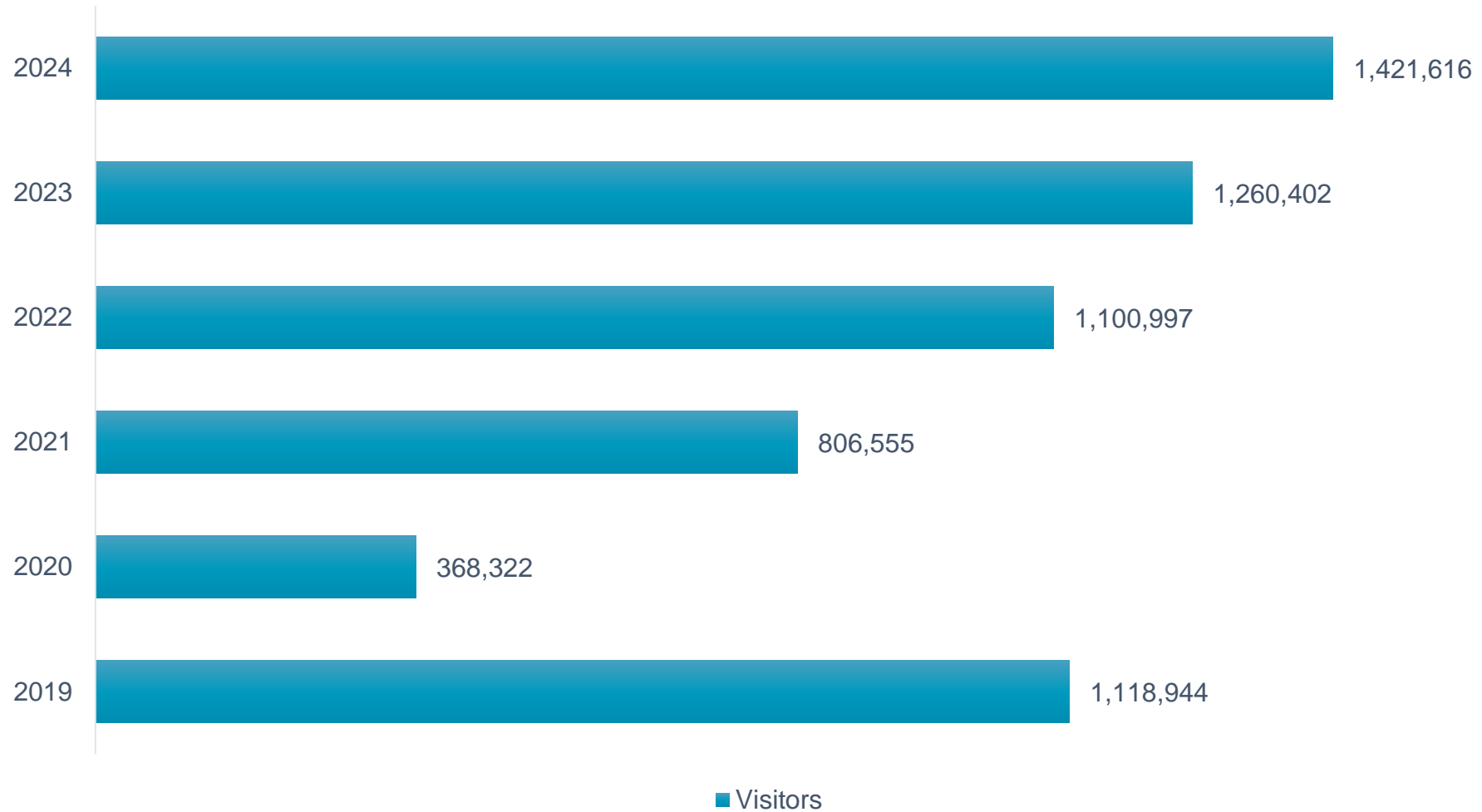




DECEMBER 2024

Monthly Report

Visitors 2019- 2024



World Map

2024

Canada

Market share

Europe

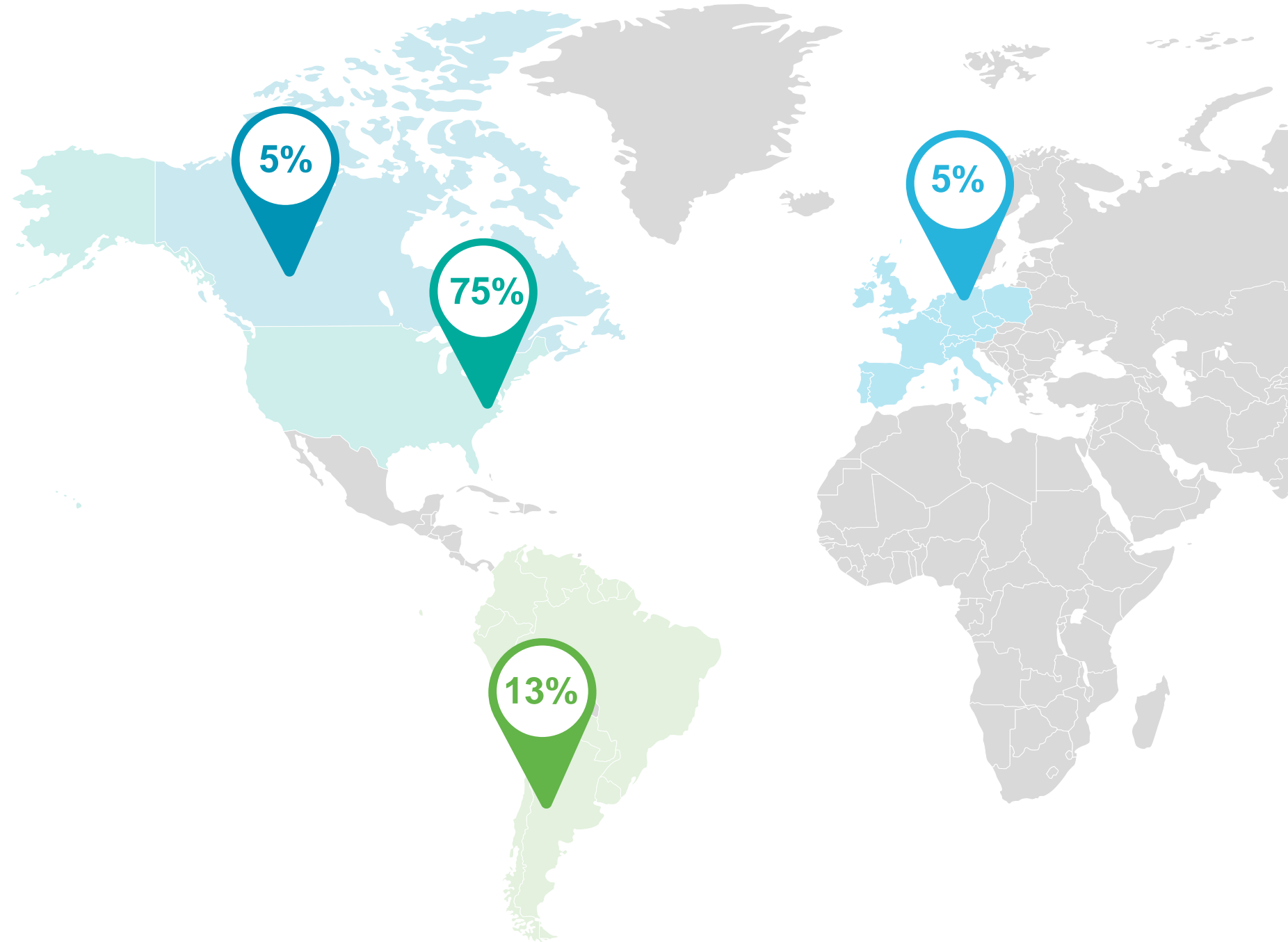
Market share

United States

Market share

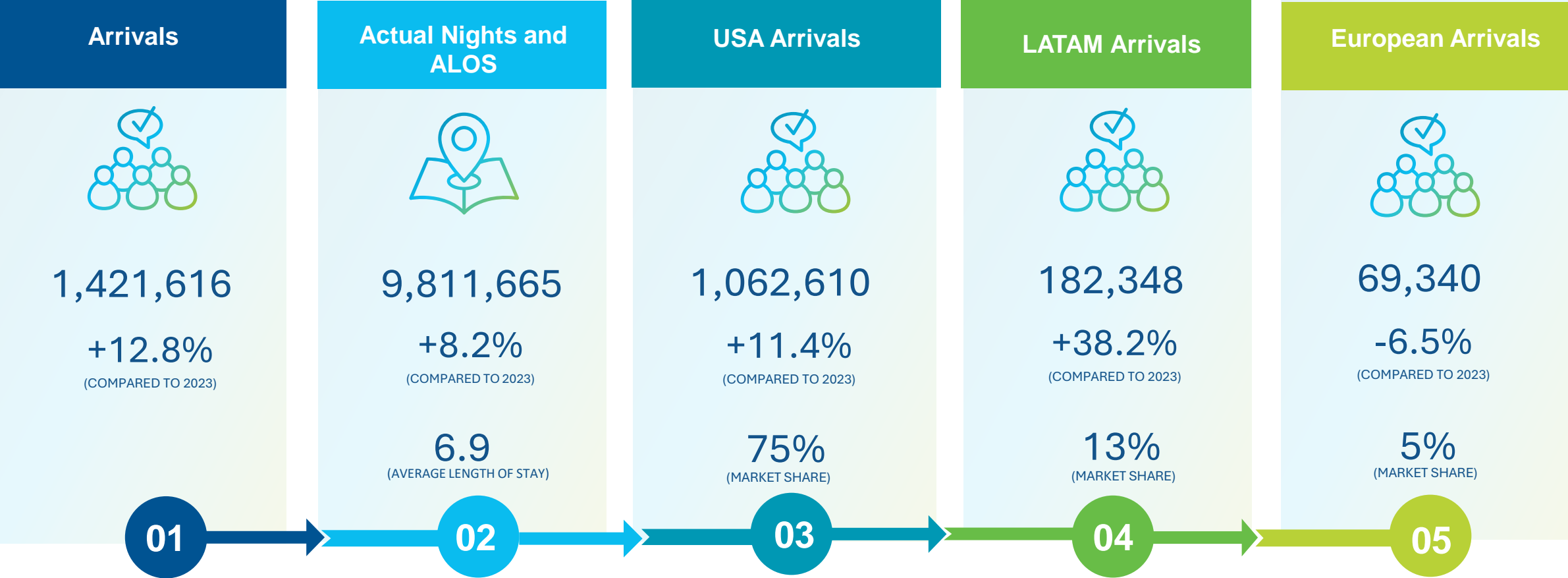
Latam

Market share



Arrivals 2024

Overview





MONTHLY OVERVIEW OF NIGHTS

2024

Corrected

9,811,665
ARRIVALS

8.2%
GROWTH

	Jan	Feb	March	April	May	June	July	August	Sept	Oct	Nov	Dec
United States	647,597	632,757	702,849	582,771	526,917	601,835	601,557	579,135	429,002	479,231	462,176	643,251
Canada	109,686	90,325	75,153	46,743	22,864	19,673	29,568	30,076	23,787	40,855	60,295	99,042
Venezuela	2,930	2,332	3,577	2,133	2,525	2,913	3,505	5,974	4,119	2,413	3,615	9,424
Colombia	38,466	22,010	33,862	23,609	31,556	51,081	38,676	36,239	27,742	31,391	28,417	56,337
Brazil	10,162	6,511	6,203	7,427	6,884	7,466	12,884	7,029	8,181	5,933	11,774	16,206
Argentina	26,185	18,273	20,129	16,334	13,436	20,331	29,811	19,924	19,808	17,870	16,015	22,035
Peru	6,557	10,782	9,396	6,860	8,474	6,322	11,450	10,308	7,633	10,233	7,469	12,586
Ecuador	2,513	3,982	3,952	5,056	4,948	2,832	4,554	5,918	3,871	3,966	4,719	3,401
Surinam	2,587	2,150	3,271	2,810	3,069	2,332	2,411	3,320	5,667	3,949	2,781	3,638
Chile	10,162	9,586	7,997	9,043	6,825	13,498	9,269	8,005	11,017	6,304	6,511	7,737
Mexico	1,450	1,670	4,444	3,337	6,179	3,476	6,087	4,876	2,786	2,240	1,985	2,534
Rest of South America	5,741	5,797	6,381	8,706	6,292	8,596	10,140	11,866	8,715	6,601	6,892	8,762
Netherlands	55,508	48,875	36,939	40,812	36,122	32,740	48,655	45,481	41,468	46,604	39,375	45,566
Belgium	1,837	3,368	2,125	1,855	1,507	1,785	1,183	628	1,443	1,691	1,676	1,460
Germany	3,831	3,825	5,230	2,663	3,476	1,773	3,073	5,506	3,656	4,648	4,722	3,993
Austria	1,206	604	481	297	462	183	360	456	255	439	283	577
Swiss	1,366	2,041	1,494	1,623	1,041	676	1,876	1,044	1,150	1,464	1,826	1,668
Portugal	319	437	176	351	296	301	352	539	572	342	554	708
Spain	2,400	1,134	1,596	1,132	960	1,875	2,354	3,451	1,974	1,678	1,862	3,116
Italy	3,007	3,186	1,429	1,836	1,549	2,937	3,310	15,891	4,457	3,099	3,291	4,285
United Kingdom	5,385	6,120	6,548	4,796	5,785	5,110	5,101	7,794	7,691	4,722	3,873	4,575
Denmark	348	82	697	217	224	81	419	282	226	287	371	469
Finland	198	598	284	85	51	131	66	19	121	201	213	360
Norway	980	590	955	205	181	800	566	214	331	301	465	1,207
Sweden	1,181	1,332	955	563	282	468	403	271	197	1,014	848	1,411
Rest of Europe	6,177	4,775	3,350	3,224	3,348	2,963	3,049	3,900	3,425	4,159	4,304	5,035
Rest of the World	14,285	15,122	15,355	13,813	17,228	15,811	22,152	19,461	13,873	19,629	17,410	19,764
Total	962,064	898,264	954,828	788,301	712,481	807,989	852,831	827,607	633,167	701,264	693,722	979,147



MONTHLY OVERVIEW OF NIGHTS

2023

Corrected

9,071,151
ARRIVALS

13.5%
GROWTH

	Jan	Feb	March	April	May	June	July	August	Sept	Oct	Nov	Dec
United States	594,867	544,399	572,401	563,764	478,793	522,954	580,033	512,061	424,331	462,077	509,214	646,789
Canada	102,531	77,933	64,823	38,529	24,189	16,991	27,618	24,862	22,279	36,498	65,253	109,412
Venezuela	2,059	832	1,260	1,490	1,932	2,271	3,804	6,642	3,833	2,131	2,012	8,788
Colombia	24,118	17,710	21,840	23,582	21,528	43,428	39,115	30,648	23,828	30,688	30,180	63,948
Brazil	6,398	5,191	4,098	5,958	5,809	7,167	11,506	6,253	10,387	6,054	7,241	11,078
Argentina	16,525	12,282	11,069	11,985	12,388	11,666	19,044	17,149	17,159	13,532	12,398	13,263
Peru	2,074	3,153	2,980	2,515	3,317	2,263	4,991	3,777	3,988	3,569	3,906	10,520
Ecuador	1,218	2,428	3,551	2,748	2,312	1,900	3,059	4,269	4,390	4,270	4,497	3,364
Surinam	2,865	2,408	3,401	7,026	2,822	2,797	3,372	6,054	6,912	3,917	3,922	5,296
Chile	4,981	7,465	4,054	3,878	3,481	6,200	6,849	5,918	6,711	4,649	4,431	7,065
Mexico	738	1,110	1,328	1,826	1,713	1,152	2,030	2,500	1,966	1,622	1,471	2,048
Rest of South America	4,501	3,852	3,875	4,636	4,169	5,775	6,535	6,398	7,363	5,777	5,371	6,819
Netherlands	56,135	53,724	40,250	42,304	36,559	33,774	56,890	48,466	43,066	46,145	51,794	51,844
Belgium	3,383	2,161	1,657	2,321	1,573	1,332	2,206	2,010	1,647	2,387	1,785	2,033
Germany	5,258	3,343	5,540	4,161	3,492	3,310	3,177	3,906	4,439	4,491	4,962	4,382
Austria	665	765	719	418	387	170	733	416	584	614	610	1,074
Swiss	1,643	1,195	1,546	1,861	1,362	768	1,356	973	1,138	1,541	1,550	1,499
Portugal	309	282	418	225	234	189	966	490	423	223	225	347
Spain	2,219	1,111	1,274	1,378	810	1,493	1,700	2,400	1,728	951	1,584	2,647
Italy	3,796	2,610	1,652	1,610	2,136	3,560	4,916	14,887	5,230	3,604	2,845	4,766
United Kingdom	2,765	2,323	3,624	4,804	4,440	5,544	6,554	10,868	8,293	6,130	5,683	4,249
Denmark	544	516	162	352	168	203	346	342	183	510	642	190
Finland	567	520	183	173	218	93	65	112	175	207	489	617
Norway	1,264	1,265	814	345	374	895	1,368	191	377	544	884	1,265
Sweden	8,730	8,753	778	500	291	437	546	210	327	1,537	1,339	2,302
Rest of Europe	7,585	6,268	4,703	3,511	3,201	3,472	3,479	3,819	3,407	4,304	4,859	5,328
Rest of the World	13,265	12,610	13,914	15,264	15,776	15,147	22,780	18,679	16,241	18,445	16,764	23,432
Total	871,003	776,209	771,914	747,164	633,474	694,951	815,038	734,300	620,405	666,417	745,911	994,365

SNAPSHOT YTD DEC 2024/2023



HOW MANY ARRIVALS?

1,421,6116

12.8%



HOW MANY CRUISE TOURISM?

897,274

9.7%

Compared to 2023



HOW LONG DID THEY STAY?

9,811,665

8.2%



WHAT DID THEY SPEND?*

Central Bank Aruba
(Q1 and Q2 2024)

Avg. 2,874.70 min

19%

Q1 and Q2 2023: 2,413.40

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

WHERE DID THEY STAY?



