, challenges in equipment availability, and capacity constraints at the airport. There was a robust year-over-year growth of 18% in seat capacity compared to 2023, equating to an additional 195,193 seats.

The strength of the Aruba brand, coupled with the Aruba Tourism Authority's (A.T.A.) strategic destination and partnership marketing efforts, played a pivotal role in achieving an impressive annual load factor of 88% across all airlines servicing the U.S. market.

With the emphasis on the long-haul markets within Latin America, this region demonstrated substantial growth in 2024, with a total of 356,620 seats, which represents a 25% increase compared to the previous year. Load factor levels averaged 77%, reflecting a one-percentage-point improvement from 2023. This growth was bolstered by the introduction of new direct flights from Lima to Aruba (LIM-AUA) with LATAM Airlines, initiated at the end of 2023, as well as an

increase in flight frequencies with the same airline throughout 2024.

Conversely, the European market faced challenges, registering a total of 168,474 seats—a 9% decrease compared to the previous year. This decline was primarily due to political and social pressures affecting travel from Schiphol. A confluence of factors contributed to the downturn in travel to Aruba from Europe in 2024, including changes in available air service, a robust North American market leading to reduced inventory on the island, heightened inflation in Europe, and a growing trend toward last-minute bookings that often limited availability.

The Aruba Hotel and Tourism Association (AHATA) member hotels surpassed the Average Daily Rate (ADR) for 2024 by 7%. Additionally, revenue per available room (RevPAR) experienced an impressive increase of 12% compared to 2023 levels. Short-term vacation rentals (STVR) also saw growth in their ADR, with a rise of 7% compared to 2022. The occupancy level of STVRs averaged 58% in 2024. Notably, the market share of stay-over visitors choosing alternative accommodations, including STVRs, rose from 29% in 2023 to 33% in 2024, whilst the market share of visitor nights increased from 34% in 2023 to 37% in 2024, hereby surpassing the market share of EP (21%) and All Inclusive accommodations (14%) combined. The A.T.A. continues to advocate for a balanced portfolio of on-island accommodations, as a healthy mix is crucial to the success of Aruba.

The cruise industry also had a positive growth in 2024, reaching an all time high when looking back to 2014 thereby surpassing pre-pandemic levels and fully recovering. Last year recorded 347 calls a total of 897,273 cruise visitor arrivals, which is an increase of 20% when compared to 2023.



Aruba maintained a high level of visitor satisfaction in 2024, with a monthly average satisfaction score of 9 out of a possible 10. This outstanding rating serves as a testament to the hard work and dedication of everyone involved in delivering exceptional experiences to our guests. Aruba truly excelled in overall satisfaction, reflecting our collective commitment to excellence in hospitality and service.

From a marketing perspective, the development of our new MACS created a significant shift in our positioning, and ultimately our attraction and replacement strategies. Guided by this new direction, we reframed the question from, “What can Aruba do for its visitors?” to “What can Aruba do for its guests, and what can our guests do for Aruba?”

This greatly impacted our Aruba Effect communication strategy, further evolving it to now include, ‘protect it,’ a meaningful commitment to invest in work and communication strategy that protects the island, the wildlife, the culture, and the quality of life for the locals.

Becoming our internal rallying point to influence how we communicate with a range of audiences, from potential first-time guests and repeaters, to on-island residents and businesses, and to on-island guests. By applying the right communication strategy at the ‘Feel it’, the stage that provides inspiration, the ‘Want it’ which aims to create desire, and the ‘Get it’ the stage at which the desire is converted into an actual purchase, the ‘Protect it’ is now at the heart of what we do and shall influence how we communicate with each audience, in every single stage. This spearheaded the direction of brand Aruba talking more about responsible tourism on an international front.

From a destination development perspective, we acknowledged that it was imperative to initiate significant shifts. To this end, our Destination Services Unit introduced a robust new framework centered around five guiding principles that informed all our destination management efforts: community engagement, sustainable coastal development, carrying capacity, regenerative tourism practices, and ongoing advocacy.

Our destination development initiatives focused on actions that emphasized protection and balance, supported by communication strategies grounded in thorough research and data analysis.

A critical component of the A.T.A.’s efforts lay in our advocacy work, wherein we actively participated in collaborative projects involving both the private and public sectors, joining forces in committees and on boards to drive sustainable change.

Effective management of guest mobility across the island was essential to our strategy. We achieved this not only through product upgrades and the introduction of new experiences but also by diligently tracking visitor movement and collecting data to enhance management practices. To facilitate this, the A.T.A. installed sensors at key tourist sites, which provided us with real-time data. This technology empowered us to enhance visitor experiences by delivering live occupancy information and ultimately allowed us to optimize visitor flow through data-driven analytics.

Additional accomplishments by the organization include the timely submission of critical documents such as the 2023 Annual Report and the 2025 Corporate Plan and Budget both which received a seal of approval from the Minister of Tourism. In 2024, the A.T.A.'s total operating income reached Afl.147,017 thousand, exceeding the budget by 27%. Of the Afl. 91,433 thousand allocated for marketing expenses, 91% was effectively utilized.

As we present the 13th Annual Report of the A.T.A. SG, we take a moment to reflect on the many achievements of the past year, even amidst continued ongoing challenges we face on both local and global scales.

Looking ahead, it is crucial that we continually reassess Aruba's tourism direction and strategic priorities while embracing the new direction set forth in the MACS 2025-2035 aimed at sustainable

development. As we navigate this path, our commitment to fostering a smart approach towards sustainable and regenerative tourism development will be paramount. This not only enhances the visitor experience but also protects our island's natural and cultural resources for future generations. That said, let us remember that "Un Aruba Dushi pa Biba ta Un Aruba Dushi pa Bishita" is a shared responsibility. Together, we must always uphold what makes Aruba not just a great vacation destination, but an even greater place to live.

Ronella Croes
CEO, Aruba Tourism Authority

Sustainable Tourism Practices

In 2024, the A.T.A. reaffirmed its commitment to sustainable tourism by aligning with the High-Value, Low-Impact (HVL) model. This model serves as the foundation for Aruba's sustainable tourism development and is embedded within A.T.A.'s five strategic pillars, which form part of the recently developed Multi-Annual Corporate Strategy (MACS) 2025-2035.

A key component of the MACS development was defining A.T.A.'s Sustainability Ambition, which serves to inspire, commit, and guide the organization in making choices that prioritize the preservation and enhancement of Aruba's environment, culture, and quality of life.

This process involved a comprehensive analysis of the UN's 2030 Sustainable Development Goals (SDGs) to ensure alignment with global sustainability objectives.

The SDG Assessment focused on the following key areas:

- To identify A.T.A.'s contribution to the SDGs through its roles and core activities within the Guest Economy Value Chain as Destination Marketing and Management Organization. The UN's 'SDG Framework for Tourism' was used as a guiding reference.
- To identify A.T.A.'s contribution to the SDGs through its internal business operations and way of working to ensure alignment with ESG principles, promoting environmental sustainability, social responsibility, and ethical conduct.

Subsequently A.T.A.'s core and corporate commitment were refined into four sustainability commitments. These serve as guiding principles in transforming the organization, taking a holistic approach to the value of the guest economy, and driving meaningful change. The first three align with the UN SDG framework, balancing environmental, economic, and socio-cultural aspects to ensure long-term sustainability. These commitments ensure that economic growth is supported by a socially just, thriving society and a sustainable environment. The fourth commitment reflects A.T.A.'s corporate contribution to sustainability.

A.T.A.'s Sustainability Ambition: Our Four Commitments

Environmental Commitment

The guest economy restores and nurtures the environment for the intergenerational benefit of Aruba.



Social Commitment

The guest economy enriches our values, culture and heritage and makes people flourish through jobs, knowledge exchange, and well-being.



Economic Commitment

The guest economy thrives and grows incremental value to the Aruban economy and its assets.



Sustainable Destination Management Organization

Exemplary in ESG Sustainability.



Various key sustainable tourism initiatives undertaken in 2024, as outlined in the report, demonstrate A.T.A.'s ongoing commitment to environmental conservation, cultural preservation, and responsible tourism development. This was achieved through amongst other strategic collaborations with key stakeholders, such as the Aruba Conservation Foundation (ACF), the Aruba Hospitality & Security Foundation (AH&SF), along with other public and private sector partners. Furthermore, A.T.A.'s research, advisory efforts, and advocacy for responsible destination management remained central to its strategy, reinforcing its long-term commitment to sustainability.

The next step as part of the SDG Assessment is for the A.T.A. to refine and prioritize its identified contributions to the SDGs and consolidate them for effective reporting and communication.

CHAPTER

02

Supervisory Board





Supervisory Board as per yearend 2024

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

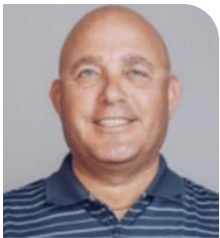
The Supervisory Board is charged with ensuring that the strategic business plan of the organization and the resulting plans of actions and budgets are aimed toward the realization of the Tourism Policy as defined by the Government of Aruba.

Additionally, the Supervisory Board is charged with monitoring the performance of management, being the CEO, and ensuring that the institution’s internal control and risk management systems are effective.

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

Supervisory Board composition and membership

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



Francisco Quant. Chairman

Date of Birth: May 12, 1969

First Appointed on: January 1, 2018

End of Term: January 1, 2026 | 2nd Term

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



Joe Najjar. Board Member

Date of Birth: January 18, 1957

First Appointed on: January 6, 2020

End of Term: January 6, 2028 | 2nd Term

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



Janien Huistra. Board Member

Date of Birth: December 21, 1972

First Appointed on: April 1, 2017

End of Term: April 1, 2025 | 2nd Term

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



Gregory Croeze. Board Member

Date of Birth: February 15, 1977

First Appointed on: July 1, 2019

End of Term: July 1, 2027 | 2nd Term

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



Charleson Oduber. Board Member

Date of Birth: November 19, 1978

First Appointed on: September 1, 2022

End of Term: September 1, 2026

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



Gerald Tsu. Board Member

Date of Birth: July 14, 1975

First Appointed on: September 1, 2021

End of Term: September 1, 2025

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



Tisa LaSorte. Board Member

Date of Birth: April 9, 1962

First Appointed on: September 1, 2021

End of Term: September 1, 2025

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

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

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

Board, and management meet when deemed necessary.

State Ordinance

Reporting to Parliament through the Minister of Tourism, A.T.A.'s legislative requirements are outlined in the State Ordinance –

“Landsverordening instelling A.T.A. Sui Generis (AB 2011 No 13, AB 2011 No 14 and AB 2015 No 63)”.

Supervisory Board Attendance

The Supervisory Board held 17 Supervisory Board meetings during the year. The Supervisory Board had an average attendance of 87.4%

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

Under article 14 of the State Ordinance, Afl. 750 is the compensation granted to each Supervisory Board member per attended meeting (with a maximum of Afl. 24,000 per year per Supervisory Board member). A total of Afl. 78,000 was paid as compensation to the Supervisory Board in 2024 (maximum overall: Afl.126,000).

Highlights of topics discussed during the Supervisory Board meetings

Important topics which were discussed during the Supervisory Board meetings did include the presentation and approval of the Annual Report 2023 and the Corporate Plan and Budget 2025, as well as key marketing and destination services projects. In addition, the standard agenda points were discussed, such as the monthly approval of minutes of previous Supervisory Board meeting(s), the approval of purchase orders and agreements, and the revision of the monthly financial reports.

Internal Audit

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

As per A.T.A.'s internal auditor (Deloitte), the overall impression of A.T.A.'s internal controls and results were to their satisfaction. Management is to finalize the internal audit for 2024 and present this to the Board.

Approval of Purchase Orders

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

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

External Accountant

The audit results are an integral part of A.T.A.'s Annual Report and were conducted by EY partially in 2024 and partially in 2025. The external audit resulted in another positive review by the independent auditor over calendar year 2024.

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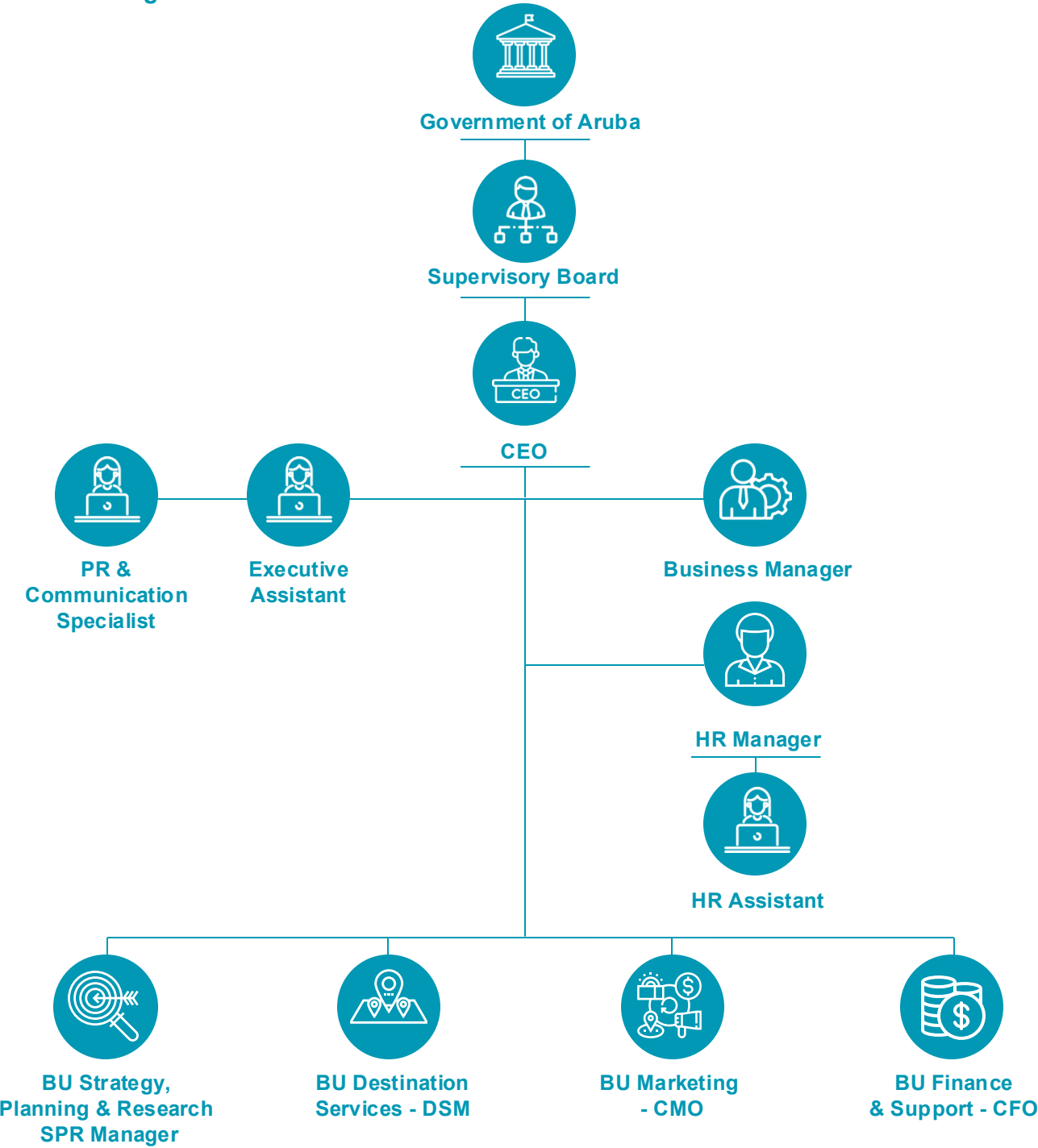
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Corporate Profile



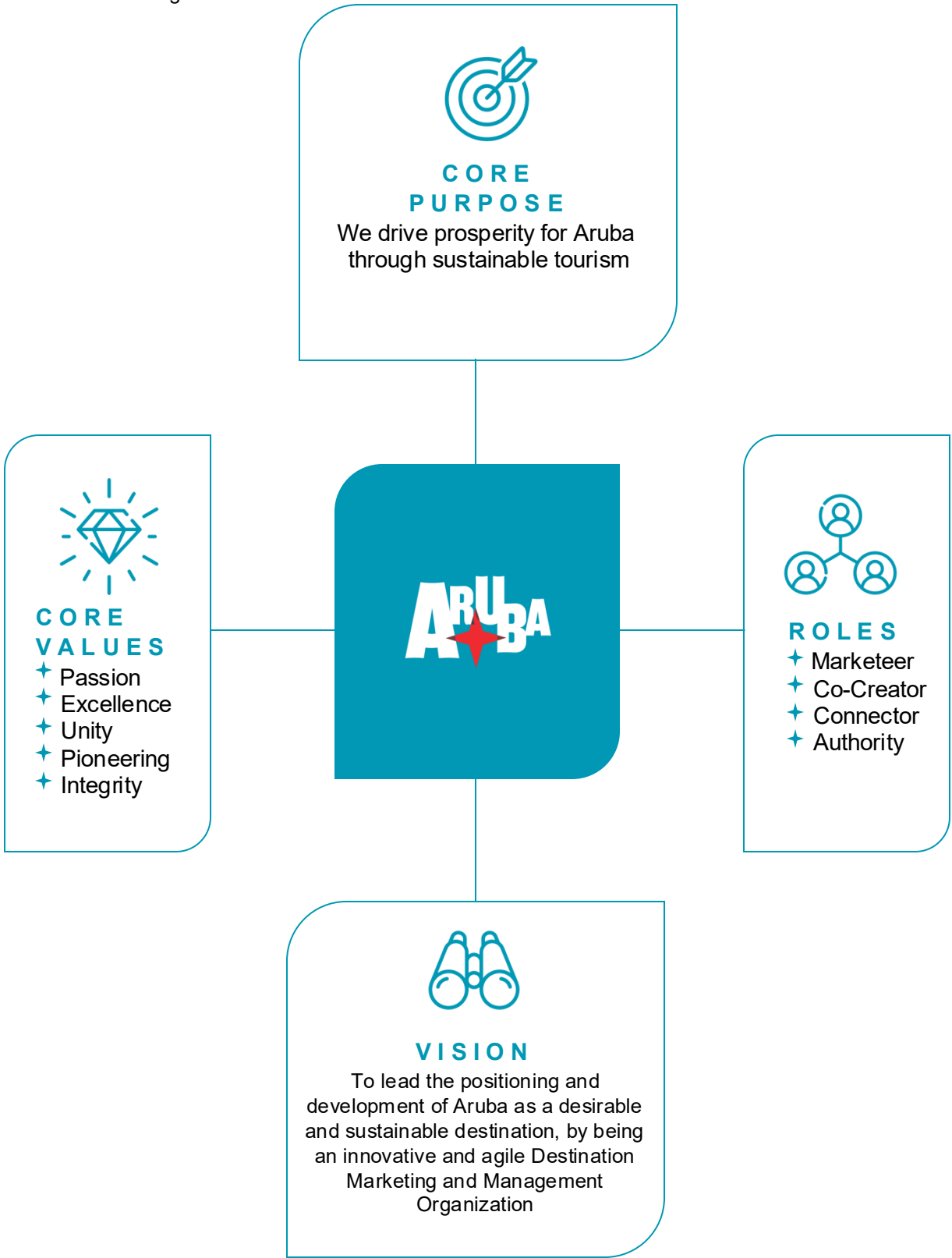
The Aruba Tourism Authority (A.T.A.) is the Destination Marketing and Management Organization (DMMO) of Aruba responsible for uniting tourist interests amongst the on- and off-island stakeholders/partners for the purpose of coordinating destination marketing, destination development and destination partnerships.

A.T.A. Organizational Chart



A.T.A.'S Aspiration 2025

The Aspiration of the A.T.A. provides a clear picture about what we as foundation stand for and where we want to go.



Our Goals & Strategic Objectives

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

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

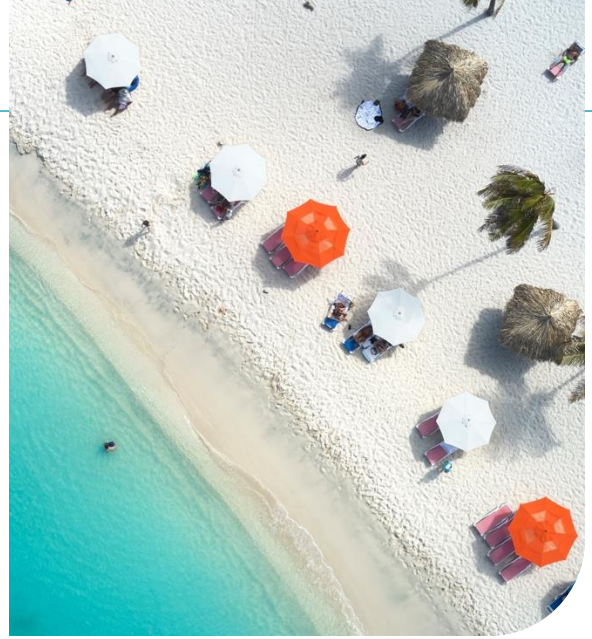
CHAPTER

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Human Resources



The mission of Human Resources (HR) at A.T.A. is to enhance the organization's success by implementing effective HR practices aimed at retaining, engaging, and empowering high-performing individuals. We strive to foster innovation and attract top talent, recognizing that our team members are among the most valuable assets of the organization. They play a crucial role in developing and executing plans and strategies that are integral to our tourism offerings.



Staff Statistics & Recruitment Efforts

As per December 31, 2024, a total of 67 team members worked at the A.T.A. of which 31% were employed overseas.

The A.T.A. recruited eight new team members. Six employees resigned, and the employment agreement of 1 employee was terminated upon mutual agreement. The A.T.A. had nine open FTE positions as per December 31, 2024, including open positions at the overseas offices.

Corporate Wellness

In 2024, A.T.A. developed a comprehensive corporate wellness plan aimed at promoting health and well-being of its employees throughout the organization year-round.

