# Monthly Report



## VISA SPENDING Q1 2024

HOME

SUPPLY CASINO

FUEL

**IMPROVEMENT &** 

TRAVEL SERVICES

\$974,212

\$914.227

\$895.983

\$721,025 -29.2%

6.2%

-53.6%

22.1%

2 3 6 2

602

22835

1074



NETHERLANDS

**USD\$733** 

GIFT, CARD,

NOVELTY STORES

\$3 423 736

13%

ART DEALERS / GALLERIES

\$144 531

67%

**ITALY** 

**USD\$403** 

GOLF COURSES

\$539 125

15%

CLOTHING

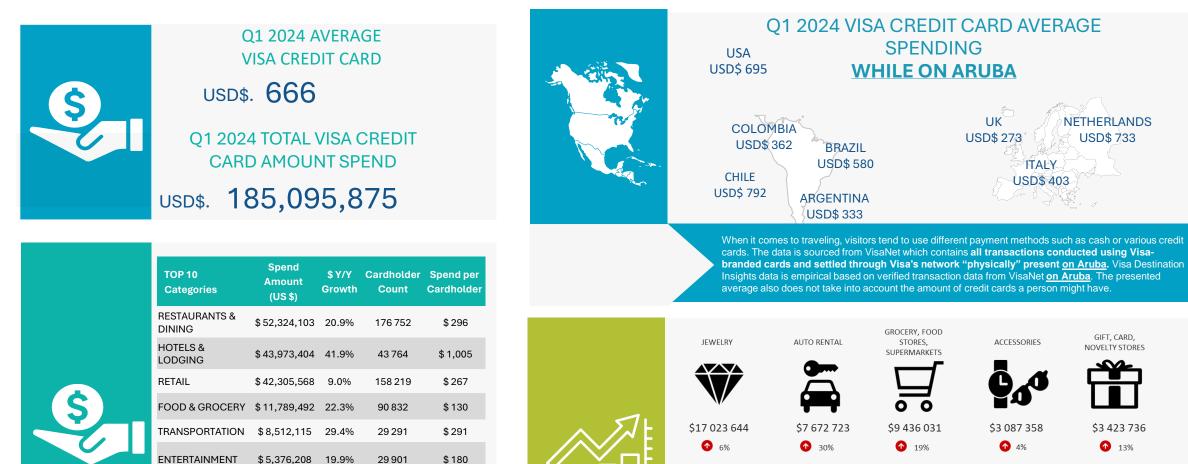
\$2 126 354

22%

**BOAT RENTAL & SERVICES** 

\$447 956

**21%** 



\$412

\$1.519

\$39

\$671

COSMETICS

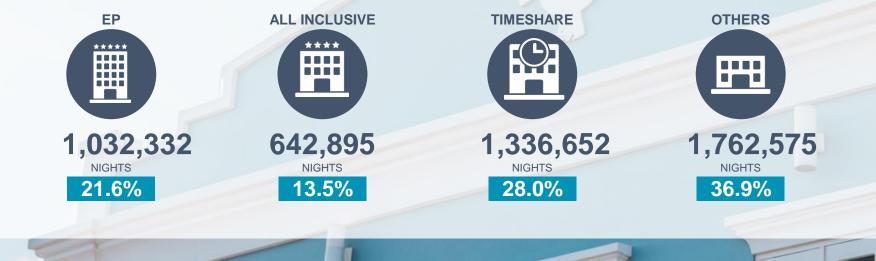
\$1 981 893

-23%

### SNAPSHOT YTD MAY 2024/2023

HOW MANY ARRIVALS?	HOW MANY CRUISE TOURISM?	HOW LONG DID THEY STAY?	WHAT DID THEY SPEND?** Central Bank Aruba (Q1- Q3 2023)	**Tourism Credits: In the new presentation of the Balance of Payments, the Central Bank of Aruba reclassified maintenance fee arising from Timeshare arrangement from "Other Services" to "Travel Services" (Tourism). With this reclassification it should be noted that the term Tourism
615,118 18.7%	<b>500,184</b> 6.4% Compared to 2023	4,774,454 13.9%	Awg. <b>3,451.6</b> min <b>15%</b> Q1-Q3 2022: 2,993.70	Receipts has changed to Tourism Credits in the new presentation of Balance of Payments. This reclassification resulted in an upward adjustment of the previously used term Tourism Receipts.

### WHERE DID THEY STAY?



One happy island + ARUBA.COM

# ARRIVALS YTD MAY 2024/2023

615,118 ARRIVALS



	2023		Growth	2024	% Growth	Marketsha	are 2023 Mar	ketshare 2024
USA	399,780		68,1	04 467,884	17.0%		77.1%	76.1%
Canada	31,060		5,230	36,290	16.8%	6.0%	5.9%	
NA	430,840			334 504,174	17.0%		83.1%	82.0%
Venezuela	713		526	1,239	73.8%	0.1%	0.2%	
Colombia	16,090		7,204	23,294	44.8%	3.1%	3.8%	
Brazil	4,550		1,807	6,357	39.7%	0.9%	1.0%	
Argentina	7,167		3,334	10,501	46.5%	1.4%	1.7%	
Chile	3,130		2,656	5,786	84.9%	0.6%	0.9%	
Ecuador	2,118		2,710	4,828	128.0%	0.4%	0.8%	
Peru	2,048		5,535	7,583	270.3%	0.4%	1.2%	
Paraguay	434		28	462	6.5%	0.1%	0.1%	
Uruguay	588		454	1,042	77.2%	0.1%	0.2%	
Mexico	1,177		258	1,435	21.9%	0.2%	0.2%	
Others	4,652		838	5,490	18.0%	0.9%	0.9%	
SA	42,667		25,350	68,017	59.4%	8.2%	11.1%	
Netherlands	17,075	-1,424		15,651	-8.3%	3.3%	2.5%	
UK	2,117		1,139	3,256	53.8%	0.4%	0.5%	
Germany	2,669	-754		1,915	-28.3%	0.5%	0.3%	
Italy	1,339	-31		1,308	-2.3%	0.3%	0.2%	
Sweden	1,590	-1,157		433	-72.8%	0.3%	0.1%	
Belgium	877	-102		775	-11.6%	0.2%	0.1%	
Austria	302	-13		289	-4.3%	0.1%	0.0%	
Switzerland	820		52	872	6.3%	0.2%	0.1%	
Others	4,236	-74		4,162	-1.7%	0.8%	0.7%	
Europe	31,025	-2,364		28,661	-7.6%	6.0%	4.7%	
ROW	13,669		597	14,266	4.4%	2.6%	2.3%	
Total	518,201			96,917 <b>615,118</b>	18.7%			

W/O Ven. 517,488	96.391	613,879	18.6%
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# ARRIVALS USA YTD MAY 2024/2023



**17.0%** GROWTH

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
New York	74,950	16,876	91,826	22.5%	18.7%	19.6%
Massachusetts	59,672	3,259	62,931	5.5%	14.9%	13.5%
New Jersey	41,569	12,382	53,951	29.8%	10.4%	11.5%
Pennsylvania	22,803	4,050	26,853	17.8%	5.7%	5.7%
Illinois	10,954	815	11,769	7.4%	2.7%	2.5%
Connecticut	15,306	3,059	18,365	20.0%	3.8%	3.9%
Florida	19,796	3,573	23,369	18.0%	5.0%	5.0%
Ohio	11,663	2,138	13,801	18.3%	2.9%	2.9%
Maryland	11,612	2,266	13,878	19.5%	2.9%	3.0%
Michigan	9,784	324	10,108	3.3%	2.4%	2.2%
Virginia	10,817	1,649	12,466	15.2%	2.7%	2.7%
Georgia	8,720	1,024	9,744	11.7%	2.2%	2.1%
North Carolina	11,061	1,863	12,924	16.8%	2.8%	2.8%
Texas	9,844	1,210	11,054	12.3%	2.5%	2.4%
California	6,711	1,241	7,952	18.5%	1.7%	1.7%
Other	74,518	12,375	86,893	16.6%	18.6%	18.6%
Total	399,780	68	<b>467,884</b>	17.0%		