2,053,302

NIGHTS

20.9%



1,355,610

NIGHTS

13.8%



2,801,478

NIGHTS

28.6%



3,601,275

NIGHTS

36.7%



ARRIVALS YTD DECEMBER 2024/2023

1,421,616
ARRIVALS

12.8%
GROWTH

	2023		Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
USA	953,800		108,810	1,062,610	11.4%	75.7%	74.7%
Canada	63,254		7,598	70,852	12.0%	5.0%	5.0%
NA	1,017,054		116,408	1,133,462	11.4%	80.7%	79.7%
Venezuela	3,165		715	3,880	22.6%	0.3%	0.3%
Colombia	52,665		12,907	65,572	24.5%	4.2%	4.6%
Brazil	14,002		3,357	17,359	24.0%	1.1%	1.2%
Argentina	18,866		8,550	27,416	45.3%	1.5%	1.9%
Chile	8,433		5,754	14,187	68.2%	0.7%	1.0%
Ecuador	7,668		3,582	11,250	46.7%	0.6%	0.8%
Peru	7,453		12,345	19,798	165.6%	0.6%	1.4%
Paraguay	1,194		81	1,275	6.8%	0.1%	0.1%
Uruguay	1,981		1,866	3,847	94.2%	0.2%	0.3%
Mexico	3,308		457	3,765	13.8%	0.3%	0.3%
Others	13,202		797	13,999	6.0%	1.0%	1.0%
SA	131,937		50,411	182,348	38.2%	10.5%	12.8%
Netherlands	38,809	-3,096		35,713	-8.0%	3.1%	2.5%
UK	6,985		505	7,490	7.2%	0.6%	0.5%
Germany	5,600	-1,042		4,558	-18.6%	0.4%	0.3%
Italy	6,669	-186		6,483	-2.8%	0.5%	0.5%
Sweden	2,174	-1,272		902	-58.5%	0.2%	0.1%
Belgium	1,927	-358		1,569	-18.6%	0.2%	0.1%
Austria	699	-117		582	-16.7%	0.1%	0.0%
Switzerland	1,825		211	2,036	11.6%	0.1%	0.1%
Others	9,509		498	10,007	5.2%	0.8%	0.7%
Europe	74,197	-4,857		69,340	-6.5%	5.9%	4.9%
ROW	37,214	-748		36,466	-2.0%	3.0%	2.6%
Total	1,260,402		161,214	1,421,616	12.8%		
W/O Ven.	1,257,237		160,....	1,417,736	12.8%		



ARRIVALS USA YTD DECEMBER 2024/2023

1,062,610
ARRIVALS

11.4%
GROWTH

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
New York	186,974	24,183	211,157	12.9%	19.6%	19.9%
Massachusetts	119,774	6,412	126,186	5.4%	12.6%	11.9%
New Jersey	115,556	18,913	134,469	16.4%	12.1%	12.7%
Pennsylvania	55,936	6,322	62,258	11.3%	5.9%	5.9%
Illinois	26,166	-30	26,136	-0.1%	2.7%	2.5%
Connecticut	34,819	4,654	39,473	13.4%	3.7%	3.7%
Florida	52,160	4,240	56,400	8.1%	5.5%	5.3%
Ohio	26,925	3,153	30,078	11.7%	2.8%	2.8%
Maryland	29,611	4,553	34,164	15.4%	3.1%	3.2%
Michigan	18,520	-380	18,140	-2.1%	1.9%	1.7%
Virginia	26,544	3,677	30,221	13.9%	2.8%	2.8%
Georgia	23,298	388	23,686	1.7%	2.4%	2.2%
North Carolina	27,654	3,086	30,740	11.2%	2.9%	2.9%
Texas	28,967	2,704	31,671	9.3%	3.0%	3.0%
California	18,154	1,585	19,739	8.7%	1.9%	1.9%
Other	162,742	25,350	188,092	15.6%	17.1%	17.7%
Total	953,800	108,810	1,062,610	11.4%		



NIGHTS YTD DECEMBER 2024/2023

9,811,665
ARRIVALS

8.2%
GROWTH

	2023		Growth	2024	% Growth	ALOS 2023	ALOS 2024
USA	6,411,683		477,395	6,889,078	7.4%	6.7	6.5
Canada	610,918		37,149	648,067	6.1%	9.7	9.1
NA	7,022,601		514,544	7,537,145	7.3%	6.9	6.6
Venezuela	37,054		8,406	45,460	22.7%	11.7	11.7
Colombia	370,613		48,773	419,386	13.2%	7.0	6.4
Brazil	87,140		19,520	106,660	22.4%	6.2	6.1
Argentina	168,460		71,691	240,151	42.6%	8.9	8.8
Chile	65,682		40,272	105,954	61.3%	7.8	7.5
Ecuador	38,006		11,706	49,712	30.8%	5.0	4.4
Peru	47,053		61,017	108,070	129.7%	6.3	5.5
Paraguay	7,795		451	8,246	5.8%	6.5	6.5
Uruguay	15,291		14,511	29,802	94.9%	7.7	7.7
Mexico	19,504		21,560	41,064	110.5%	5.9	10.9
Others	92,777		1,649	94,426	1.8%	7.0	6.7
SA	949,375		299,556	1,248,931	31.6%	7.2	6.8
Netherlands	560,951	-42,806		518,145	-7.6%	14.5	14.5
UK	65,277		2,223	67,500	3.4%	9.3	9.0
Germany	50,461	-4,065		46,396	-8.1%	9.0	10.2
Italy	51,612	-3,335		48,277	-6.5%	7.7	7.4
Sweden	25,750	-16,825		8,925	-65.3%	11.8	9.9
Belgium	24,495	-3,937		20,558	-16.1%	12.7	13.1
Austria	7,155	-1,552		5,603	-21.7%	10.2	9.6
Switzerland	16,432		837	17,269	5.1%	9.0	8.5
Others	95,553	-5,646		89,907	-5.9%	10.0	9.0
Europe	897,686	-75,106		822,580	-8.4%	12.1	11.9
ROW	201,489		1,520	203,009	0.8%	5.4	5.6
Total	9,071,151		740,514	9,811,665	8.2%	7.2	6.9



ACCOMMODATIONS YTD DECEMBER 2024/2023

1,421,616
ARRIVALS

12.8%
GROWTH

ARRIVALS BY ACCOMMODATION

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
EP	339,721	28,622	368,343	8.4%	27.0%	25.9%
All Inclusive	219,402	8,196	227,598	3.7%	17.4%	16.0%
Timeshare	339,069	18,327	357,396	5.4%	26.9%	25.1%
Others	362,210	106,069	468,279	29.3%	28.7%	32.9%
Total	1,260,402	161,214	1,421,616	12.8%		

NIGHTS BY ACCOMMODATION

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
EP	1,936,901	116,401	2,053,302	6.0%	21.4%	20.9%
All Inclusive	1,345,427	10,183	1,355,610	0.8%	14.8%	13.8%
Timeshare	2,730,730	70,748	2,801,478	2.6%	30.1%	28.6%
Others	3,058,093	543,182	3,601,275	17.8%	33.7%	36.7%
Total	9,071,151	740,514	9,811,665	8.2%		

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



VISITORS BY AGE YTD DECEMBER 2024/2023

1,421,616
ARRIVALS

12.8%
GROWTH

	2023	Growth	2024	% Growth
0 - 11	84,474	15,947	100,421	18.9%
12-19	85,415	16,518	101,933	19.3%
20 - 29	151,542	23,463	175,005	15.5%
30 - 39	199,717	26,195	225,912	13.1%
40 - 49	207,351	28,256	235,607	13.6%
50 - 59	240,977	18,505	259,482	7.7%
60 - 69	190,806	20,377	211,183	10.7%
70 +	100,051	11,989	112,040	12.0%
Not Stated	69	-36	33	-52.2%
Total	1,260,402	161,214	1,421,616	12.8%



GENERATIONS YTD DECEMBER 2024/2023

1,421,616
VISITORS

12.8%
GROWTH

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
Gen A	66,616	12,373	78,989	18.6%	5.3%	5.6%
Gen Z	183,468	34,243	217,711	18.7%	14.6%	15.3%
Millennials	315,149	40,766	355,915	12.9%	25.0%	25.0%
Gen X	334,539	37,686	372,225	11.3%	26.5%	26.2%
Baby Boomers	324,909	31,035	355,944	9.6%	25.8%	25.0%
Silent Generations	35,652	5,147	40,799	14.4%	2.8%	2.9%
Age not specified	69	-36	33	-52.2%	0.0%	0.0%
Total	1,260,402	161,214	1,421,616	12.8%		



PURPOSE OF VISIT YTD DECEMBER 2024/2023

1,421,616
VISITORS

12.8%
GROWTH

PURPOSE OF VISIT 2024

	2024	Market share 2024	2023	Market share 2023	% Growth
Sun, Sand, Sea	1,207,411	84.9%	1,034,948	82.1%	16.7%
Business	23,918	1.7%	22,935	1.8%	4.3%
Conference	6,618	0.5%	7,971	0.6%	-17.0%
Honeymoon	35,559	2.5%	38,611	3.1%	-7.9%
Diving	3,677	0.3%	4,331	0.3%	-15.1%
Incentive	9,695	0.7%	11,176	0.9%	-13.3%
Meeting	7,045	0.5%	8,592	0.7%	-18.0%
Not specified	94,047	6.6%	93,692	7.4%	0.4%
Shopping	7,092	0.5%	8,419	0.7%	-15.8%
Wedding	26,554	1.9%	29,727	2.4%	-10.7%
Total	1,421,616	100.0%	1,260,402	100.0%	12.8%

CONVINCING REASONS FOR VISIT 2024

Reasons for Choice	2024	Market Share
Adventure activities	61,715	4%
Direct flights	56,309	4%
Ease /comfort	97,121	7%
Familiarity	127,511	9%
Family-friendly destination	371,124	26%
Not specified	13,081	1%
Other	170,427	12%
Outside hurricane belt	48,106	3%
Points redemption	22,653	2%
Reliable weather	188,248	13%
Word of mouth	238,784	17%
(blank)	26,537	2%
Total	1,421,616	100%



CARRIERS YTD DECEMBER 2024/2023

1,421,616
VISITORS

12.8%
GROWTH

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
JETBLUE	298,258	49,192	347,450	16.5%	23.7%	24.4%
AMERICAN AIRLINES	271,791	-3,026	268,765	-1.1%	21.6%	18.9%
UNITED AIRLINES	163,916	26,940	190,856	16.4%	13.0%	13.4%
DELTA AIRLINE	143,328	18,693	162,021	13.0%	11.4%	11.4%
SOUTHWEST AIRLINES	58,363	6,602	64,965	11.3%	4.6%	4.6%
AVIANCA	57,566	7,199	64,765	12.5%	4.6%	4.6%
COPA AIRLINES	47,927	14,783	62,710	30.8%	3.8%	4.4%
WESTJET AIRLINES	21,926	11,494	33,420	52.4%	1.7%	2.4%
WINGO	22,813	8,522	31,335	37.4%	1.8%	2.2%
KLM ROYAL DUTCH	33,512	-2,943	30,569	-8.8%	2.7%	2.2%
SPIRIT AIRLINES	22,077	7,397	29,474	33.5%	1.8%	2.1%
LATAM AIRLINES / PERU	1,855	21,720	23,575	1170.9%	0.1%	1.7%
DIVI DIVI AIR	19,816	-893	18,923	-4.5%	1.6%	1.3%
AIR CANADA	16,240	-979	15,261	-6.0%	1.3%	1.1%
SUNWING AIRLINES	14,903	-2,075	12,828	-13.9%	1.2%	0.9%
TUI FLY NL	15,323	-2,592	12,731	-16.9%	1.2%	0.9%
EZ AIR	12,119	-445	11,674	-3.7%	1.0%	0.8%
PRIVATE	10,848	-1,139	9,709	-10.5%	0.9%	0.7%
SURINAM AIRWAYS	6,500	-515	5,985	-7.9%	0.5%	0.4%
WINAIR	2,722	2,987	5,709	109.7%	0.2%	0.4%
BRITISH AIRWAYS	4,949	129	5,078	2.6%	0.4%	0.4%
CHARTER	3,734	624	4,358	16.7%	0.3%	0.3%
SUN COUNTRY AIRLINES	2,765	646	3,411	23.4%	0.2%	0.2%
ARAJET	1,229	803	2,032	65.3%	0.1%	0.1%
SKY HIGH AVIATION	1,006	35	1,041	3.5%	0.1%	0.1%
GOL	0	943	943	-	0.0%	0.1%
Others	4,916	-2,888	2,028	-58.7%	0.4%	0.1%
Total	1,260,402	161,214	1,421,616	12.8%		



CARRIERS YTD DECEMBER 2024/2023

1,421,616
VISITORS

12.8%
GROWTH

City	APO Code	2024	Mkt Share	2023	Mkt Share	24 vs 23
JFK NY	JFK	231,086	16.3%	217,997	17.3%	6.0%
Boston	BOS	162,994	11.5%	147,669	11.7%	10.4%
Newark	EWR	160,919	11.3%	123,554	9.8%	30.2%
Miami	MIA	105,138	7.4%	99,977	7.9%	5.2%
Charlotte	CLT	96,640	6.8%	104,023	8.3%	-7.1%
Atlanta	ATL	76,622	5.4%	64,310	5.1%	19.1%
Bogota	BOG	72,092	5.1%	69,817	5.5%	3.3%
Panama City	PTY	62,800	4.4%	47,989	3.8%	30.9%
Toronto	YYZ	61,560	4.3%	53,143	4.2%	15.8%
Philadelphia	PHL	54,655	3.8%	54,405	4.3%	0.5%
Orlando	MCO	47,656	3.4%	47,190	3.7%	1.0%
G.Bush DC	IAD	43,683	3.1%	28,941	2.3%	50.9%
Amsterdam	AMS	43,235	3.0%	48,274	3.8%	-10.4%
Curacao	CUR	36,714	2.6%	39,961	3.2%	-8.1%
Fort Lauderdale	FLL	30,097	2.1%	22,862	1.8%	31.6%
Lima, Peru	LIM	23,575	1.7%	1,875	0.1%	1157.3%
Chicago	ORD	19,321	1.4%	17,383	1.4%	11.1%
Medellin	MDE	17,750	1.2%	8,060	0.6%	120.2%
Baltimore	BWI	17,448	1.2%	11,238	0.9%	55.3%
Houston International	IAH	9,726	0.7%	9,502	0.8%	2.4%
Cali, Alfonso Bonilla Aragon	CLO	6,433	0.5%	2,792	0.2%	130.4%
Sint Maarten	SXM	5,716	0.4%	2,710	0.2%	110.9%
Dallas Fort Worth Int Airport	DFW	5,486	0.4%	5,665	0.4%	-3.2%
Johan A. Pengel Int Airport, Suriname	PBM	5,450	0.4%	5,523	0.4%	-1.3%
Gatwick Airport , UK	LGW	5,079	0.4%	4,839	0.4%	5.0%
	Others	19,741	1.4%	20,703	1.6%	-4.6%
Total		1,421,616	100.0%	1,260,402	100.0%	12.8%



CRUISE COMPARISON



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CRUISE YTD DECEMBER 2024/2023



2023



CRUISE PAX

817,670

CRUISE CALLS

317



2024



CRUISE PAX

897,274

9.7%

CRUISE CALLS

347

9.5%

ABSOLUTE GROWTH PAX YTD DECEMBER

79,604

9.7%

ABSOLUTE GROWTH CALLS YTD DECEMBER

30

9.5%

DECEMBER RESULT 2024

NORTH AMERICA



101,713

79.3%

SOUTH AMERICA



17,884

13.9%

EUROPE



5,772

4.5%

OTHERS



2,871

2.2%

TOTAL ARRIVALS

128,240

100%



ARRIVALS DECEMBER 2024/2023

128,240
ARRIVALS

-0.8%
GROWTH

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
USA	92,315	-580	91,735	-0.6%	71.4%	71.5%
Canada	10,872	-894	9,978	-8.2%	8.4%	7.8%
NA	103,187	-1,474	101,713	-1.4%	79.8%	79.3%
Venezuela	641	-10	631	-1.6%	0.5%	0.5%
Colombia	7,221	-496	6,725	-6.9%	5.6%	5.2%
Brazil	1,637	858	2,495	52.4%	1.3%	1.9%
Argentina	1,360	1,032	2,392	75.9%	1.1%	1.9%
Chile	863	143	1,006	16.6%	0.7%	0.8%
Ecuador	661	-46	615	-7.0%	0.5%	0.5%
Peru	1,706	327	2,033	19.2%	1.3%	1.6%
Paraguay	109	34	143	31.2%	0.1%	0.1%
Uruguay	129	92	221	71.3%	0.1%	0.2%
Mexico	335	-18	317	-5.4%	0.3%	0.2%
Others	1,309	-3	1,306	-0.2%	1.0%	1.0%
SA	15,971	1,913	17,884	12.0%	12.4%	13.9%
Netherlands	3,242	-327	2,915	-10.1%	2.5%	2.3%
UK	459	10	469	2.2%	0.4%	0.4%
Germany	501	-102	399	-20.4%	0.4%	0.3%
Italy	505	-33	472	-6.5%	0.4%	0.4%
Sweden	192	-75	117	-39.1%	0.1%	0.1%
Belgium	136	-32	104	-23.5%	0.1%	0.1%
Austria	66	-34	32	-51.5%	0.1%	0.0%
Switzerland	158	7	165	4.4%	0.1%	0.1%
Others	997	102	1,099	10.2%	0.8%	0.9%
Europe	6,256	-484	5,772	-7.7%	4.8%	4.5%
ROW	3,889	-1,018	2,871	-26.2%	3.0%	2.2%
Total	129,303	-1,063	128,240	-0.8%		
W/O Ven.	128,662	-1,053	127,609	-0.8%		



ARRIVALS USA DECEMBER 2024/2023

91,735
ARRIVALS

-0.6%
GROWTH

	2023		Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
New York	17,291		39	17,330	0.2%	18.7%	18.9%
Massachusetts	11,442		171	11,613	1.5%	12.4%	12.7%
New Jersey	10,714	-592		10,122	-5.5%	11.6%	11.0%
Pennsylvania	5,059		73	5,132	1.4%	5.5%	5.6%
Illinois	4,102	-543		3,559	-13.2%	4.4%	3.9%
Connecticut	2,650	-88		2,562	-3.3%	2.9%	2.8%
Florida	5,152	-585		4,567	-11.4%	5.6%	5.0%
Ohio	2,741	-180		2,561	-6.6%	3.0%	2.8%
Maryland	2,697		175	2,872	6.5%	2.9%	3.1%
Michigan	2,292	-160		2,132	-7.0%	2.5%	2.3%
Virginia	2,891	-62		2,829	-2.1%	3.1%	3.1%
Georgia	2,248	-89		2,159	-4.0%	2.4%	2.4%
North Carolina	2,881	-84		2,797	-2.9%	3.1%	3.0%
Texas	2,468		213	2,681	8.6%	2.7%	2.9%
California	1,840	-187		1,653	-10.2%	2.0%	1.8%
Other	15,847		1,319	17,166	8.3%	17.2%	18.7%
Total	92,315	-580		91,735	-0.6%		