This initiative included an enhanced Wellness Month Program and activities designed to address physical, mental, and emotional wellness. As part of this program, the gym membership benefit was introduced at headquarters in Q4 and had an enrollment of 25 employees. Under this initiative, A.T.A. subsidizes a portion of the monthly gym membership costs.

The wellness plan also encompasses regular health assessments, fitness challenges, workshops, and resources for healthy living. By fostering a supportive environment focused on wellbeing, A.T.A. seeks to enhance employee

engagement, avoid absenteeism, and contribute to overall workplace morale. Ultimately, the corporate wellness plan reflects A.T.A.'s commitment to creating a healthier workplace where employees feel valued and empowered to prioritize their health.

Career Portal

The HR unit at A.T.A. launched a career portal designed to streamline and enhance the recruitment process. This innovative platform provides a user-friendly interface for job seekers, allowing them to easily browse and apply for available positions within the organization. By centralizing job postings and application tracking, the career portal improves efficiency for both candidates and the HR staff. Overall, the portal plays a significant role in A.T.A.'s commitment to effective recruitment and in building a strong, skilled workforce.

Learning & Development

Learning and development are essential components that drive A.T.A.'s innovation and agility. In the face of a rapidly changing environment, it is crucial for A.T.A. to adapt to consumer and marketing trends, emerging marketing technologies, and evolving industry standards. The organization's initiatives in learning and development empower employees to stay informed and adjust their skills accordingly.

In 2024, A.T.A. allocated a budget to invest in the collective and individual learning of its team members. The organization offered various training and development opportunities to both local and international employees, including masterclasses on personal development and on becoming more resilient, mental health awareness courses, attendance at the PRSA 2024 Travel & Tourism Conference, Phocus wright Conference, security awareness training, and Microsoft 365 training to name a few.

Employee Recognition Program

The Hi5 program was updated in 2024, and the process was simplified to make it easier for employees to cast their votes and recognize their peers. With these enhancements, participation in the program increased significantly, allowing team members to engage more effectively in acknowledging each other's contributions. Additionally, the program was expanded to include A.T.A.'s overseas offices, ensuring that employees could take part in the initiative globally. This expansion fostered a greater sense of community and collaboration across the organization, reinforcing the importance of employee recognition and engagement.

YOU Anniversary

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

In 2024, 11 employees were recognized, ranging from those celebrating their fifth-year anniversary to those with thirty-five years of service to the tourism industry.

CHAPTER

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Aruba Tourism Industry

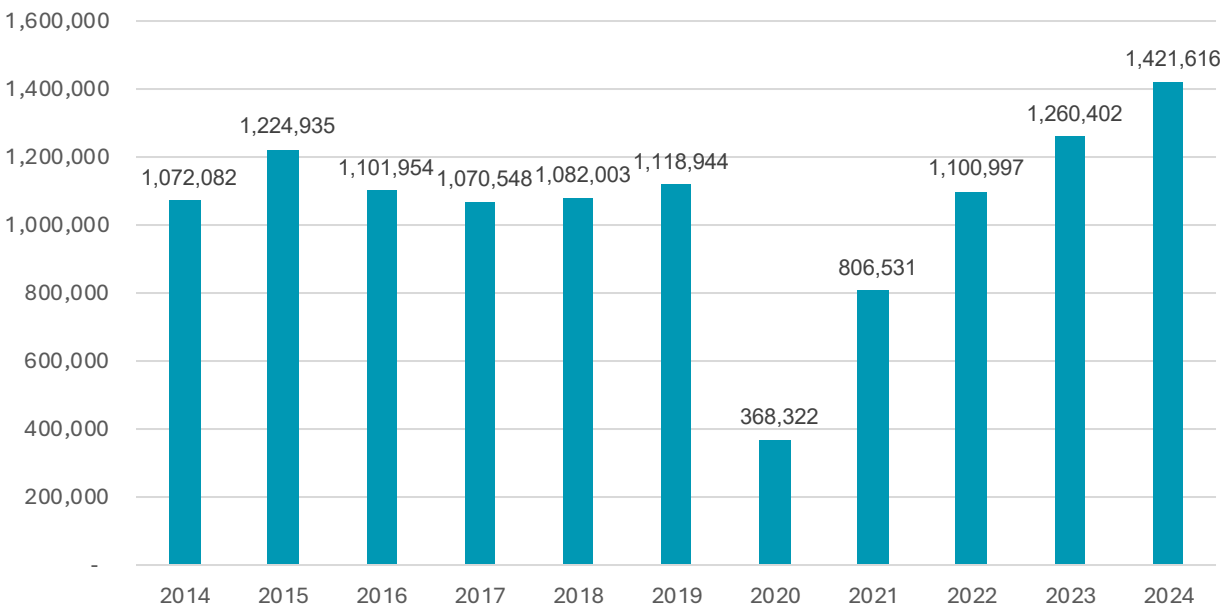


Stay-Over Visitor Arrivals

ACTUAL 2024

vs 2023: +13%

Aruba closed 2024 with a 127% recovery compared to the 2019 stay-over visitor arrivals level.



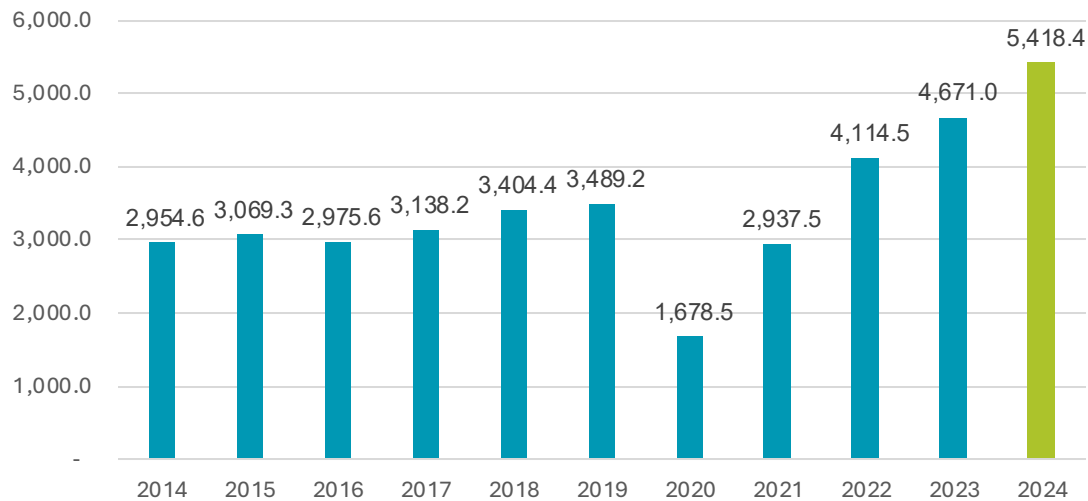
Source: CBA/ A.T.A.

Tourism Receipts 2014-2024

ESTIMATED FINAL 2024

vs 2023: +16%

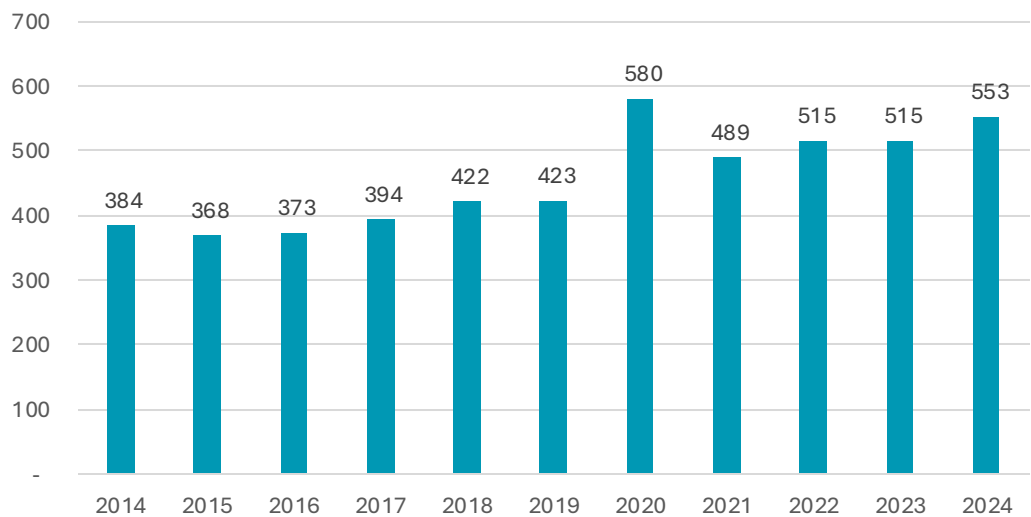
Tourism receipts, which encompasses the total on-island expenditures during the trip, recovered consistently. The estimated final for the full year 2024 is Afl. 5.4 billion, a 155% growth in comparison to 2019.



Source: CBA
2024 is Estimated Final

Average Daily Tourist Spending (ADTS) 2014-2024

In the past three years, the average daily tourist spending (ADTS) has steadily increased, with a visitor spending of an average of Afl. 553 per day in 2024, which is a 7% growth compared to 2023.



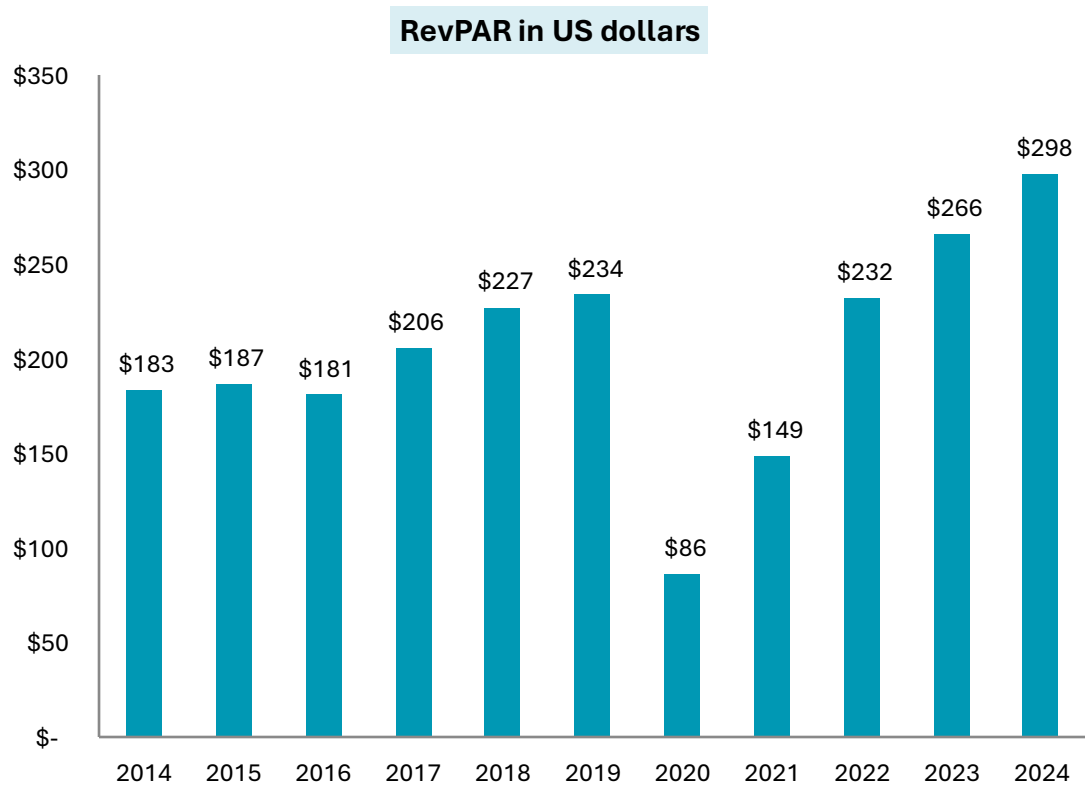
Source: CBA/ A.T.A.

Hotel Performance 2011-2024 | Revenue Per Available Room (RevPAR)

RESULTS 2024

vs 2023: +12%

In 2024, the Revenue Per Available Room (RevPAR) surpassed the 2023 levels by 12%.



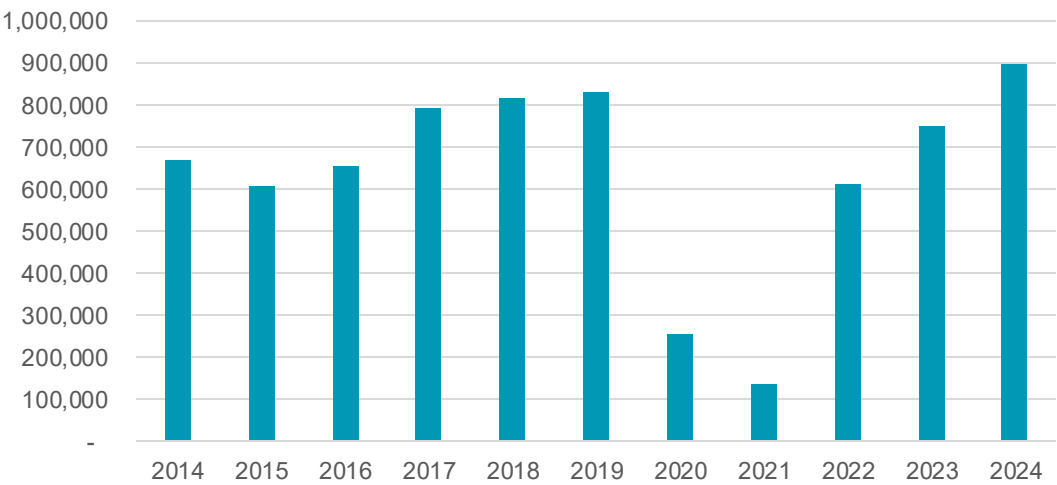
Source: Aruba Hotel & Tourism Association (AHATA)

Cruise Visitors Arrivals 2011-2024

RESULTS 2024

vs 2023: +20%

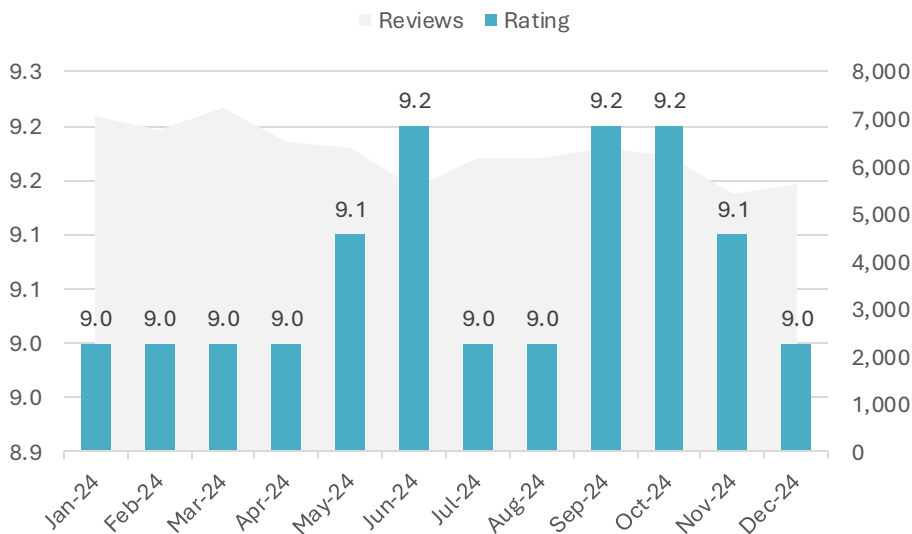
Last year recorded 347 calls a total of 897,273 cruise visitor arrivals, which is an increase of 20% when compared to 2023.



Source: Aruba Port Authority (APA)

Visitor Satisfaction

Regarding visitor satisfaction, Aruba maintained an impressive record in 2024, boasting a monthly average satisfaction score of 9 out of 10. This score highlights Aruba's success in providing a gratifying experience for its visitors, contributing to the positive trajectory of the tourism industry.



Source: A.T.A.

CHAPTER

06

Marketing & Promotions



North America

Situational Analysis

U.S.A

In 2024, the USA market registered 1,062,610 tourist arrivals. This figure represented a 11.4% increase compared to 2023, adding to the USA's dominance with a market share of 74.7%. The core markets in the Northeast maintained their prominence, capturing 56.6% of the U.S. market share. The visitation numbers from these key markets increased by 5.2% compared to the previous year, driven primarily by strong growth in New York, New Jersey, Connecticut and Pennsylvania.

The A.T.A.'s North America office conducted an in-depth analysis of the organizational structure for the market, along with a gap analysis based on the roles and responsibilities of current team members. This analysis highlighted the need for additional team members to effectively serve the market.

As a result, a Communications and Digital Specialist will be added to the team in 2025. This role is designed to strengthen the A.T.A.'s marketing and outreach efforts in an increasingly digital landscape. Additionally, the development of a comprehensive sales framework has been initiated. Sales positions have been redefined into distinct Sales Territories and Geographic Designated Sales Areas (GDSAs), considering factors such as the proximity of states, team members' home base locations, the distribution of primary and feeder markets, and the number of stayover visitors per territory.

Particular focus has been placed on expanding "Opportunity Markets"—specifically Houston,

Nashville, and Los Angeles—which are viewed as key areas for growth potential.

Airlift

The strong collaboration and partnership among key stakeholders – including the A.T.A., A.A.A., AHATA, the Ministry of Tourism, and airlines - have been instrumental in the continued success of the destination in the U.S. market. Despite occasional airline scheduling adjustments, equipment availability challenges, and capacity constraints at the airport, seat capacity experienced a robust year-over-year growth of 18% compared to 2023—an increase of 195,193 seats.

The strength of the Aruba brand, combined with the A.T.A.'s destination and partnership marketing efforts, played a key role in achieving an annual load factor of 88% across all airlines serving the U.S. market. This can be considered impressive considering the combination of significant growth in seats while maintaining a load factor close to ninety percent.

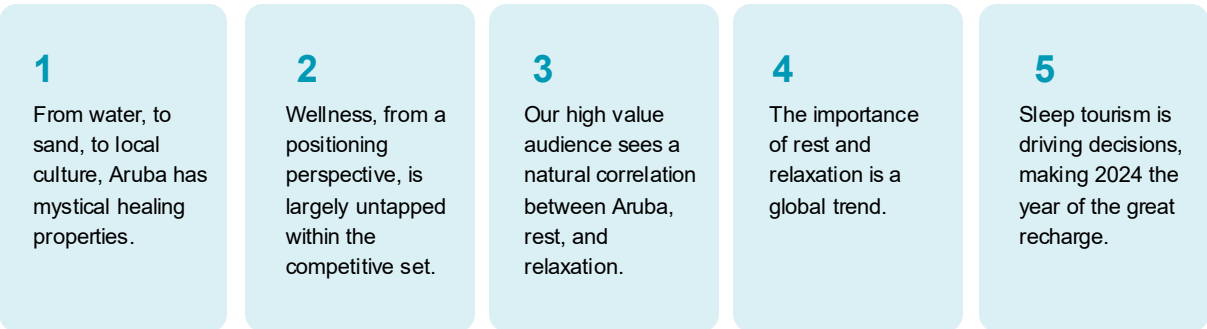
Branding and Advertising

Brand Strategy

In 2022, a new strategy was defined to differentiate Aruba to best appeal to the wants and needs of our high-value audience. The goal was to answer the question, "What makes Aruba different?"

Answering that question meant articulating a difference which visitors don't see but feel. From the people to the land, to the water, what makes Aruba different is the transformational power the island has over those who visit.

Foundational insights:



They are better, happier, and more optimistic versions of themselves. This transformational power was named *The Aruba Effect*.

Over the past years, the strategy has evolved to both double down on differentiation and reflect the changing trends in the travel industry.

In 2022

The Aruba Effect was established: Aruba changes you within.

In 2023

The focus shifted on the lasting Effect: It stays with you.

In 2024

The objective sought to define the 'It'. What stays with you?

These insights pointed to two strategic shifts in 2024:

- 1. Position Aruba, through the Aruba Effect, as the most rejuvenating vacation destination (Aruba's ownable, differentiated version of wellness).
- 2. Proving this claim by articulating Aruba's unique value proposition:
 - a) Healing Water – Aruba's waters have mystical properties that have been healing locals and

- visitors for centuries. Our water is medicine for the soul.
- b) Masha Danki culture - Graciousness and Gratitude are at the heart of Aruban hospitality. When you visit, you feel it. It takes down your guard and puts you at ease.
- c) Cooling sand - Our sand has the confounding ability to stay cool on the warmest days. You can lounge on it and walk on it, making our beaches the most relaxing in the world.
- d) Worry-free discovery - When these words come together, you get a feeling that is uniquely Aruban. Ease, proximity, safety, even potable water makes discovering the diverse things the island has to offer a breeze. Discovering Aruba is how to discover yourself.

Communications Framework

A Communications Framework was again used to unify the yearly plan by providing a blueprint for all marketing channel roles (paid media, public relations, influencer, email, etc.) and messaging decisions at distinct moments of our target consumers' purchase journey. The framework informs decisions about the investment of time, budget, and resources, in addition to helping guide measurement of marketing effectiveness. In 2024, the framework included the use of new audience segment groupings by identifying moments when shared vacation and messaging requirements could lead to budget efficiencies.

Creative Platform

The Aruba Effect

In 2024, the Aruba Effect creative platform evolved in three ways to reflect shifts in strategy.

1. To position Aruba, through The Aruba Effect, as the most rejuvenating vacation destination, we used existing footage from our 2022 and 2023 productions to bring to life island RTBs (reasons to believe) that prove the rejuvenation power of Aruba - healing water, cooling sand, Masha Danki culture, and worry-free discovery.
2. The creative assets were tailored to the new audience groupings - chillers, doers, and pleasers. Each group was paired with the island RTB most motivating to them:
 - Chillers - "Best Beaches in the Caribbean". Water with mystical healing properties. Crushed coral sand that stays cool to the touch. Cooling trade winds that make the most sunny days the most pleasant sunny days.
 - Doers - "Worry-free Discovery. New tastes, terrains, experiences, emotions, and cultures.
 - Pleasers - "A Culture of Masha Danki." The most inherently generous and gracious local culture. Your family is our family.
3. Paid media was balanced with two brand actions to not just say, but prove the rejuvenating power of Aruba:

International Day of Happiness

The International Day of Happiness (IDOH) global activation laid the foundation for Aruba to own happiness amongst its island competitors. To ensure that Aruba is the most synonymous island with IDOH - we created & launched a fully global campaign to launch The Language of Happiness - the only language that everyone can understand, no matter where you live or which native language you speak

On IDOH, the world was taught a new language- The Language of Happiness. Social-first content and a long-form explainer video were created and translated in multiple languages to post globally in a synchronized effort on March 20th, 2024.