**13.9%** GROWTH

	2023		Growth	2024	% Growth	ALOS 2023	ALOS 2024
USA	3,071,219		384,972	3,456,191	12.5%	7.7	7.4
Canada	331,114		45,632	376,746	13.8%	10.7	10.4
NA	3,402,333		430,604	3,832,937	12.7%	7.9	7.6
Venezuela	6,914		7,525	14,439	108.8%	9.7	11.7
Colombia	115,215		39,150	154,365	34.0%	7.2	6.6
Brazil	27,436		12,605	40,041	45.9%	6.0	6.3
Argentina	64,906		30,684	95,590	47.3%	9.1	9.1
Chile	24,266		19,204	43,470	79.1%	7.8	7.5
Ecuador	11,594		9,445	21,039	81.5%	5.5	4.4
Peru	15,413		28,745	44,158	186.5%	7.5	5.8
Paraguay	3,024	-109		2,915	-3.6%	7.0	6.3
Uruguay	4,513		3,501	8,014	77.6%	7.7	7.7
Mexico	6,974		4,718	11,692	67.7%	5.9	8.1
Others	32,962		3,740	36,702	11.3%	7.1	6.7
SA	313,217		159,208	472,425	50.8%	7.3	6.9
Netherlands	253,071	-10,680		242,391	-4.2%	14.8	15.5
UK	18,386		12,788	31,174	69.6%	8.7	9.6
Germany	22,518	-3,038		19,480	-13.5%	8.4	10.2
Italy	12,437	-1,116		11,321	-9.0%	9.3	8.7
Sweden	19,694	-15,016		4,678	-76.2%	12.4	10.8
Belgium	11,472		1,430	12,902	12.5%	13.1	16.6
Austria	3,088		334	3,422	10.8%	10.2	11.8
Switzerland	7,795		504	8,299	6.5%	9.5	9.5
Others	44,900	-7,690		37,210	-17.1%	10.6	8.9
Europe	393,361	-22,484		370,877	-5.7%	12.7	12.9
ROW	82,443		15,772	98,215	19.1%	6.0	6.9
Total	4,191,354		583,100	4,774,454	13.9%	8.1	7.8

### ACCOMMODATIONS YTD MAY 2024/2023





### ARRIVALS BY ACCOMMODATION

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
EP	141,397	24,999	166,396	17.7%	27.3%	27.1%
All Inclusive	91,139	4,388	95,527	4.8%	17.6%	15.5%
Timeshare	135,236	12,825	148,061	9.5%	26.1%	24.1%
Others	150,429	54,705	205,134	36.4%	29.0%	33.3%
Total	518,201	96,917	615,118	18.7%		

### NIGHTS BY ACCOMMODATION

	2023	Growth	2024 %	% Growth	Marketshare 2023	Marketshare 2024
EP	904,943	127,389	1,032,332	14.1%	21.6%	21.6%
All Inclusive	631,188	11,707	642,895	1.9%	15.1%	13.5%
Timeshare	1,257,758	78,894	1,336,652	6.3%	30.0%	28.0%
Others	1,397,465	365,110	1,762,575	26.1%	33.3%	36.9%
Total	4,191,354	583,100	4,774,454	13.9%		

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

### ACCOMMODATIONS YTD MAY 2024/2023





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		EP			All Inclusiv	e		Timeshare	)		Others	
	2024	2023	% growth	2024	2023	% growth	2024	2023	% growth	2024	2023	% growth
USA	141,568	122,500	15.6%	77,433	72,949	6.1%	135,095	123,733	9.2%	113,788	80,598	41.2%
Venezuela	235	159	47.8%	6	12	-50.0%	130	100	30.0%	868	442	96.4%
Netherlands	1,585	1,839	-13.8%	530	871	-39.2%	569	610	-6.7%	12,967	13,755	-5.7%
Canada	5,866	4,643	26.3%	7,580	7,652	-0.9%	5,288	5,042	4.9%	17,556	13,723	27.9%
Brazil	1,858	1,344	38.2%	598	606	-1.3%	539	484	11.4%	3,362	2,116	58.9%
Colombia	2,573	1,611	59.7%	1,050	1,212	-13.4%	1,571	1,424	10.3%	18,100	11,843	52.8%
Argentina	1,371	1,062	29.1%	3,665	3,145	16.5%	1,369	892	53.5%	4,096	2,068	98.1%
Chile	999	419	138.4%	1,316	1,263	4.2%	612	324	88.9%	2,859	1,124	154.4%
Peru	1,290	324	298.1%	1,169	556	110.3%	563	182	209.3%	4,561	986	362.6%
UK	1,088	718	51.5%	208	158	31.6%	244	202	20.8%	1,716	1,039	65.2%
Italy	369	237	55.7%	132	182	-27.5%	111	90	23.3%	696	830	-16.1%
Total main market	158,802	134,856	17.8%	93,687	88,606	5.7%	146,091	133,083	9.8%	180,569	128,524	40.5%
All visitors	166,396	141,397	17.7%	95,527	91,139	4.8%	148,061	135,236	9.5%	205,134	150,429	36.4%

### ACCOMMODATIONS YTD MAY 2024/2023

ARRIVALS

615,118

18.7%

GROWTH

		EP			All Inclusiv	е		Timeshare	<u>)</u>		Others	
	2024	2023	% growth	2024	2023	% growth	2024	2023	% growth	2024	2023	% growth
USA	85.1%	86.6%	-1.8%	81.1%	80.0%	1.3%	91.2%	91.5%	-0.3%	55.5%	53.6%	3.5%
Venezuela	0.1%	0.1%	25.6%	0.0%	0.0%	-52.3%	0.1%	0.1%	18.7%	0.4%	0.3%	44.0%
Netherlands	1.0%	1.3%	-26.8%	0.6%	1.0%	-41.9%	0.4%	0.5%	-14.8%	6.3%	9.1%	-30.9%
Canada	3.5%	3.3%	7.4%	7.9%	8.4%	-5.5%	3.6%	3.7%	-4.2%	8.6%	9.1%	-6.2%
Brazil	1.1%	1.0%	17.5%	0.6%	0.7%	-5.9%	0.4%	0.4%	1.7%	1.6%	1.4%	16.5%
Colombia	1.5%	1.1%	35.7%	1.1%	1.3%	-17.3%	1.1%	1.1%	0.8%	8.8%	7.9%	12.1%
Argentina	0.8%	0.8%	9.7%	3.8%	3.5%	11.2%	0.9%	0.7%	40.2%	2.0%	1.4%	45.2%
Chile	0.6%	0.3%	102.6%	1.4%	1.4%	-0.6%	0.4%	0.2%	72.5%	1.4%	0.7%	86.5%
Peru	0.8%	0.2%	238.3%	1.2%	0.6%	100.6%	0.4%	0.1%	182.5%	2.2%	0.7%	239.2%
UK	0.7%	0.5%	28.8%	0.2%	0.2%	25.6%	0.2%	0.1%	10.3%	0.8%	0.7%	21.1%
Italy	0.2%	0.2%	32.3%	0.1%	0.2%	-30.8%	0.1%	0.1%	12.7%	0.3%	0.6%	-38.5%
Total main markets	95.4%	95.4%	0.1%	98.1%	97.2%	0.9%	98.7%	98.4%	0.3%	88.0%	85.4%	3.0%
All visitors	100.0%	100.0%	0.0%	100.0%	100.0%	0.0%	100.0%	100.0%	0.0%	100.0%	100.0%	0.0%







	2023		Growth		2024	% Growth
0 - 11	32,630		9,196		41,826	28.2%
12-19	29,874		8,403		38,277	28.1%
20 - 29	56,708		15,023		71,731	26.5%
30 - 39	78,688		17,857		96,545	22.7%
40 - 49	82,817		15,934		98,751	19.2%
50 - 59	103,726		11,494		115,220	11.1%
60 - 69	87,774		12,982		100,756	14.8%
70 +	45,935		6,053		51,988	13.2%
Not Stated	49	-25			24	-51.0%
Total	518,201			96,917	615,118	18.7%



### GENERATIONS YTD MAY 2024/2023





	2023		Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
Gen A	25,838		7,377	33,215	28.6%	5.0%	5.4%
Gen Z	66,229		18,752	84,981	28.3%	12.8%	13.8%
Millennials	123,486		27,474	150,960	22.2%	23.8%	24.5%
Gen X	137,456		21,640	159,096	15.7%	26.5%	25.9%
Baby Boomers	149,067		19,193	168,260	12.9%	28.8%	27.4%
Silent Generations	16,076		2,506	18,582	15.6%	3.1%	3.0%
Age not specified	49	-25	r I	24	-51.0%	0.0%	0.0%
Total	518,201		96,917	615,118	18.7%		