NIGHTS DECEMBER 2024/2023

979,147
NIGHTS

-1.5%
GROWTH

	2023	Growth	2024	% Growth	ALOS 2023	ALOS 2024
USA	646,789	-3,538	643,251	-0.5%	7.0	7.0
Canada	109,412	-10,370	99,042	-9.5%	10.1	9.9
NA	756,201	-13,908	742,293	-1.8%	7.3	7.3
Venezuela	8,788	636	9,424	7.2%	13.7	14.9
Colombia	63,948	-7,611	56,337	-11.9%	8.9	8.4
Brazil	11,078	5,128	16,206	46.3%	6.8	6.5
Argentina	13,263	8,772	22,035	66.1%	9.8	9.2
Chile	7,065	672	7,737	9.5%	8.2	7.7
Ecuador	3,364	37	3,401	1.1%	5.1	5.5
Peru	10,520	2,066	12,586	19.6%	6.2	6.2
Paraguay	764	203	967	26.6%	7.0	6.8
Uruguay	941	956	1,897	101.6%	7.3	8.6
Mexico	2,048	486	2,534	23.7%	6.1	8.0
Others	10,410	-874	9,536	-8.4%	8.0	7.3
SA	132,189	10,471	142,660	7.9%	8.3	8.0
Netherlands	51,844	-6,278	45,566	-12.1%	16.0	15.6
UK	4,249	326	4,575	7.7%	9.3	9.8
Germany	4,382	-389	3,993	-8.9%	8.7	10.0
Italy	4,766	-481	4,285	-10.1%	9.4	9.1
Sweden	2,302	-891	1,411	-38.7%	12.0	12.1
Belgium	2,033	-573	1,460	-28.2%	14.9	14.0
Austria	1,074	-497	577	-46.3%	16.3	18.0
Switzerland	1,499	169	1,668	11.3%	9.5	10.1
Others	10,527	526	11,053	5.0%	10.6	10.1
Europe	82,676	-8,088	74,588	-9.8%	13.2	12.9
ROW	23,299	-3,693	19,606	-15.9%	6.0	6.8
Total	994,365	-15,218	979,147	-1.5%	7.7	7.6



ACCOMMODATIONS DECEMBER 2024/2023

128,240
ARRIVALS

-0.8%
GROWTH

ARRIVALS BY ACCOMMODATION

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
EP	32,709	-932	31,777	-2.8%	25.3%	24.8%
All Inclusive	19,097	-1,250	17,847	-6.5%	14.8%	13.9%
Timeshare	32,470	-2,047	30,423	-6.3%	25.1%	23.7%
Others	45,027	3,166	48,193	7.0%	34.8%	37.6%
Total	129,303	-1,063	128,240	-0.8%		

NIGHTS BY ACCOMMODATION

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
EP	192,570	-3,831	188,739	-2.0%	19.4%	19.3%
All Inclusive	120,550	-8,520	112,030	-7.1%	12.1%	11.4%
Timeshare	274,124	-16,631	257,493	-6.1%	27.6%	26.3%
Others	407,121	13,764	420,885	3.4%	40.9%	43.0%
Total	994,365	-15,218	979,147	-1.5%		

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



VISITORS BY AGE DECEMBER 2024/2023

128,240
ARRIVALS

-0.8%
GROWTH

	2023	Growth	2024	% Growth
0 - 11	10,309	-210	10,099	-2.0%
12-19	11,801	541	12,342	4.6%
20 - 29	18,278	-380	17,898	-2.1%
30 - 39	19,285	-1,278	18,007	-6.6%
40 - 49	20,785	-514	20,271	-2.5%
50 - 59	22,868	-186	22,682	-0.8%
60 - 69	16,471	389	16,860	2.4%
70 +	9,502	577	10,079	6.1%
Not Stated	4	-2	2	-50.0%
Total	129,303	-1,063	128,240	-0.8%



GENERATIONS DECEMBER 2024/2023

128,240
ARRIVALS

-0.8%
GROWTH

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
Gen A	8,083	-238	7,845	-2.9%	6.3%	6.1%
Gen Z	24,934	599	25,533	2.4%	19.3%	19.9%
Millennials	30,812	-1,945	28,867	-6.3%	23.8%	22.5%
Gen X	33,410	547	32,977	-1.3%	25.8%	25.7%
Baby Boomers	28,316	409	28,863	1.9%	21.9%	22.5%
Silent Generations	3,744	409	4,153	10.9%	2.9%	3.2%
Age not specified	4	-2	2	-50.0%	0.0%	0.0%
Total	129,303	-1,063	128,240	-0.8%		



PURPOSE OF VISIT DECEMBER 2024/2023

128,240
ARRIVALS

-0.8%
GROWTH

PURPOSE OF VISIT DEC 2024

	2024	Market share 2024	2023	Market share 2023	% Growth
Sun, Sand, Sea	121,450	94.7%	112,820	87.3%	7.6%
Business	1,339	1.0%	1,307	1.0%	2.4%
Conference	5	0.0%	325	0.3%	-98.5%
Honeymoon	944	0.7%	2,715	2.1%	-65.2%
Diving	0	0.0%	498	0.4%	-100.0%
Incentive	57	0.0%	727	0.6%	-92.2%
Meeting	7	0.0%	670	0.5%	-99.0%
Not specified	3,418	2.7%	8,072	6.2%	-57.7%
Shopping	21	0.0%	809	0.6%	-97.4%
Wedding	999	0.8%	1,360	1.1%	-26.5%
Total	128,240	100.0%	129,303	100.0%	-0.8%

CONVINCING REASONS FOR VISIT DEC 2024

Reasons for Choice	Dec 2024	Market Share
Adventure activities	6,691	5%
Direct flights	6,522	5%
Ease/comfort	10,249	8%
Familiarity	12,949	10%
Family friendly destination	36,364	28%
Not specified	438	0%
Other	15,490	12%
Outside hurricane belt	2,092	2%
Points redemption	2,948	2%
Reliable weather	18,698	15%
Word of mouth	14,502	11%
(blank)	1,297	1%
Total	128,240	100%



CARRIERS DECEMBER 2024/2023

128,240
ARRIVALS

-0.8%
GROWTH

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
JETBLUE	28,482	-2,487	25,995	-8.7%	22.0%	20.3%
AMERICAN AIRLINES	24,054	-904	23,150	-3.8%	18.6%	18.1%
UNITED AIRLINES	16,994	2,097	19,091	12.3%	13.1%	14.9%
DELTA AIRLINES	15,561	-152	15,409	-1.0%	12.0%	12.0%
AVIANCA	5,349	262	5,611	4.9%	4.1%	4.4%
WESTJET AIRLINES	3,763	1,066	4,829	28.3%	2.9%	3.8%
COPA AIRLINES	4,977	-238	4,739	-4.8%	3.8%	3.7%
SOUTHWEST AIRLINES	4,339	24	4,363	0.6%	3.4%	3.4%
WINGO	3,131	203	3,334	6.5%	2.4%	2.6%
LATAM AIRLINES / PERU	1,855	1,332	3,187	71.8%	1.4%	2.5%
KLM ROYAL DUTCH	2,695	262	2,957	9.7%	2.1%	2.3%
AIR CANADA	3,347	-571	2,776	-17.1%	2.6%	2.2%
SPIRIT AIRLINES	3,766	-1,687	2,079	-44.8%	2.9%	1.6%
CHARTER	352	1,269	1,621	360.5%	0.3%	1.3%
DIVI DIVI AIR	1,645	-31	1,614	-1.9%	1.3%	1.3%
SUNWING AIRLINES	2,103	-797	1,306	-37.9%	1.6%	1.0%
PRIVATE	1,708	-406	1,302	-23.8%	1.3%	1.0%
EZ AIR	1,127	-138	989	-12.2%	0.9%	0.8%
GOL	0	943	943	-	0.0%	0.7%
TUI FLY NL	1,147	-501	646	-43.7%	0.9%	0.5%
WINAIR	456	142	598	31.1%	0.4%	0.5%
SURINAM AIRWAYS	665	-112	553	-16.8%	0.5%	0.4%
SUN COUNTRY AIRLINES	509	14	523	2.8%	0.4%	0.4%
BRITISH AIRWAYS	330	-40	290	-12.1%	0.3%	0.2%
ARAJET	183	29	212	15.8%	0.1%	0.2%
SKY HIGH AVIATION	158	-96	62	-60.8%	0.1%	0.0%
OTHERS	607	-546	61	-90.0%	0.5%	0.0%
Total	129,303	-1,063	128,240	-0.8%		



CARRIERS DECEMBER 2024/2023

128,240
ARRIVALS

-0.8%
GROWTH

City	APO Code	2024	Mkt Share	2023	Mkt Share	24 vs 23
JFK NY	JFK	16,986	13.2%	17,832	13.8%	-4.7%
Boston	BOS	15,526	12.1%	14,209	11.0%	9.3%
Newark	EWR	12,601	9.8%	14,035	10.9%	-10.2%
Toronto	YYZ	8,911	6.9%	9,249	7.2%	-3.7%
Miami	MIA	8,857	6.9%	8,183	6.3%	8.2%
Atlanta	ATL	7,339	5.7%	7,976	6.2%	-8.0%
Charlotte	CLT	7,112	5.5%	8,186	6.3%	-13.1%
Bogota	BOG	6,254	4.9%	6,707	5.2%	-6.8%
Philadelphia	PHL	5,792	4.5%	5,508	4.3%	5.2%
G.Bush DC	IAD	4,818	3.8%	2,775	2.1%	73.6%
Panama City	PTY	4,747	3.7%	4,993	3.9%	-4.9%
Orlando	MCO	3,705	2.9%	3,681	2.8%	0.7%
Curacao	CUR	3,618	2.8%	4,536	3.5%	-20.2%
Amsterdam	AMS	3,603	2.8%	3,894	3.0%	-7.5%
Chicago	ORD	3,493	2.7%	4,322	3.3%	-19.2%
Lima, Peru	LIM	3,187	2.5%	1,870	1.4%	70.4%
Fort Lauderdale	FLL	2,148	1.7%	3,863	3.0%	-44.4%
Medellin	MDE	1,885	1.5%	745	0.6%	153.0%
Minneapolis St. Paul Inter Airp	MSP	1,259	1.0%	509	0.4%	147.3%
Sao Paolo	GRU	943	0.7%	0	0.0%	—
Houston International	IAH	912	0.7%	727	0.6%	25.4%
Cali, Alfonso Bonilla Aragon	CLO	814	0.6%	1,109	0.9%	-26.6%
Baltimore	BWI	658	0.5%	663	0.5%	-0.8%
Dallas Fort Worth Int Airport	DFW	636	0.5%	773	0.6%	-17.7%
Sint Maarten	SXM	601	0.5%	463	0.4%	29.8%
	Others	1,835	1.4%	2,495	1.9%	-26.5%
Total		128,240	100.0%	129,303	100.0%	-0.8%



CRUISE COMPARISON



One happy island ✦ ARUBA.COM



CRUISE DECEMBER 2024/2023



2023



CRUISE PAX

119,793

CRUISE CALLS

53



2024



CRUISE PAX

124,662

4.06%

CRUISE CALLS

59

11.3%

ABSOLUTE GROWTH PAX DECEMBER

4,869

4.06%

ABSOLUTE GROWTH CALLS DECEMBER

6

11.3%

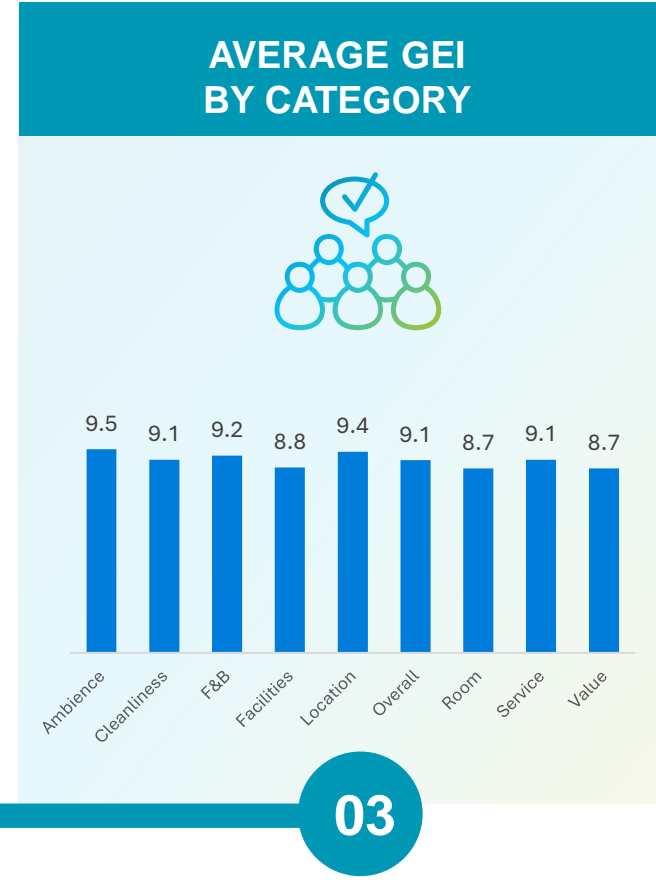
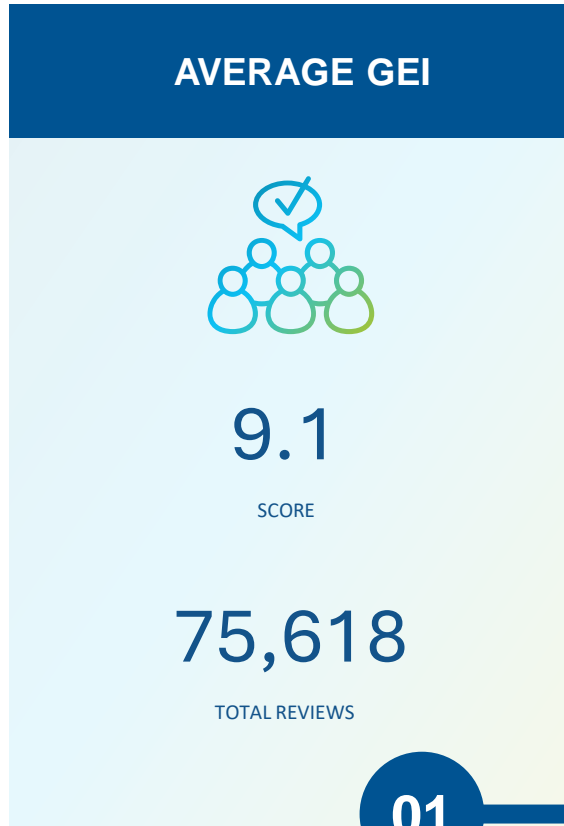


GUEST SATISFACTION



GEI 2024

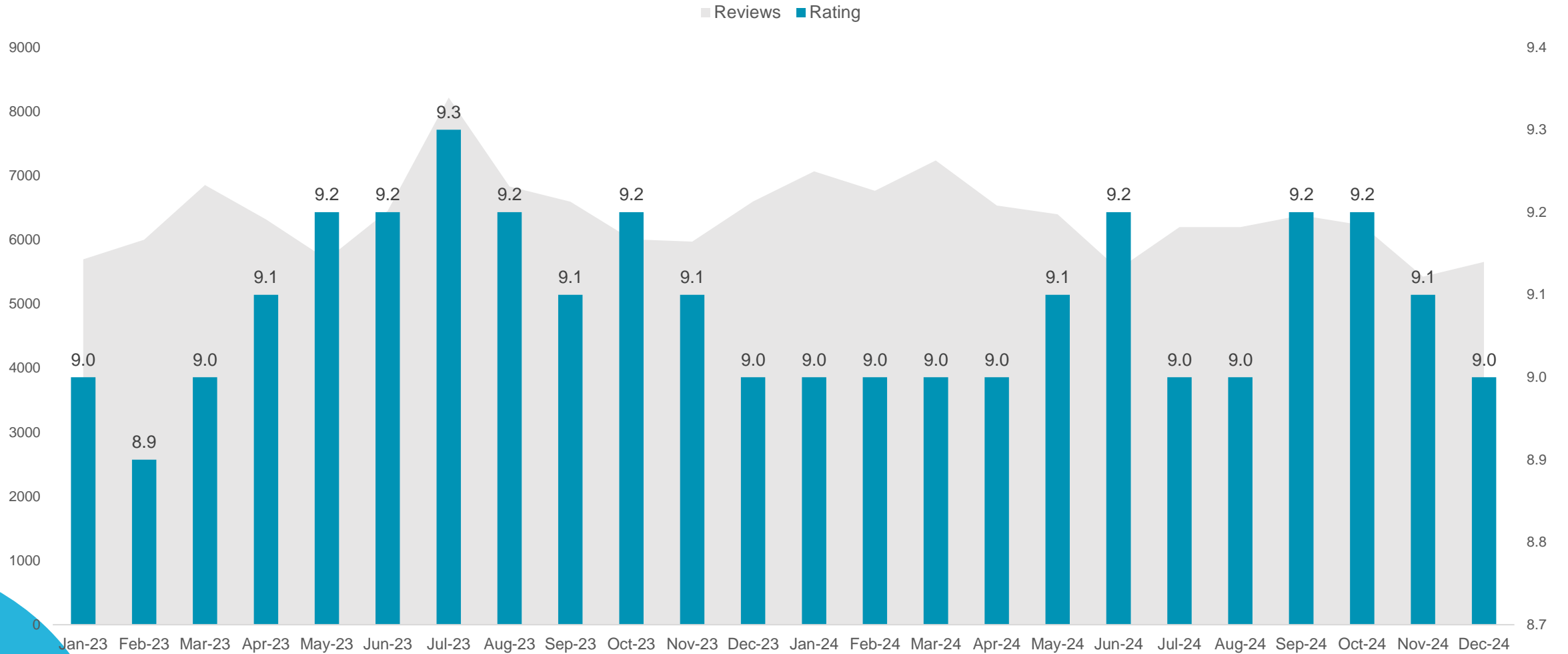
Overview





GUEST EXPERIENCE INDEX (GEI)