Additionally, creators and celebrities who had experienced Aruba's rejuvenating effects were engaged to share what stayed with them from their visits.

The initiative included earned media outreach, with coverage seen in travel trade publications, and partnerships with at-home creators Dean & Caelynn Bell, Scott & Collette Stohler, Jeremy Flores, and Martin Riese. Creator content and media coverage drove to the dedicated Aruba.com landing page home to the campaign's hero video.

We saw 174.52k total creator impressions, a 1.32% avg video view rate, 375 press release placements and 195M+ press release impressions.



Relaxathon

In Summer 2024, the world's greatest athletes headed to Paris to showcase their physical prowess. But the world's greatest relaxers headed somewhere a little warmer, and definitely more relaxing. Introducing the Aruba Relaxathon: the world's most relaxing competition held in the world's most relaxing place.



Participants from all corners of the globe came together on Aruba’s Eagle Beach and had their ability to relax put to the test for a chance to be named the world’s best relaxer, hosted by legendary snowboarder Shaun White. For one hour we monitored each competitor’s heart rate in real time, throwing some fun surprises in along the way to shake things up. Because when it comes to finding rejuvenating comfort, no destination does it better than Aruba.

The Relaxathon was a truly integrated event, bringing together creative, creator, paid, earned and owned media.

The event unfolded in three phases:

| PHASE 1 | PHASE 2 | PHASE 3 | PHASE 4 |
|---|--|--|---|
| We used organic social and earned outreach to inspire participation, offering a chance to win a free trip to Aruba to take part in the event. | We used creator, earned, and our celebrity partner, Sean White, to drive broad awareness of the event. | We created a teaser video asset through a partnership with Vox media to encourage tune in. | On premiere day, we hosted the long-form event content on a dedicated Relaxathon hub hosted on thrillist.com, while Shaun White posted social content to drive to the site. |

RESULT

Prior to the campaign, KPIs were set, and every discipline met or exceeded their performance metrics.

- Our earned efforts secured 60 placements, 2.1B+ earned impressions.
- We partnered with 5 creators resulting in 65 pieces of content, with 494.8k cumulative impressions, and 24.1% average IG reel video view rate.
- Our partnership with Vox Media achieved 18.35 M impressions, 90k+ page views, 16k+ clicks, and exceeded 107% of the contracted goal reach.
- Paid social media efforts complemented the campaign with 16.24M impressions, 10.67% avg cpr, 3.45M YouTube views.

Times Square Out of Home Activation

Peace was brought to the busiest place in the world “Times Square” with an interactive digital out-of-home experience that allowed passersby to scan a QR code to choose the Aruba Effect of their choosing.

The video ads would play based on the experience the passerby selected, allowing consumers to have control of what people were viewing in the billboard capital of the world. The massive billboards were in a prominent high traffic position in the heart of Times Square, reaching over a million people per day during their evening commutes and exploration of NYC. This was a huge reach play for ATA, generating up to 50 million impressions over the course of the flight. This campaign delivered in full with strong engagement of the out-of-home experience with 530+ visits to the microsite, exceeding expectations.



2024 Paid Media Strategy

All strategic decisions for 2024 were grounded in the Communications Framework including vendor selection and audience targeting.

The plan engaged potential visitors with high-impact content as well as unique storytelling placements across multiple media channels and re-engaged them with retargeting and complimentary sequential messaging. Always-on conversion focused tactics were active to capture the heightened interest and encourage booking.

High-impact tactics were used to build brand awareness and inspire interest among potential visitors to the island, playing an important role throughout the year, particularly in late Q3 and Q4 leading into the peak travel season. Increased investment in media types like podcasts and digital out-of-home, followed where indicators showed growth in consumer usage and interest. In

contrast, less reliance was placed on media types with decreased usage, such as the OTAs.

In September, a formal test was launched to gauge whether increased investment in new, key markets could make an impact in consumer traffic and engagement on Aruba.com. Nashville and Houston were selected based on demographic data (segment distribution within markets, HHI Rate), brand and travel factors (Aruba visitation, airline capacity, competitive visitation), and media factors (tourism and Caribbean marketing spend, competitive set advertising expenditures, Caribbean specific travel interest). The results were strong in both markets; showing growth in monthly sessions, engaged users, and active users.

Measurement

Measurement in 2024 remained focused on the primary measurement tools, including the brand study, recurring paid media and organic social reports, and site traffic analysis. In addition to these, the diversification analysis was introduced in the first half of the year.

The diversification study was an analysis project aimed at identifying potential opportunity markets. To do this, historical market data was analyzed, including paid media performance, island visitation, competitive search interest, and market demographics in markets outside of Aruba’s core DMAs. The resulting model surfaced several markets with strong indicators across the datasets, identifying them as ready for additional investment. Ultimately, the project led to the campaign activation in Houston and Nashville.

Results & Tactical Summary

Aruba.com

Website Performance and Traffic

Total U.S. site traffic reached 5.2 million sessions in 2024, a 22% increase from 4.3 million sessions in 2023. Among our traffic sources, Paid Search and Paid Social saw the largest year-over-year increases, at 50% and 78%, respectively. Organic traffic also saw a 5% increase.

The top three most viewed pages were "Plan Your Visit - All Inclusive," "The Aruba Effect," and "Traveler Health Requirements." These were the same top three pages as in 2023; however, the "Plan Your Visit" page overtook "The Aruba Effect" as the most viewed page this year.

| | |
|---------------------------------|-----------------|
| "Plan Your Visit All Inclusive" | 1 million views |
| "The Aruba Effect" | 617,000 views |
| Traveler Health Requirements": | 520,000 views |

The pages with the highest year-over-year growth were "Things to Do / Beaches & Coves" and "Why Aruba - Families." Views for the "Things to Do" page increased by 204%, while views for the "Families" page grew by over 2,100%.

Top traffic sources for the year included Paid Search (32%), Direct (26%), Paid Social (16%), and Organic (18%). Paid media was responsible for 2.6 million sessions, approximately 50% of total traffic to the website, up from 1.7 million and 40% in 2023.

Market Delivery and Performance

The top five markets in terms of spend for 2024 were New York, Washington, Philadelphia, Boston, and Chicago. These markets accounted for 43% of the overall budget allocation, with New York remaining at the top, capturing 20% of total spend. Among the top-spending markets, Boston continued to be the best performer, while Philadelphia showed strong improvements from 2023, becoming the second most efficient market in terms of cost per conversion.

Paid Social Media

In 2024, paid social media remained a key tactical pillar. Meta was the primary advertising platform; however, TikTok was launched as a new test channel. Paid ads were again deployed across Facebook and Instagram, using a variety of engaging and impactful ad units, such as carousel ads, videos, sponsored stories, and static panels. On TikTok, the focus was on creator collaboration content to foster deeper engagement with our audience.

Several key changes occurred within paid social throughout the year, with the most significant being the launch of our new creative in April. With this launch, the campaign targeting was reconfigured to align with the Chillers, Doers, and Pleasers segment groupings, which were aligned with the new creative.

Additionally, key age demographics were prioritized by breaking out dedicated budgets for the Millennial and Gen X audiences. These breakout targets outperformed the previous combined targeting structure.

Within Meta, spend was increased by 3% from the previous year, leading to success in both awareness and engagement on the platform. For awareness, reach increased by 15%, and impressions were up by 5%. For engagement, clicks rose by 37%, and the click-through rate increased by 31%. On TikTok, our total spend delivered 49 million impressions, 201k clicks, and 15 million total users reached.

Paid Search

Paid Search strategy continued to play a prominent role within the campaign approach and remained the key tactic for capturing interest and demand generated by other marketing efforts. Paid search keywords triggered search ads across Google and Microsoft search engines.

With significant changes to Google forecasting, 2024 was a year of adjustments, yet expectations were exceeded—so much so that it needed to be re-forecast twice midyear. Looking ahead, this resulted in early improvements across key metric categories (2023 vs. 2024):

Conversions were up **41%**
 Conversion rate increased by **44%**
 Cost-per-conversion decreased by **45%**
 Search Impression Share grew by **33%**
 Cost decreased by **22%**
 Clicks were down by **2%**
 Impressions were down by **6%**

In summary, improved use of the allotted budget led to better results in nearly every Key Performance Indicator, surpassing all goals and ultimately driving more high-value site visitors via Google and Microsoft Ads search ads.

Key optimizations leading to improved performance included:

- Incorporating more headline and description copy to earn more high-quality impressions
- Honing the keyword bidding strategy and refining the keyword list
- Diversifying, expanding, and segmenting key markets, allowing for greater control over bid and budget efficacy
- Implementing values-based Bidding, where the highest-value conversions were weighted to allow in-platform bidding automation to better target the highest-value landing page engagements (e.g. lead scoring)
- Testing budget reallocation between search engines to find the most valuable balance

Video

Over 240M video impressions were served in 2024 while continuing to prioritize premium video ad inventory within streaming platform partners like Max, Hulu, Disney+ and Netflix, and online video placements via Meta, TikTok, YouTube, programmatic partner IQM and Ink Global. These partners showcased Aruba with high impact placements in relevant streaming content and delivered ads to a high-value audience.

NEW in 2024: Added TikTok based on its usage growth of 20%-35% YoY across all our affluent segments, and our high-value Doer segment grouping exhibited positive sentiment towards the platform. TikTok accounted for 20% of the video impressions and 10% of the video investment. YouTube shorts had a comparable creative and targeting strategy to TikTok and a similar user experience. Ink Global was included to engage consumers while in-flight and enabled Aruba to provide free inflight Wi-Fi on Jetblue and American Airlines after watching our ad. Both airlines have significant airlift in the Caribbean.

OTA / Metasearch

In 2024, key OTA and Metasearch vendors continued to be used; running consistently on Expedia, Priceline, Booking.com, Kayak and TripAdvisor to keep Aruba top of mind during searches. High-impact, top-performing ad units were prioritized using high household income targeting to reduce wasted impressions and intercept Caribbean travel interest. Performance variations across partners were again evident as consumer habits continued to evolve with increased preference for direct booking and cross-platform shopping.

NEW in 2024: A shift in targeting was recommended across all existing OTA partners to broaden reach to all hand raisers and reach all Caribbean searchers.

Display Banners

Display banners were deployed on various websites using travel data and targeting criteria from Adara, one of the few digital media partners who harness, and leverage verified travel data outside of OTA environments. Partnering with Kargo expanded display banner reach with its mobile-first ad approach.

Digital Out-of-Home

NEW in 2024: In October, we launched a Digital Out of Home campaign within Times Square showcasing videos of Aruba in the most prominent way possible. These digital boards utilized augmented reality technology, prompting users to select from six different Aruba experiences to cast on large digital screens.

The partnership led to 1.2M 18+ impressions daily, totaling 50M+ over the flight. Significant engagement was also accomplished with over 2,800 scans and website visits.

Podcasts

High-value audiences were reached with podcast producers, Spotify, Wondery and NY Times. On Spotify, which has the highest usage of all podcast platforms, impactful audio messages were paired with companion displays banners to complete the message.

NEW in 2024: Targeting criteria, powered by artificial intelligence (AI) were integrated on Spotify to dynamically insert ads based on themes that hosts discussed, like wellness or travel. New and historically strong podcast performers were used, on the Wondery network, that provided contextual relevance to build positive association with the hosts and shows. A custom podcast ad segment was launched with the NY Time's Daily podcast, the 3rd most popular podcast in the US.

Native Advertising:

Native advertising mimics the look and feel of digital news articles and delivers sponsored content directly into news feeds. Partnerships with Nativio continued, which provided an opportunity to distribute long form stories and articles about Aruba into highly-trusted news-adjacent environments.

NEW in 2024: An enhanced targeting strategy to reach all six segments with more creative differentiation. Added further innovation by retargeting off of video views with a sequential display message.

Custom Partnerships

NEW in 2024: Partnered with Bon Appetit and Modern Luxury.

Tapping into Bon Appetit to elevate Aruba's culinary diversification through visual storytelling and sensory-forward moments. Leveraged ASMR style videos to immerse the audience with the vibrancy of Aruba's cuisine through heightened sights and sounds. To support overall visibility, reach and impact of the video content, a custom Interactive Sensory Branded Native article unit housed three videos and was seeded through social amplification and fifteen seconds video pre-roll across Conde Nast's targeted network.

Modern Luxury reaches a highly affluent audience that has a discretionary income and desire to travel. As a strategic foundation, the new luxury video streaming network M/LUX was sponsored and paired with impactful media that provided brand awareness among its elite audience. Wedding related content was leaned into early in 2024 with custom content such as 'Wed in Luxury: 7 Reasons Why Aruba is the Best Destination Wedding Locale' amplified with custom articles on its site, social and email channels. All tactics significantly overdelivered engagement rate benchmarks.

In late 2024, Aruba's Rejuvenation message was conveyed through branded content, boosted social media posts via Modern Luxury handle, Travel+Adventure category sponsorship and added value, national editorial in its December Arts & Culture issue. Garnering 8.4M impressions, overdelivered pageviews and beat social engagement rate benchmarks by ~70%.

Public Relations

In 2024 Aruba's North American PR initiatives resulted in 9,969,502,612 media impressions and \$92,217,899.16 in PR Value. As well as 8,665,293 social impressions and \$3,398,314.47 in iValue. Additionally, our paid social media activations resulted in 18,780,713 paid social impressions and 162,335 Aruba.com views.

Compared to 2023, media impressions and PR Value decreased by 4% YOY. This decline can be attributed to a fewer number of brand acts executed in 2024, given a shift in communications priorities and strategy. Activations like World's Easiest Job, Tattoovenirs, and the 5th Anniversary of Aruba I Do, among others, garnered numerous national syndications in 2023 leading to a spike in impressions. In 2024, fewer activations in the second half of the year and the strategic pivot of Aruba I Do resulted in less coverage volume holistically, leading to fewer impressions and PR Value YOY.

As for creator results, iValue increased by 52% YOY while social impressions decreased by 38% YOY. This can be attributed to the number of at-home creators producing story-only content for key moments like International Day of Happiness and Relaxathon, which typically generate fewer impressions compared to Instagram (IG) in-feed or Reel content. Holistically, our creator partners performed well above the industry standard, with content garnering an average 24.16% IG Reel video view rate (VVR), compared to the 18.46% benchmark. The increase in iValue is a result of a strong average engagement rate of 1.17%, in line with the 1.18% industry benchmark.

Additional key 2024 initiatives included:

- Celebrated the all-new Aruba I Do, ushering in a new era for the event, shifting from the Caribbean's largest vow renewal to its most memorable. The event emphasized creating lasting memories for couples and took place at the historic Fort Zoutman Museum, honoring the 200th anniversary of Oranjestad. Past creator partners, Ken + Tori returned to The One Happy Island to renew their vows and bring their followers along for the journey.
- Unveiled the revamped Aruba Promise and all-new Guest Guidelines to educate travelers on how to be respectful and responsible guests while on island. Completed through several phases, Zeno worked alongside A.T.A. to conduct stakeholder interviews, finalize key messaging, create a partner toolkit and update Aruba.com.
- Supported the ATA in its inaugural Autentico culinary festival through talent partnerships, earned media outreach, shifting the timing of the culinary group press trip, and hosting a group creator trip. Media from The Spruce Eats, The Kitchn and Forbes, along with creators Erica Noblecilla and Minne Nguyen, visited the culinary festival and savored the island's vibrant food scene. Meanwhile, Chef Antonia Lofaso, Water Sommelier Martin Riese and Mixologist Kate Gerwin hosted pavilion booths, completed earned interviews, and posted event content on social. These efforts resulted in 1.2M+ impressions across earned and creator workstreams.
- Leveraged seasonal news angles and trends such as Valentine's Day, volunteer tourism, Sober October, and Black Friday & Cyber Monday, among other timely moments, to secure coverage in Forbes, TODAY, NerdWallet and more. Additionally, the team

also highlighted business developments via the 2024 Product Development press release to trade media. These efforts drove headlines and garnered over 35 placements and 2.5B+ impressions.

In 2024, A.T.A. hosted seven individual press trips and four group trips. Media from across the US and Canada were invited to individual trips, each focused on priority themes including family travel, parental wellness and eco-conscious travel. Group press trips were planned to support key messaging pillars including culture, culinary, wellness and weddings, with some overlapping with tentpole moments such as Relaxathon and Autentico. In total, press trips resulted in 51 placements, garnering over 1.6B+ media impressions.

From a creator perspective, we worked with 24 partners to showcase all there is to see, do and enjoy on the One Happy Island. In total, creators shared 382 posts, resulting in 8.6M+ organic social impressions.

As for paid social, 16 creators had their content amplified. Utilizing a combination of their photo and video assets, this amplified content resulted in 18M paid social impressions and over 162K Aruba.com page visits. Overall CTR dipped slightly YOY, but this was expected with the addition of a new optimization KPI in 2024 (video views for IDOH and Relaxathon).



Marketing Partnerships

In 2024, the A.T.A continued to strengthen its strategic marketing partnerships across the U.S and Canada, playing a vital role in driving demand and engagement for Aruba. These collaborations, carefully timed to align with key booking windows, enhanced visibility, maximized conversions, and reinforced Aruba's robust distribution of network. Our partners remained instrumental in connecting suppliers, airlines, travelers, and travel agencies, ensuring a steady and sustainable market position for the island. These partnerships collectively contributed 745,272 room nights, a 13.53% increase over the previous year, additionally Aruba's ADR saw YOY growth, further strengthening the destination's economic performance.

A key focus with the COOP marketing partnerships was diversifying Aruba's appeal beyond its award-winning beaches. Through targeted marketing campaigns, the A.T.A. successfully attracted high-value, first-time visitors by highlighting Aruba's distinctive niche markets. The island's reputation was reinforced as a premier wedding destination, catered to luxury travelers seeking wellness, adventure, and authentic experiences, and positioned Aruba as the ultimate family friendly getaway. Additionally, culinary initiatives further established Aruba as the Caribbean's most diverse dining destination. A standout achievement in 2024 was the test partnership with Capital One via Hopper, which led to a significant increase in bookings from Capital One customers, a successful initiative that's planned to build upon in the future.

Airline Marketing

The airline marketing programs soared to new heights in 2024, seamlessly combining creativity, collaboration and data driven insights to solidify Aruba as a top Caribbean destination. Strategic partnerships with leading carriers: Jetblue, American Airlines, United Airlines, Delta and Sun Country helped drive route specific bookings and inspire travel.

A multichannel approach was implemented to expand reach, leveraging high impact digital campaigns and targeted social media efforts on Pinterest and Meta to engage Caribbean bound travelers. Out of home activation with United Airlines further amplified visibility on the “Where’s Next” show, and a Good Morning Washington live broadcast from Aruba. Additionally, collaborations with Delta SkyMiles and World Agent Direct strengthened engagement with both consumers and travel agents. In-flight advertising with key airline partner JetBlue further enhanced the customer experience. A high impact partnership with American Airlines and AFAR introduced curated performance driven itineraries that inspire travelers from initial interest to booking, supported by homepage takeover and destination spotlight emails.

Collaboration remained the foundation of Aruba’s success in airline and partnership marketing. By evolving strategies, leveraging innovative tactics, and maintain strong relationships, Aruba’s strong position in the Caribbean is reinforced.

Sales

The N.A. Sales Team strategically covered key national shows and regional events. Despite staffing challenges, the sales team successfully engaged in 139 trade and consumer shows, reaching over 7,000 advisors solely through trade shows. A major highlight was Autentico, where culinary experiences took center stage for this first-time event. Chef activation events were successfully executed in NY, Montreal and

Houston while additional events focused on Romance, Wellness and Culture were scheduled throughout the year.

Recognizing that many advisors now work remotely and are selective about in-person events, the team leveraged high-value experiences to increase engagement. In major cities, only premium locations and unique experiences draw advisors. To address this, the team incorporated destination-inspired activities such as wine tastings, glass blowing, hands-on cooking classes, and speakeasy gatherings, creating a direct connection to the island.

One of the most effective ways to educate advisors remains first-hand experience. The US hosted seven fam trips, bringing 54 advisors down to the island. As a direct result, ten advisors secured immediate bookings to Aruba upon returning home reinforcing the impact of these immersive experiences.

ACE

In 2024, 1727 advisors successfully completed the Aruba Certified Expert Course, expanding our network of certified specialists. Out of these, 1599 were located across the US while the other 128 were from Canada.

To encourage broader participation and increase reporting, the rewards program transitioned from a top production payout to multiple random drawings each month per territory. This shift allowed more advisors to win, with the goal of boosting engagement and motivation. The impact was immediate, with several advisors winning for the first time fulfilling the initial goal. 372 advisors reported 2014 bookings throughout 2024.

Data already shows 181 advisors reporting 928 bookings for 2025, indicating strong momentum and progress toward the program’s long-term objectives.

Trade Marketing

Consortia and Host Agency partnerships remain essential in reaching and educating key travel advisors. These partnerships provide access to influential networks, including Virtuoso, Signature and Travel Leaders. A new partnership in 2024 was established with The Wander Network, a host agency founded by two leaders from Oasis Network. Through the partnership agreements, multiple engagement channels were leveraged, including:

- Email communications to advisors and consumers

- Dedicated webinars to provide in-depth destination training
- Blog participation to highlight Aruba in unique ways
- Social media takeovers to maximize visibility and engagement
- Attendance at regional and national conferences for in-person training and networking

These partnerships continue to expand Aruba's reach, ensuring that the island remains top-of-mind for key travel professionals.