### PURPOSE OF VISIT YTD MAY 2024/2023





#### PURPOSE OF VISIT YTD MAY 2024

### CONVINCING REASONS FOR VISIT YTD MAY 2024

Total	615,118	100.0%	518,201	100.0%	18.7%
Wedding	10,973	1.8%	10,472	2.0%	4.8%
Shopping	3,778	0.6%	3,304	0.6%	14.3%
Not specified	37,391	6.1%	35,965	6.9%	4.0%
Meeting	3,979	0.6%	3,736	0.7%	6.5%
Incentive	5,554	0.9%	6,147	1.2%	-9.6%
Diving	2,022	0.3%	1,776	0.3%	13.9%
Honeymoon	12,692	2.1%	11,883	2.3%	6.8%
Conference	4,551	0.7%	4,816	0.9%	-5.5%
Business	11,498	1.9%	11,038	2.1%	4.2%
Sun, Sand, Sea	522,680	85.0%	429,064	82.8%	21.8%
	2024	Market share 2024	2023	Market share 2023	% Growth

Reasons fo	or Choice	YTD May 2024	Market Share
Adventure /	Activities	26,061	4%
Direct Fligh	ts	27,785	5%
Ease/Comf	ort	43,787	7%
Familiarity		54,552	9%
Family Frier Destination	•	153,365	25%
NOT SPEC	IFIED	10,195	2%
OTHER		72,488	12%
Outside Hu	rricane Belt	9,099	1%
Points rede	mption	9,437	2%
Reliable we	ather	97,383	16%
Word of mo	outh	110,966	18%

### CARRIERS YTD MAY 2024/2023





	2023		Growth	202	24 % (	Growth	Marketshare 2023	Marketshare 2024
JETBLUE	116,872		25,556	142,42	28	21.9%	22.6%	23.2%
AMERICAN AIRLINES	116,978		978	117,9	56	0.8%	22.6%	19.2%
DELTA AIRLINES	68,993		15,423	84,4	16	22.4%	13.3%	13.7%
UNITED AIRLINES	62,702		15,447	78,14	49	24.6%	12.1%	12.7%
SOUTHWEST AIRLINES	25,028		3,127	28,1	55	12.5%	4.8%	4.6%
COPA AIRLINES	16,637		9,369	26,00	06	56.3%	3.2%	4.2%
AVIANCA	19,738		3,475	23,2	13	17.6%	3.8%	3.8%
SPIRIT AIRLINES	5,968		9,727	15,69	95	163.0%	1.2%	2.6%
WESTJET AIRLINES	9,305		5,429	14,73	34	58.3%	1.8%	2.4%
KLM ROYAL DUTCH	15,581	-3,013		12,50	68	-19.3%	3.0%	2.0%
WINGO	6,469		5,060	11,52	29	78.2%	1.2%	1.9%
AIR CANADA	10,281	-396		9,88	35	-3.9%	2.0%	1.6%
DIVI DIVI AIR	8,004	-532		7,4	72	-6.6%	1.5%	1.2%
SUNWING AIRLINES	7,536	-631		6,90	)5	-8.4%	1.5%	1.1%
LATAM AIRLINES	0		6,468	6,40	68	-	0.0%	1.1%
TUI FLY NL	6,603	-801		5,80	)2	-12.1%	1.3%	0.9%
EZAIR	4,699	-152		4,54	47	-3.2%	0.9%	0.7%
PRIVATE	5,074	-1,008		4,00	66	-19.9%	1.0%	0.7%
SUN COUNTRY AIRLINES	2,256		632	2,88	38	28.0%	0.4%	0.5%
SURINAM AIRWAYS	2,185		196	2,38	31	9.0%	0.4%	0.4%
WINAIR	542		1,767	2,30	)9 :	326.0%	0.1%	0.4%
BRITISH AIRWAYS	787		1,419	2,20	)6 ·	180.3%	0.2%	0.4%
LATAM AIRLINES PERU	0		1,388	1,38	38	-	0.0%	0.2%
CHARTER	2,034	-657		1,3	77	-32.3%	0.4%	0.2%
ARAJET	443		353	79	96	79.7%	0.1%	0.1%
JET AIR CARIBBEAN	985	-205		78	30	-20.8%	0.2%	0.1%
OTHERS	2,501	-1,502		99	99	-60.1%	0.5%	0.2%
Total	518,201			96,917 <b>615,1</b> 1	8	18.7%		





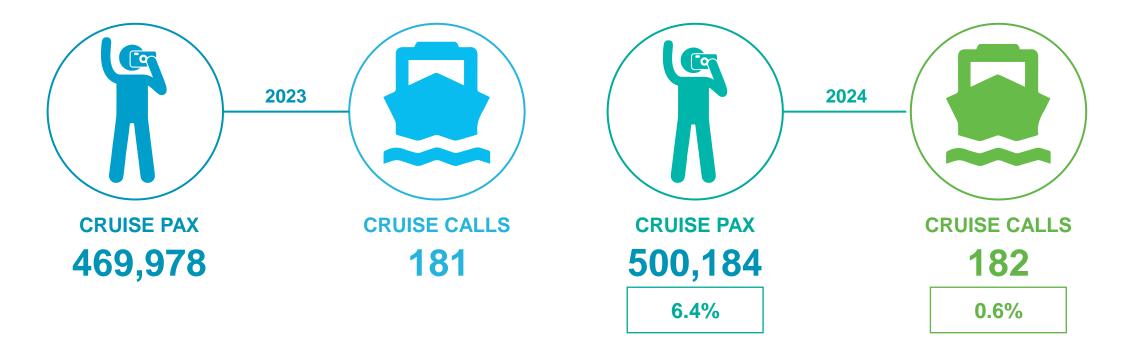


City	APO Code	JAN-MAY '24	Mkt Share	JAN-MAY'23	Mkt Share	24 vs 23
JFK NY	JFK	91,834	14.9%	84,090	16.2%	9.2%
Boston	BOS	79,676	13.0%	76,186	14.7%	4.6%
Newark	EWR	68,061	11.1%	41,141	7.9%	65.4%
Miami	MIA	43,388	7.1%	40,281	7.8%	7.7%
Charlotte	CLT	41,483	6.7%	42,027	8.1%	-1.3%
Atlanta	ATL	38,696	6.3%	25,460	4.9%	52.0%
Toronto	YYZ	31,559	5.1%	27,143	5.2%	16.3%
Bogota	BOG	27,406	4.5%	23,505	4.5%	16.6%
Philadelphia	PHL	26,924	4.4%	27,699	5.3%	-2.8%
Panama City	PTY	26,077	4.2%	16,652	3.2%	56.6%
Orlando	MCO	21,693	3.5%	20,097	3.9%	7.9%
Amsterdam	AMS	18,375	3.0%	21,578	4.2%	-14.8%
G.Bush DC	IAD	16,504	2.7%	13,666	2.6%	20.8%
Fort Lauderdale	FLL	16,056	2.6%	6,298	1.2%	154.9%
Curacao	CUR	13,706	2.2%	15,302	3.0%	-10.4%
Chicago	ORD	9,885	1.6%	7,357	1.4%	34.4%
_ima, Peru	LIM	7,856	1.3%	0	0.0%	—
Baltimore	BWI	6,480	1.1%	4,970	1.0%	30.4%
Medellin	MDE	4,726	0.8%	2,778	0.5%	70.1%
Cali, Alfonso Bonilla Aragon	CLO	2,733	0.4%	4	0.0%	68225.0%
Houston International	IAH	2,587	0.4%	2,997	0.6%	-13.7%
Vinneapolis St. Paul Inter Airp	MSP	2544	0.4%	2,256	0.4%	12.8%
Dallas Fort Worth Int Airport	DFW	2,332	0.4%	2,794	0.5%	-16.5%
Sint Maarten	SXM	2,306	0.4%	608	0.1%	279.3%
LaGuardia Airport, NY	LGA	2,285	0.4%	2,573	0.5%	-11.2%
	Others	9,946	1.6%	10,739	2.1%	-7.4%
Total		615,118	100.0%	518,201	100.0%	18.7%