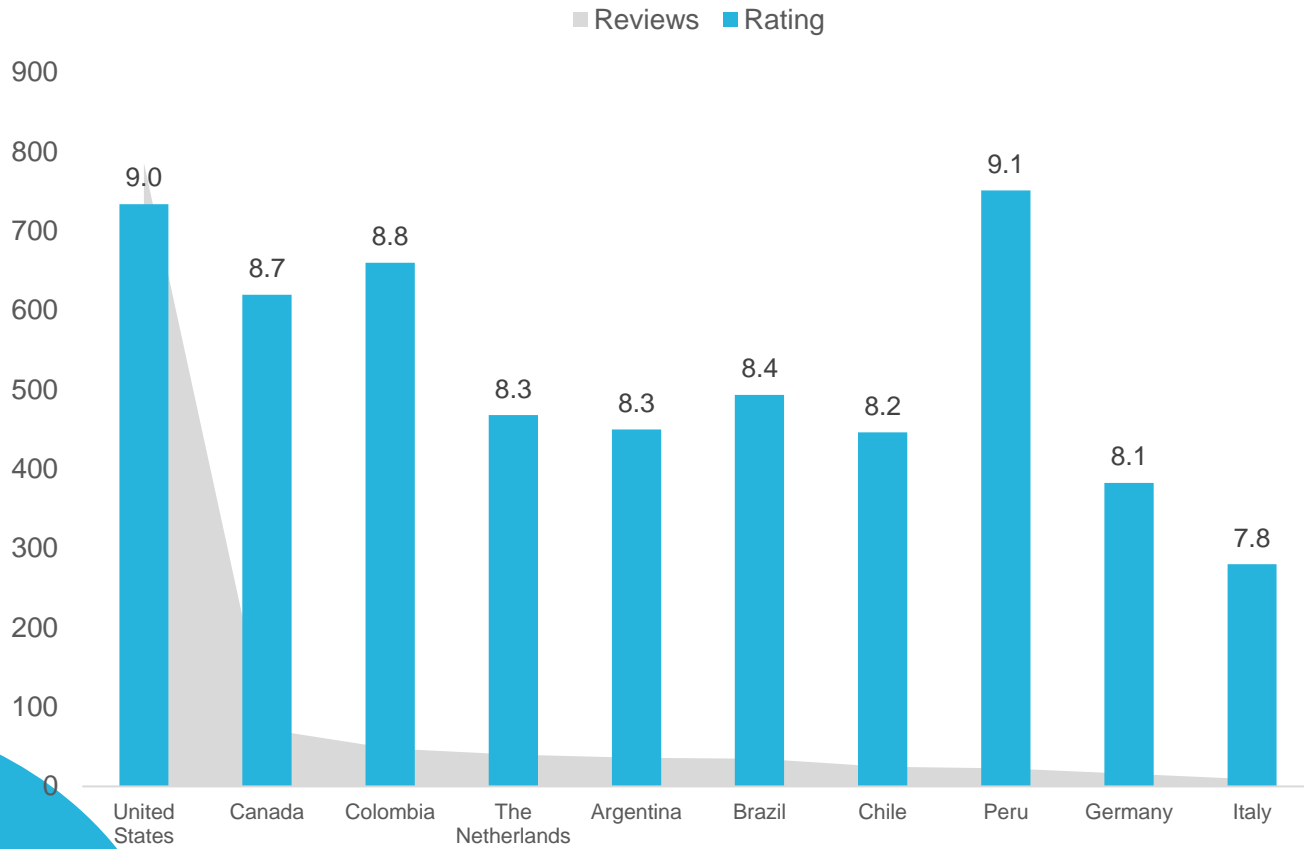
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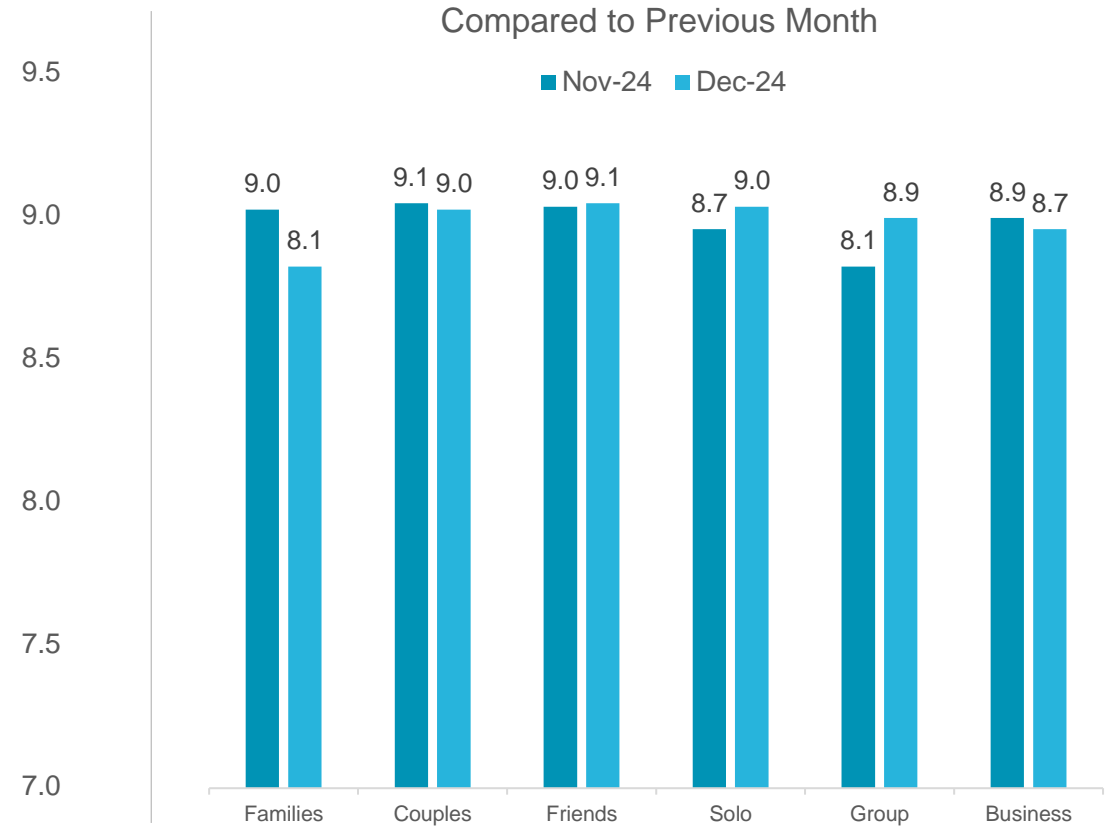


GEI DECEMBER 2024

MARKETS

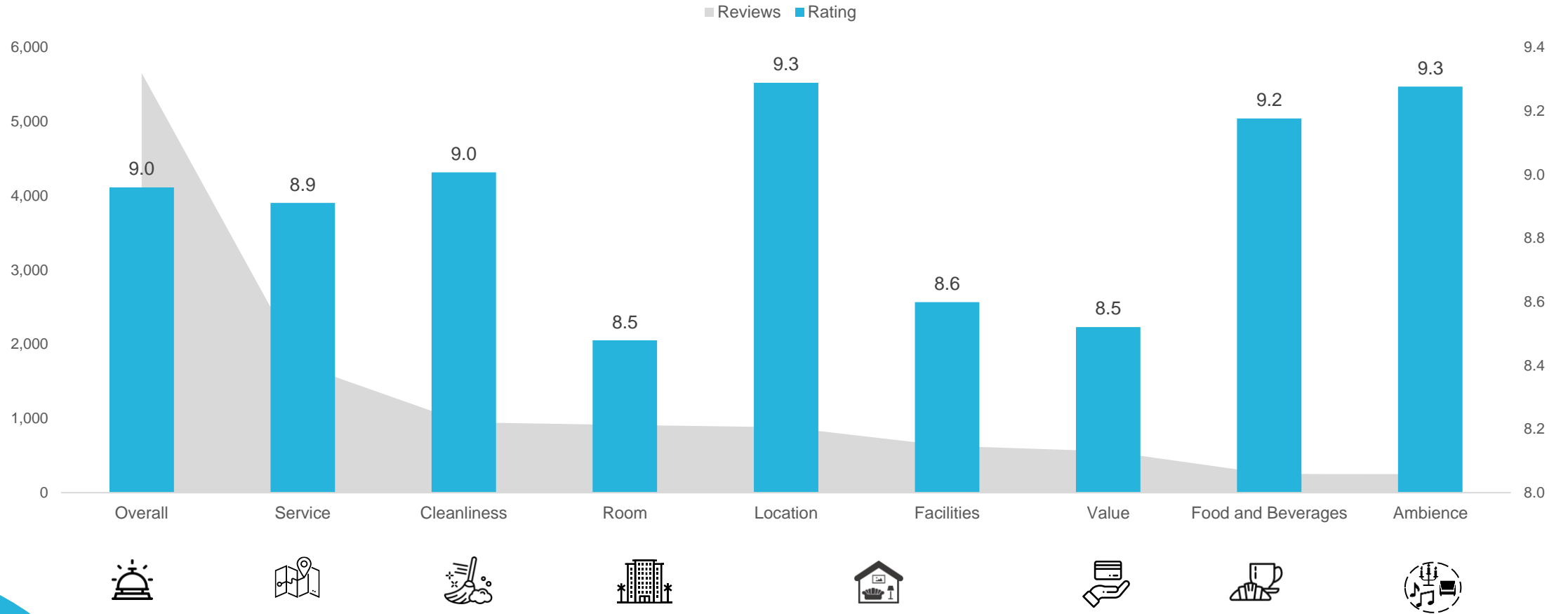


TRAVEL PARTY





GEI DECEMBER 2024





RESTAURANT GEI DECEMBER 2024





VACATIONS RENTALS

 **Transparent**
an OTA INSIGHT company

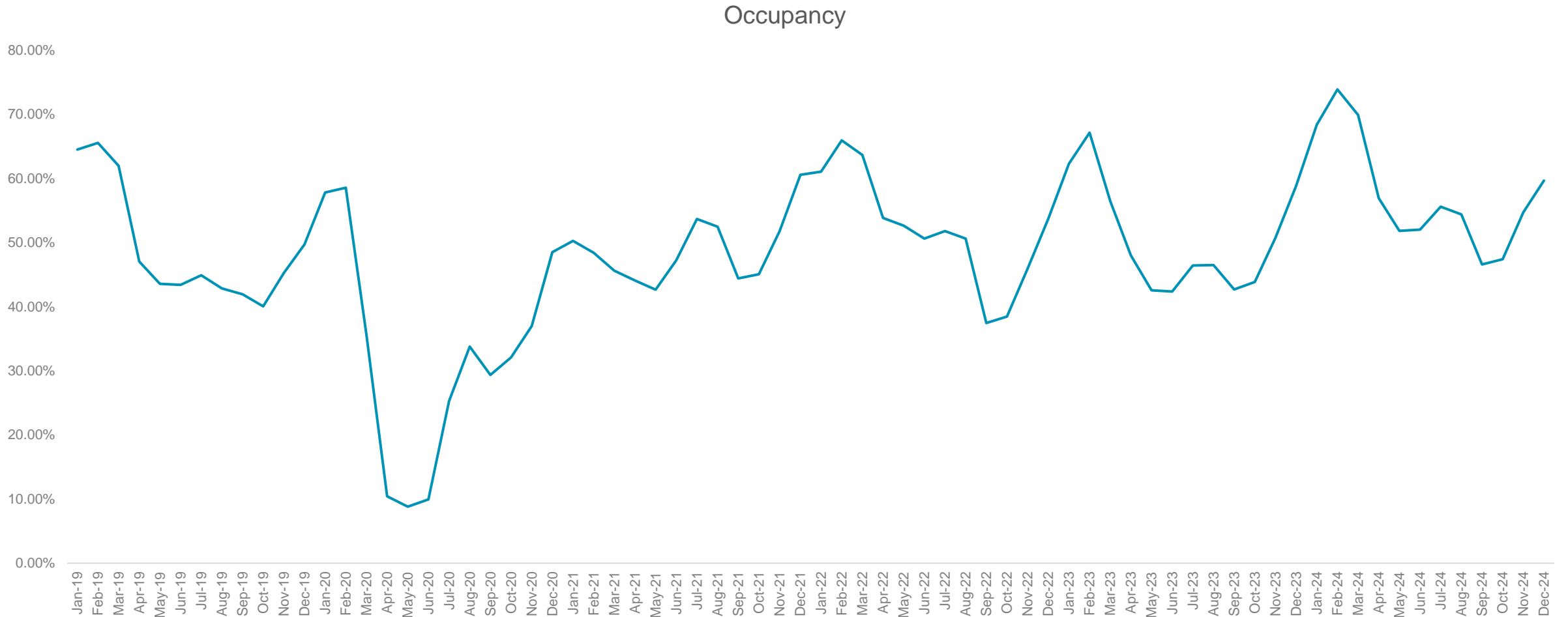
INTRODUCTION

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



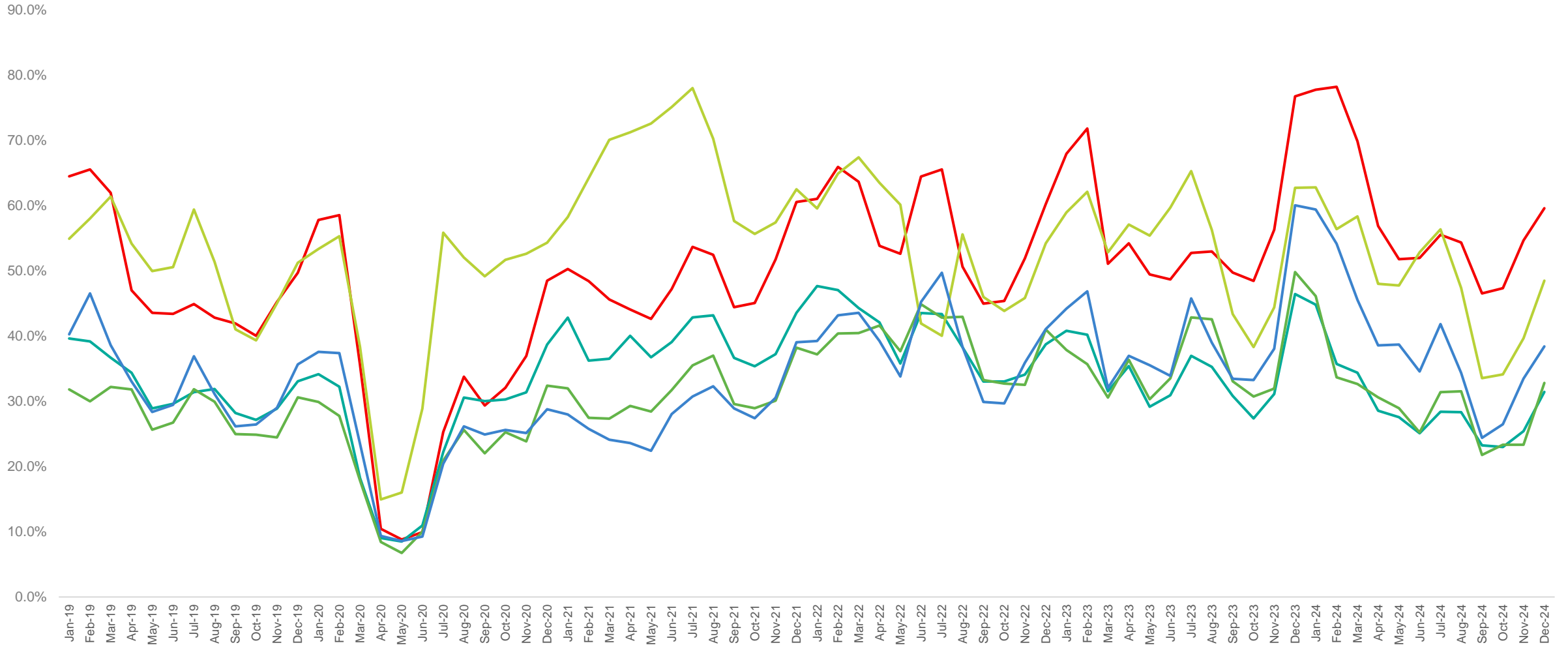
OCCUPANCY

DEC 2023 Occupancy: 58.9% | DEC 2024 Occupancy: 59.7%
AVERAGE 2023 Occupancy: 50.7% | AVERAGE 2024 Occupancy: 57.6%



OCCUPANCY BENCHMARK

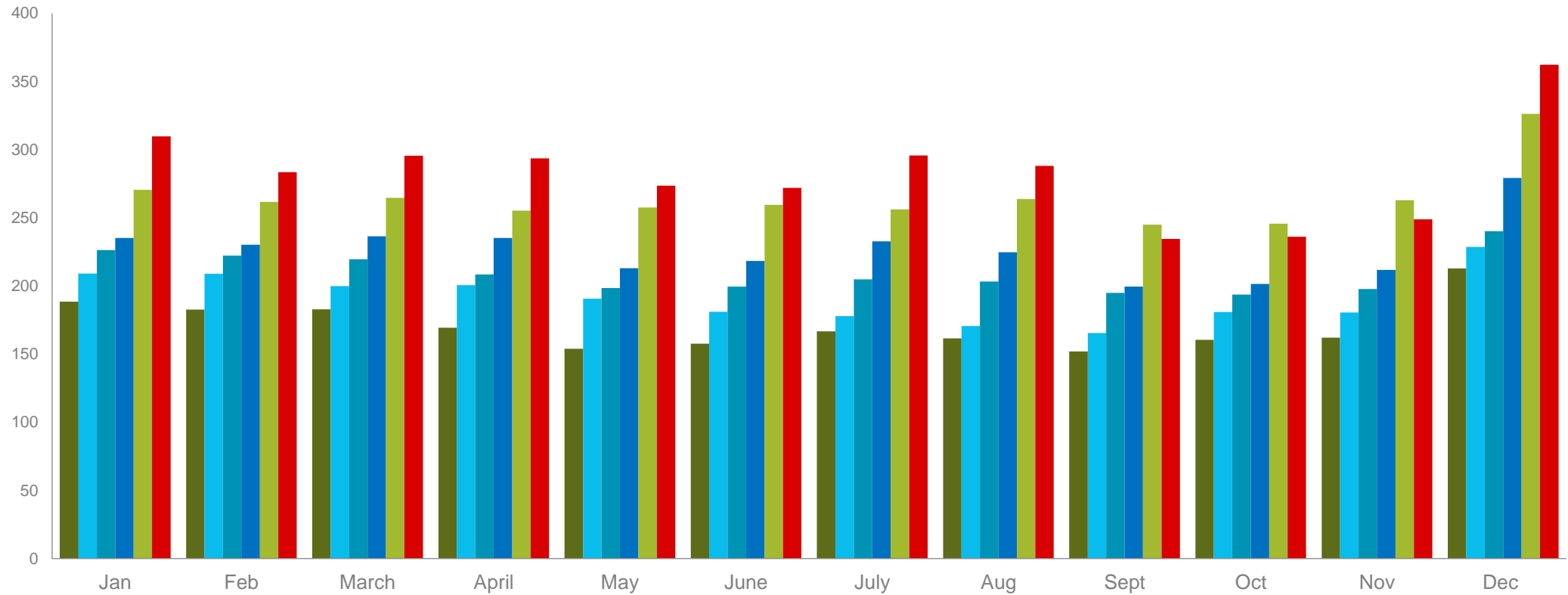
— Aruba — DR — Jamaica — Puerto Rico — Saint Lucia