Canada

The Canada market registered 70,852 tourist arrivals in 2024. This figure represented a growth of 12% compared to 2023. Recognizing the increase in demand, key airline partners added the seats required and experienced record load factors. These impressive results represented the market's highest level of global market share at 5% and positioned Canada as Aruba's second-largest market behind the USA.

Trade Marketing

In 2024, the A.T.A maintained its comprehensive coverage in Canada, mainly in the provinces of Ontario and Quebec while strategically expanding into the growth markets of British Colombia and Alberta. The sales action plan for 2024 included generating leads, brand awareness, educating travel advisors through sales calls, presentations (webinars included), networking, participating in

both trade events and consumer shows as well as hosting ACE dedicated events including a culinary event in Montreal. Canada's 2024 action plan also highlighted the luxury market including Destination Weddings and Honeymoon segment.

The growth in demand in the Canadian market can be attributed to the sales activities in market. Sales activities includes webinars, sales calls, trade events, presentations, webinars including tour operator shows. As well as, the coordination of multiple activities through the Spoiled Agent partnership, three dedicated ACE events, trade conferences and one Canadian Travel Advisor Destination FAM trip. The market successfully engaged in 22 trade and consumer shows reaching over 3,800 Canadian advisors solely through tradeshow. Furthermore, A.T.A. Canada participated both in the Air Canada and Travel Brands tour operator events.



In 2024 the Canadian market remained focused on the growing Romance market by attending three romance shows. An article written by Travel Writer Jim Byers stated that Toronto is the top-performing North American origin city for Romance travel to the Caribbean with arrivals up 23% YOY, this growth was largely due to an increase in 15% seat capacity between Toronto and the Caribbean.

ACE

There were 128 new Travel Advisor certifications in 2024, with the total number of Canadian ACE advisors certified totaling 3451. This success reflects the program's continued integration into our sales calls, webinars, and dedicated presentations, as well as the three dedicated ACE advisor events held in Toronto and Montreal.

Furthermore, A.T.A's collaboration with the Association of Canadian Travel Agencies (ACTA) remains robust, with the ACE program being linked to the ACTA website which streamlines agent enrollment and communication. Partnerships with Spoiled Agent and Travelweek further extend the program's reach, which features the ACE program as part of its educational program.

Canada Media Strategy

The 2024 Canada campaign ran in November and December during a key booking window, and delivered 34M total impressions. The campaign focused on reaching the greater Toronto area and

was guided by the same Communications Framework used in the US portion of the campaign. Similar to a year prior, YouTube was used to create targeted awareness, Meta to intercept traveler interests, and Paid Search to encourage committing to a trip.

NEW in 2024: Tactics were strengthened with high-impact video ads on streaming platforms and debuted the use of TikTok to engage a new user base. Both partners had seen success in the US.

Video tactics reached high-value audiences with compelling storytelling. Paid Social media ad placements were deployed on Facebook, Instagram and TikTok, connecting specific messaging to our targets. Paid Search was used to capture the attention of audiences seeking Caribbean information on Google. Both Social and Search accomplished strong click-through rates over the two-month campaign period. Similar to previous year, Paid Media support in Canada launched in November.

Latin America

Situational Analysis

2024 was the year to solidify the Latin America strategy, diversifying Aruba's footprint in the region, growing in key markets with long-haul flights such as Argentina, Brazil, Chile, and Peru, but also maintaining its position in mature markets such as Colombia and developing markets such as Ecuador. In 2024, the Latin American market grew significantly by 38%, with a market share of 13% vs. 10% in 2023, representing a total of 174,895 guests from Latin America (excluding Venezuela). Including Venezuela, this amounts to a total of 182,383 guests. This is a record result for 2024, with significant increases in markets such as Argentina, Brazil, Chile, and Peru, strengthening the commitment to attract and receive quality guests to the island.

In 2024, Argentina (27,418 visitors) and Brazil (17,360 visitors) emerged as the second and third top-performing markets, boasting growth rates of 45% and 24% against 2023, respectively— and surpassing the targets set for 2024 by 22% in Argentina and 16% in Brazil according to the optimistic scenario outlined during the year.

This achievement is the result of the improvements in connectivity in the Argentinian market, mainly with Copa Airlines and LATAM Airlines, but also the increase in advertising levels both in trade and consumer actions.

The contribution from the Chilean market was positive, welcomed 14,187 visitors, an increase of 68% compared to 2023, mainly attributed to increased capacity and available seats with LATAM Airlines, improved air connectivity with Copa Airlines, increased advertising funds and stronger consumer actions.

Furthermore, the Colombian market maintain its position with a 25% growth compared to 2023, hosting 65,583 stayover visitors, solidifying its importance in the Latin market and being the country with the highest volume of passengers arriving. This is mainly attributed to the launch of the direct Medellin-Aruba route with Avianca, an attractive average fare for consumers and a high travel intention to the destination.

Ecuador has shown continued growth with remarkable results of 47% compared to 2023, attracting 11,251 visitors. These figures are the result of the collaborative work with the operators, increasing the investment of cooperative agreements by 67% and the presence of a commercial figure to represent and develop the business in the market.

In 2024, Peru demonstrated an outstanding performance, by welcoming 19,809 visitors, and as a result achieving a remarkable 166% growth compared to 2023. This success can be attributed mainly to the launch of the new direct Lima-Aruba flight with LATAM Airlines and its increase in frequencies during the year from 3X to 5X weekly with an average occupancy rate of over 80%.

Regarding, Tourism Receipts, the Visa credit card data, the average on-island spend for markets such as Brazil and Chile scored the highest, reaching up to \$835 per Visa credit Card holder for visitors from Chile and up to \$685 per Visa credit Card holder for visitors from Brazil. Making these markets attractive for further growth and expansion do to its positive economic impact.

Airlift

In 2024, the Latin American market saw substantial growth, adding an estimated total of 356,620 seats, marking a 25% increase compared to 2023, and load factor levels in the region up to 77%, increasing 1pp vs. 2023. This growth was fueled by the new direct LIM-AUA flight with



LATAM Airlines started by the end of 2023 and an increase in frequencies with the same airline during 2024.

Avianca, despite the no significant growth, maintains its leadership position in the market with 37% market share, being the airline with the largest capacity and availability of seats to Aruba 132,638 compared to Copa Airlines which is the second major player with 103,033 seats. In June 2024, Avianca began operations in Medellín with two high-season flights connecting to the Argentine, Chilean, and Peruvian market, achieving an average load factor of 63%.

In 2024, Copa Airlines increased its weekly flight frequency to 10x and sustained an approximate 85% load factor throughout the year. Remaining the second-largest carrier for Aruba, Copa held a strong position in long-haul flights, with 16% ethnic travel and 84% tourist travel, maintaining a 29% share in 2024.

Wingo increased its operation to Aruba in 2024 by 9% vs. 2023, due to increases in Medellin and Bogota moving from 2x weekly frequencies to 3x during high season. Wingo as a developing airline maintains its market share at 24% being the third most important player for our business.

| | 2023 | | 2024 | | Delta % |
|----------|---------------------------------|---------|---------------------------------------|---------|---------------|
| AIRLINES | FREQUENCY WEEKLY | SEATS | FREQUENCY WEEKLY | SEATS | 2023 vs. 2019 |
| SARPA | - | 569 | - | - | - |
| AVIANCA | 9 | 122.384 | BOG: 11 MDE: 4 | 132.638 | 8% |
| COPA | 7 - 9 | 82.538 | 10 - 11 | 103.033 | 25% |
| WINGO | BOG & MDE 2 - 3 CLO 3 high | 76.846 | BOG: 3 - 2 MDE: 3 CLO: 2 (DEC) | 83.810 | 9% |
| LATAM | 3 (DEC) | 2.277 | 4 - 5 | 35.798 | - |
| GOL | - | - | 3 (DEC) | 1.341 | - |
| | TOTAL SEATS | 284.613 | TOTAL SEATS | 356.620 | 25% |

In 2024, Gol Airlines introduced a new route in Brazil serving the SAO-AUA direct route with a load factor of 76% for the first two months of operation, focusing efforts not only on the Brazilian market, which represents 70% of the flight, but also on the Argentinian market, which has a share of 18%. Likewise, the direct channel represents almost 66% of sales, and tour operators and online travel agencies 59%, focusing investment efforts on both this point of sales.

Latin America Strategy 2024

n 2024, A.T.A.'s marketing strategy focused on creating a full-funnel experience aimed at increasing visibility in key and emerging markets, strengthening consideration in more mature countries, and driving conversions through performance-oriented campaigns. This strategic approach delivered outstanding results, with a 121% increase in Aruba’s search intent compared to 2023. Additionally, brand awareness grew by 35.1%, reaching over 41,038,711 people across the region. Destination consideration saw a significant boost, with 11,582,948 sessions on Aruba.com. At the same time, relationships with partners were strengthened through offers that generated more than 118,884 outbounds, marking a 13.72% increase compared to the previous year.

Throughout the year, the brand maintained strong media visibility with campaigns aligned with the

full-funnel strategy, including:

- Equity (Branding) +134% in reach vs. 2023
- AON (Consideration) +89.2% in sessions vs. 2023
- Bigplays (Outbounds) +13.7% in outbounds vs. 2023

The Aruba Effect Reached Every Corner

In 2024 for the first year, A.T.A. Latin America implemented the creative concept of “ The Aruba Effect” redefining it for the regional audience, We connected the island’s attributes with the happiness found in every corner, thus seeking a more emotional connection with our audiences, which allowed us to establish a closer and more effective bond.

In addition, we embraced a personalized messaging strategy, tailoring our content to reflect the multicultural identity of the region. We adapted our messaging to match the language and unique characteristics of each country. A great example of this was our Father’s Day campaign, where local insights shaped stories of fathers “made in Aruba”.

From Data to Travelers: The Secret Behind Our Success

Throughout 2024, we built various audience segments with a strong focus on aligning with the user profiles we aim to attract to the island.

Embracing the use of data, we gathered remarketing audiences through Google Analytics and our Data Management Platform, "Loop". This allowed us to segment our audiences into six different strategies, optimizing campaign impact and aligning with specific objectives.

- **Market-Based:** Tailor our messaging by country.
- **Content Interest:** Increased Click Through Rate levels by more than 4 percentage points compared to 2023.
- **Big Plays "Offers":** We re-engaged users who visited Big Plays offers but didn't generate outbounds.
- **Lead Audiences:** Converted data points into remarketing audiences.
- **Lookalike:** Expanded campaign reach by over 80%.
- **Engagement:** Users interacting with our social media demonstrated a strong interest in traveling to the destination. This led to a 27% increase in engagement and interest compared to other audience types.

Growing at Every Stage: Winning Campaign Strategies

In 2024, we implemented standout campaigns that significantly boosted brand recognition and strengthened audience engagement. These campaigns followed a structured conversion funnel, moving from branding to consideration, and conversion, ensuring impact at every stage.

Equity: Increase reach by over 127% vs. 2023. The goal was to engage users who matched our target profile but weren't yet considering Aruba. By encouraging interaction with our digital

channels, we seamlessly brought them into our conversion funnel.

Always On: Focused on users already familiar with the destination or considering Caribbean travel. We highlighted Aruba's unique attractions—its beaches, culture, cuisine, and unforgettable experiences. As a result, the KPI for sessions grew by more than 69% compared to 2023.

Big Plays & Mini Big Plays: Over the years, we have refined this conversion-driven strategy (outbounds), leveraging audiences impacted by Equity and Always On campaigns. This approach increased new conversions by 13%, offering high-potential incentives to motivate travelers to visit the island.

Hot Sales Opportunities: These campaigns allowed us to be present during key moments like Father's Day, Mother's Day, celebrations, and International Happiness Day. These emotional connections resonated with our core audiences—families and couples—leading to a 31% increase in brand engagement compared to previous year.

Marketing Activities

Aruba.com

In 2024, the Spanish version of Aruba.com (ES) became the primary driver of growth for the global platform, contributing 11,258,674 sessions, an 87% increase year-over-year and a 138% improvement against KPIs. This success reflects a focused strategy combining content optimization and a strong emphasis on conversion-driven campaigns for 7 months of the year. These campaigns were designed to reduce on-site time while increasing outbound clicks, aligning with the year's primary objective of boosting direct conversions.

The organic traffic to the Spanish site saw significant growth, 28% sessions with an impressive 4 minutes 8 seconds average engagement time and a 19% bounce rate. This success was driven by the creation of 160 new content to enhance accessibility and relevance for target audiences. These efforts highlight the critical role of strategic content creation in attracting high-quality traffic and fostering deeper engagement.

The Brazilian market Aruba.com (BR) maintained steady traffic levels, with 324,274 total sessions. However, significant improvements were observed in the quality of sessions, reflecting the effectiveness of efforts to attract higher-value users and improve engagement. The focus in Brazil remained on enhancing user quality over quantity, particularly through organic channels. The low bounce rate and high session duration on organic traffic underscore the relevance of the content and its alignment with user needs. Big Play campaigns further supported engagement and outbound click strategies, continuing the success of previous year with a 155% growth.



Social Media

In 2024, social media content strategy centered on inspiring, aspirational, and organic content designed to evoke the "Aruba Effect" among travelers. Video formats continued to dominate digital platforms, with a significant rise in the consumption of vertical, short-form content. Collaboration with the SEO team ensured strategic use of keywords to optimize visibility in TikTok's "For You" search algorithm.

Each platform and region demonstrated unique characteristics. For instance, in Brazil, native content with localized tips and AI-generated music featuring Brazilian rhythms helped build affinity between the Aruba brand and its audience. In Latin America, the focus was on providing valuable travel insights and aligning with emerging trends.

Platform Performance Overview:

Instagram

Instagram remained the primary platform for @arubabonbini and @aruba_br, fostering connections with trendy content, travelers, and influencers.

- Engagement rates: 4.6% (arubabonbini) and 6.17% (Aruba_br), significantly outperforming the global tourism industry benchmark (1.41%*).
- The Latin American market saw a +137% increase in engagement compared to 2023, while the Brazilian market recorded a 1-point year-over-year (YoY) increase.

Facebook

User-generated content resonated strongly on Facebook:

- Brazilian account: 1.73% engagement rate, 381,846 organic reach (+8% YoY).
- Latin America account: 3.6% engagement rate (+137% YoY), with 703,520 organic reach (+2% YoY).

Both accounts surpassed the global category average engagement rate (*0.27%).

TikTok

TikTok experienced remarkable growth in 2024:

- Arubabonbini: 16% follower growth, 622,475 organic interactions, and 20,951,173 views.
- Aruba_BR: 32% follower growth, exceeding 362,000 views.

Engagement rates: Brazilian account (8.4%) exceeded the global tourism industry benchmark, while Latin America (4.9%) fell slightly below the average despite high viewership, warranting further optimization.

ECRM

In 2024, eCRM remained a key communication channel for the Latin American market, with an impressive delivery rate of 99.5%. The open rate was 31%, slightly below the previous year (34% 2023). However, the number of emails sent in 2024 more than doubled compared to the previous year. The click-to-open rate (CTOR) was 3.2%, and the click-through rate (CTR) stood at 1%, which are in line with industry benchmarks.

The focus for the year was on lead generation, maintaining audience engagement, and minimizing list attrition. Campaigns like newsletters, blog promotions, and BigPlays offers were pivotal in achieving these goals. The personalized content strategy successfully kept the audience engaged.

Public Relations

In 2024, Latin America PR accomplished a PR Value of \$63,024,606 a remarkable growth of 30% compared to 2023 (PR Value \$49,916,150.51) and versus regional target it surpassed the goal with 153%. Aruba made a substantial impact by generating 2,187 news that resulted into 1,918,022,721.22 impressions across Latin America's media outlets more than 15.63% vs. 2023. In terms of the quality of the media 41% of the notes were in Tier 1 media, 37% in Tier 2 and 22% in Tier 3. In terms of press & i-trips, the A.T.A. hosted 34 trips divided into press and content creators from the region.

| PR VALUE 2024 | | |
|--|---------------|------------|
| COUNTRY | PR VALUE | % VS. 2023 |
| Argentina | \$ 8,889,670 | + 41% |
| Brazil | \$ 47,607,953 | + 23% |
| Chile | \$ 906,725 | + 40% |
| Colombia | \$ 5,099,825 | + 36% |
| Perú | \$ 753,907 | + 56% |
| Latin America Blue Lizard Effect | \$ 2,500,000 | + 2.5M% |
| TOTAL | \$ 65,758,080 | + 32% |

Influencer strategy 2024 changed in terms of type of influencers, instead of celebrities and macro towards micro and mid with focus in niches. Aruba hosted 42 influencers, 12 journalist-influencers and worked with 15 content creators to push regional campaigns: Aruba Happiness Filter, Blue lizard effect and Happiness Day.

The Influencer Value (I-value) was \$9Million and the total reach was 25,8M, the decrease of 63% and 41%, respectively from 2023, was aligned with the strategy. The influencers managed to generate 1,314 posts tagged @arubabonbini and @aruba_br, a total of 10.3% more than in 2024.

| INFLUENCERS VALUE 2024 *INFO FROM KLEAR | |
|--|--------------|
| Influencers | 69 |
| Post | 1,314 |
| Engagements | 1,400,000 |
| Reach | 25,800,000 |
| I-value | \$ 9,000,000 |

Key PR Highlights of 2024

Argentina

Portsaid's production achieved extensive visibility across key cities, including Buenos Aires, Córdoba, Mendoza, Rosario, and Mar del Plata. The press trip featuring Flor de la V generated a PR value of \$1,351,186.

Brazil

Key initiatives included the launch of "The Blue Lizard Effect," Happiness Day celebrations, "Follow the Beach Copacabana," the announcement of the Gol flight, and Ana Furtado's press trip. These actions resulted in a total PR value of \$13,000,000.

Colombia

Highlights of the year included the Bogotá Eats, a co-branding collaboration with Bohio Playa, and the "Blue Lizard Effect" campaign. These efforts collectively delivered a PR value of \$491,823.

Peru

Milestones included the Aruba Carnival in Lima, which generated a PR value of \$52,000, and the launch of "El Oráculo de la Felicidad," an editorial product encapsulating Aruba's essence as a happiness tool. This campaign achieved a PR value of \$125,457.

Chile

Aruba secured strong television exposure through appearances on Canal 13 and 13C with La Gracia de Viajar Conmigo and Siempre Hay un Chileno, Mega's Viajando Ando, and TVN's Buenos Días a Todos. These efforts generated a PR value of \$310,104.

Regional

The Blue Lizard Effect was the project of the year. This co-produced and co-created branded content was the first of its kind, featured on Max and Warner Bros. Discovery channels (Warner, Travel Channel, Discovery, and TNT) across Latin America, the Caribbean, Europe, and the U.S., aired in 46 countries. The four-episode docuseries achieved 2,5M in PR Value, 144,400,000 impressions and reached 37,000,000 people through digital and offline content, with 1,000,000 viewers via television. According to Max's study, 79% of viewers expressed a desire to visit Aruba in the future. Through captivating stories of islanders, music, and the "Aruba Effect," the docuseries effectively conveyed the essence of Aruba as a destination.

Trade

By 2024, 46% of bookings were made through travel agencies and tour operators, reinforcing the

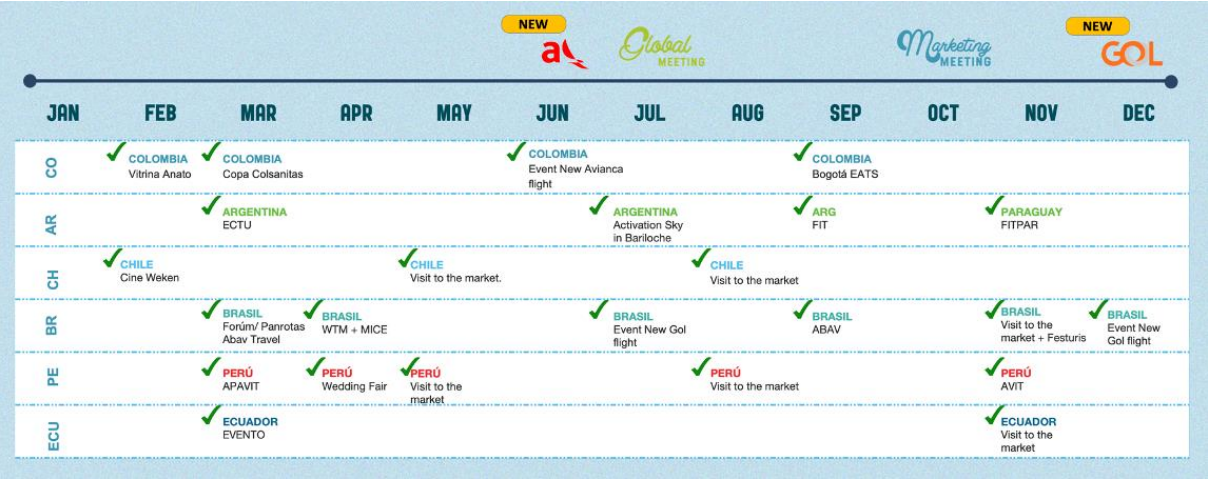
importance of this point of sale in the region and in the promotion of our product.

Considering the relevance of this channel, the strategy was to continue sales training and developing relationships with travel agents, wholesalers, and the tourism industry. Additionally, some new initiatives were introduced, such as opening up commercial activities in Ecuador, resuming MICE actions in the Colombian and Brazilian markets, and participating in trade events and fairs.

These efforts were carried out in collaboration with an Aruba delegation, resulting in a total of 1,045 sales actions in the region with +62,000 people reached, an increase of 79% vs. 2023.

Some of the most significant trade fairs and events in Latin America included: Vitrina Turística de ANATO in Colombia; WTM and MICE events in Brazil, an extraordinary event for the launch of the direct SAO-AUA flight with Gol Airlines; an event to recognize the work of tour operators during 2024 in Ecuador; FIT and ECTU in Argentina.