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## MAY RESULT 2024









	2023		Growth	2024	% Growth	Marketshar	e 2023	Marketsh	are 2024
USA	76,063		10,272	86,335	13.5%		79.8%		77.7%
Canada	2,914	-52		2,862	-1.8%	3.1%		2.6%	
NA	78,977		10,220	89,197	12.9%		82.8%		80.2%
Venezuela	159		42	201	26.4%	0.2%		0.2%	
Colombia	3,040		2,114	5,154	69.5%	3.2%		4.6%	
Brazil	986		223	1,209	22.6%	1.0%		1.1%	
Argentina	1,358		199	1,557	14.7%	1.4%		1.4%	
Chile	469		495	964	105.5%	0.5%		0.9%	
Ecuador	450		808	1,258	179.6%	0.5%		1.1%	
Peru	554		1,005	1,559	181.4%	0.6%		1.4%	
Paraguay	68		51	119	75.0%	0.1%		0.1%	
Uruguay	117		140	257	119.7%	0.1%		0.2%	
Mexico	311		62	373	19.9%	0.3%		0.3%	
Others	983		193	1,176	19.6%	1.0%		1.1%	
SA	8,495		5,332	13,827	62.8%	8.9%		12.4%	
Netherlands	2,906	-83		2,823	-2.9%	3.0%		2.5%	
UK	525		143	668	27.2%	0.6%		0.6%	
Germany	370	-19		351	-5.1%	0.4%		0.3%	
Italy	255	-38		217	-14.9%	0.3%		0.2%	
Sweden	33		2	35	6.1%	0.0%		0.0%	
Belgium	134	-14		120	-10.4%	0.1%		0.1%	
Austria	49	-6		43	-12.2%	0.1%		0.0%	
Switzerland	159	-28		131	-17.6%	0.2%		0.1%	
Others	574	-6		568	-1.0%	0.6%		0.5%	
Europe	5,005	-49		4,956	-1.0%	5.2%		4.5%	
ROW	2,889		311	3,200	10.8%	3.0%		2.9%	
Total	95,366		15,8	14 <b>111,180</b>	16.6%				

W/O Ven.	95,207	15,772	110,979	16.6%







	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
New York	13,552	1,632	15,184	12.0%	17.8%	17.6%
Massachusetts	7,812	1,239	9,051	15.9%	10.3%	10.5%
New Jersey	8,746	1,293	10,039	14.8%	11.5%	11.6%
Pennsylvania	4,476	430	4,906	9.6%	5.9%	5.7%
Illinois	1,807	281	2,088	15.6%	2.4%	2.4%
Connecticut	2,787	239	3,026	8.6%	3.7%	3.5%
Florida	5,187	310	5,497	6.0%	6.8%	6.4%
Ohio	2,049	342	2,391	16.7%	2.7%	2.8%
Maryland	2,997	526	3,523	17.6%	3.9%	4.1%
Michigan	1,407	-96	1,311	-6.8%	1.8%	1.5%
Virginia	2,296	529	2,825	23.0%	3.0%	3.3%
Georgia	2,704	99	2,803	3.7%	3.6%	3.2%
North Carolina	2,742	403	3,145	14.7%	3.6%	3.6%
Texas	2,860	359	3,219	12.6%	3.8%	3.7%
California	1,926	339	2,265	17.6%	2.5%	2.6%
Other	12,715	2,347	15,062	18.5%	16.7%	17.4%
Total	76,063		10,272 86,335	13.5%		







	2023		Growth	2024	% Growth	ALOS 2023	ALOS 2024
USA	538,032		70,884	608,916	13.2%	7.1	7.1
Canada	25,586	-797		24,789	-3.1%	8.8	8.7
NA	563,618		70,087	633,705	12.4%	7.1	7.1
Venezuela	1,934		1,023	2,957	52.9%	12.2	14.7
Colombia	20,564		12,231	32,795	59.5%	6.8	6.4
Brazil	5,856		978	6,834	16.7%	5.9	5.7
Argentina	12,472		987	13,459	7.9%	9.2	8.6
Chile	3,847		2,956	6,803	76.8%	8.2	7.1
Ecuador	2,237		2,711	4,948	121.2%	5.0	3.9
Peru	3,254		5,231	8,485	160.8%	5.9	5.4
Paraguay	438		292	730	66.7%	6.4	6.1
Uruguay	852		1,024	1,876	120.2%	7.3	7.3
Mexico	1,713		1,309	3,022	76.4%	5.5	8.1
Others	5,835		945	6,780	16.2%	5.9	5.8
SA	59,002		29,687	88,689	50.3%	6.9	6.4
Netherlands	42,050		5,751	47,801	13.7%	14.5	16.9
UK	4,440		2,440	6,880	55.0%	8.5	10.3
Germany	3,584	-108		3,476	-3.0%	9.7	9.9
Italy	2,136	-587		1,549	-27.5%	8.4	7.1
Sweden	291		356	647	122.3%	8.8	18.5
Belgium	1,573		299	1,872	19.0%	11.7	15.6
Austria	387		75	462	19.4%	7.9	10.7
Switzerland	1,362	-321		1,041	-23.6%	8.6	7.9
Others	8,079	-2,834		5,245	-35.1%	14.1	9.2
Europe	63,902		5,071	68,973	7.9%	12.8	13.9
ROW	17,414		3,733	21,147	21.4%	6.0	6.6
Total	703,936		1	108,578 <b>812,514</b>	15.4%	7.4	7.3



### ACCOMMODATIONS MAY 2024/2023

**111,180** ARRIVALS

# **16.6%** GROWTH

### ARRIVALS BY ACCOMMODATION

	2023	Growth		2024	% Growth	Marketshare 2023	Marketshare 2024
EP	26,338	2,397		28,735	9.1%	27.6%	25.8%
All Inclusive	18,711	670		19,381	3.6%	19.6%	17.4%
Timeshare	25,214	3,316		28,530	13.2%	26.4%	25.7%
Others	25,103	9,431		34,534	37.6%	26.3%	31.1%
Total	95,366		15,814	111,180	16.6%		

### NIGHTS BY ACCOMMODATION

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
EP	159,521	15,073	174,594	9.4%	22.7%	21.5%
All Inclusive	124,988	4,505	129,493	3.6%	17.8%	15.9%
Timeshare	206,339	20,844	227,183	10.1%	29.3%	28.0%
Others	213,088	68,156	281,244	32.0%	30.3%	34.6%
Total	703,936	108,578	812,514	15.4%		

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



### ACCOMMODATIONS MAY 2024/2023

**111,180** ARRIVALS **16.6%** дкомтн

	EP			All Inclusive			Timeshare			Others		
	2024	2023	% growth	2024	2023	% growth	2024	2023	% growth	2024	2023	% growth
USA	24,665	23,163	6.5%	16,547	15,872	4.3%	26,179	23,243	12.6%	18,944	13,785	37.4%
Venezuela	29	29	0.0%	0	0	0	22	41	-46.3%	150	89	68.5%
Netherlands	219	279	-21.5%	87	148	-41.2%	126	131	-3.8%	2,391	2,348	1.8%
Canada	399	453	-11.9%	745	867	-14.1%	456	477	-4.4%	1,262	1,117	13.0%
Brazil	307	335	-8.4%	121	92	31.5%	121	107	13.1%	660	452	46.0%
Colombia	628	250	151.2%	250	285	-12.3%	465	326	42.6%	3,811	2,179	74.9%
Argentina	196	155	26.5%	605	610	-0.8%	246	166	48.2%	510	427	19.4%
Chile	155	76	103.9%	246	217	13.4%	119	40	197.5%	444	136	226.5%
Peru	306	114	168.4%	302	138	118.8%	185	80	131.3%	766	222	245.0%
UK	252	186	35.5%	62	52	19.2%	52	68	-23.5%	302	219	37.9%
Italy	71	51	39.2%	28	62	-54.8%	16	17	-5.9%	102	125	-18.4%
Total main market	27,227	25,091	8.5%	18,993	18,343	3.5%	27,987	24,696	13.3%	29,342	21,099	39.1%
All visitors	28,735	26,338	9.1%	19,381	18,711	3.6%	28,530	25,214	13.2%	34,534	25,103	37.6%