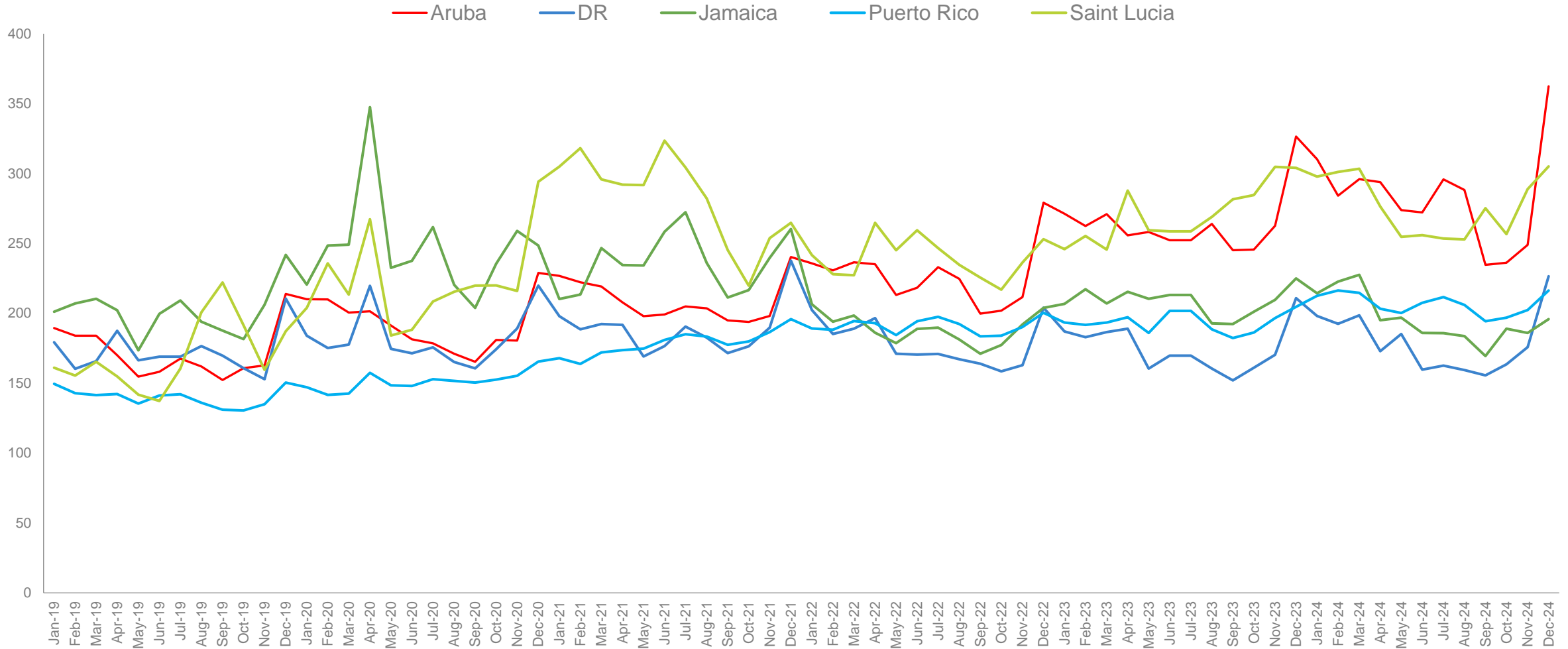
ADR

DEC 2023 ADR: \$326 | DEC 2024 ADR: \$362
AVERAGE 2023: \$264 | AVERAGE 2024: \$283

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

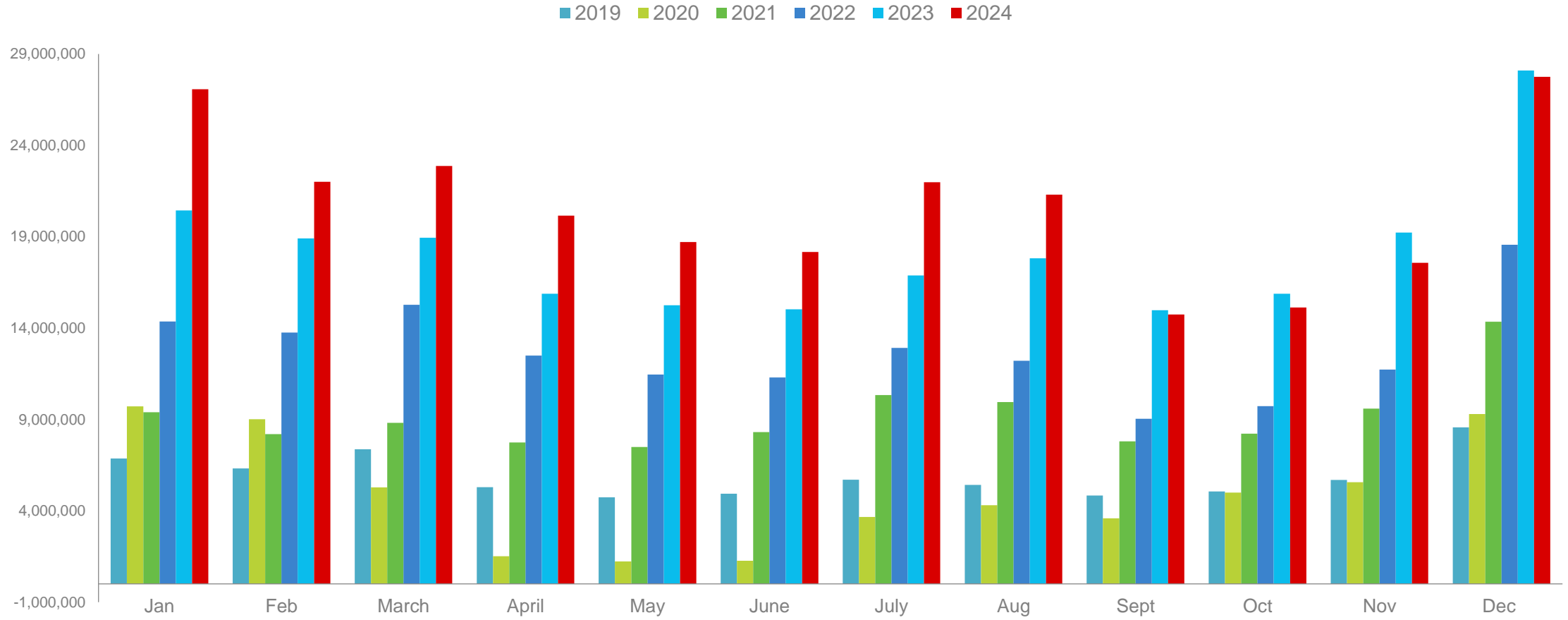


ADR BENCHMARK



REVENUE

Total Revenue 2023: USD\$ 217,346,538 | Total Revenue 2024: USD\$ 247,469,852
DEC 2023: USD\$ 28,097,155 | DEC 2024 USD\$ 27,755,582



T I D B I T S

Aruba Tourism Authority Exit Survey Research

Q4 2024

Background

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

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

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

We collected 3,301 surveys in total. The data was collected in Q4 2024, which started in October 2024.

The overrepresentation of U.S. visitors in the Q4 2024 survey resulted from the testing phase, during which we focused on refining and improving the study. As a result, we do not have sufficient Q4 data to draw conclusions about the LATAM and European markets. However, we can still provide insights based on the overall results.

Methodology

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

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

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

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

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

Methodology

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

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

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



Demographics

Demographics of Respondents

Country



87%

USA

13%

OTHER

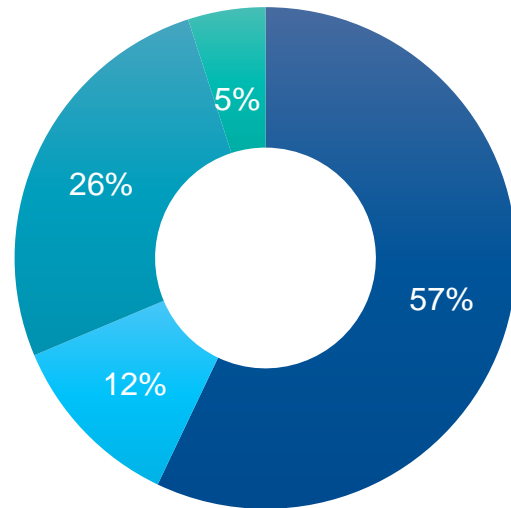
Age Group



63%

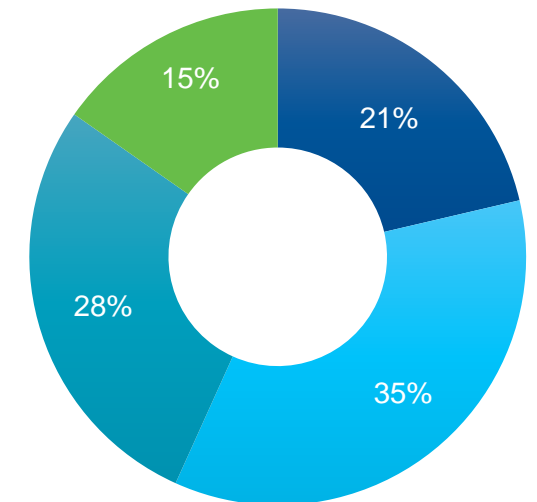
Between 28-59
years old

USA Region



■ Northeast ■ Midwest ■ South ■ West

Generations



■ Baby Boomers ■ Gen X ■ Millennials ■ Gen Z

Preferences





Key Take-aways

Preferences

Visitors prioritize relaxation and cultural experiences

The highest agreement scores were for: "I like to experience local cuisine" , "I am mostly concerned with relaxing when on vacation" "Local culture and local people are important to me in an experience". This suggests that most visitors to Aruba highly value relaxation, with a strong emphasis on enjoying local cuisine and immersing themselves in the island's culture. They value experiences that allow them to unwind while also engaging with local traditions and people.

Visitors are open to new experiences but not necessarily new destinations

"I strive to experience something new on every vacation" scored fairly high. However, "I prefer to go somewhere different every time I vacation" received a more neutral response. This indicates that while visitors like trying new things, they may be open to returning to the same destination rather than always seeking a new place. This aligns well with Aruba's strong repeat visitor potential, as people enjoy discovering new aspects of the island rather than always seeking an entirely new place.

Planning ahead is important to most visitors

"I plan my vacations far in advance" received strong agreement. "I like to look for last-minute deals" was more neutral. This suggests that Aruba attracts travelers who prefer to plan their trips in advance rather than relying on spontaneous deals.

Total

First Timers

First Timers HHI 150K+



n= 1581



n= 551

Q: How much do you agree or disagree with each of the following? (1= Strongly disagree 2=Somewhat disagree 3=Neither agree nor disagree 4=Somewhat agree 5=Strongly agree)
n =3031

Spending



Overview of Spending

Average Party Size



3.3

n =2658

Average Package Spending per trip



\$ 3,888

Per Trip including
airfare

n =966

Average Spending per trip



\$5,840

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

n =3031

Average Spending per day



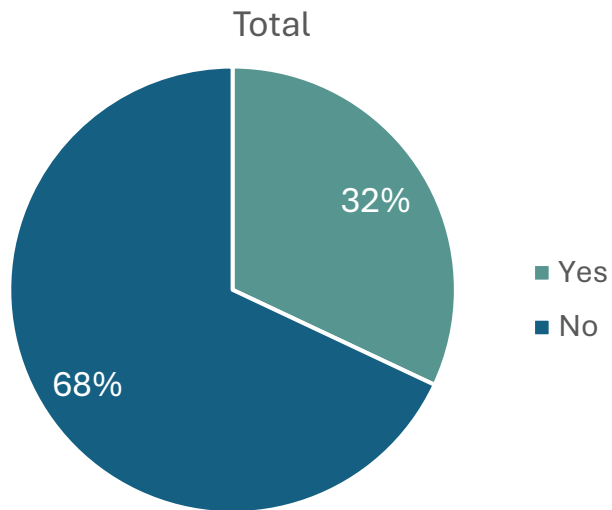
\$335

Per person per day

n =2655

Vacation Package

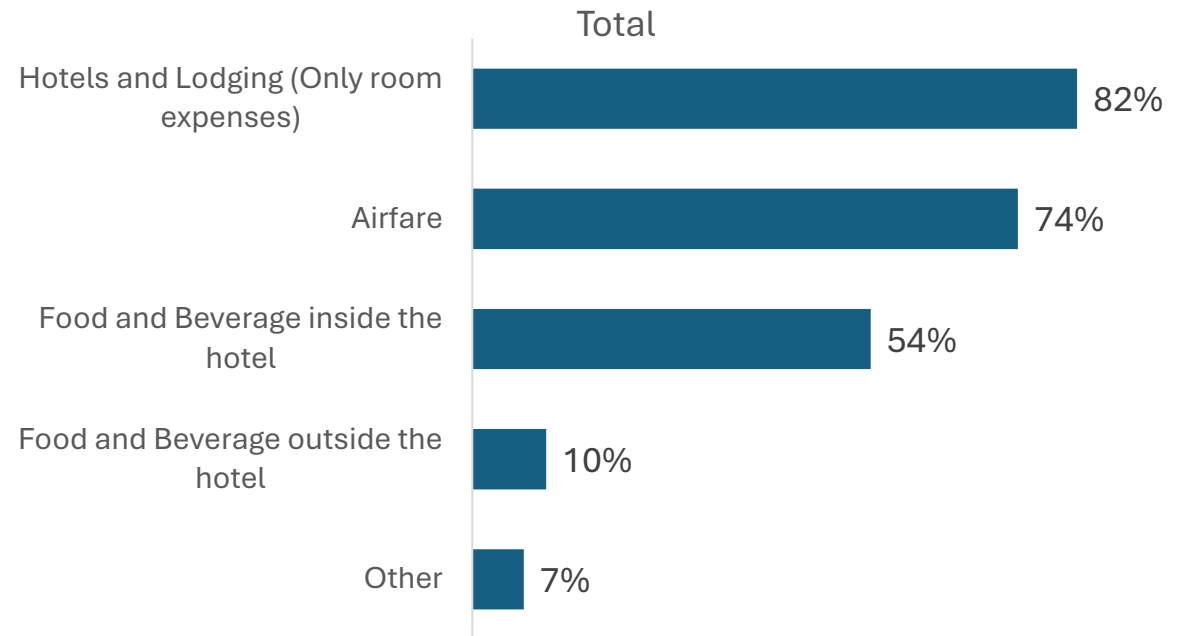
Vacation Package



About 32% of respondents traveled with a vacation package.

Q: Did you purchase a vacation package? A packaged vacation means paying one price for a combination of 2 or more of lodging, travel to and from Aruba, or transport within Aruba
n = 3031 total

Vacation Package Components



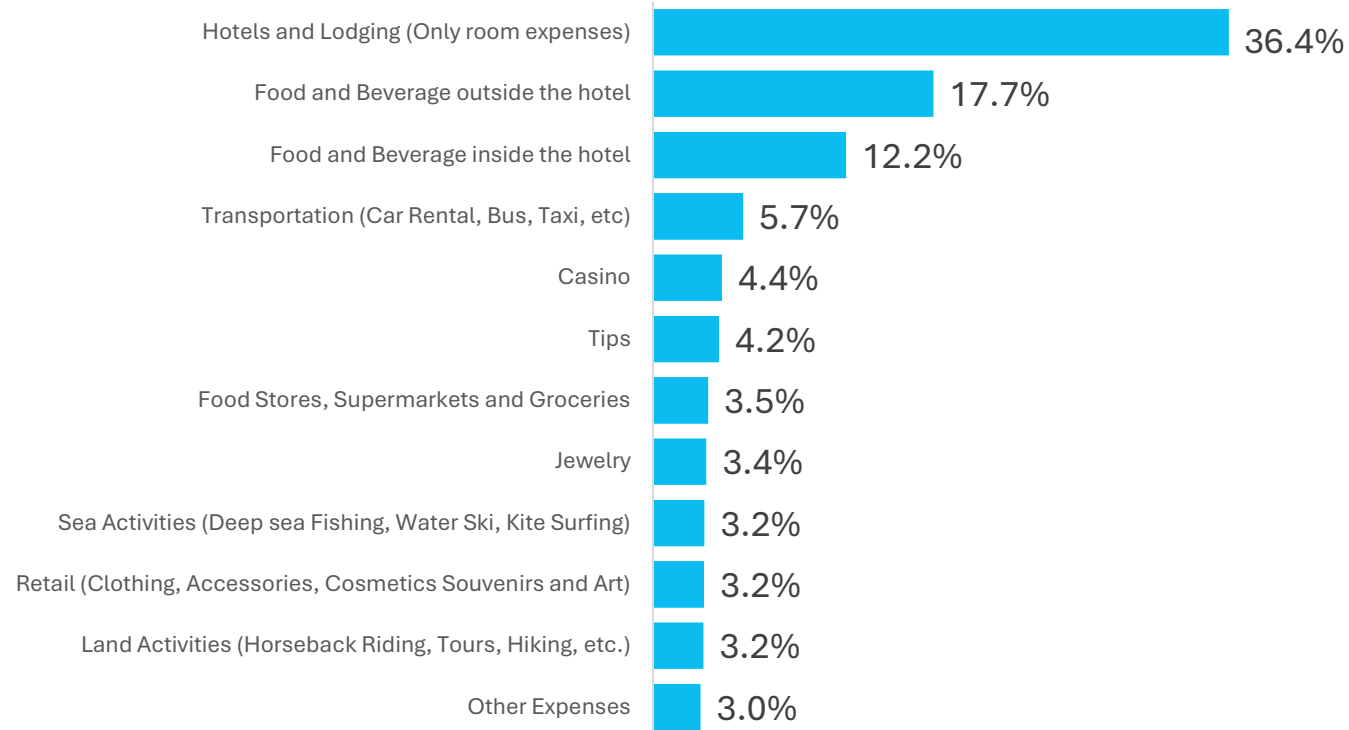
The majority of visitors' package tours in Aruba include hotels and lodging (82%) and airfare (74%), while fewer visitors have food and beverage options (54% inside the hotel, 10% outside) or other components (7%).