Commercial Calendar 2024





Events and sponsorships

In 2024, the A.T.A. took part in exclusive events that drew a large number of high-value visitors to Latin America:

Colombia

Participated in Copa Colsanitas, a high-value sporting event, reaching over 19,000 people.

Argentina

Ski event to promote Aruba to a niche audience with high spending.

Chile

First time participating in Cine Wiken, an outdoor experience with +20,000 people of high socioeconomic level impacted.

Brazil

Follow the beach Copacabana, an event to connect the importance of beach tennis in Aruba with the practice of this sport in the Brazilian market, with an impact of +12,000 people.

Marketing Partnerships

In 2024, 63 COOP agreements were signed with TOs (Tour Operators) and OTAs (Online Travel Agencies), growing 19% vs. 2023. These efforts contributed approximately 51.000 visitors for the market, which represented 34% of total passengers for the year. The main focus of these actions was on direct clients through online and offline advertising. Other important initiatives included training for the main travel agents of the tour operators, branding offices, and sales incentives.

During the year, the A.T.A. organized 11 FAM trip groups for the Brazilian, Chilean, Colombian, and Peruvian markets. Additionally, in the second edition of the Global Tourism Conference, A.T.A. Latin America had a delegation of 32 wholesalers from its main markets present and 3 airlines, LATAM, Copa, and Gol airlines, highlighting a workshop to promote the launch of the new direct GRU-AUA route with Gol.

Europe

Situational Analysis

In 2024, European outbound travel to the Caribbean faced a challenging landscape shaped by economic and geopolitical factors. The EU market registered a total of 69,480 tourist arrivals, reflecting a 6.4% decrease from 2023. This decline was influenced by persistent inflation, which averaged 2.4% across the Eurozone, and rising operating costs for airlines, driven by high interest rates, elevated jet fuel prices and increased labor costs. Despite a modest increase in purchasing power, averaging €19,200 per capita, higher travel costs led European travelers to adopt a more cautious approach, prioritizing value for money and opting for shorter stays and budget-friendly accommodations.

In 2024, Amsterdam's Schiphol Airport experienced significant operational changes aimed at improving efficiency and sustainability. The airport introduced a cap on annual flight movements, reducing the total to 452,500, nearly 10% below pre-pandemic levels. This measure, designed to address noise pollution and environmental concerns, faced criticism from airlines and industry groups, who argued it could hinder growth and limit capacity for leisure travel. Despite these challenges, Schiphol maintained its position as one of Europe's best-connected airports, with 301 direct destinations. However, the restrictions on flight movements and operational hours likely impacted the availability and scheduling of outgoing leisure flights, prompting travelers to adapt to the new constraints.

Despite the challenges, compared to 2023, the travel landscape in 2024 showed both resilience and adaptation. While the overall number of European tourists to the Caribbean decreased slightly, there was a noticeable shift in travel patterns. The demand for vacation rentals and alternative accommodation continued to rise, driven by increased availability and cost-effectiveness. Specifically, Aruba saw a slight decline in European arrivals, attributed to changes in air service availability and competition from robust North and Latin American markets. Despite these challenges, Aruba maintained a strong presence on shared flights (with Bonaire and Curacao), securing 50% of seats on KLM and 48% on TUI Netherlands flights.

The Italian travel industry continued to recover from the pandemic, with growth in both medium and long-haul travel. However, economic factors such as inflation and rising fuel costs led many Italians to plan shorter trips and opt for alternative accommodations. In Germany, economic pressures and operational hurdles created a challenging travel environment, making it difficult for travelers to plan and secure long-haul journeys. Conversely, Aruba catered well to affluent Swiss travelers, who embraced spontaneous, premium travel experiences despite high-cost pressures and currency volatility.

Key takeaways for the coming year include a steadfast demand for travel, the popularity of sun and beach holidays, continued digital transformation in travel booking, and a focus on sustainability. Data from the YouGov 2024 Travel Insights Report indicated growing interest in high-end travel, particularly among older demographics. For example, despite rising living costs, 27% of Britons (UK) were willing to pay a premium for luxury accommodation, with beach holidays being the most appealing.

On an operational level, the A.T.A. Europe team experienced some significant changes in human resources and in-market representation. In June, the UK Country Manager resigned and was replaced by a full-service PR and Marketing agency, LOTUS, which started in September. The Sales and Marketing Manager Europe resigned in September, and the A.T.A. managed to recruit a new candidate who will start in 2025. Additionally, a new FTE position, Jr. Sales & Marketing Executive, was recruited and started in September. Although these changes needed time for new team members to settle and get acquainted with the work in 2024, A.T.A. Europe will have a dedicated team to tackle 2025.

Overall, the main challenge for the European markets in 2024 was, and will still be in 2025, the retention of direct flight connectivity from Europe to Aruba.

Airlift

At the start of 2024, Europe had a respectable number of direct flights from Europe into Aruba with three different airlines. Daily flights departed from Amsterdam with KLM, shared with Bonaire. There were three weekly flights with TUI Netherlands, shared with either Bonaire or Curacao, and one weekly flight with British Airways shared with Antigua.

The overall seat capacity on KLM in 2024 was 8% lower than in 2023 (8,361 seats), which could

explain the increased load factor from 82% to 89%. KLM faced significant challenges due to political and social pressure on Schiphol to reduce the number of flight movements. This affected their connectivity within Europe into Amsterdam, impacting incoming traffic from Italy and, to a lesser extent, some German hubs. The most affected routes included:

- Amsterdam Schiphol to Rome Fiumicino (KL1602): High disruption rate.
- Amsterdam Schiphol to Edinburgh (KL926): Significant delays and cancellations.
- Amsterdam Schiphol to Manchester (KL1033): Notable percentage of cancellations.
- Amsterdam Schiphol to Leeds Bradford (KL1023): Delays and cancellations.

These cancellations were primarily due to the reduction in runway capacity at Schiphol, especially during peak hours. The airport had to limit the number of arrivals during these times to ensure safe and stable operations. The UK routes were considered less important due to the availability of the British Airways flight from Gatwick to Aruba.

The performance on KLM flights from a share of seat perspective started slowly, with an average share of 44% from January to May. As of June, the A.T.A. Europe teams increased their efforts, resulting in an average performance of 55% share of seats. By the end of 2024, the average share of seats to Aruba compared to Bonaire was 50%.

TUI Netherlands focused on holiday package sales on their flights rather than ticket-only sales. Due to the change in demand for more alternative accommodation and the fact that hotels in Aruba no longer offer contracts and fixed (European) rates, there was pressure on the package business model applied by TUI. They indicated that even though the flights had high load factors, their profitability was low.

British Airways struggled to fill the back end of the plane due to a lack of attractively priced mid-range hotels on Aruba. Where in the past hotels such as the RIU and the Divi All Inclusive would carry the volume to fill a flight, this was not the case in 2024. Although the premium classes on board the British Airways flights were selling well, the overall profitability of the route to Aruba was low. In the summer of 2024, BA management decided to cease operations as of the end of March 2025.

Branding & Advertising (Paid media)

In 2024, the A.T.A. collaborated with DEPT® to implement a strategic paid media approach across European markets. This evaluation provides insights into the performance, key learnings, and future recommendations based on the year's activities.

Strategy Overview

The 2024 strategy focused on optimizing budget allocation, targeting peak travel moments, and enhancing channel tactics. Key elements included:

1. **New Market Scoring Approach:** Markets were ranked based on core criteria such as willingness to travel, costs to advertise, audience coverage, and growth targets. The Netherlands and the UK received the largest share of media, followed by Italy and Germany, with Switzerland and Belgium receiving the smallest allocations due to their smaller audience sizes and less ambitious growth targets.
2. **Focus on Peak Moments:** Campaigns were aligned with peak travel periods, running awareness and consideration flights for 2-4 months depending on market importance. Budget distribution was based on expected impact and advertising costs, with a continuous search layer to capture consumer demand.
3. **Clear Channel Tactics:** Defined targets per market and channel, with improved monthly



evaluations to identify gaps and focus points. This approach ensured a clear view of channel performance and necessary adjustments.

Performance Evaluation

The 2024 paid media activities yielded mixed results across key performance indicators (KPIs):

- **Impressions and Video Views:** Impressions were slightly below target (-7%), indicating acceptable CPM levels. However, video views lagged behind the annual target by 12%, highlighting the need for refreshed video content to boost engagement and view-through rates.
- **Sessions and Outbound Clicks:** Sessions exceeded forecasts by 39%, driven by lower-than-expected CPCs, especially in non-branded search. Conversely, outbound clicks were 35% below target, with notable underperformance in the Netherlands due to lower conversion rates.

Market-Specific Insights

- **Netherlands:** Despite a significant budget allocation, outbound clicks were below target, necessitating a review of conversion strategies.

- UK: Achieved strong session growth but faced challenges in video engagement.
- Italy and Germany: Balanced performance with budget reallocations impacting overall results.
- Switzerland and Belgium: Smaller markets with focused campaigns, showing potential for growth with targeted efforts.

Key Learnings

1. **Measurement Challenges:** GA4 attribution issues highlighted the need for improved data practices and alignment with global teams.
2. **Creative Refresh:** Ad fatigue in social and programmatic channels underscored the importance of regularly updating creatives to maintain engagement.
3. **Channel Budget Revisions:** Adjusting channel budgets based on both external and internal data will enhance future allocations.
4. **Exploring New Channels:** Expanding the channel mix to include 3-5 channels per market will maximize audience coverage and performance.

Conclusion

The 2024 paid media strategy for the European markets provided valuable insights and highlighted areas for improvement. By addressing the identified challenges and leveraging key learnings, the A.T.A. can enhance its paid media efforts in 2025, ensuring sustained growth and visibility across European markets.

Sales

In 2024, the travel trade continued to play a pivotal role in promoting Aruba across Europe. The A.T.A. focused on engaging travel agents through extensive training and incentives, resulting in a record demand for trade events and destination

updates. Supported by the private sector, our strategy led to a packed sales calendar, with A.T.A. successfully training and engaging 4,800 travel agents across all markets—a 71% increase from 2022. Notable markets included the UK with 1,563 agents and The Netherlands with 1,130 agents.

In 2024, ATA Italy significantly boosted its sales efforts through participation in three major industry trade shows (Buy Latin America, BIT, and TTG), organizing two fam trips and a national roadshow, and collaborating with nine Italian tour operators, one GDS, and four TA networks. These initiatives resulted in 1,400 sales contacts.

ATA GS also trained over 620 agents in person through various events and webinars, while external e-learning through FWW certified 166 agents in 2024, with more certifications continuing into 2025.

Additionally, between September and December 2024, 335 agents in the UK were trained through sales calls, training sessions, roadshows, and webinars, focusing on luxury and Caribbean travel specialists in key UK areas.

In the Netherlands, ATA trained and engaged with 1,595 travel agents, a 41% increase from 2023, and collaborated with trade magazines to keep Aruba top of mind. Key events included the Travel Counsellors Conference, JIJ & KLM trip, and Masters of Expo lunch.

In Belgium, activities included a sweepstake with TravelWorld and an Aruba Culinary Night in Ghent, engaging 225 travel agents in total.

B2C Initiatives

For B2C, A.T.A. partnered with TUI, participating in the annual Vakantiebeurs consumer show (The Netherlands), and organizing the Aruba Romance Experience during Valentine's week.

We engaged directly with consumers at small fairs organized by TUI retail shops and at luxurious events like the Society World event, where we left a lasting impression on over 600 attendees with signature Aruba Ariba cocktails.

In Italy, participation in industry trade shows, fam trips, and collaborations with tour operators and travel agent networks resulted in 1,400 sales contacts. ATA GS trained over 620 agents in person and produced 166 certified agents through e-learning.

Key sales events in other markets:

- Germany: DERTOUR Summer Lounge, reaching 230+ agents.
- Switzerland: AGK (CTO) Roadshow, reaching around 100 agents
- UK: The Major Travel 50th Anniversary event allowed the ATA UK team to interact with 171 travel agents.

Marketing Partnerships

In Europe joint marketing campaigns with partners are still important, as these help in achieving high rates of reach with the desired consumer segments. Through these partnerships the A.T.A. can also stretch each marketing dollar (Euro) due to the media buying power of the partner in questions. Apart from this, in Europe still many consumers like to book via Tour Operators and Travel Agencies because of the buyer protection they offer.

The largest campaign in the Netherlands was with TUI, a year-round marketing initiative that included digital, radio, TV, and print media, along with activities targeting travel agents. TUI remains the largest producer for Aruba, holding approximately 40% market share.

For the German-speaking markets, the REWE group, including DERTOUR, Meiers Weltreisen, and Kuoni, emerged as the largest partner for Aruba. Their campaign focused on pushing winter

bookings. The growth in arrivals from Switzerland was due to strong partnerships with KUONI (REWE group) and Knecht Reisen.

The A.T.A. had significant marketing partnerships with KLM and British Airways. The British Airways campaign, executed with British Airways Holidays, focused on promoting packaged sales but ended in September 2024 due to the cessation of flights in early 2025. The KLM campaign, aimed at selling tickets, ran year-round in the Netherlands with a special Q3 focus on Germany and Switzerland.

Highlights of 2024

In Italy, Among the most significant, the partnership with Alidays included the "Invasione della Felicità" campaign—an incentive initiative that involved sending branded promotional materials to create a "happiness oasis" in 100 Italian travel agencies. A.T.A. UK executed 10 Co-Op marketing campaigns with key UK partners, focusing on boosting sales through the British Airways route. Notable campaigns included:

- Hays Travel: boosted sales by 25%, achieving an estimated ROI of 9:1.
- TravelUp: increased bookings from 65 room nights in 2023 to 465 in 2024.

Following British Airways' decision to discontinue the Aruba route, the UK strategy pivoted in Q3 to promote KLM flights, focusing on main hubs like London, Birmingham, and Manchester.

Conclusion

Despite the evolving landscape of tourism and travel, Tour Operators remain vital partners for Aruba. Through strategic marketing partnerships and campaigns, Aruba continues to enhance its reach and appeal across various markets, ensuring sustained growth and visibility.



Public Relations

PR & Communications 2024

The Global PR & Communications strategy is an integral part of the Marketing Communications Framework and plays a role in the “feel it” and “want it” phases. As per the 2024 PR & Communications strategy the A.T.A. set forth to share its niche content amongst other through PR & Communications efforts with each market focusing on the most relevant niches for their respective markets.

As part of its plans for 2024, the A.T.A. set out to find a new way to measure its PR efforts.

A measurement pilot was conducted for North America, looking at other ways to measure media/ad value. Together with the Zeno measurement team the A.T.A. agreed on a few metrics it wanted to look at and started the respective pilot in Q3. Based on the 2024 results, the pilot will be extended to all regions in 2025.

In 2024 the A.T.A. expanded and enhanced its niche content by working with more content writers. In addition to the initiatives highlighted in the markets’ sections, a number of HQ led PR & Communications initiatives in 2024 were:

Key 2024 PR & Communications initiatives

[Carnival Global Group Press Trip](#)

The Global Group Press Trip for Carnival gave media from Germany, Italy, Colombia, Brazil, Peru/Chile, Argentina and the United States the opportunity to experience Carnival up close in Aruba. They were able to learn about Carnival History, speak to “Carnivalistas”, decorate their own hats, see the behind the scenes of Carnival preparations for kids and adults as well as experience the Aruba Lighting Parade.

International Day of Happiness

In celebration of International Day of Happiness the Language of Happiness was introduced. The initiative was led by the PR & Communications team with support and input of all markets and included earned media outreach, with coverage seen in travel trade publications, and partnerships with at-home creators from different markets. Creator content and media coverage drove those interested to the dedicated Aruba.com landing page, home to the campaign's hero video. The hero video was available in English (US and UK), Dutch, Spanish, Portuguese, German and Italian.

Press & Creator Trips

On the Press and Creator Trips front, together with the Trade unit and with support of the Niche unit, programs were curated throughout the year to fit the respective niches. This ensured diversity in programs and diverse coverage outlets.

Educational Sessions Eco-Conscious Niche

The A.T.A. held educational sessions for its partners on the Eco-Conscious Niche together with its Product Specialist colleagues and the ACF.

One of the educational sessions was centered around and served as the launch of the revamped Aruba Promise and guest guidelines. The Aruba Promise will continue to be an important tool to nurture and feed the protect it messaging and thus the communication –and behavioral– shift in 2025.

Aruba I Do

After five successful years of the Aruba I Do vow renewal, while looking through the Eco-Conscious lens, the A.T.A. opted to shift its messaging from the “Largest vow Renewal in the Caribbean” to the “Most Memorable vow renewal in the Caribbean”. The A.T.A. moved the event away from the beach and opted to host the event at Fort Zoutman thereby highlighting one of Aruba's and limiting the number of participants. Every couple's renewal remained very special.

CHAPTER 6

MICE

In 2024, Aruba’s MICE industry stabilized as travel demand returned to a more predictable and consistent pattern. Unlike previous years, which were affected by the lasting effects of COVID-19, the market has now regained balance, enabling better forecasting and improved strategy execution allowing a steady group demand.

The year presented both challenges and opportunities, particularly in managing Hilton’s temporary inventory reduction, adapting to shifting segment demands and incorporating new property additions while integrating property strategies. ACB actively worked to increase planner value with initiatives like our “One Happy Planner” campaign delivering planner resources quickly to capitalize on opportunities.

ACB refined its targeting strategy, prioritizing groups with higher per-person spending potential. Premium MICE groups which align with Aruba’s high-value proposition and drive RevPar within the segment continued to be pursued and secured.

Despite evolving challenges, 2024 has set the stage for sustainable growth, with a strong forward pipeline and strategic adjustments that align with industry trends and ATA’s positioning. By continuing to enhance sales strategies, elevate planner engagement, and adapt to market shifts, ACB remains well-positioned for long-term success in the competitive MICE landscape.

Key Terms

| FRP | LEAD (RFP RECEIVED) | TURNED DEFINITE | DEFINITES ON ISLAND |
|--|--|---|--|
|  <p>A formal request that includes all group needs, Outlining the requirements For the event, rooms, etc.</p> |  <p>A potential group business opportunity indicating initial interest from a client. Lead assist 3rd party involved. Unique lead: sole effort</p> |  <p>When a lead converts into a confirmed booking, even If the event is scheduled for a future year.</p> |  <p>Events that have been actualized and held on island in 2024</p> |

North America

Sales Targets and strategy North America

1. Lead Volume

Grow the leads and leads assist room nights with 10%, compared to 2023 year-end results.

1.1 Goal

For 2024, ACB set an ambitious target of 332,338 room nights, presenting a 10% increase over the previous year. In past years, lead volumes consistently ranged in the mid-to-high 200,000s. ACB aimed to build on the strong momentum of 2023; however, this growth strategy had to account for market stabilization and evolving industry trends.

1.2 Results

ACB set a goal to increase the number of leads by 10% compared to the actual lead volume room nights achieved in 2023, targeting a total of 332,338 room nights for 2024. By the end of the year, ACB registered 566 RFP's totaling 231,716 room nights. Hereby, achieving 70% of the established goal, falling short by 30%.

| ACB NA LEAD VOLUME 2024 | |
|---------------------------|--------------------|
| 2023 Actual Lead Volume | 302,126 RN |
| Target 10% increase | 30,212 RN |
| 2024 Target | 332,338 RN |
| 2024 Actual (566 RFP) | 231,716 RN |
| Shortfall (Target-Actual) | -100,622 RN (-30%) |



In 2024, a significant shift in booking patterns emerged compared to previous years. Traditionally, a larger share of group inquiries focused on in-the-year-for-the-year (ITYFTY) bookings or the following year. However, in 2024, the booking window extended further into the future, with noticeably fewer inquiries for 2024 and 2025, and a stronger distribution across 2026 and beyond.

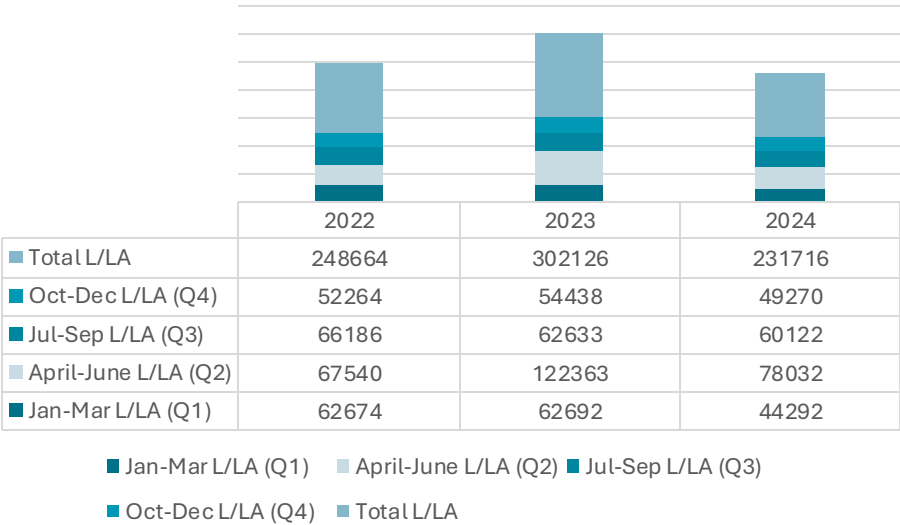
| YEAR OF BOOKING | 2022 INQUIRIES | 2023 INQUIRIES | 2024 INQUIRIES |
|----------------------------|----------------|------------------|------------------|
| ITYFTY (Same-Year Booking) | 2% (2022) | 17% (2023) | 10% (2024) |
| Next Year | 54% (2023) | 51% (2024) | 40% (2025) |
| 2 Years Ahead | 30% (2024) | 25% (2025) | 44% (2026) |
| 3 Years Ahead | 4% (2025) | 7% (2026 & 2027) | 9% (2027) |
| Beyond 3 Years | - | - | 2% (2028 & 2029) |

This shift suggests that groups are now planning further ahead than in previous years, reducing short-term demand but creating a stronger long-term pipeline.