### ACCOMMODATIONS MAY 2024/2023





	EP				All Inclusiv	/e		Timeshar	е	Others		
	2024	2023	% growth	2024	2023	% growth	2024	2023	% growth	2024	2023	% growth
USA	85.8%	87.9%	-2.4%	85.4%	84.8%	0.6%	91.8%	92.2%	-0.5%	54.9%	54.9%	-0.1%
Venezuela	0.1%	0.1%	-8.3%	0.0%	0.0%	0	0.1%	0.2%	-52.6%	0.4%	0.4%	22.5%
Netherlands	0.8%	1.1%	-28.1%	0.4%	0.8%	-43.2%	0.4%	0.5%	-15.0%	6.9%	9.4%	-26.0%
Canada	1.4%	1.7%	-19.3%	3.8%	4.6%	-17.0%	1.6%	1.9%	-15.5%	3.7%	4.4%	-17.9%
Brazil	1.1%	1.3%	-16.0%	0.6%	0.5%	27.0%	0.4%	0.4%	-0.1%	1.9%	1.8%	6.1%
Colombia	2.2%	0.9%	130.2%	1.3%	1.5%	-15.3%	1.6%	1.3%	26.1%	11.0%	8.7%	27.1%
Argentina	0.7%	0.6%	15.9%	3.1%	3.3%	-4.2%	0.9%	0.7%	31.0%	1.5%	1.7%	-13.2%
Chile	0.5%	0.3%	86.9%	1.3%	1.2%	9.4%	0.4%	0.2%	162.9%	1.3%	0.5%	137.3%
Peru	1.1%	0.4%	146.0%	1.6%	0.7%	111.3%	0.6%	0.3%	104.4%	2.2%	0.9%	150.8%
UK	0.9%	0.7%	24.2%	0.3%	0.3%	15.1%	0.2%	0.3%	-32.4%	0.9%	0.9%	0.2%
Italy	0.2%	0.2%	27.6%	0.1%	0.3%	-56.4%	0.1%	0.1%	-16.8%	0.3%	0.5%	-40.7%
Total main market	94.8%	95.3%	-0.5%	98.0%	98.0%	0.0%	98.1%	97.9%	0.2%	85.0%	84.0%	1.1%
All visitors	100.0%	100.0%	0.0%	100.0%	100.0%	0.0%	100.0%	100.0%	0.0%	100.0%	100.0%	0.0%







	2023		Growth		2024	% Growth
0 - 11	3,826		1,200		5,026	31.4%
12-19	3,191		918		4,109	28.8%
20 - 29	13,618		2,774		16,392	20.4%
30 - 39	16,440		3,063		19,503	18.6%
40 - 49	15,121		2,302		17,423	15.2%
50 - 59	20,441		2,118		22,559	10.4%
60 - 69	15,608		2,383		17,991	15.3%
70 +	7,117		1,057		8,174	14.9%
Not Stated	4	-1			3	-25.0%
Total	95,366			15,814	111,180	16.6%



### GENERATIONS MAY 2024/2023





	2023		Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
Gen A	3,231		1,056	4,287	32.7%	3.4%	3.9%
Gen Z	11,099		2,672	13,771	24.1%	11.6%	12.4%
Millennials	26,014		4,698	30,712	18.1%	27.3%	27.6%
Gen X	26,163		3,412	29,575	13.0%	27.4%	26.6%
Baby Boomers	26,476		3,514	29,990	13.3%	27.8%	27.0%
Silent Generations	2,379		463	2,842	19.5%	2.5%	2.6%
Age not specified	4	-1		3	-25.0%	0.0%	0.0%
Total	95,366		15,814	111,180	16.6%		



### PURPOSE OF VISIT MAY 2024/2023



**16.6%** GROWTH

	2024	Market share 2024	2023	Market share 2023	% Growth
Sun, Sand, Sea	89,389	80.4%	74,299	77.9%	20.3%
Business	2,219	2.0%	2,218	2.3%	0.0%
Conference	723	0.7%	839	0.9%	-13.8%
Honeymoon	3,096	2.8%	3,306	3.5%	-6.4%
Diving	348	0.3%	307	0.3%	13.4%
Incentive	1,117	1.0%	1,370	1.4%	-18.5%
Meeting	745	0.7%	713	0.7%	4.5%
Not specified	9,423	8.5%	8,033	8.4%	17.3%
Shopping	666	0.6%	679	0.7%	-1.9%
Wedding	3,454	3.1%	3,602	3.8%	-4.1%
Total	111,180	100.0%	95,366	100.0%	16.6%





16.6% GROWTH

	2023		Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
AMERICAN AIRLINES	22,100		2,694	24,794	12.2%	23.2%	22.3%
JETBLUE	20,830		3,275	24,105	15.7%	21.8%	21.7%
UNITED AIRLINES	14,336		2,592	16,928	18.1%	15.0%	15.2%
DELTA AIRLINES	11,372		741	12,113	6.5%	11.9%	10.9%
SOUTHWEST AIRLINES	5,633		99	5,732	1.8%	5.9%	5.2%
COPA AIRLINES	3,559		2,145	5,704	60.3%	3.7%	5.1%
AVIANCA	3,932		895	4,827	22.8%	4.1%	4.3%
SPIRIT AIRLINES	1,547		1,002	2,549	64.8%	1.6%	2.3%
WINGO	1,242		1,292	2,534	104.0%	1.3%	2.3%
KLM ROYAL DUTCH	2,347		72	2,419	3.1%	2.5%	2.2%
DIVI DIVI AIR	1,618	-146		1,472	-9.0%	1.7%	1.3%
WESTJET AIRLINES	504		927	1,431	183.9%	0.5%	1.3%
LATAM AIRLINES PERU	0		1,388	1,388	-	0.0%	1.2%
EZAIR	878		128	1,006	14.6%	0.9%	0.9%
TUI FLY NL	1,212	-240		972	-19.8%	1.3%	0.9%
SUNWING AIRLINES	900	-185		715	-20.6%	0.9%	0.6%
SURINAM AIRWAYS	448		127	575	28.3%	0.5%	0.5%
WINAIR	131		302	433	230.5%	0.1%	0.4%
BRITISH AIRWAYS	370		12	382	3.2%	0.4%	0.3%
JET AIR CARIBBEAN	163		150	313	92.0%	0.2%	0.3%
PRIVATE	586	-296		290	-50.5%	0.6%	0.3%
CHARTER	309	-71		238	-23.0%	0.3%	0.2%
SKY HIGH AVIATION	19		90	109	473.7%	0.0%	0.1%
ARAJET	90		10	100	11.1%	0.1%	0.1%
AIR CENTURY	51	-1		50	-2.0%	0.1%	0.0%
AMERIFLIGHT	0		1	1	-	0.0%	0.0%
OTHERS	1,189	-1,189		0	-100.0%	1.2%	0.0%
Total	95,366		15,8	314 <b>111,180</b>	16.6%		







City	APO Code	April '24	Market share 2024	April'23	Market share 2023	2024 vs 2023
JFK NY	JFK	18,529	16.7%	18,381	19.3%	0.8%
Newark	EWR	11,120	10.0%	10,349	10.9%	7.4%
Boston	BOS	10,576	9.5%	8,144	8.5%	29.9%
Miami	MIA	9,243	8.3%	7,811	8.2%	18.3%
Charlotte	CLT	9,061	8.1%	8,525	8.9%	6.3%
Atlanta	ATL	6,545	5.9%	5,787	6.1%	13.1%
Bogota	BOG	5,734	5.2%	4,683	4.9%	22.4%
Panama City	PTY	5,707	5.1%	3,559	3.7%	60.4%
Philadelphia	PHL	5,346	4.8%	4,664	4.9%	14.6%
G.Bush DC	IAD	4,793	4.3%	2,675	2.8%	79.2%
Orlando	MCO	4,685	4.2%	4,577	4.8%	2.4%
Amsterdam	AMS	3,391	3.1%	3,559	3.7%	63.3%
Curacao	CUR	2,811	2.5%	3,025	3.2%	-7.1%
Fort Lauderdale	FLL	2,592	2.3%	1,587	1.7%	-4.7%
Toronto	YYZ	2,148	1.9%	2,485	2.6%	-13.6%
Lima, Peru	LIM	1,388	1.2%	0	0.0%	_
Baltimore	BWI	1,049	0.9%	1,067	1.1%	-1.7%
Medellin	MDE	956	0.9%	494	0.5%	93.5%
Chicago	ORD	873	0.8%	672	0.7%	29.9%
Houston International	IAH	727	0.7%	647	0.7%	12.4%
Cali, Alfonso Bonilla Aragon	CLO	676	0.6%	0	0.0%	_
Dallas Fort Worth Int Airport	DFW	676	0.6%	643	0.7%	5.1%
LaGuardia Airport, NY	LGA	559	0.5%	507	0.5%	10.3%
Johan A. Pengel Int Airport, Suriname	PBM	517	0.5%	450	0.5%	14.9%
Sint Maarten	SXM	433	0.4%	150	0.2%	188.7%
	Others	1,045	0.9%	925	1.0%	13.0%
Total		111,180	100.0%	95,366	100.0%	16.6%