Q: What components were part of your package tour? Please check all answers that apply
n = 966

Spending on Non-Vacation Package

Spending Categories

Percentage spend per person per day
Spend categories



Q: Please provide the total amount you or the immediate travelers in your party spent on the following items during your stay.
n=1804



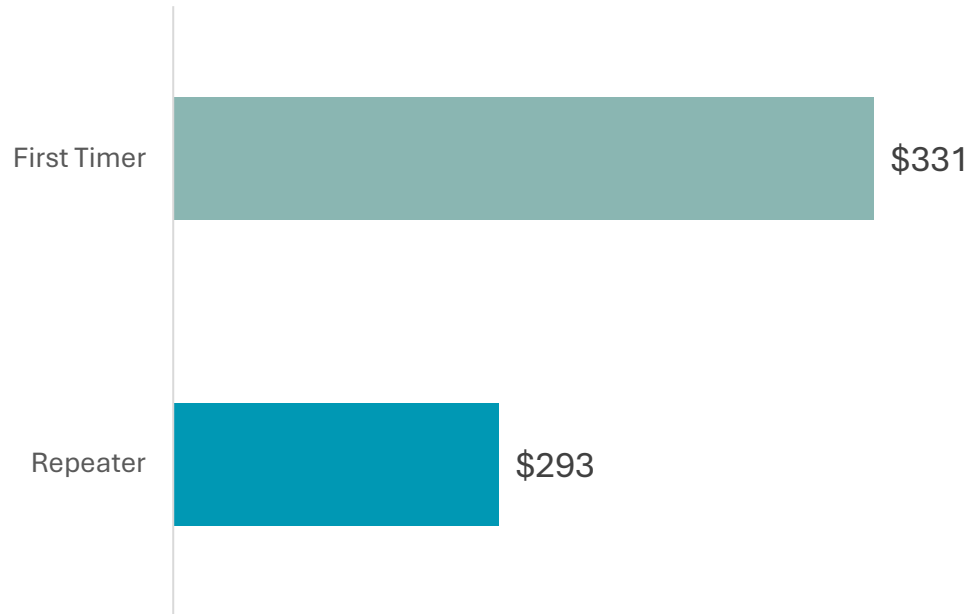
Spending on Non-Vacation Package

First-timers spend the most, \$331 per day, compared to the average total, \$335, while frequent travelers reduce daily spending, likely benefiting from familiarity and cost-saving strategies.

First Timers vs Repeaters

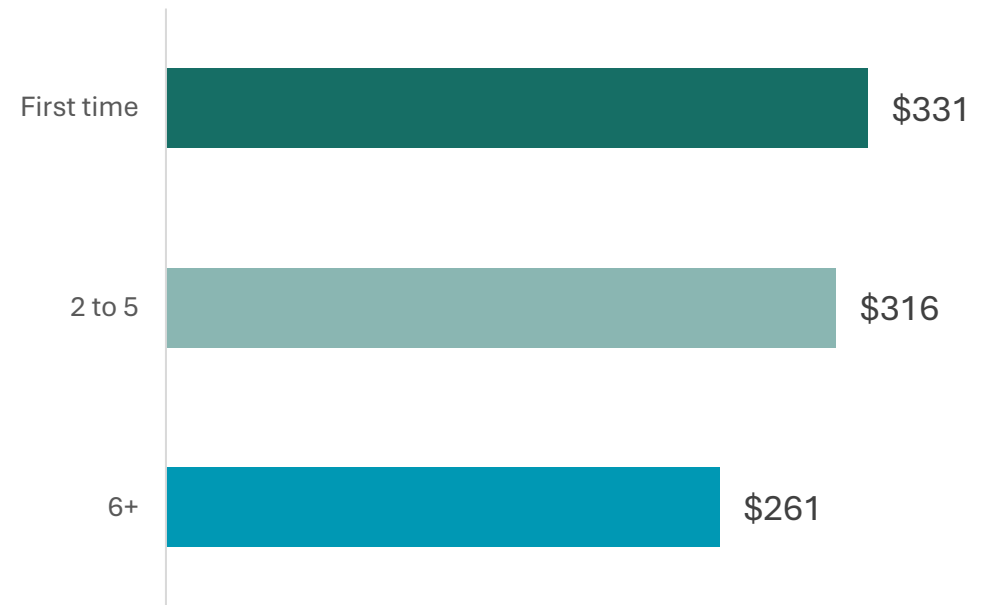
Frequency by detail

Average of Total Spend per person per day
First Timers vs Repeaters



n= 1804 (897 First Timers and 698 Repeaters)

Average of Total Spend per person per day
Number of Visits



Q: How many nights did you stay in Aruba?
n= 1804

Spending on Non-Vacation Package

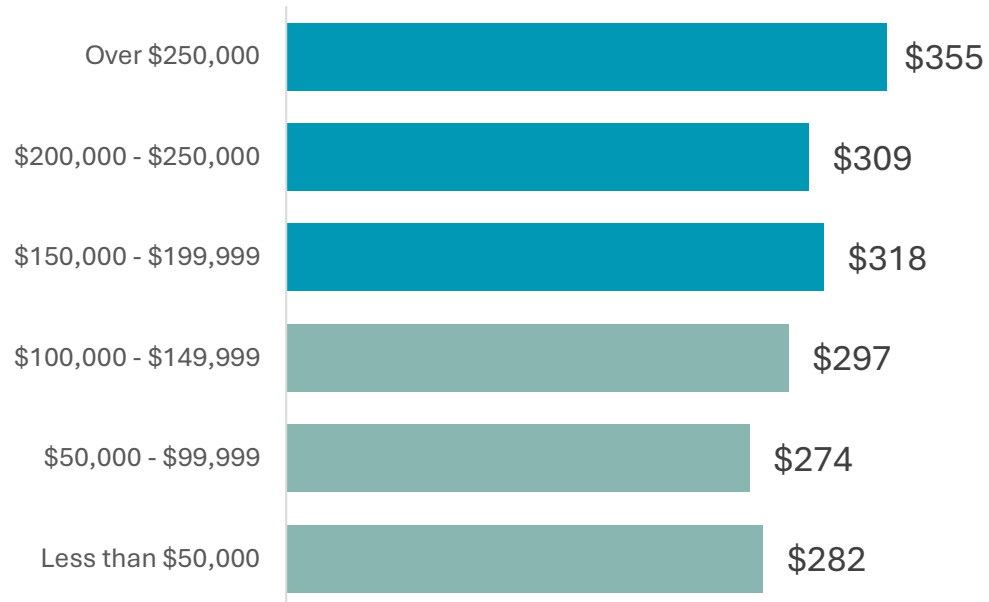
Affluent travelers with an HHI over \$250,000 spend \$355 per day, followed by those earning \$150,000- \$199,999, who spend an average of \$318.

Respondents staying at a Hotel/ Resort spend an average of \$387 per person per day.

Household Income

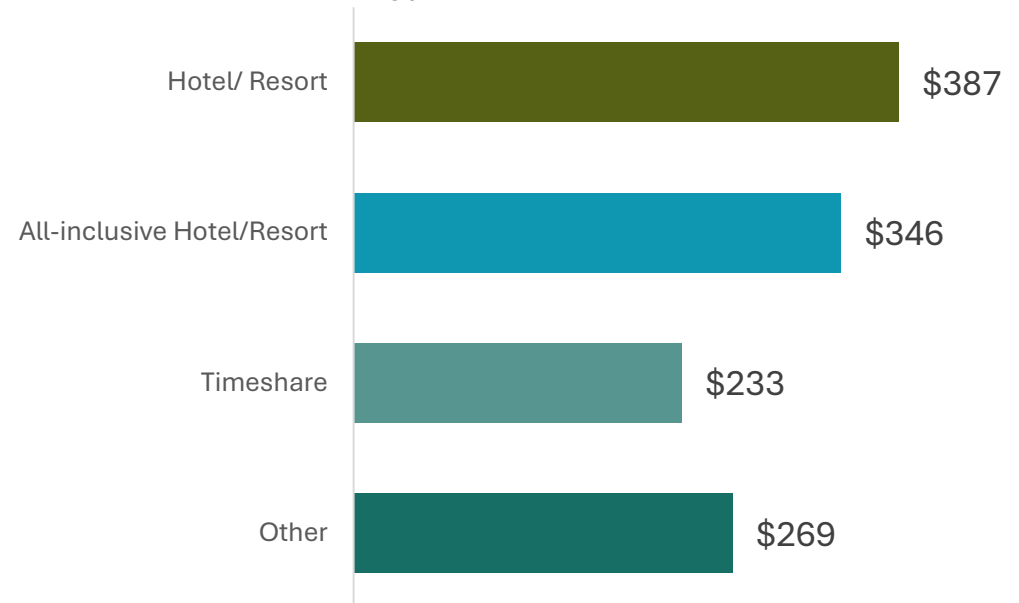
Spending by Accommodation

Average of Total Spend per person per day
Household Income



Q: Can you please indicate your household income? Please check one answer only
n= 1316

Average of Total Spend per person per day
Type of Accommodation

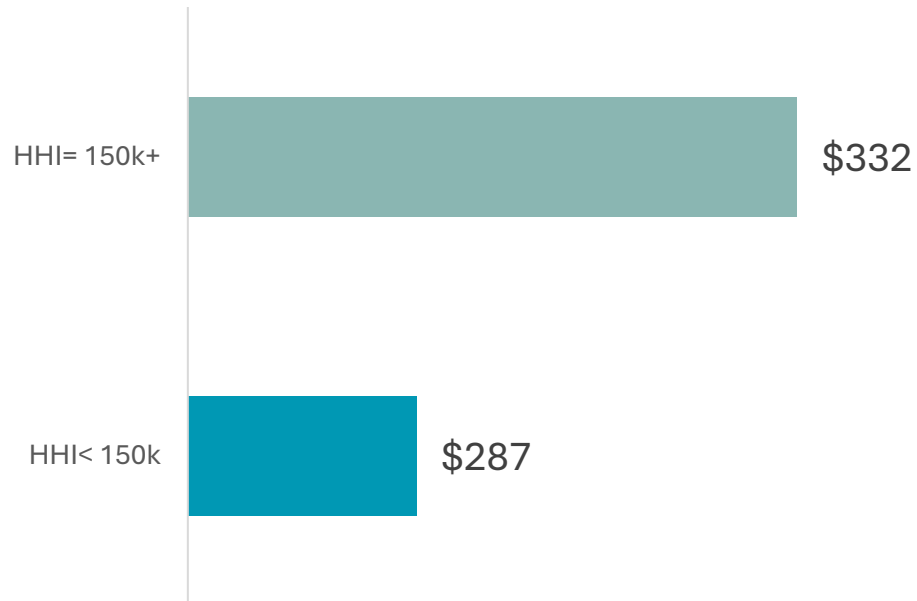


Q: What was the main type of accommodation used during your visit to Aruba? Please check one answer only
n= 1804

Spending on Non-Vacation Package

Affluent vs Non-Affluent

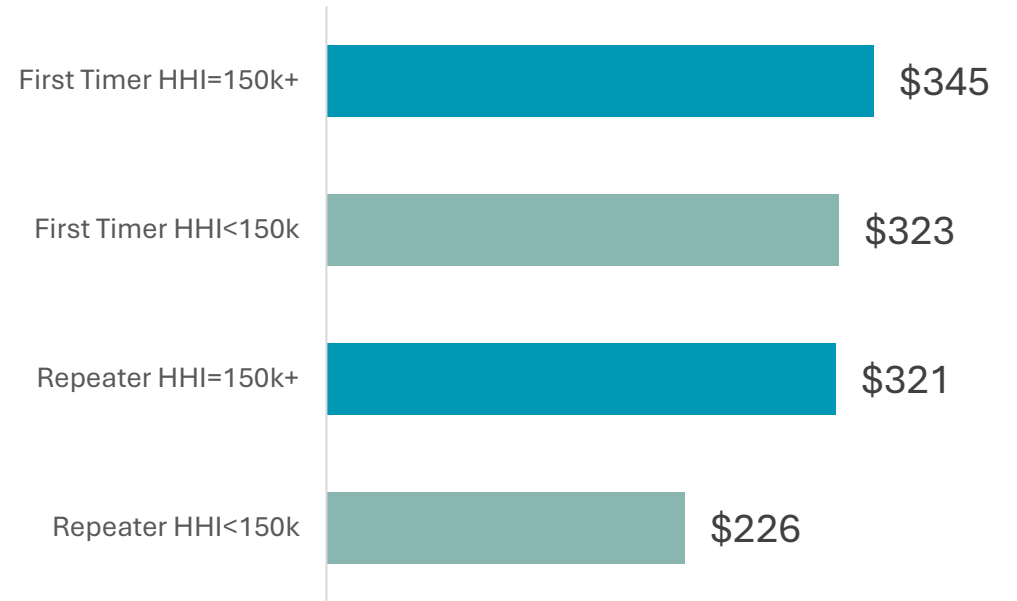
Average of Total Spend per person per day
Household Income: HHI < 150k vs HHI = 150k+



n= 1316

Affluent vs Non-Affluent First Timers vs. Repeaters

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



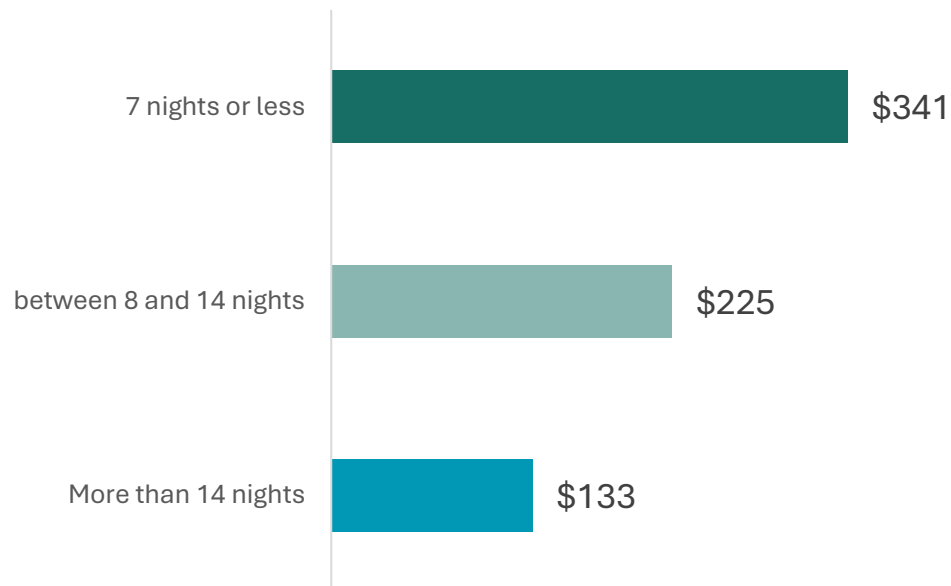
n= 1316

Spending on Non-Vacation Package

Length of Stay

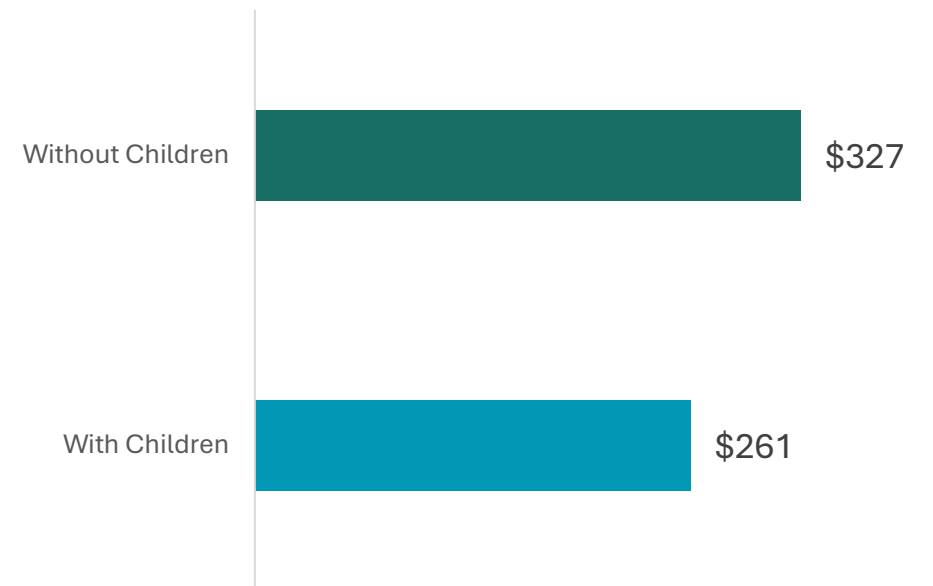
With or without Children

Average of Total Spend per person per day
Length of Stay



n= 1804

Average of Total Spend per person per day
With or without Children



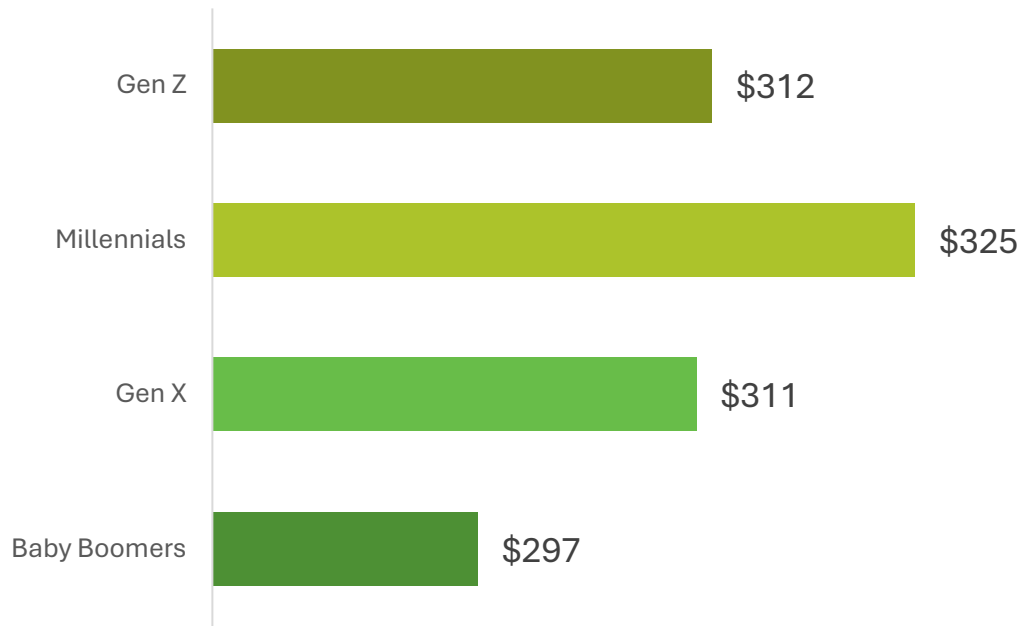
n= 1804

Spending on Non-Vacation Package

Younger generations (Gen Z and Millennials) spend significantly more per day in Aruba (\$312 and \$325, respectively) compared to Baby Boomers (\$297). However, Gen X travelers spend \$311 per day, which is closer to Millennials than Baby Boomers. This suggests that while younger travelers may prioritize higher-cost experiences, spending habits vary across age groups rather than following a strict generational divide.