In the first half of the year, ACB NA experienced a 33% decline in lead volume compared to the same period in 2023. However, Q3 saw a 3% increase over 2023’s Q3 figures. While ACB NA was not expected to surpass 2023 room night totals, this decline should be viewed in the context of an exceptional previous year driven by post-pandemic rebound dynamics and ACB’s strategic focus on lead qualification; rather than chasing volume, it prioritized higher-quality leads with more substantial conversion potential.

The 2024 lead volume year-end numbers show a decline of 70,410 room nights (-23%) compared to 2023 year-end production.

ACB NA - ACTUAL LEADS
Leads assist 2022 - 2024 by quarter



2. Definite Conversion

2.1 Goal

Reach a definite conversion of 17% of room nights, of the total lead volume room nights of 2024

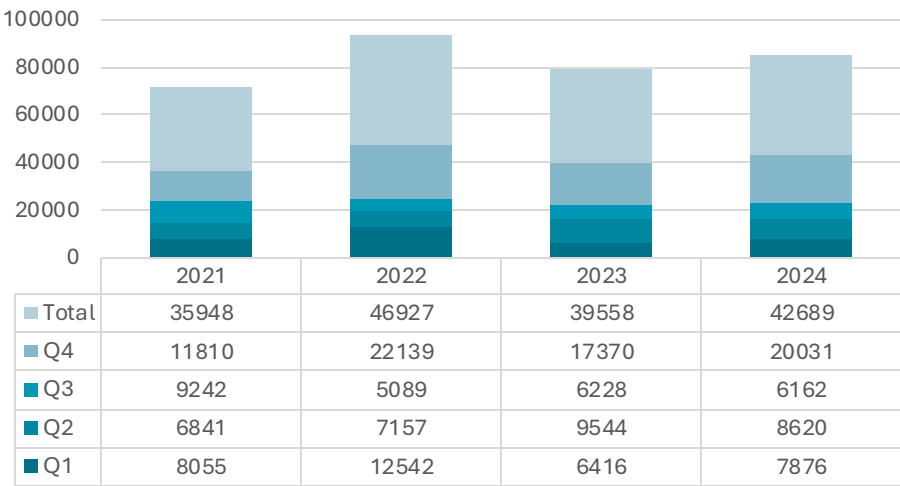
The definite conversion target is consistently measured against the lead performance of the same year. This translates into a conversion

target of 39,392 room nights to be booked in 2024 for any future year.

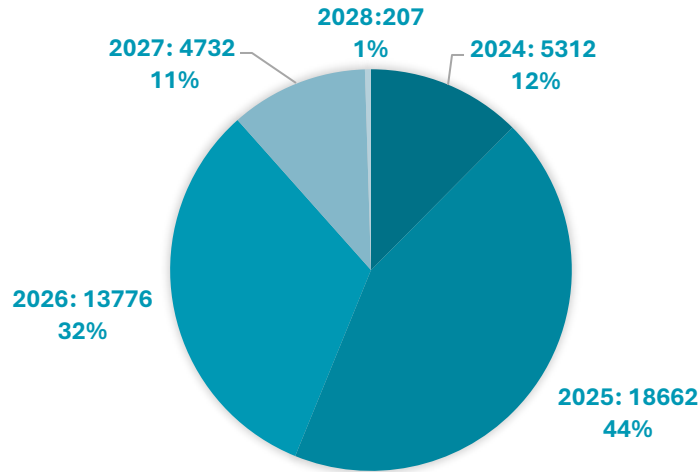
2.2 Results

In 2024, ACB NA recorded a total of 100 groups that turned definite, resulting in 42,689 total room nights, marking a 17.7% conversion rate and achieving 108% of the target.

ACB NA - Definite Conversion 2022 - 2024



ACB NA - 2024 DEFINITE CONVERSION FUTURE EVENT DATES



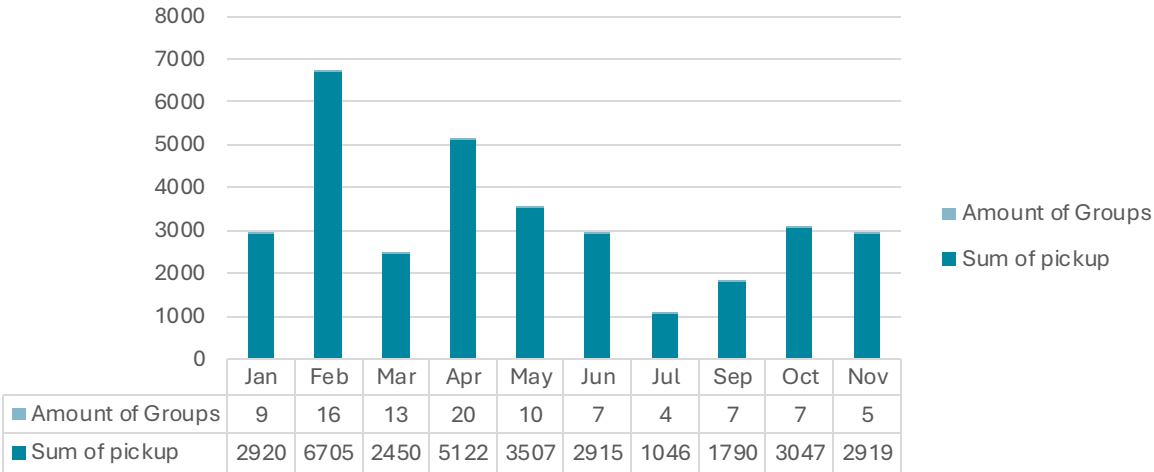
This indicates that ACB continues building a solid base up to 4 years ahead, with over 37,000 secured room nights converted in 2024 alone for the future years.

3. Definites on-island

In 2024, ACB NA registered 98 groups on the island, representing 32,864 total room nights.

These groups contributed to an estimated economic impact of approximately \$19,972,110

*Calculation based on the STR Report Groups ADR of \$450.83 per room night. (2024) + 156.89 (In-market spending) x total room nights.



Economic Impact

In 2024, the groups registered on the island are projected to generate a substantial economic impact estimated at \$19,960,920. This figure is derived from lodging revenue, which amounts to \$450.83 per person, as indicated by the STR Report for 2024. Additionally, the in-market spending per individual is anticipated to be \$156.89, based on the findings from the Economic Impact Study conducted by Destination Analysts in 2018. Combining these factors, the total registered economic impact reaches an impressive \$19,972,302, highlighting the significant contribution of these groups to the local economy.

Since ACB registers only about 15% of total group events annually, the estimated total economic impact of all events on the island is approximately \$133,148,680. These events include meetings, conferences, and incentive travel, excluding social groups such as weddings.

Focus Areas

MICE Tradeshows and Sales Events

Building on hotel partner recommendations, ACB maintained presence at key industry events to maximize lead generation and conversion potential. With a fully staffed sales team, participation in 2024 tradeshows and events was more robust than previous years. ACB focused on high-ROI activities, prioritizing tradeshows, industry networking, and targeted sales missions.

To further optimize event participation, ACB refined its show evaluation process by implementing a data-driven fact sheet. This structured approach allowed for a more analytical assessment of tradeshow ROI, ensuring that selected events align with a high-value, low-impact model, stakeholders' strategy, and overall destination positioning. By continuously refining this methodology, ACB remained committed to attending only the most impactful industry events, maximizing return on investment and conversion potential.

Latin America and Europe

Targets & Results

To expand the destination's geographical portfolio, ACB strategically assessed sales and marketing efforts for the Latin American and European markets. A key focus was leveraging new direct flights to Peru and Brazil, along with increased flight frequency to Colombia, to strengthen connectivity within Latin America. ACB actively participated in key industry events, including FIEXP0 and ANATO, and conducted targeted sales calls in Brazil, Chile, and Peru. These activations played a direct role in driving demand, increasing visibility, and ultimately contributing to a surge in group bookings for 2024 and a 66% growth of room night production over 2023 year-end numbers.

Additionally, ACB continued to strengthen its presence in the European market by participating in major industry events such as IMEX Frankfurt, TMS (Northstar), and IBTM World—key tradeshow events that provide valuable opportunities for networking and market expansion with buyers globally.

1. Lead Volume

ACB recorded 21,645 total room nights for the LATAM market in 2024, marking a 16% growth over 2023. This strong performance highlights LATAM's full recovery, with increasing demand driven by consistent engagement and targeted sales efforts.

For the European market, ACB registered 1,126 total room nights, reflecting a 78% decline compared to 2023 year-end figures. The 2023 numbers were directly impacted by the temporary boost from the UK flight. With these factors no longer driving volume, the demand from European markets softened, signaling the need for a revised strategy geared towards social groups and "boutique" sized groups.



2. Definite on island

In 2024, ACB recorded 26 groups all from the LATAM region, totaling 3,555 room nights. This represents an increase of over 40% compared to actualized events in 2023. These groups were diverse, including incentive programs from industries such as insurance, banking, and retail. There was a rise in group bookings from Chile, Peru and Brazil. These programs played a crucial role in filling traditionally off-peak periods for the destination.

Marketing strategy and results

In 2024, ACB significantly expanded its online presence through strategic marketing campaigns in partnership with Travel2Latam, Egroup Communications, and Travelport (UK). Multiple campaigns were executed to promote the MICE market, highlight island events, and position Aruba as a premier responsible destination for meetings and incentives. The eGroup Communications platform, registered an open rate of approximately 18.5% and a click-through rate nearly double their usual of 1.5–2%. This demonstrates strong engagement through the applied eCRM program.

Overall, ACB's digital marketing efforts continued to perform well, with delivery rates consistently above 95% and in-house eCRM email blasts achieving open rates averaging in the high 20%. These efforts, combined with impactful banner ads such as gif banners and curated content marketing, reinforced Aruba's presence in key markets and drove higher engagement.

ACB attended, organized and conducted a total of 29 sales actions/shows all together for the NA, LATAM and EU markets

February: Phoenix AZ & CA, Denver CO

March: Atlanta, Georgia

June: Northeast (Boston & Providence)

July: Midwest (Minneapolis, Des Moines & Chicago)

August: Westcoast (Phoenix & Scottsdale, Arizona and Beverly Hills & San Diego, California)

September: Co-Hosted St. Regis Aruba Networking event in NYC delving in the luxury segment.

In 2024, ACB continued to successfully host on-island events, including its bi-annual Destination Review. This exclusive familiarization trip featured a curated itinerary that consistently integrated local culture, partnered with outside vendors to support local businesses, and delivered a unique, memorable experience for our One Happy Planners. This year's program received outstanding survey scores, with many participants calling it the best FAM trip they had ever attended. Additionally, ACB collaborated with First Class to introduce an exclusive airport experience that planners can now incorporate into their group offerings.

The return on investment remains high, with measurable success—over 24% of all definite group bookings came from planners who attended a Destination Review. Given its continued impact, this initiative remains a key focus for driving business to the destination.

CSR Campaign, New MICE Properties & Awards

In 2024, ACB achieved significant marketing milestones, securing industry recognition through nominations and awards.

- The Aruba Convention Bureau was awarded Top International CVB/DMO in the Smart Stars 2024 Awards, as voted by meeting and incentive planners worldwide. This achievement was actively promoted across ACB's social media channels and featured in the Q2 newsletter.
- Aruba was nominated in Pevue's 2024 Visionary Awards for Best International Destination for Incentives.
- Aruba was also nominated for "Caribbean's Best Incentive Destination 2024" at the World MICE Awards. Voting ran from June to August 2024, with ACB implementing a targeted social media and email campaign to encourage participation.
- 2024 Platinum Choice Awards: ACB was recognized as a 2024 Platinum Choice Awards Winner, further solidifying its reputation as a top-tier MICE destination.

New MICE Properties Onboarding

With new hotel properties entering the MICE market in 2024, ACB prioritized integrating them into Aruba's broader destination strategy. Efforts included destination presentations to educate new properties on Aruba's MICE positioning and best practices, strategic sales and marketing support in connecting new properties with key planners and industry stakeholders to accelerate their market entry. This proactive approach ensures that new hotels seamlessly integrate into Aruba's MICE ecosystem.

Digital Marketing

Aruba.com messaging shift

In 2024, our focus expanded beyond crafting inspirational content to refining our communication approach, embracing a more sustainable mindset. The Aruba Promise was revamped, serving as a foundational pillar in how Aruba engages with its audience going forward. By implementing the adoption of a "guest mindset," the A.T.A. will now encourage visitors to experience Aruba as they would a friend's home, respectfully and mindfully. In 2024, the A.T.A. started implementing this shift in communication on Aruba.com and will continue adapting all remaining content to fit this narrative. This shift will be reflected in Aruba's messaging and overall brand positioning in 2025 and beyond.

To enhance Aruba's visibility on Google's Search Engine Results Page (SERP), the A.T.A. collaborated closely with the SEO team to remove broken links and update outdated pages. While organic traffic growth appeared more modest due to the increasing presence of paid search, these optimizations ensured a better user experience and stronger long-term visibility. Additionally, the A.T.A. adapted to Google's evolving SERP features, such as rich snippets and the "People also ask" section, to present Aruba in a visually engaging and informative manner.

Ensuring the accuracy and relevance of all content on Aruba.com remains a key priority as the Digital unit navigates ongoing digital trends and user behaviors

Autentico Aruba Culinary Festival

In 2024, the A.T.A. successfully launched the

Autentico culinary event as part of its long-term strategy to position Aruba as a premier culinary destination. To support this initiative, the A.T.A. launched the Autentico website and developed a comprehensive email journey aimed at boosting awareness and capturing valuable data from its culinary target audience.

Website traffic was largely driven by paid social media, organic search, and email marketing campaigns. As a result, almost 18K sessions were driven to the site and close to 30K pageviews were recorded.

Additionally, the A.T.A. piloted its first push notification campaign and location-based messaging, a promising initiative that it plans to further optimize in 2025.

Noteworthy Campaigns and Landing Pages

Throughout 2024, the A.T.A. implemented several impactful campaigns and landing pages that supported its broader objectives. Each initiative was designed to resonate with diverse audiences while reinforcing Aruba's brand identity and long-term goals.

Aruba Promise

The Aruba Promise inspired travelers to embrace responsible tourism by minimizing their environmental footprint, respecting local traditions, and actively supporting the island's sustainability efforts.



Aruba I do Vow Renewal

Positioned as the Caribbean's most memorable vow renewal ceremony, this campaign celebrated Aruba as one of the top wedding and vow renewal destinations. A dedicated landing page highlighted Aruba's idyllic setting, attracting couples seeking meaningful moments and memorable experiences.

Sustainability Fee Announcement

A communication-focused landing page introduced the sustainability fee while educating visitors on how their contributions support Aruba's environmental preservation efforts.

International Day of Happiness

To inspire global participation in the celebration of joy, Aruba offered lessons in happiness, promoting a deeper connection to this universal value. This campaign capitalized on Aruba's branding as "One Happy Island" while building a strong emotional rapport with current and prospective travelers.

Steelpan History

A cultural landing page dedicated showcased the heritage and history of the steelpan, underscoring Aruba's vibrant music culture.

myAruba Assistant (AI)

AI is at the forefront of technological innovation, transforming how industries and businesses interact with the audience. In essence, AI has

become a crucial part of our daily operations, and its presence will only continue to grow.

Recognizing this transformative power, the A.T.A. has seized the opportunity to integrate AI into its platforms, ensuring travelers and users benefit from cutting-edge technology. By launching an AI-driven system on Aruba.com and via WhatsApp, the A.T.A set a new standard in delivering real-time answers and guidance to its audience.

Whether it's about finding travel tips, discovering the best experiences Aruba has to offer, or simply answering travel related inquiries, AI provides accurate, personalized support 24/7. This integration positions the A.T.A at the forefront of customer-centric innovation, making travel planning seamless and enriching users' experiences.

MyAruba Assistant Performance

In 2024, the A.T.A. recorded 1,303 active users who collectively sent 5,710 messages, with 79% of interactions occurring via WhatsApp and 21% through Aruba.com. As the first full year of operation, 2024 will serve as the benchmark for evaluating performance in 2025.

Global Aruba.com Site Performance

There's a notable increase in sessions globally and across most regions, suggesting a successful reach and engagement strategy. The overall traffic to the global site increased by 60% YOY, mostly driven by the Spanish site with an impressive 87%.

However, despite this growth in sessions, the average engagement time has decreased globally and in most regions. This trend may indicate that while more users are visiting, they might not be engaging as deeply with the content. It is acknowledged that the moments of extra push within the LATAM region are closely geared towards generating conversion and thus are focused on activating the lower-funnel. This decreases engagement time, as users move more quickly towards conversion actions.

Brazil stands out with an increase in both sessions and engagement time, indicating strong content resonance with this audience.

When it comes to channel specific performance, Cross-network, Paid Search, Organic Search and

Paid Social all showed an increase in sessions as well as engagement rate with Paid Search showing the strongest engagement growth. The high engagement rate of 75% in 2024, up from 70% in 2023, indicates that the content and targeting strategies are resonating well with the users from paid channels. The strongest engagement time per session in 2024 was observed in the email channel which also increased with almost 17% over 2023. This indicates that users interacting through email, spent the most time engaging with the content.

More detailed information on the respective market digital strategies can be found in the respective market sections while more details on Organic Search can be found in the SEO section.

Metrics Aruba.com

| SESSIONS | 2023 GA4 | AVG.ENGAGE MENT TIME PER SESSION 2023 | 2024 GA4 | AVG.ENGAGE MENT TIME PER SESSION 2024 | % SESSIONS | % AVG.ENGAGE MENT TIME PER SESSION |
|----------|-------------|--|-------------|--|------------|---|
| GLOBAL | 11,734,987 | 43s | 18,770,840 | 29s | 60% | -33% |
| US | 4,294,184 | 1m13s | 5,223,849 | 1m1s | 22% | -16% |
| ES | 6,036,548 | 23s | 11,258,674 | 13s | 87% | -43% |
| BR | 324,094 | 40s | 324,275 | 51s | 0.1% | 28% |
| NL | 349,112 | 1m1s | 418,857 | 48s | 20% | -21% |
| IT | 105,044 | 1m26s | 196,332 | 1m3s | 87% | -27% |
| DE | 127,062 | 1m22s | 204,191 | 59s | 61% | -28% |
| UK | 172,036 | 1m27s | 208,585 | 1m5s | 21% | -25% |

SEO

In 2024, Aruba.com built on the recovery achieved at the end of 2023, with visibility on search engines showing steady, incremental growth throughout the year. This improvement led to an increase in organic traffic across almost all markets. However, the traffic growth hasn't quite matched expectations given the visibility levels, likely due to increased efforts in Paid Search, which seems to have taken a slice of the traffic that SEO would otherwise capture.

In 2024, A.T.A.'s strategy focused on two key pillars: Semantic SEO, where the A.T.A. identified key entities, addressed content gaps, and improved internal linking; and "Experience, Expertise, Authoritativeness, and Trustworthiness"(EEAT), reinforcing Aruba.com's strengths to boost authority and relevance in search engines. Both approaches have proven effective, not only for traditional search but also for optimizing content for Generative Search (like ChatGPT, Gemini, and Perplexity), as these models process content in ways similar to Google, keeping the A.T.A. aligned with evolving search trends.

In 2024, Google rolled out four major updates (March, August, November, and December), none of which significantly impacted Aruba.com's rankings, though some tourism industry players, especially specialized blogs, were penalized.

The successful implementation of A.T.A.'s strategies did face a few challenges, mainly due to CMS limitations and unresolved technical issues which delayed the publication of new content. Addressing these will be a priority for 2025 to unlock the full potential of efforts and to ensure continued growth.

Social Media

A.T.A.'s social mission is to cultivate a content destination that consistently embodies the distinct and unique spirit of Aruba. Through the dissemination of value-added messaging, the objective is to stimulate booking intent, enhance engagement, and ignite curiosity about experiencing the essence of the happy island. Furthermore, the aim is for Aruba to remain top of mind long after visitors depart by offering a unique, thought-provoking, and delightful holiday experience. The goal is for visitors to depart feeling harmoniously connected with nature, others, and themselves, spreading joy from Aruba to every corner of the globe, popularly known as The Aruba Effect, which serves as a cornerstone for social media content creation.

To achieve this, the Digital unit ensures that A.T.A.'s feed was immersive, the content appealing and dynamic, and that it naturally fits each distinct social platform. Throughout the year, the A.T.A. fine-tunes its approach based on recorded results, discerning what works and what doesn't. It has gathered over 468 million impressions across all our Facebook pages, representing a 42% increase. Specifically, our US Facebook page garnered 111 million impressions in 2024 (22% increase), surpassing the previous year, while experiencing a 4.1% increase in followers. Notably, the engagement rates have consistently surpassed industry standards in similar categories. Instagram, A.T.A.'s most significant and fastest-growing platform, gathered a 7% increase in followers in 2024.

The A.T.A. is also monitoring the further developments of Tik Tok after the announcement of the possible ban of the platform in the U.S. at the end of 2024 and what implications (if any) it will have on social efforts for 2025.

Technical Maintenance

Due to ongoing investments in the technical maintenance of Aruba.com, the site has been able to meet customers' increased demand for more information successfully. In 2024 these investments continued with a focus on improving how search engines and AI can find information about Aruba through technical SEO, usability improvements on Category-, Deals-, and Events-pages, optimizations to the authoring experience in the CMS, and keeping up with changing integrations and software updates.

Lead Generation / Marketing Automation

In 2024, the A.T.A. successfully expanded its e-marketable subscriber base from 215,000 to 1.2 million, driven by automations within data pipeline. The A.T.A. expects for this pipeline to support continued growth of 40,000 new subscribers per month, resulting in an annual increase of approximately half a million subscribers.

To enhance communication strategies, the Digital unit introduced four dynamic subscriber categories that automatically update based on user interactions. This dynamic segmentation enables the A.T.A. to deliver personalized messages tailored to each group, improving customer engagement and overall experience. The expansion of the subscriber base and the introduction of dynamic segmentation are key to improving engagement across all regions.