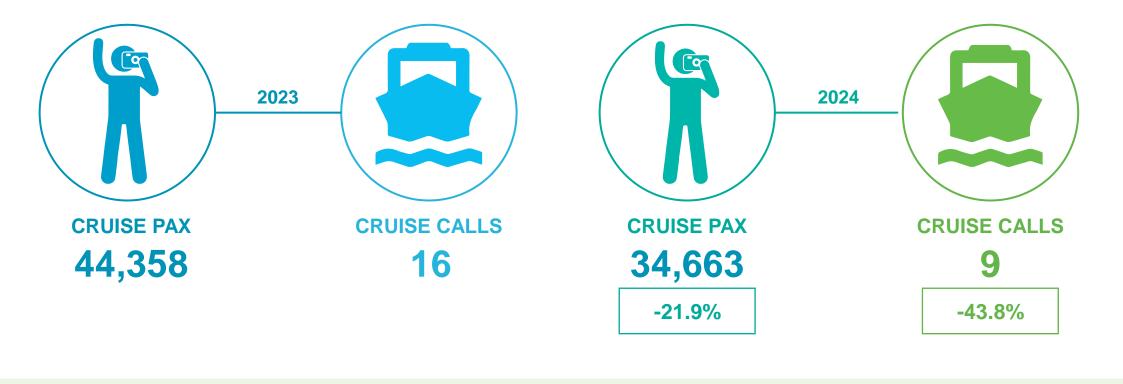
# CRUBSE COMPANY SUSTINE TO AN A SUSTINE TO AN A

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# CRUISE MAY 2024/2023

ABSOLUTE GROWTH PAX MAY

**-9,695** -21.9%









Reviews and Ratings

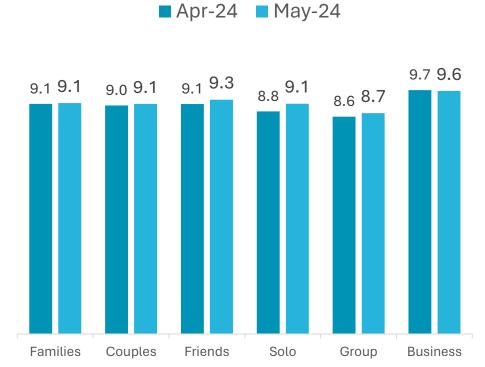




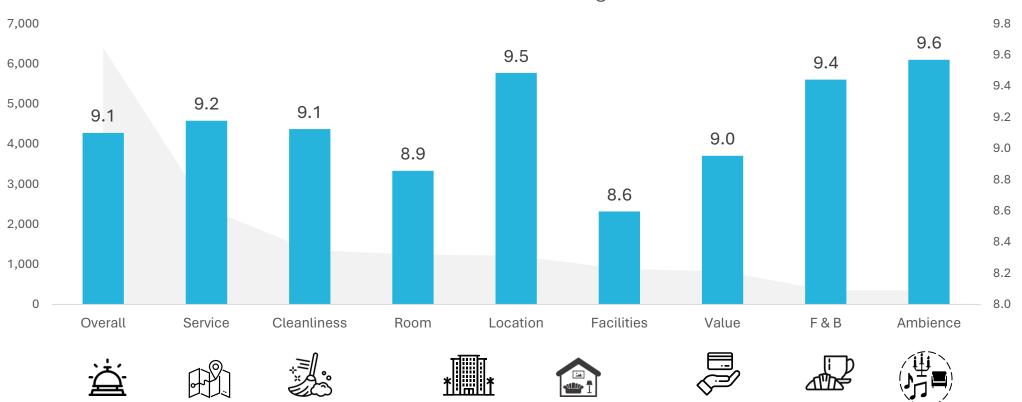
MARKETS



TRAVEL PARTY Compared to Previous Month







Reviews Rating



12.0

10.0

8.0

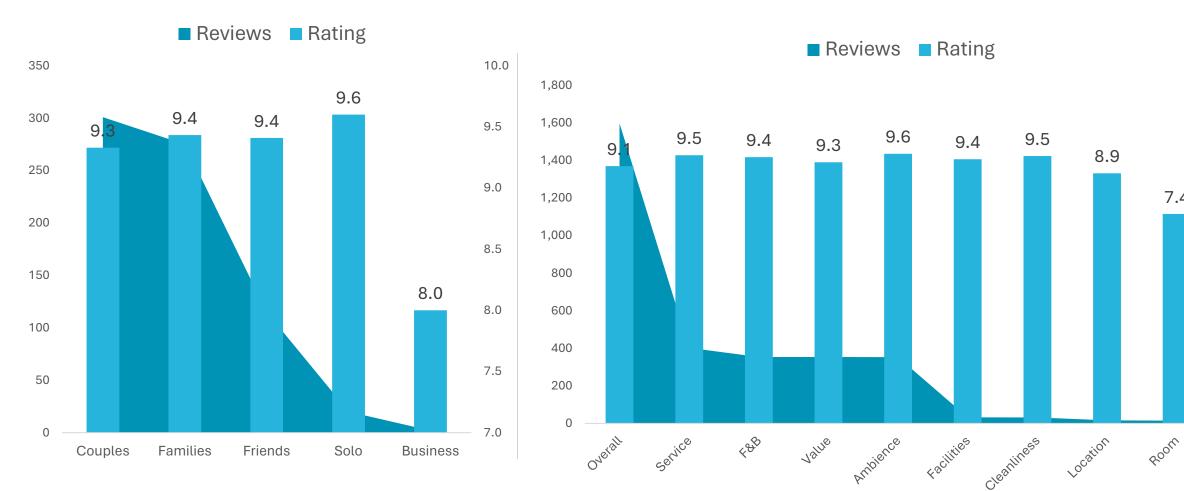
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Aruba Tourism Authority