Generations

Average of Total Spend per person per day
Generations



n= 1796



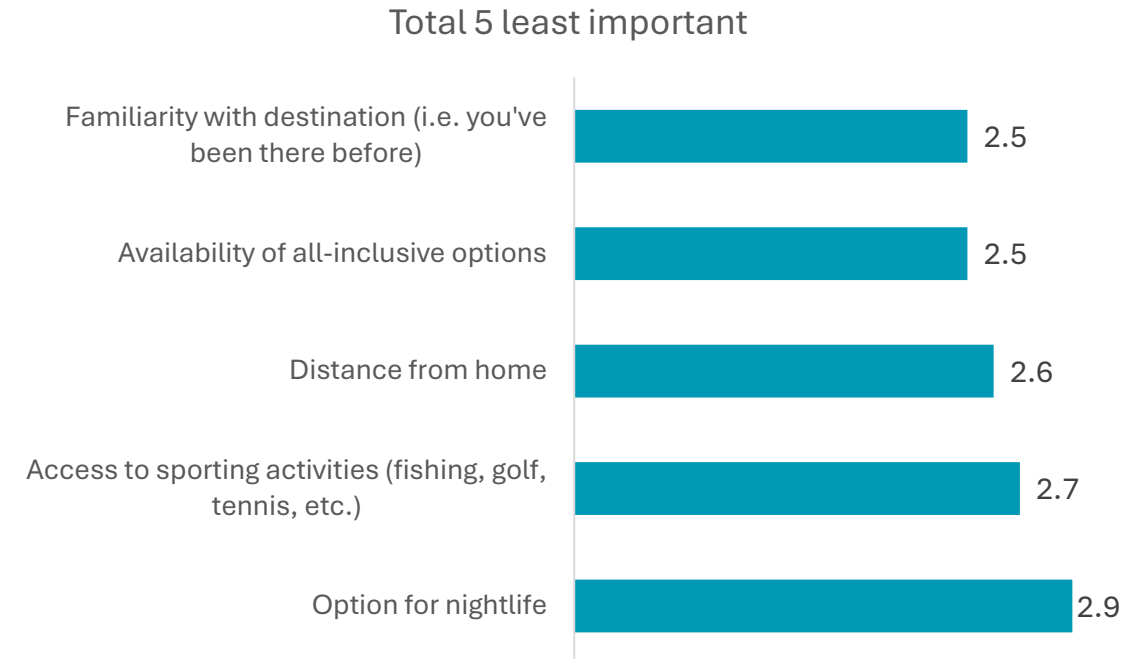
While on-island....



Important Destination Features

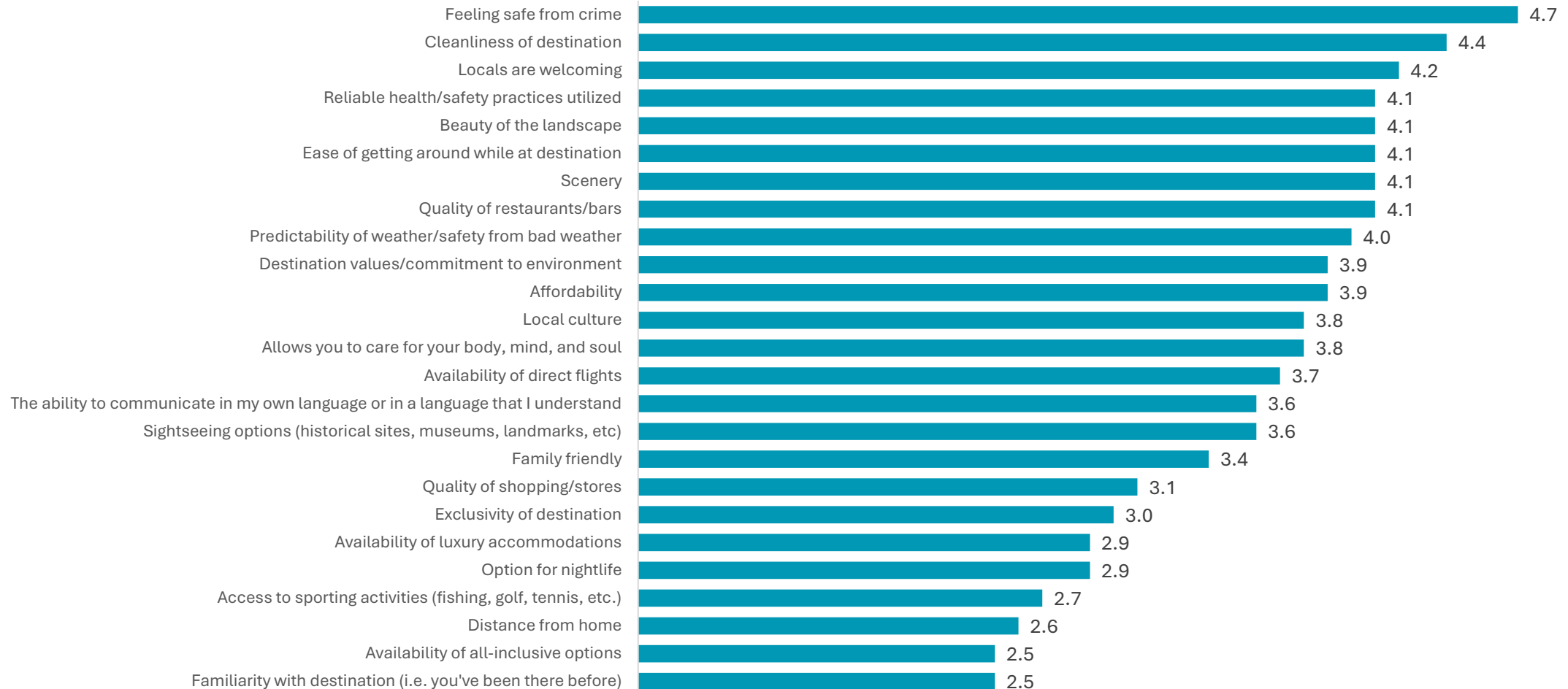
Top 5 Most important

Top 5 Least important



Important Destination Features

Overview of all results



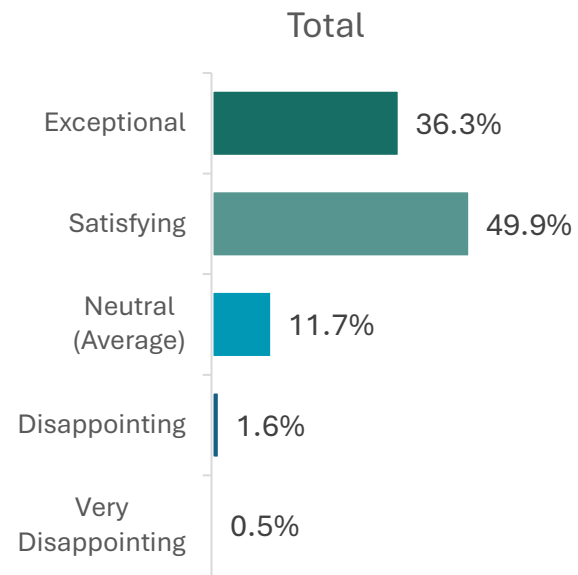
Q: How important are the following features when choosing a vacation destination? (Select one for each). Answer possibilities: not at all important, slightly, moderately, very and extremely important
n = 3031

Ranking Culinary Experience

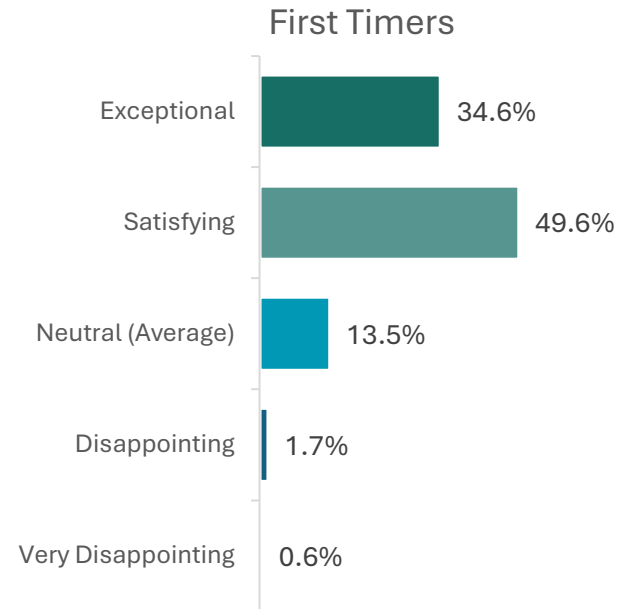
Total

First Timers

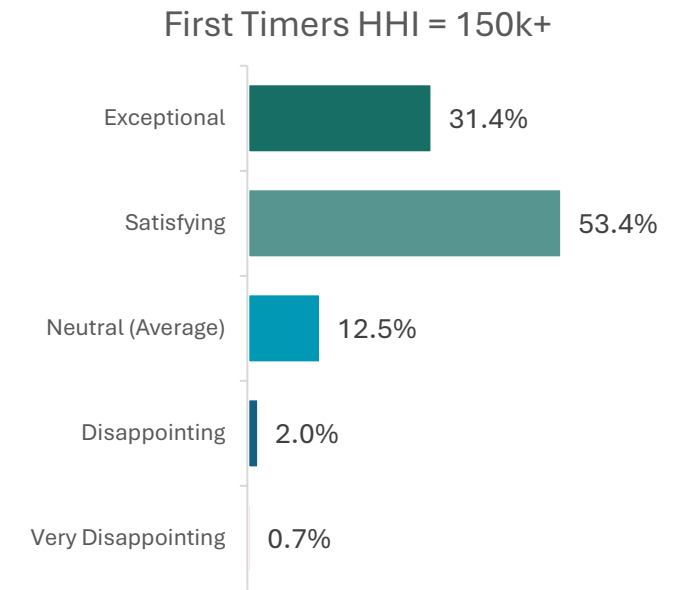
First Timers HHI 150K+



n= 3031



n= 1581



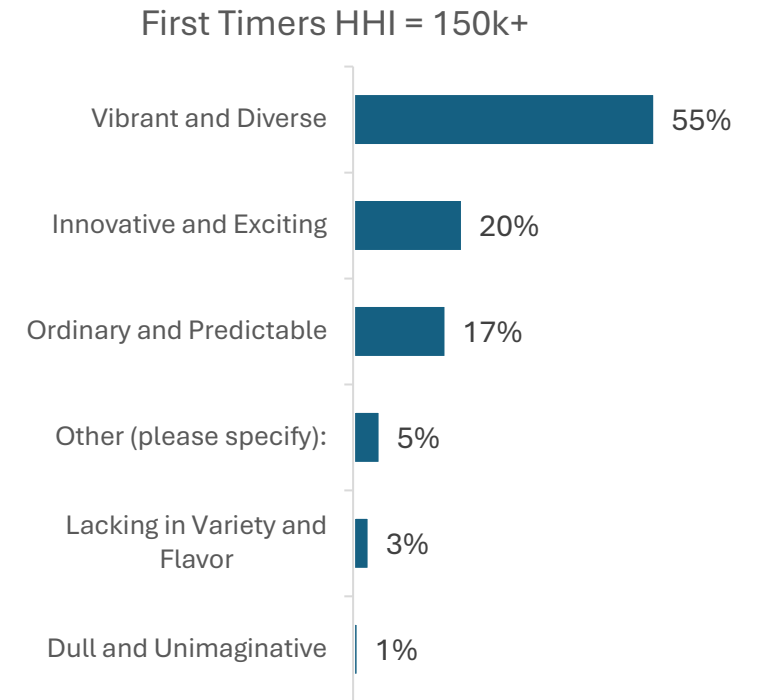
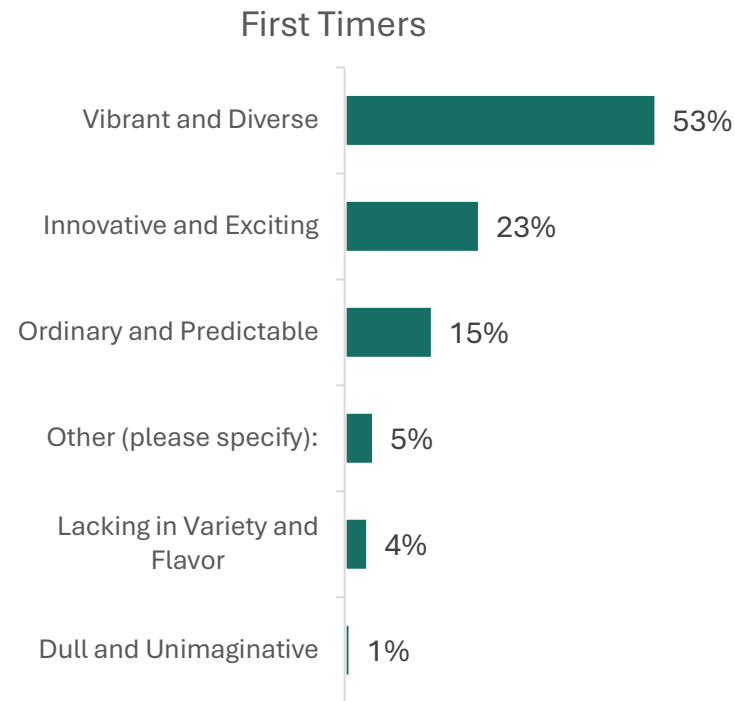
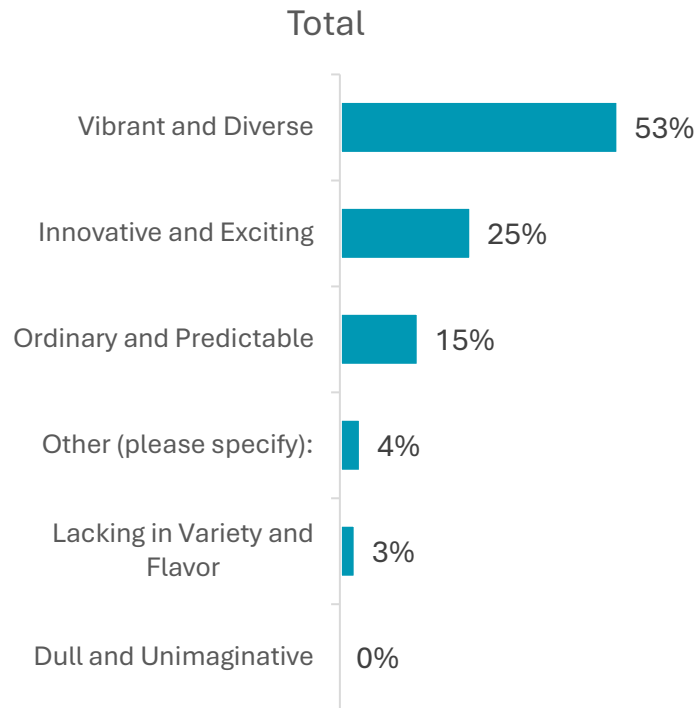
n= 551

Description Culinary Experience

Total

First Timers

First Timers HHI 150K+



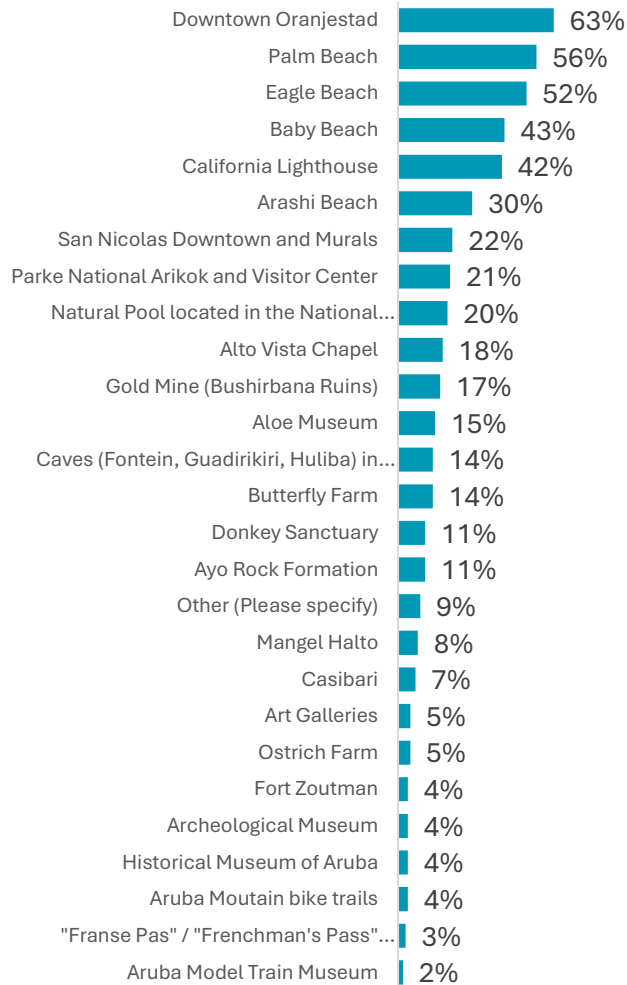
n= 3031

n= 1581

n= 551

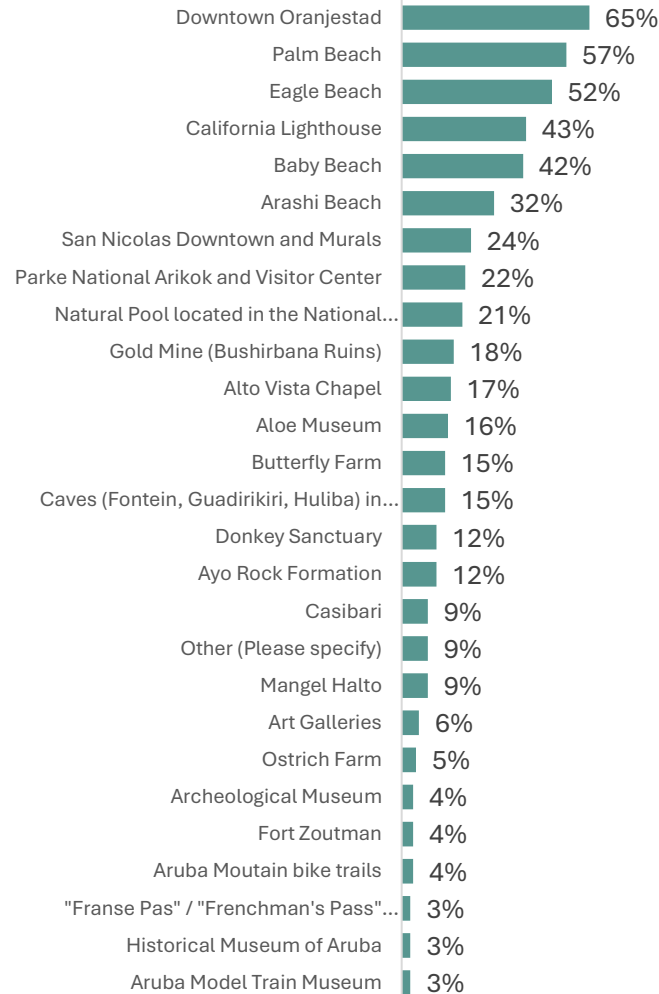
Cultural activities/attractions during trip