Global Email Marketing

The A.T.A. continued to refine its email marketing workflow, prioritizing operational efficiency, enhancing the customer experience and improving lists hygiene. Building upon the foundation established in 2023, the A.T.A. expanded its library of email journeys. A key milestone was the implementation of a newsletter journey, leveraging advanced automations and AI to streamline processes. This enabled markets to focus primarily on validating and localizing

communications rather than manual execution. The newsletter journey is now deployed in seven languages, ensuring wider reach and greater audience relevance, while the journeys keep Aruba top of mind depending on user interactions. By expanding and fine-tuning automated email journeys, A.T.A. successfully enhanced engagement, strengthened consumer connections, and improved the effectiveness of its communications on a global scale. While some of the global email performance metrics slightly decreased in 2024, the email channel showed the strongest engagement time of all channels on aruba.com.

Site Performance North America

The North America Site performance showed a notable increase of 22% in sessions indicating a significant growth in site traffic. The number of active users increased by an impressive 51% compared to 2023 indicating a broader reach and increased interest in Aruba as a destination.

Channel Specific performance: Almost all channels showed an increase in sessions, however, despite the increase in sessions, some of these channels also showed a decrease in engagement rate. The Paid Search channel as well as the Direct channel continue to perform well with high engagement rates and sessions durations, indicating effective strategies. For Paid social, despite the increased sessions, showed relatively low engagement rates. The email channel saw a decrease of 30% in sessions but an increase of 17% in engagement time.

Email Marketing North American Market

The focus for the North American market remained on operational efficiency and enhancing the customer experience through structured and automated email journeys, particularly in B2C communications.

Key Developments

Email Volume:

There was a strategic reduction in the number of emails sent, with a shift towards prioritizing quality over quantity. This approach aimed to deliver more targeted and relevant content to the audience, aligning with the overall strategy of enhancing engagement.

Engagement Metrics:

The click-to-open rate (CTOR) was 3.8% in 2024, which is below the industry benchmark of 7%-10%, indicating that while the content resonated with recipients who opened the emails, there is room for improvement.

Open Rate:

The open rate was 52% in 2024, slightly lower than the previous year's 57%, yet significantly above the industry benchmark of 20%-30%. This stability suggests that the audience's interest in the email content and subject lines was maintained, even with fewer emails being sent.

Click Rate:

The click-through rate (CTR) was 2% in 2024, reflecting the effectiveness of the targeted content in driving user actions. Although lower than the previous year's 2.6%, it remains within the industry benchmark of 2%-5%.

Unsubscribe Rate:

The unsubscribe rate was 0.4% in 2024, remaining within the industry benchmark of 0.2%-0.5%. While it remained relatively low, suggesting that the content was generally well-received, there is room for improvement in segmentation to further reduce unsubscribes.



Delivery Rate:

The delivery rate was 99.5% in 2024, maintaining a high standard and exceeding the industry benchmark of 95%-98%. This reflects a strong focus on deliverability and list hygiene.

| METRICS US | 2023 | 2024 | Industry Benchmark |
|---------------------------|-------|-------|--------------------|
| OPEN RATE (OR) | 57% | 52% | 32%-39% |
| CLICK-TO-OPEN RATE (CTOR) | 4.5% | 3.8% | 7%-10% |
| CLICK-THROUGH RATE (CTR) | 2.6% | 2% | 2%-5% |
| UNSUBSCRIBE RATE | 0.4% | 0.4% | 0.2%-0.5% |
| DELIVERABILITY RATE | 99.4% | 99.5% | 95%-98% |

Email Marketing Latin American Market

In 2024, Latin America focused on revitalizing its email communication strategy aiming to enhance engagement and deliver more targeted content.

Key Developments:

Email Volume:

There was a significant increase in the number of emails sent, reflecting efforts to expand reach and engage a broader audience.

Engagement Metrics:

The engagement metrics showed mixed results. The click-to-open rate (CTOR) was 3.2% in 2024, indicating that while the content resonated with some recipients, there is room for improvement to meet industry benchmarks.

Open Rate:

The open rate was 31% in 2024, slightly lower than the previous year's 34%. This suggests a need to enhance subject lines and content relevance to maintain audience interest.

Click Rate:

The click-through rate (CTR) was 1% in 2024, reflecting challenges in driving user actions. This is below the industry benchmark, indicating a need for more compelling calls-to-action and content.

Unsubscribe Rate:

The unsubscribe rate was 0.2% in 2024, slightly above the previous year's 0.17%, but still within the industry benchmark. This suggests that the content was generally well-received, though there is potential to further reduce unsubscribes through better segmentation.

Delivery Rate:

The delivery rate was 99.5% in 2024, maintaining a high standard and exceeding the industry benchmark. This reflects a strong focus on deliverability and list hygiene.



The Latin American market's email marketing strategy is evolving, with a focus on delivering personalized content to engage the audience effectively. The data indicates a need to refine content strategies and improve targeting to enhance engagement metrics.

| METRICS LATIN AMERICA | 2023 | 2024 | Industry Benchmark |
|----------------------------------|-------|-------|-----------------------|
| OPEN RATE (OR) | 34% | 31% | - |
| CLICK-TO- OPEN RATE (CTOR) | 4.8% | 3.2% | - |
| CLICK- THROUGH RATE (CTR) | 1.6% | 1% | - |
| UNSUBSCRI BE RATE | 0.17% | 0.2% | - |
| DELIVERAB ILITY RATE | 98.8% | 99.5% | - |

Email Marketing European Market

In 2024, the A.T.A. continued to refine its email communication strategy for the European market, focusing on delivering targeted and relevant content to enhance engagement and customer experience.

Key Developments:

Email Volume:

There was a significant increase in the number of emails sent (YOY18%), reflecting efforts to expand reach and engage a broader audience.

Engagement Metrics:

The engagement metrics showed mixed results. The click-to-open rate (CTOR) was 4% in 2024, indicating that while the content resonated with some recipients, there is room for improvement to meet industry benchmarks.

Open Rate:

The open rate was 37% in 2024, slightly lower than the previous year's 38%. This suggests a need to enhance subject lines and content relevance to maintain audience interest.

Click Rate:

The click-through rate (CTR) was 1.5% in 2024, reflecting challenges in driving user actions. This is below the industry benchmark, indicating a need for more compelling calls-to-action and content.

Unsubscribe Rate:

The unsubscribe rate was 0.50% in 2024, and within the industry benchmark. This suggests that the content was generally well-received, though there is potential to further reduce unsubscribes through better segmentation.

Delivery Rate:

The delivery rate was 99.2% in 2024, maintaining a high standard and exceeding the industry benchmark. This reflects a strong focus on deliverability and list hygiene.



Overall, the European market's email marketing strategy is evolving, with a focus on delivering personalized content to engage the audience effectively. The data indicates a need to refine content strategies and improve targeting to enhance engagement metrics.

| METRICS EUROPE | 2023 | 2024 | Industry Benchmark |
|---------------------------|-------|-------|--------------------|
| OPEN RATE (OR) | 38% | 37% | 32%-39% |
| CLICK-TO-OPEN RATE (CTOR) | 4.4% | 4.0% | 7%-10% |
| CLICK-THROUGH RATE (CTR) | 1.7% | 1.5% | 2%-4% |
| UNSUBSCRIBE RATE | 0.5% | 0.5% | 0.2%-0.4% |
| DELIVERABILITY RATE | 98.3% | 99.2% | 95%-98% |

CHAPTER

07

Destination Services

Destination Development

The A.T.A.'s Destination Services Unit (DSU) continued its focus on implementing projects that enhance the overall visitor experience, satisfaction and awareness while elevating the value of tourism, and simultaneously ensuring sustainable tourism development.

The following are highlights of DSU's 2024 key accomplishments.

Destination Management

Destination management adds long-term value to a destination, and refers to managing different elements including physical locations, people, products and services. When combining these elements, the destination's attractions, transportation, accommodation and hospitality a.o. need to be managed to ensure sustainability and consistency in the guests' experiences. Along that same line, the A.T.A. is involved in different committees and represented on several boards in order to enhance its advocacy efforts. Some of the committees include amenities, ATV/UTV enforcement, watersports, infra, labor shortage, airlift, cruise, Port City, macro-economic modeling. Board representation include Aruba Hospitality & Security Foundation, Fundacion Museonan Arubano, Tourism Promotion Enhancement Fund, ACF, AEF and the Stichting Aruba su Maneho di Carnaval.

Infra-Tourism committee

As per the Ministry of Tourism Policy 2021-2025 an infra-tourism committee was formalized by Ministerial decree. Key members of this committee include the A.T.A., DOW, DIP, and TPEF, DNM and the Ministry of Tourism. The goal of this committee is to foster collaboration amongst key members on the development,

tender and initiation of various infrastructural projects intended for tourism or product enhancement, of which the majority were funded by either the A.T.A. or TPEF.

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

Destination Enhancement

The Destination Enhancement efforts consist of implementing and supporting projects and activations that benefit the overall local and guest experience and satisfaction while seeking to increase on-island awareness to elevate the overall value of tourism, quality of life of our residents and simultaneously encourage sustainable tourism practices, community engagement, culture preservation and further development of the Culture and Creative industry (CCI). A short recap of the efforts follows below.

CreActivo Conference (CCI)

The CreActivo Conference, organized by Go Cultura Foundation in collaboration with A.T.A., marked a significant milestone in stakeholder engagement and capacity building for Aruba's Cultural and Creative Industries (CCIs) during a two-day conference. The conference emphasized the importance of data-driven strategies and collaboration in fostering sector growth, with 250 in-person and 125 online participants each day. Key insights from international speakers included: Felipe Buitrago highlighted the transformative potential of CCIs, drawing from his experiences in Colombia. He underscored the importance of mapping initiatives to unlock economic opportunities and strengthen cultural identity. John King emphasized the role of cultural heritage in shaping national branding and economic resilience, reinforcing the mapping project's objective of aligning CCIs with Aruba's broader development strategies.

These perspectives underscored the need for a comprehensive and inclusive mapping effort to ensure the long-term success of Aruba's CCIs.

Niche Activations:

Aruba Signature Experiences

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

In 2024, five winners were selected from the participants who completed the "Small Business Academy" course by Qredits. This course facilitated participants to write a business and financial plan which they could then use to then apply for a micro-loan at Qredits if funding was required to bring their experiences to fruition. The winners of the ASE program received marketing support, guidance and a financial contribution from the A.T.A. for use towards marketing related

investments, as well as personalized business coaching to assist them with setting up their business and the promotion thereof.

Culture

As Culture is an integral part of our heritage, identity and authenticity as we set for efforts in keeping the Bon Bini Festival and four museums operational and accessible for on-island guests and locals. We supported the CCDN to organize the national holidays and co-created and supported other Cultural projects such as the Aruba Art Fair, Steelpan Orchestra Project during Carnaval 70, Paranda Nacional di Dande and Dia di Brazil to highlight a few.

Steelpan Orchestra Project

The Steelpan orchestra project during Carnaval 70 aimed to celebrate and showcase the rich history and cultural significance of Steelpan music in Aruba by assembling a national orchestra featuring esteemed members from various groups. In collaboration with the Go Cultura Foundation, A.T.A. co-created and presented this initiative.

Beyond musical performances, the project incorporated historical elements through extensive research, collecting archival information, photos, and videos, which were displayed on LED screens during the parades. Significant logistical efforts ensured seamless execution, including the design and construction of trailers, as well as the production of high-quality audio and audiovisual content. Additional coordination covered essential aspects such as restroom facilities, catering, uniforms, and collaboration with key stakeholders, including SMAC, KPA, and DOW. This comprehensive approach not only honored Aruba's steelpan legacy but also delivered an immersive and memorable experience for both participants and audiences.



Aruba Art Fair

The Aruba Art Fair, aimed at enriching Aruba as a culturally vibrant destination, successfully showcased new murals and artistic expressions, enhancing experiences for guests and locals alike. The 2024 edition featured 8 Muralists through the Aruba Mural Festival (local and international). During the Aruba Art Fair, 113 local exhibitors displayed their artwork and crafts, 150 local performers enriching the event's ambiance and preserving the island's cultural heritage and promoting arts tourism. This year's festival also introduced new sculptural and interactive installations including seven (7) contemporary local artists, adding a dynamic three-dimensional element to the streets of San Nicolas.

Dia di Brazil

A.T.A. played a key role as the main contributor and collaborator in the festivities surrounding Dia di Brazil, organized by Fundacion Chico Harms. The celebrations culminated in two major parades: Parada cu Lanterna, which drew 1,500 participants and Parada Folklore Cultural, featuring 2,500 participants, including a cultural group from Curaçao. Approximately 7,000 spectators gathered to witness the vibrant parades, celebrating Aruba's rich cultural diversity.

Paranda Nacional di Dande

The Paranda Nacional di Dande project, organized by the Go Cultura Foundation and

supported by A.T.A., revitalized Aruba's 150-year-old Dande tradition through an innovative and inclusive approach. By bringing the celebration to neighborhoods, schools, and tourist areas, the initiative reignited community engagement, strengthened cultural pride, and provided an immersive experience for both locals and guests. Utilizing a mobile trailer with live musicians and audiovisual effects, the project ensured cultural preservation while fostering youth involvement, inclusivity, and tourism enrichment.

On-Island Communication

Local Awareness - Ban Serio!

The Ban Serio awareness program launched various campaigns and activations throughout the year, producing and executing diverse content focused on four key pillars: culture, environment, hospitality, and safeguarding.

Among the standout initiatives were Scoge Pa Bleki during Carnaval 70, Scavenger Hunt 2.0 with 75 participants, Aruba Limpi beach cleanups with a total of 190 participants, and the Ban Wak Luz activations. Several of these activations utilized the MyAruba App, offering on-island content and guiding participants through relevant tasks. Awareness efforts were amplified through social media, encouraging community engagement in beach and inland cleanups. These activations were further promoted via local media, digital platforms, and content production.

Additionally, in celebration of World Tourism Month, we produced a series of posts and interviews under the hospitality pillar, Nos Cordialidad, serving as a reminder of the beauty and significance of our hospitality. The Kindness Day Program continued with a second edition, reinforcing our Cordialidad through acts of Amabilidad. In collaboration with a local artist and poet, we created a series of postcards featuring three unique illustrations paired with poetry in Papiamentu. This initiative culminated in the event Amabilidad: Un Anochi di Poesia.

Through ongoing social media efforts, Ban Serio continued to promote national holidays and festivities while raising awareness of the importance of preserving our natural environment, culture, and hospitality.

Guest Awareness – Aruba Promise

The 'Aruba Promise' awareness program highlights our destination's values and prompts our guests to make a promise to Aruba to act as an ecologically and socially responsible guest. The program has been revamped and worked on diligently to reflect eight Do's and Don'ts as a way of enjoying our island and leaving it better than before. Further development and execution of the program will follow through in the following year.

Signage Ayo Rock Formation

The A.T.A. assisted the Aruba Amenities Committee with the enhancement of the Ayo Rock Formation park through the development of a welcome sign, a rules and regulations sign for the park, and the development of an experiential trails plan, including text for signs along the trail. The informational signs resulting from this development are to be placed in 2025.

Visitor Information Center San Nicolas

The Visitor Information Center (VIC) in San Nicolas focused on providing visitors with comprehensive information on attractions and things to do in the city center and surrounding

areas. VIC also offered maps and self-guided mural walking tours of the city of San Nicolas. Throughout the year, the VIC successfully served a diverse group of visitors, with 86% being first-timers to San Nicolas. Most of the visitors were interested in exploring the city center of San Nicolas with the murals.

Aruba Certification Program

In 2024, the Aruba Certification Program underwent a comprehensive overhaul of its content and structure. The materials for both the in-person and online courses were updated to include new information about Aruba and its history.

In December, the new 'Deep Dive' course titled "Sea the Change" was officially launched in partnership with Scubble Bubbles. The pilot group included employees from the Aruba Excellence Foundation (AEF) and a member of the A.T.A. This course addresses reef rehabilitation and involves a workshop where participants cut and replant coral fragments, which will eventually grow and be reintroduced along Aruba's coast. In total, there were 443 certifications awarded in 2024, a decrease from the 586 certifications in 2023. This decline can be attributed to ongoing labor shortages in the hospitality and tourism sectors, as well as the recent redesign of the courses.

Product Development

Product Development efforts in 2024 included projects in line with A.T.A.'s vision and projects stemming from the Tourism Policy 2021-2025 including a focus on beaches, mountain bike trails, design of the new Visitor Inspiration Center Oranjestad, several maintenance aspects, recycling initiatives, "Rioolwaterzuiveringsinstallaties" (RWZI) support and research on the Bushiri Beach shoreline to name a few. Brief descriptions of some of the highlights follow:

Buoys Maintenance & Mooring Management

The A.T.A. remained committed to the upkeep of swim area buoys, as defined by the Beach Policy, through routine cleaning, maintenance, and timely replacements after storms or incidents of vandalism. The maintenance of these buoys is vital for adhering to beach regulations, ensuring swimmer safety, and preserving the integrity of designated swimming zones.

To enhance user safety, particularly in high-traffic areas, the A.T.A. invested in the installation of new, upgraded buoys that clearly mark both the buffer zones and swimming areas. In 2024, a comprehensive overhaul of the buoy system was achieved, replacing outdated materials with more sustainable and highly visible options, further supporting the safety of all beachgoers.

Mountain Bike Trails Project

The Mountain Bike Trails Project, which began in 2022, is a multi-year initiative slated for completion in 2025. This ambitious project aims to develop approximately 50 km (30 miles) of mountain bike trails along North Coast.

As of the end of 2024, an impressive 47.8 km (29.7 miles) of trails have already been developed and constructed, with the final segment at Saliña Druif designed and awaiting further approval. The concluding phase of the project, which includes the installation of signage and GPS tracking systems, is set to be finalized in 2025. This endeavor promises to enhance outdoor recreational opportunities and showcase Aruba's stunning natural landscapes.



Beach Management Projects

The A.T.A. played a vital role in the development, enhancement, and renovation of several beach-focused projects. Many initiatives outlined in the Sero Colorado Master Plan—a comprehensive multi-year strategy—have either been completed or approved. Notable projects include:

- Baby Beach Welcome Sign: Nearing completion.
- Protective Coating for Rodger's and Baby Beach Staircase: Completed.
- Rodgers' Beach Parking Lot and Enhancement Project: Initiated.
- Refurbishment of Baby Beach Tennis/Sports Courts: Project approved, set to begin in 2025.
- Design of a New Restaurant at Baby Beach: Completed.

Additionally, further phases at Mangel Halto are underway in collaboration with the ACF for the installation of new palapas on the cliff. Other efforts also include the approval of projects to refurbish palapas and benches at Boca Catalina and the planting of flora along the Eagle Beach corridor.

Visitor Inspiration Center Oranjestad

The planning phases for the revitalization of the historic "Ex-DOW" monumental building were initiated last year. The A.T.A. intends to utilize a ground floor section of this iconic structure for a 306 m² Visitor Inspiration Center (VIC). This innovative Visitor Center will provide a unique experience that seamlessly merges Aruba's cherished outdoor and historical elements with modern technological masterpieces. The design for this architectural and immersive experience is currently underway, with the project expected to come to fruition in 2026.

Maintenance

Maintaining public spaces and projects previously initiated by the A.T.A. is essential to ensuring safety, functionality, and longevity. In 2024,

several initiatives were launched to enhance recreational areas and improve street and beach signage, emphasizing cleanliness, structural repairs, and environmental conservation. In late 2024, a renewed beach cleaning initiative was implemented to enhance the appearance of six of the most prominent and frequented beach areas, preserve the coastal ecosystem, and ensure ongoing maintenance. These projects included:

- Cleaning and maintenance of street and beach signs, ensuring visibility and proper upkeep of the public signage.
- Beach Sand cleaning, removing debris to protect the coastal ecosystem and maintain a cleaner shoreline.
- Palm Beach Tower Platform repair and cleaning, ensuring clean and safe public usage.
- Mountain Bike Trails Maintenance, keeping trails clear of overgrown grass, addressing erosion after rainfall and repairing the damage caused by horses and motorized vehicles.
- Temporary assisting with Eagle Beach plant watering and maintenance.
- Buoys management, maintenance, cleaning and repair, including stock inventory for fast replacement after vandalism.

Beach Recycling Bins

Trash collection and recycling, in collaboration with the Metabolic Foundation continued in 2024 with 10 sorting stations across Aruba's beaches. Metabolic Foundation was responsible for collecting, sorting and recycling plastic, metal and non-local glass materials. In 2024, 5,318 kg of materials was recycled and since 2022, this initiative has helped avoid 172.9 tons of carbon emissions.



Innovation Development

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

The Aruba Happy One Pass (AHOP)

The Aruba Happy One Pass (AHOP) was launched in 2023, as a follow-up to the previously introduced "Aruba Happy Flow." AHOP's goal is to ensure a seamless travel experience for visitors coming to Aruba by leveraging digitalization and biometric technology. Following a successful pilot in October 2023, 2024 was utilized for further technical developments and negotiations with SITA a leading specialist in air transport

communications and information technology with the goal to eventually transform the AHOP into an indispensable tool for the entire vacation experience in Aruba.

Contributions

Aruba Hospitality & Security Foundation
Since 2011, the A.T.A. has been funding the Aruba Hospitality & Security Foundation (AH&SF), which is responsible for the organization, supervision and implementation of safety and security requirements/projects focused on the hotel, commercial and tourism sectors as well as the general public.

Launched in December 2023, the Tourism Security Patrol Aruba (TSPA), funded by the AH&SF, enhances safety in key tourist areas like Palm Beach and Eagle Beach. Working with local police (KPA) and hotel security, TSPA ensures visibility while prioritizing prevention.

Through active patrolling, preventive profiling, and community engagement, officers deter crime, patrol key areas, and respond swiftly to incidents. By reducing petty theft and security concerns, TSPA helps create a safer environment for residents and visitors alike.