# VACATIONS RENTALS



#### INTRODUCTION

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

#### **OCCUPANCY**

May 2023 Occupancy: 42.6% | May 2024 Occupancy: 52.1%

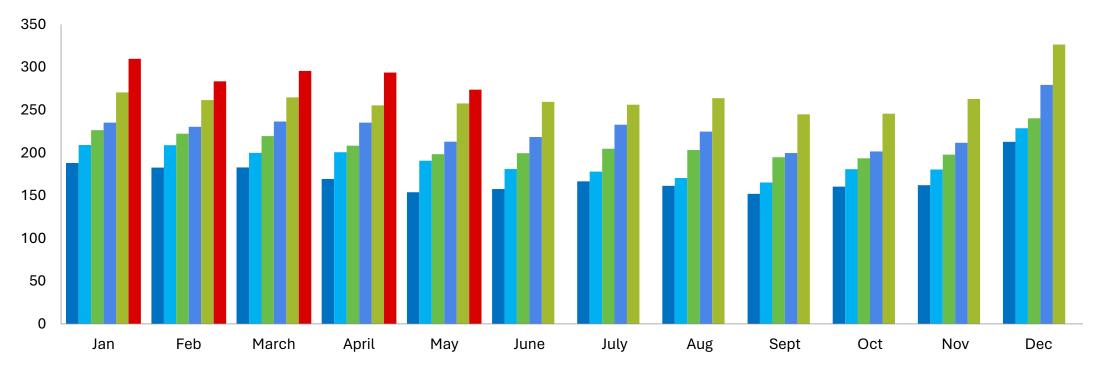


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**ADR** 

May 2023 ADR: \$258 | May 2024 ADR: \$274

■ 2019 ■ 2020 ■ 2021 ■ 2022 ■ 2023 **■** 2024

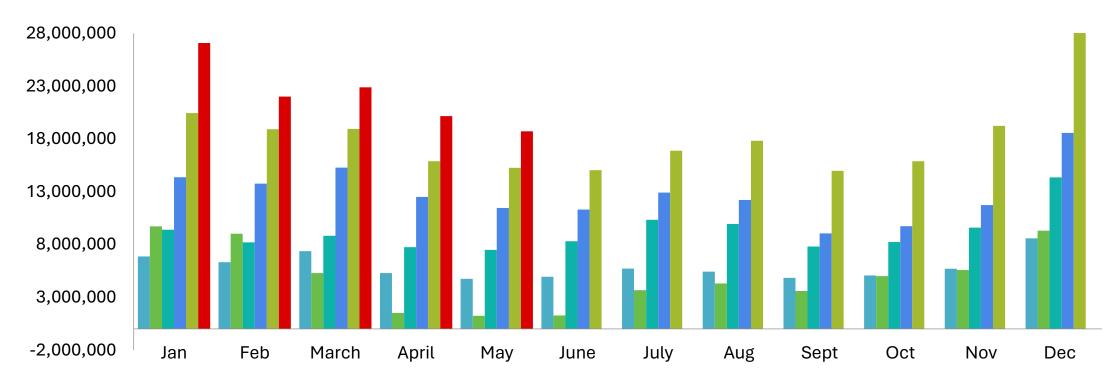


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Total Revenue YTD May 2024: USD\$110,830,262 | Total Revenue YTD April 2023: USD\$74,175,747 May 2024: USD\$18,715,341 | May 2023: USD\$89,429,160

■ 2019 ■ 2020 ■ 2021 ■ 2022 ■ 2023 **■** 2024



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## 2024



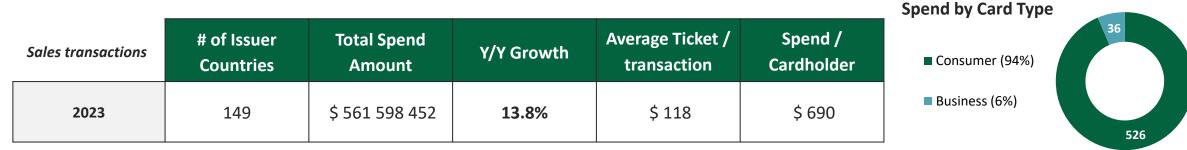
Aruba Tourism Authority

# **Visa Credit Card Spending**

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#### **Metrics**

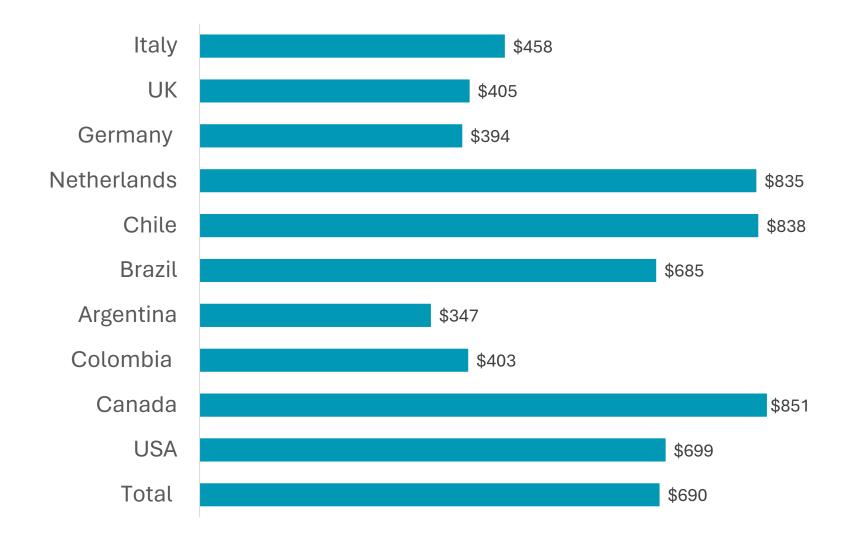
- The Visa Destination Insights reports sales volume for international Visa Cardholders visiting Aruba.
- The data is sourced from VisaNet. which contains all transactions conducted using Visa-branded cards and settled through Visa's network "physically"
  present on Aruba. Visa Destination Insights data is empirical. based on verified transaction data from VisaNet. includes all Visa credit. debit. prepaid.
  commercial and small business transactions. as well as ATM cash transactions processed through Visa's PLUS ATM Network on Aruba.
- Data are selected with **the following criteria**:
  - ✓ The Visa card was issued by a **foreign bank**.
  - ✓ The transaction was conducted in Aruba during 2023.
  - The transaction was conducted face-to-face. <u>not through the Internet</u> or as a telephone transaction. Online booking of accommodations. travel packages and attractions are not included in the data.
  - ✓ The transaction excluded the following merchant categories: Direct Marketing. Catalog Marketing. Telemarketing. Airlines. Schools. colleges and universities.
- Any cardholder whose purchase history indicates that they are a **long-term resident** rather than a tourist will have all their transactions excluded (based on consecutive spending on the last 3 months and/or in specific categories such as electrical. phone. water. self storage or insurance...).
- No individual cardholder or merchant data is ever displayed or analyzed.



2023 – Card transactions					Y/Y Growth						
	Cardholder Count (Net)	Total Spend Amount	Spend per Cardholder	Trans Count	Avg Ticket	Cardholder Count (Net)	Total Spend Amount	Spend per Cardholder	Trans Count	Avg Ticket	
Consumer	779 949	\$525 789 369	\$674	4 592 819	\$114	16.6%	13.7%	-2.5%	16.3%	-2.3%	Cash withdrawal
Business	33 848	\$35 809 082	\$1058	184 172	\$194	16.3%	15.7%	-0.5%	16.6%	-0.8%	\$ 57 330 301
Total	813 796	\$561 598 452	\$690	4 776 991	\$118	16.6%	13.8%	-2.3%	16.4%	-2.2%	•\$•

During 2023, 813 796 VISA cardholders from 149 issuer countries have spent almost US\$ 562 millions in Aruba, generating a Y/Y growth of 13.8% in total sales, supported by an increase in cardholder count (16.6%) and transactions count (16.4%). US\$ 57.3 Million cash was withdrawn. The spend per cardholder has decreased in comparison with 2022 (-2.2%).

#### 2023 Spending per market



#### Q1 2024



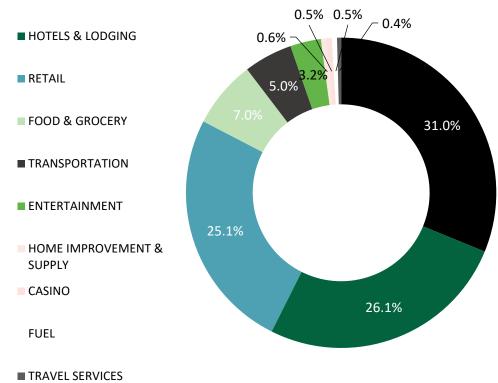
	Q1 2024 – Card transactions						Y/Y Growth				
	Cardholder Count (Net)	Total Spend Amount	Spend per Cardholder	Trans Count	Avg Ticket	Cardholder Count (Net)	Total Spend Amount	Spend per Cardholder	Trans Count	Avg Ticket	
Consumer	265 395	\$ 172,730,472	\$ 651	1 500 756	\$ 115	19.7%	20.4%	0.6%	24.8%	-3.5%	
Business	12 466	\$ 12,365,403	\$ 992	63 974	\$ 193	12.6%	4.9%	-6.8%	14.0%	-8.0%	
Total	277 861	\$ 185,095,875	\$ 666	1 564 730	\$ 118	19.4%	19.2%	-0.1%	24.3%	-4.1%	

During Q1 2024, **277 861 VISA cardholders** from **135 issuer countries** have spent **US\$ 185 millions** in Aruba, generating a **Y/Y growth of 19.2%** in total sales, supported by an **increase in cardholder count** (19.4%) and **transactions count** (24.3%). **US\$ 16.4 Million cash was withdrawn**. However, the spend per cardholder has slightly decreased in comparison with Q1 2023 (-0.1%).