After the successful launch of the Tourism Security Patrol Aruba (TSPA) in December of 2023, funded by the AH&SF to enhance safety in key tourist areas like Palm Beach and Eagle Beach. Operations continued successfully in 2024, thanks to the continued contributions of the A.T.A. to the AH&SF. Operations were expanded in 2024 from the initial 6 officers and 2 supervisors to 12 officers and 2 supervisors daily to account for increased demand and areas to be surveilled. Through active patrols, proactive profiling, and community engagement, officers effectively deterred crime, monitored key areas, and responded promptly to incidents. By addressing petty theft and security issues, TSPA played a vital role in fostering a safer environment for both residents and visitors.



Aruba Conservation Foundation

The A.T.A. maintained a strong relationship with the ACF and established a memorandum of understanding in 2024 to provide financial support for the protection and preservation of the environment and natural resources. With assistance from A.T.A.'s technical engineering company, a project was agreed upon for the refurbishment and maintenance of stairs and railings at Parke Nacional Arikok.

The goal was to enhance accessibility and improve safety on the stairways leading to five highly frequented areas: Conchi, Dos Playa, Fuente, Boca Prins, and Quadirikiri Cave. In December 2024, project execution began, with A.T.A. fully funding the refurbishment of the Conchi location.

Research & Development

Bushiri Shoreline Enhancement

A.T.A. contributed to conducting a research study to enhance the Bushiri Beach shoreline, aiming to

create a high-quality beach that complements the Port City project and helps ease congestion on other nearby beaches. This study will analyze sediment transport along the shoreline to provide recommendations for a sustainable beach design. Special attention will be given to beach stability, erosion control, and long-term maintenance. Sustainability and feasibility are key considerations to ensure a lasting and balanced improvement to the area. This study began in 2024 and is expected to be completed in 2025.

Advocacy

The A.T.A. maintained representation on various government-initiated committees addressing issues related to UTVs/ATVs, watersports, amenities, and infrastructure. The A.T.A. advocated for the inclusion of the Aruba Quality Seal (AQS) and emphasized the need for higher standards in permitting processes, considerations of carrying capacity, and improved supervision and enforcement.

Cruise



In 2024, Aruba's cruise industry maintained its upward momentum, further establishing the island as a leading cruise destination in the Caribbean. A total of 897,273 cruise visitors were welcomed, demonstrating steady growth and ongoing interest from both cruise lines and guests. The number of ship calls reached 347, reflecting a 10% increase from 317 in 2023. Aruba remained committed to sustainability and continuous enhancements in guest experience, reinforcing its reputation as a premier Caribbean cruise destination.

The top cruise lines making the most frequent calls to Aruba in 2024 were Carnival Cruise Lines (27.6%), Royal Caribbean (21.8%), and Celebrity Cruises (14.8%). Among them, Carnival Horizon had the highest number of days in port, followed by Celebrity Beyond. Contemporary cruise lines

accounted for 70.2% of total net passengers, while premium cruise lines contributed 27.4%, luxury cruise lines 2.0%, budget cruise lines 0.3%, and niche cruise lines 0.1%. Additionally, Aruba welcomed several new luxury cruise lines in 2024 and successfully executed multiple turnaround calls.

A.T.A. remained actively engaged in key cruise industry events, strengthening Aruba's visibility and fostering relationships with major cruise lines. Participation in global conferences, trade shows, and strategic meetings played a vital role in maintaining the island's competitive edge. Personalized sessions with cruise executives ensured Aruba remained a priority in itinerary planning and development.

Key Industry Engagements

PAMAC Cruise Summit – Facilitated key discussions on itinerary planning.

Seatrade Cruise Global – Reinforced Aruba's presence in the global cruise industry.

CLIA Cruise 360 – Focused on trade professional engagement and promoting Aruba as a cruise destination.

PAMAC Destination Summit – Provided an opportunity to showcase Aruba's offerings to influential cruise executives.

Seatrade Med – Aruba returned as part of the Caribbean Village, enhancing the island's visibility in the European market.

FCCA Cruise Conference – Enabled direct engagement with key decision-makers in the industry.

The A.T.A. also maintained close collaboration with the Aruba Ports Authority (APA), working together to refine cruise development strategies and analyze industry trends. This partnership remains essential to aligning Aruba's cruise infrastructure, services, and offerings with market demands and evolving traveler expectations.

To elevate the visitor experience, the A.T.A. organized specialized training programs aimed at enhancing the skills of frontline staff and tour operators. These initiatives focused on:

- Strengthening service standards
- Enhancing high-value, low-impact shore excursions
- Providing risk assessment training
- Ensuring all cruise visitors experience Aruba's renowned warm hospitality

In 2024, a key priority was enriching the arrival experience at the cruise terminal. Entertainment, cultural showcases, and welcoming activities were implemented to create a vibrant and inviting atmosphere, leaving a lasting impression.

Additionally, the A.T.A. continued supporting broader visitor experience initiatives, including guest assistance and honoring loyal visitors celebrating milestone visits to the island.

Aruba remains committed to sustainable cruise tourism by prioritizing strategic industry partnerships, enhancing visitor experiences, and investing in infrastructure improvements. These efforts ensure long-term success and reinforce the island's position as a premier cruise destination in the Caribbean.

Trade Relations

Throughout 2024, the A.T.A. played a pivotal role in amplifying Aruba's global presence, hosting over 80 international media and travel advisor groups from diverse markets. Beyond curating immersive experiences, the team provided seamless support by coordinating and arranging various activities. To further elevate A.T.A.'s marketing and niche initiatives, the team strategically incorporated key themes such as romance, wellness, and culinary experiences into the itineraries, showcasing Aruba's diverse offerings and reinforcing its appeal as a top-tier destination.

The A.T.A. made significant strides in promoting our island's vibrant culture, culinary excellence, and wellness offerings in the past year. We proudly hosted more than 60 international media representatives, giving them an immersive experience of Aruba's unique charm.

Invitees had the opportunity to explore our spectacular 70th Carnival celebration, witnessing firsthand the energy, color, and spirit that define this iconic event. Others attended the first edition of 'Autentico', a culinary experience designed to showcase Aruba's diverse gastronomic scene. Beyond the festivities, our guests found tranquility in the island's wellness experiences, allowing them to escape their daily routines and embrace relaxation.

Additionally, Aruba welcomed its inaugural flight from Brazil, marking a key milestone in expanding our reach in the South American market. We were

also honored to host Globo TV, one of the largest media networks, further strengthening Aruba's presence on the international stage. Through these initiatives, the A.T.A. continues to solidify our island's reputation as a premier destination, inviting the world to discover and celebrate all that Aruba has to offer. Familiarization trips remain a cornerstone of A.T.A.'s strategy to engage and educate travel advisors, providing them firsthand experience of Aruba's unique offerings. In 2024, the Trade Department successfully hosted more than 25 familiarization trips, welcoming travel professionals from European, Latin American, and North American markets. These immersive visits strengthened industry relationships and equipped advisors with in-depth knowledge to inspire and confidently promote Aruba as a premier travel destination.

Throughout the year, travel advisors consistently showed interest in exploring Aruba's diverse accommodations. Approximately 20 independent travel advisors conducted individual site inspections, gaining in-depth knowledge of the island's hospitality offerings. The majority of requests came from U.S.-based agents, reflecting a continued demand for firsthand experiences to serve their clients better.

Events & Sponsorships



In 2024, Events & Sponsorship continued to drive the marketing vision by fostering meaningful connections and supporting impactful initiatives through diverse events and sponsorship activations. The key events hosted, participated in, and sponsored throughout the year strengthened our destination's brand presence, elevated community engagement, and reinforced our commitment to our corporate mission, enhanced global awareness, attracted visitors, and created lasting impressions.

Carnaval

Our annual Carnaval celebration remains the island's most significant cultural and economic event, bringing together participants, spectators, visitors, and residents in a vibrant celebration. The 2024 edition built upon the remarkable success of the previous year, strengthening its presence across social media and engaging international audiences; it demonstrated the island's rich cultural heritage and economic vitality, fostering an atmosphere of excitement and unity.

Soul Beach Music Festival

The 22nd and final edition of the Soul Beach Music Festival delivered an outstanding musical experience that captivated local and international audiences alike. The event drew an impressive 6,400 international attendees—an increase from the previous year—further underscoring its appeal. Over the course of three days, a total of 16,000 tickets were sold, generating a significant economic impact of US\$15.2 million, reinforcing its role as a major contributor to Aruba's economy.

Island Fest

In 2024, this series of events made a highly anticipated return following a hiatus due to the pandemic with the financial contribution of the A.T.A. The town of San Nicolas warmly welcomed its revival, with the local community coming together to celebrate. Held on the last Thursday of every month, the event has once again become a vibrant showcase of the town's rich cultural heritage, featuring a fusion of traditional performances, artistic expressions, and authentic local cuisine. This unique combination is embraced by residents but has also captivated visitors, who quickly find themselves immersed in the festive atmosphere, bringing people together in a shared celebration of culture, flavors, and community spirit.

KLM Aruba Marathon

The sixth annual KLM Aruba Marathon continued its tradition of excellence, welcoming 2,700 participants from 35 countries. In addition to the exhilarating race, attendees enjoyed a scenic beach ceremony and post-race festivities, further elevating the event's appeal. The marathon not only promotes health and wellness but also strengthens Aruba's position as a global marathon destination, drawing fitness enthusiasts from around the world.

Aruba Hi Winds

The 2024 edition of Aruba Hi-Winds once again showcased our island as a premier destination for wind and kite surfing. With over 110 international and local competitors, the event featured exhilarating races, freestyle contests, and live entertainment. The inclusion of live-streaming expanded its global reach, inspiring future participation and strengthening the island's reputation as a hub for wind sports. Building on this momentum, we look forward to enhancing the event's appeal and attracting an even broader audience in the years to come.

The inclusion of the Professional Windsurfers Association (PWA) Youth event in 2024 marked a significant step toward introducing and promoting windsurfing among new generations, both locally and internationally. This addition also secured our destination a spot on the global windsurfing competition schedule through the PWA event calendar, granting Aruba unparalleled visibility on the international stage and reinforcing its reputation as a premier windsurfing destination for future generations.

Aruba International Beach Tennis

The 14th edition of the Aruba Cup event featured a captivating design that highlighted Aruba's natural beauty and cultural vibrancy. With an increased prize pool of \$65,000, the tournament attracted elite international beach tennis players while maintaining an inclusive spirit, welcoming over 1,200 participants, including 650 amateur players from nine countries. This event continues to elevate Aruba's presence in the global sports tourism sector.

World Tourism Day Conference

The 2024 conference once again served as a pivotal gathering for industry leaders, providing a platform to explore the ever-evolving landscape of hospitality. Although the anticipated keynote speaker was unable to attend, the event achieved remarkable success with the introduction of the 'Hero' campaign. This initiative invited visitors to nominate individuals who made their vacation in Aruba truly special—whether it was a hotel staff member, tour guide, or local ambassador.

The results of the campaign were unveiled during the conference, generating enthusiasm and appreciation among attendees. The insights gained from this initiative highlighted the profound impact of personalized service and authentic connections in the hospitality industry.

Additionally, our esteemed panel of experts shared forward-thinking strategies, reinforcing our collective commitment to innovation, excellence, and the continuous enhancement of Aruba's tourism experience. This year's discussions and findings will undoubtedly shape the future of our industry, ensuring that we remain at the forefront of hospitality excellence.

Voices of Tourism Conference

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

Autentico – a culinary experience

The event was conceived as a direct outcome of the findings from both the niche road map study and the events road map study. These studies provided valuable insights that shaped the event's concept, ensuring it catered to a specific audience with a refined taste for unique experiences.

From its inception, the event proved to be an overwhelming success, exceeding expectations in every aspect. Attendees—including visitors, vendors, and participants—were left with an insatiable desire for more events of this caliber. The seamless fusion of carefully selected food and beverage outlets played a pivotal role in elevating the experience. Each vendor was meticulously chosen to provide a diverse yet harmonious culinary offering, ensuring that every bite and sip contributed to a memorable gastronomic journey.

Beyond the exquisite selection of gourmet street food, the event's atmosphere was a defining highlight. The thoughtfully curated setup, immersive ambiance, and vibrant yet cozy vibe transformed the venue into a haven of indulgence



and relaxation. The meticulous attention to detail in design and organization fostered an inviting and sophisticated environment, making the event not just a gathering but a true celebration of culinary artistry.

Aruba Fashion Week

As a premier fashion event in the Caribbean, this prestigious showcase served as a catalyst for emerging trends in fashion, luxury, and travel. Bringing together a dynamic fusion of creativity, culture, and innovation, it became the ultimate tropical destination where designers and brands captivated audiences and left a lasting impression. Aruba Fashion Week provided global designers with an exclusive platform to present their collections, seamlessly merging the island's vibrant energy with cutting-edge fashion. Marking its 5th anniversary in 2024, the event achieved unprecedented global reach on social media, driving widespread engagement and solidifying the destination's reputation as a premier lifestyle hub.

Comité Olímpico Arubano

Building on our ongoing commitment to the Comité Olímpico Arubano (COA), we continue to support the development of local athletic talent and their journey toward international competitions, including the prestigious Olympic Games. Through COA's comprehensive training programs, state-of-the-art resources, and unwavering dedication to excellence, we help elevate Aruban athletes to compete at the highest levels. This initiative not only highlights Aruba's sporting potential on the global stage but also fosters a culture of discipline, perseverance, and achievement within the local sports community, inspiring future generations to pursue greatness.

Voices of Tourism Conference

Building on the success of the 2023 conference, this year's event once again welcomed Trent Shelton as the keynote speaker. His return was a deliberate effort to reinforce the powerful messages and transformative impact initiated in the previous year. The primary goal was to cultivate the

inspiration sparked among the youth, deepening their engagement and motivation.

To maximize the experience, the event was expanded into a two-day format, providing students with ample opportunities for both structured learning and informal, personal interactions with Shelton. This extended engagement allowed for meaningful conversations, mentorship moments, and a profound exchange of ideas, ensuring that the inspiration gained would resonate long after the conference concluded. Once again, the event left an indelible mark on the attendees, shaping their perspectives and aspirations for the future.

With an unwavering dedication to fostering talent, strengthening community involvement, and elevating our destination's global recognition, we eagerly anticipate an even more impactful year ahead. By embracing innovation, collaboration, and a relentless pursuit of excellence, we will continue to create transformative experiences that not only enhance Aruba's brand but also leave a legacy for generations to come.

CHAPTER

08

Strategy, Planning & Research

In 2024, the Strategy, Planning, and Research (SPR) unit continued to collect visitor data and conduct research to provide critical insights and highlight key trends relevant to and for the Aruba tourism industry. Additionally, the SPR provided essential business intelligence to both internal and external stakeholders.

Summary of activities

The following is a high-level overview of the research/projects conducted in 2024.

Data Warehouse

At its core, the A.T.A. database is the heart of A.T.A.'s strategic and communications strategy. In 2024, A.T.A. continued to work on the Customer Data Platform (CDP). The CDP contributes to A.T.A.'s strategic marketing evolution by, amongst other combining online and offline visitor data, hereby creating a unified 360-degree customer profile.

Visa Credit Card

The A.T.A. obtains Visa credit card data to assess the on-island spending behaviors of international credit cardholders, focusing on several key expenditure categories. These categories include restaurants and dining, retail, hotels and lodging, merchants, food and groceries, transportation, entertainment, and casinos. This data provides valuable insights into consumer spending patterns and helps inform strategic planning for enhancing the tourism experience in Aruba.

Mastercard

The A.T.A. obtains Mastercard data to evaluate the on-island spending trends of international credit cardholders and to compare these findings with those from another Caribbean destination.

This analysis encompasses ten key markets and examines the distribution of spending across ten categories, as well as the average duration of card usage while on the island. This comprehensive data allows for a deeper understanding of consumer behavior, facilitating informed decision-making.

Cruise Intelligence Platform

The Cruise Intelligence Platform tracks a variety of critical cruise indicators, providing a comprehensive overview of both current and future global industry performance. It offers valuable insights into deployment trends, passenger volumes, and pricing, while also enabling benchmarking against competitors. This platform serves as an essential tool for strategic decision-making, allowing stakeholders to make informed choices that enhances Aruba's position in the cruise industry.

The Guest Experience Index

The Guest Experience Index (GEI) dashboard provides an extensive analysis of destination reviews by collecting and consolidating online feedback from visitors regarding their experiences at accommodations, restaurants, and activities.



The GEI serves as a vital tool for assessing on-island visitor satisfaction, enabling stakeholders to identify trends and areas for improvement in the overall guest experience.

Local Sentiment Survey

In 2024, A.T.A. measured the local sentiment, leading to better policy development and strategic decisions related to the product. Results were also compared against those of the 2022 research. The sentiment analysis aimed to measure the locals' views on the tourism economy of Aruba and the positive and negative impacts of the tourism industry, with a deeper dive into the sentiments of locals on economic and social development. A total of 3,583 surveys were collected from which 2,053 responses were collected online and 1,530 face-to-face. After the data cleaning (excluding respondents not living in Aruba and unfinished surveys), the final sample size was 2,592.

Evaluation of the Impact of a New Air Passenger Levy on Tourism Demand

The focus group aimed to analyze the cumulative impact of taxation changes on tourism demand. It provided the A.T.A. with critical insights into the potential benefits and drawbacks of the proposed air passenger levy on the tourism sector, a key pillar of Aruba's economy, this to support informed policy and strategic decision-making.

Airport Exit Surveys

In the last quarter of 2024, the A.T.A. resumed its Airport Research initiative, which involves monthly data collection. This research offers valuable insights into the spending patterns of Aruba's stayover visitors, their overall experiences, and their Net Promoter Score (NPS). The NPS encompasses key metrics such as visitor satisfaction, likelihood to return, and willingness to recommend Aruba to others.

Product Inventory

The product inventory research aims to develop and maintain a local destination inventory

consisting of unique features, experiences, tourism products, events, and stakeholders. This inventory of tourism businesses will serve as a baseline to evaluate the tourism product and potential gaps and will include an assessment of whether businesses in the inventory are incorporating sustainability ESG (ESG—Environment, Social, and Governance) in their product or business model. This research kicked off in 2024.

Cruise Exit Surveys

In 2024, the A.T.A. continued its Cruise Research efforts, conducting monthly data collection to gather valuable insights. This research provided comprehensive information on the spending patterns of Aruba's cruise visitors, their experiences while on the island, and their cruise travel habits and motivations. Additionally, it assesses the likelihood of these cruise visitors to return to Aruba as land-based tourists. This ongoing analysis plays a crucial role in understanding visitor behavior and in informing strategies to enhance Aruba's appeal as a premier cruise destination.

Luxury Cruise Line Research

In 2024, the A.T.A. successfully completed the Luxury Cruise Line Research, which sought to gain insights into the luxury cruise market, including its specific demographics and emerging trends. The primary goal was to assess Aruba's attractiveness as a destination for luxury cruise vessels. This comprehensive study provided valuable data and analysis to inform A.T.A.'s marketing and promotional strategies aimed at luxury cruise travelers. Additionally, it offered critical insights to help the A.T.A. understand the key factors Aruba should consider when targeting luxury cruise ships, ultimately enhancing the island's positioning in this competitive segment of the tourism market.

US High-Value Survey and Segmentation Model

In 2024, the A.T.A. conducted a comprehensive survey within the U.S. market to collect data essential for reconstructing its High-Value Segmentation model. The insights gained from this survey will be instrumental in categorizing U.S. visitors into one of six distinct high-value segments, allowing for more targeted marketing strategies and informed decision-making. By refining this segmentation, the A.T.A. aims to enhance its outreach efforts and effectively cater to the preferences and needs of high-value travelers, ultimately driving growth and enhancing the overall visitor experience.

Tourism Impact Model (TIM)

A.T.A. engaged a research firm to review and validate the carrying capacity model scenarios. This initiative extended and adapted a previous model developed in collaboration with an international party assisting the A.T.A. herewith in 2018. The updated approach introduced refinements to equip the A.T.A. and its partners with robust insights for managing sustainable tourism development moving forward. The TIM is a model which shall continue to be used to simulate tourism impact moving forward.

Upon finalizing the enhanced Tourism Correlation Model (TCM), a TIM was developed. This model leverages established correlations and links to stayover room growth amongst other to project the potential impact on Aruba's key socio-economic indicators for the period 2024–2028. The projected pipeline of new rooms, along with expected occupancy rates and Average Daily Rates (ADRs), serves as primary drivers in forecasting the impacts under different scenarios.

ATA.aw

In 2024, A.T.A. revamped arubainsight.com into [ATA.aw](https://ata.aw), transforming it into a corporate website. This new platform offers an extensive library of easily downloadable local media articles, reflecting A.T.A.'s commitment to enhancing

information accessibility. Additionally, the website features improved backend functionality with newly developed dashboards, providing valuable insights and data management tools.

Scenario Planning

As the official custodian of Aruba's tourism industry, one of A.T.A.'s objectives is to ensure preparedness for an effective response to emergencies from a tourism perspective. In 2024, the A.T.A. continued to analyze tourism recovery and trends weekly. The A.T.A. participated in the regular economic forecast meetings organized by the Department of Economic Affairs, Commerce and Industry of Aruba (DEACI) and the "Coördinatie" Committee led by the Central Bank of Aruba.

Foster Local Strategic Alliances

The A.T.A. provided information and presentations to relevant local and international stakeholders, serving multiple purposes. The A.T.A. also formed part of the Sustainable Development Goals Indicators Working Group Committee. This involvement, amongst other, underscores the A.T.A.'s commitment in advancing sustainable practices within the tourism industry and ensuring a positive impact on the community and environment.

Communicate Continuously Through Data-sharing and Reporting

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

- Monthly Statistical Snapshots, including Tidbits
- Annual Visitor Data Reports: USA (and USA DMA report), Latin America, and European
- Average Visitor Visa Spend Report
- Market Demographics Reports (and US Repeaters Report)

The GEI serves as a vital tool for assessing on-island visitor satisfaction, enabling stakeholders to identify trends and areas for improvement in the overall guest experience.

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