### Q1 2024 Top Spending

In Q1, **Restaurants & Dining** remains **the highest spending category** in Aruba, experiencing a 20.9% increase compared to last year. The most significant increases compared to Q1 2023 spending are in **Hotels & Lodging** (41.9%) and **Transportation** (29.4%). Conversely, expenditures on **casinos (-53.6%) and travel services (-29.2%) decreased in the Y-to-Y** comparison.





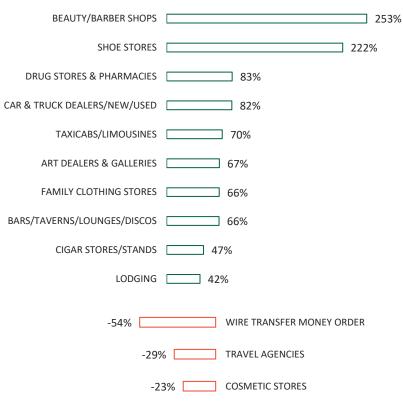
Spend Amount (US \$)	\$ Y/Y Growth	Cardholder Count	Spend per Cardholder
\$ 52,324,103	20.9%	176 752	\$ 296
\$ 43,973,404	41.9%	43 764	\$ 1,005
\$ 42,305,568	9.0%	158 219	\$ 267
\$ 11,789,492	22.3%	90 832	\$ 130
\$ 8,512,115	29.4%	29 291	\$ 291
\$ 5,376,208	19.9%	29 901	\$ 180
\$ 974,212	6.2%	2 362	\$ 412
\$ 914,227	-53.6%	602	\$ 1,519
\$ 895,983	22.1%	22 835	\$ 39
\$ 721,025	-29.2%	1 074	\$ 671
	(US \$)      \$ 52,324,103      \$ 43,973,404      \$ 43,973,404      \$ 42,305,568      \$ 11,789,492      \$ 8,512,115      \$ 5,376,208      \$ 974,212      \$ 914,227      \$ 895,983	(US \$)Growth\$ 52,324,10320.9%\$ 43,973,40441.9%\$ 43,973,40441.9%\$ 42,305,5689.0%\$ 11,789,49222.3%\$ 8,512,11529.4%\$ 5,376,20819.9%\$ 974,2126.2%\$ 914,227-53.6%\$ 895,98322.1%	(US \$)GrowthCount\$ 52,324,10320.9%176 752\$ 43,973,40441.9%43 764\$ 42,305,5689.0%158 219\$ 42,305,5689.0%158 219\$ 11,789,49222.3%90 832\$ 8,512,11529.4%29 291\$ 5,376,20819.9%29 901\$ 974,2126.2%2 362\$ 914,227-53.6%602\$ 895,98322.1%22 835

### Q1 2024 Top Spending



#### Top Sub-Categories \$ Y/Y Growth

(based on all individual Visa Merchant Codes with min \$100k spend)



#### Focus on Accommodation

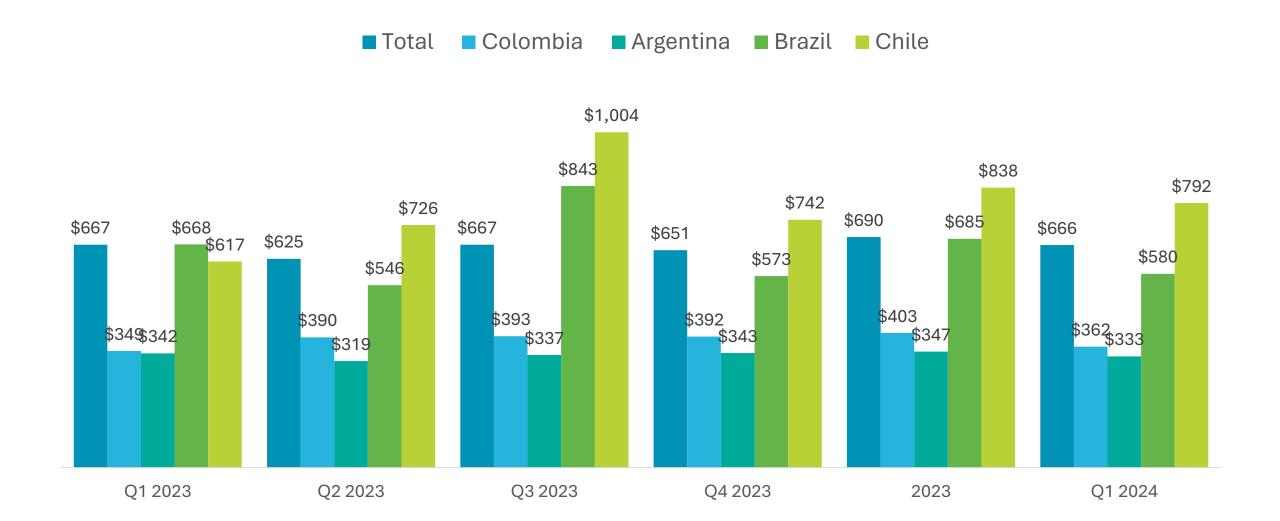
PERIOD	Spend Amount (US \$)	% of Total Spend	Cardholder Count	Spend per Cardholder
Q3-2022	\$26 154 379	24%	39 079	\$669
Q4-2022	\$22 762 445	23%	34 640	\$657
Q1-2023	\$30 988 585	22%	33 106	\$936
Q2-2023	\$26 203 363	18%	32 001	\$819
Q3-2023	\$28 894 682	23%	32 244	\$896
Q4-2023	\$35 009 755	25%	37 044	\$945
Q1-2024	\$ 43 973 404	26%	43 764	\$ 1 005

#### **USA and Canada**

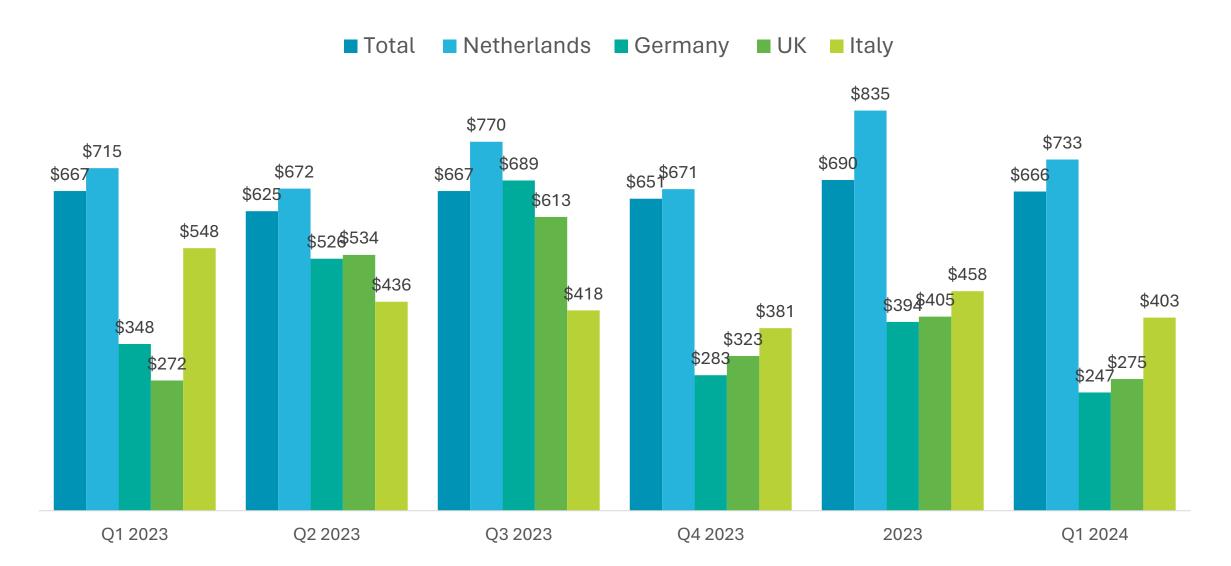


■ USA ■ Canada Total









# MASHA DANKI Thank You

For any questions related to the report and/or additional information requests please contact Melanie Evans Kelly, Manager Strategy, Research, and Planning at m.kelly@aruba.com

/isit our website www.<u>ata.aw</u>

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