Total



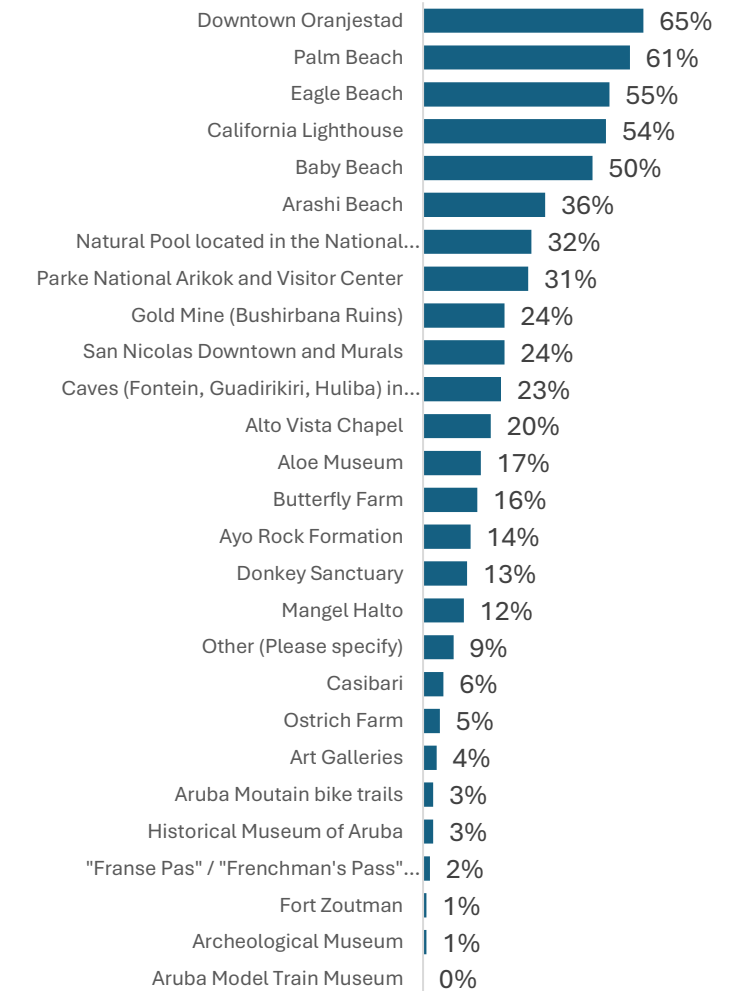
n= 1728

First Timers



n= 913

First Timers HHI 150K+



n= 351

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

Satisfaction, Likelihood to Re-Visit and to Recommend



Key Take-aways

Satisfaction

Visitor satisfaction in Aruba is remarkably high, with repeat visitors being the most enthusiastic, very few detractors across all income levels, and strong promoter rates, reinforcing Aruba's appeal as a top travel destination. First-time visitors generally have a positive experience in Aruba, with a promoter rate (69%), but their relatively higher percentage of passives (27%) suggests room for improvement.

Likelihood to Re-Visit

First-timers with an HHI of \$150+ are more hesitant than the Total average and first-timers. This group has a lower promoter score of 52% and a higher percentage of detractors (29%), highlighting an opportunity to enhance their experience and encourage return visits.

Likelihood to recommend

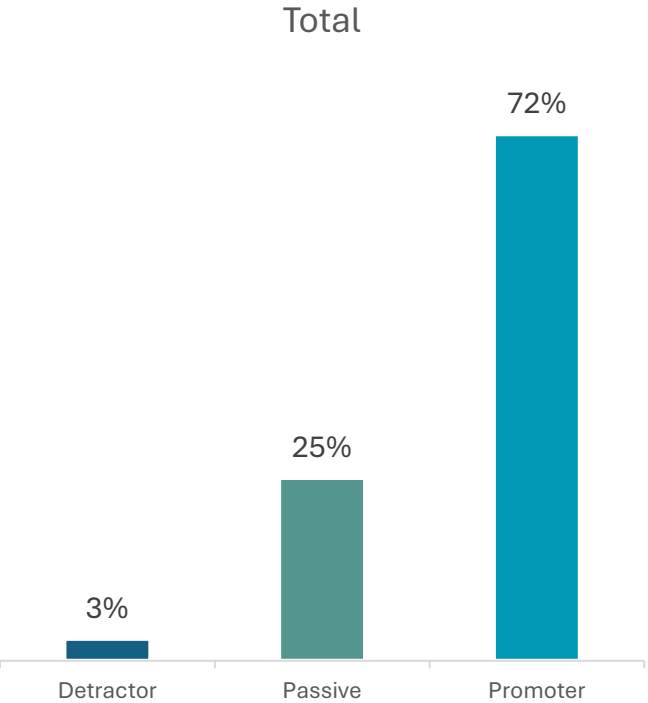
First-time high-income travelers are more hesitant, with up to 20% as passives.

Satisfaction

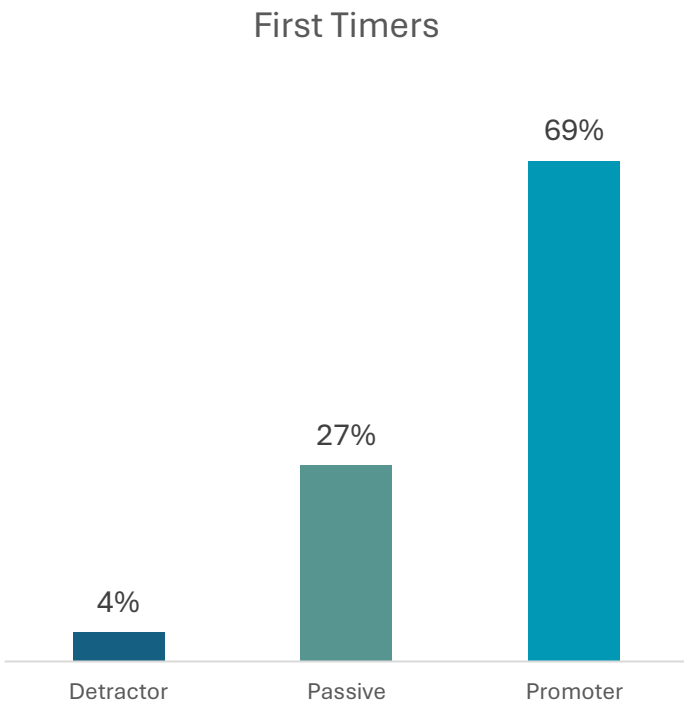
Total

First Timers

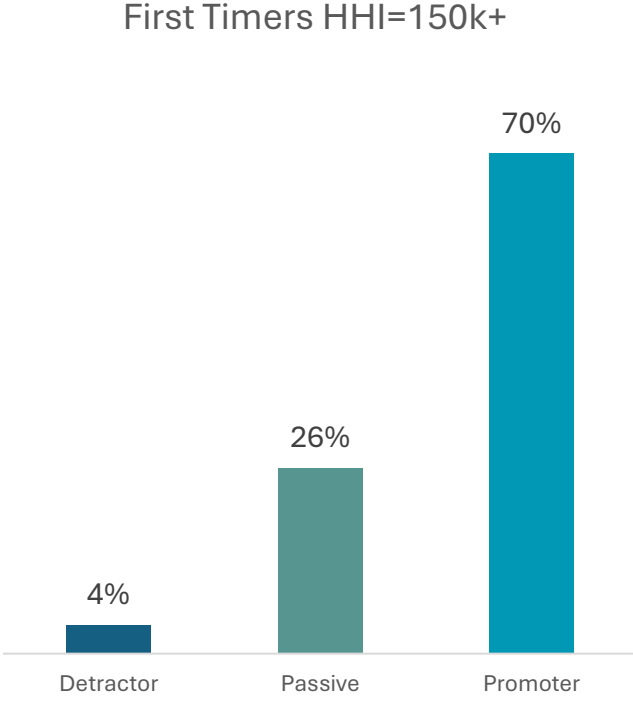
First Timers HHI 150K+



n= 3031



n= 1581



n= 551

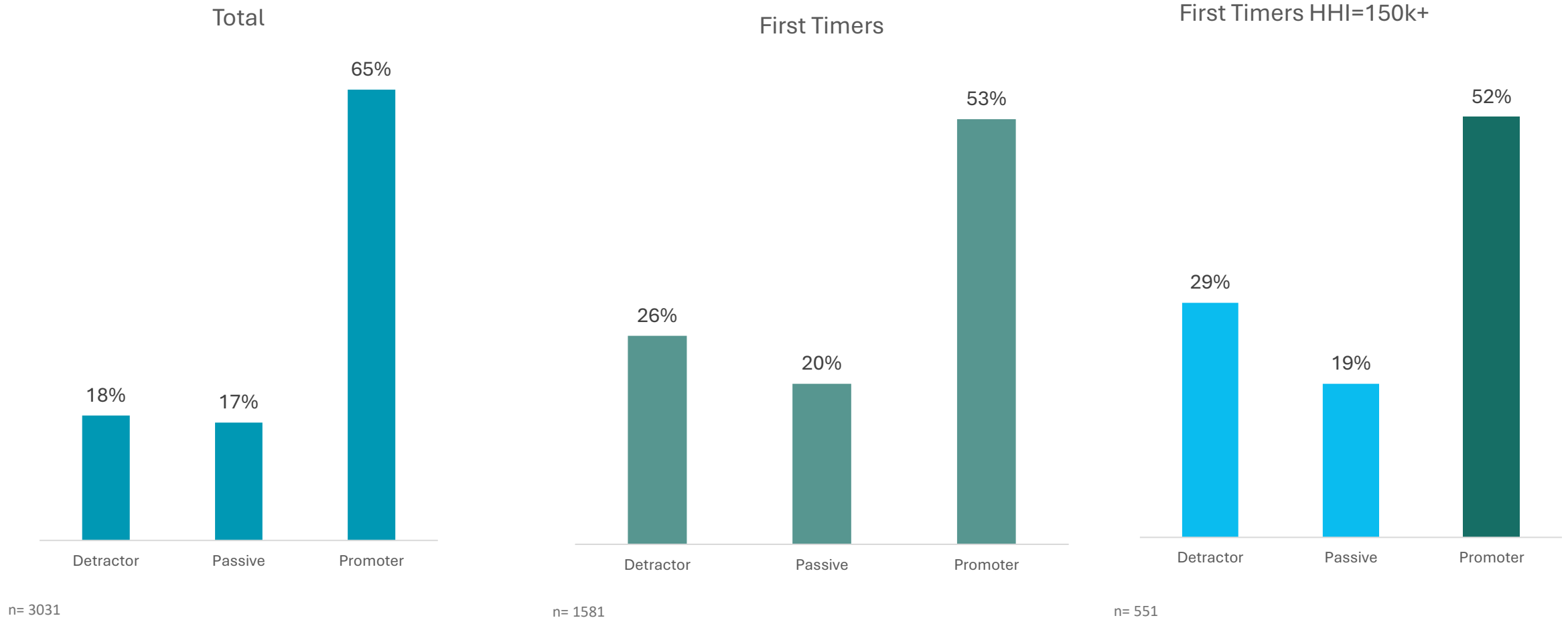


Likelihood to visit in next 5 years

Total

First Timers

First Timers HHI 150K+

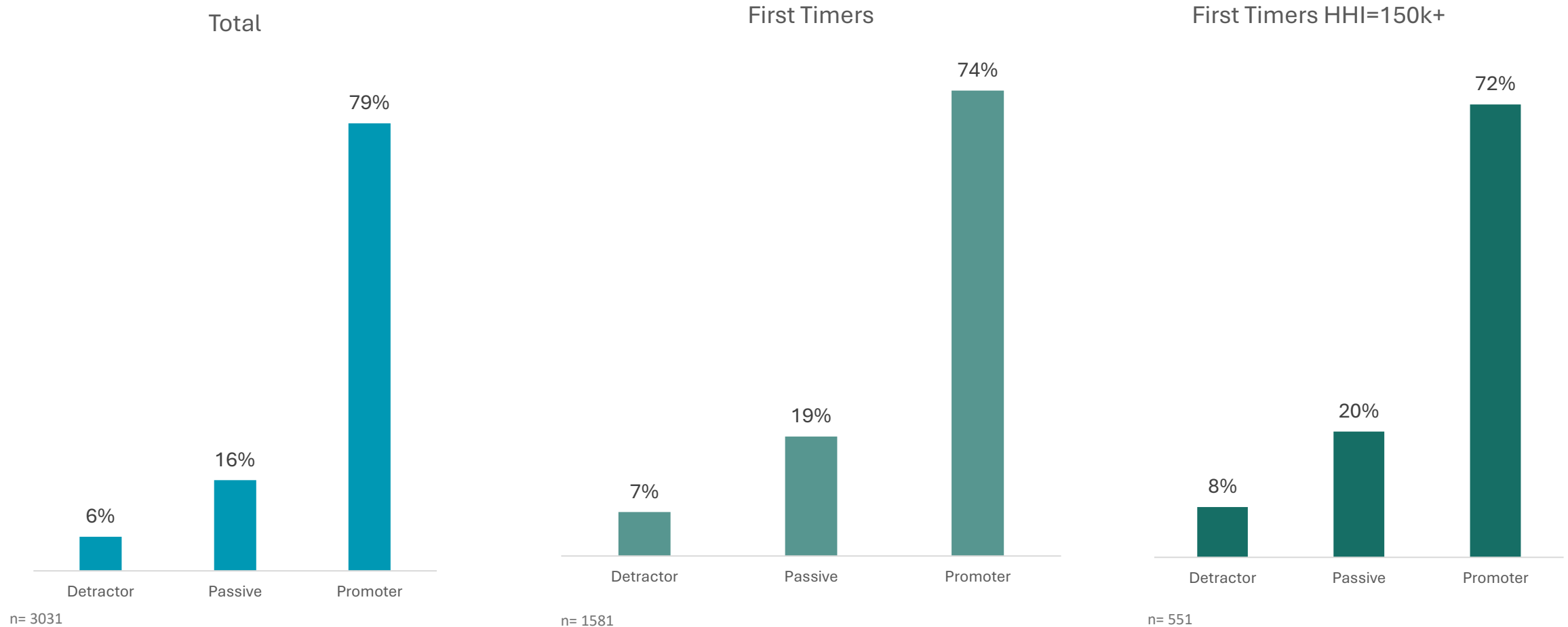


Likelihood to recommend

Total

First Timers

First Timers HHI 150K+





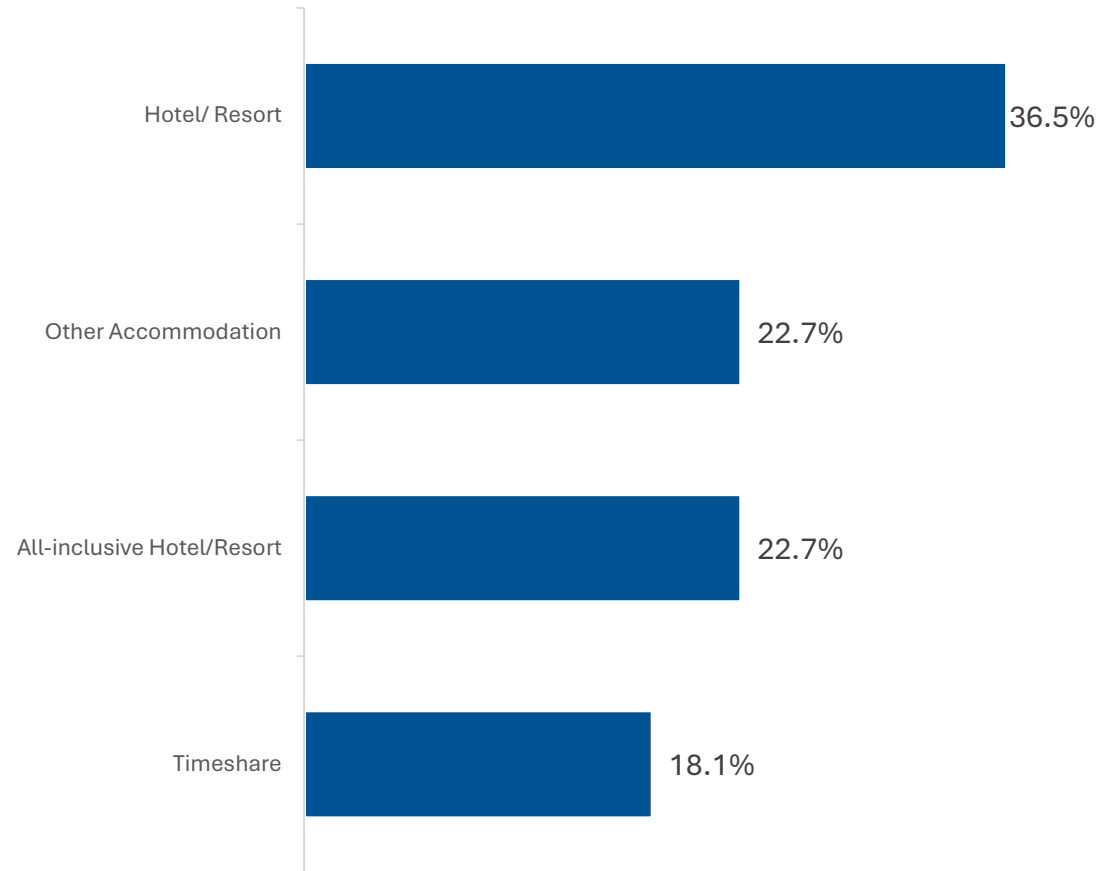
Accommodation



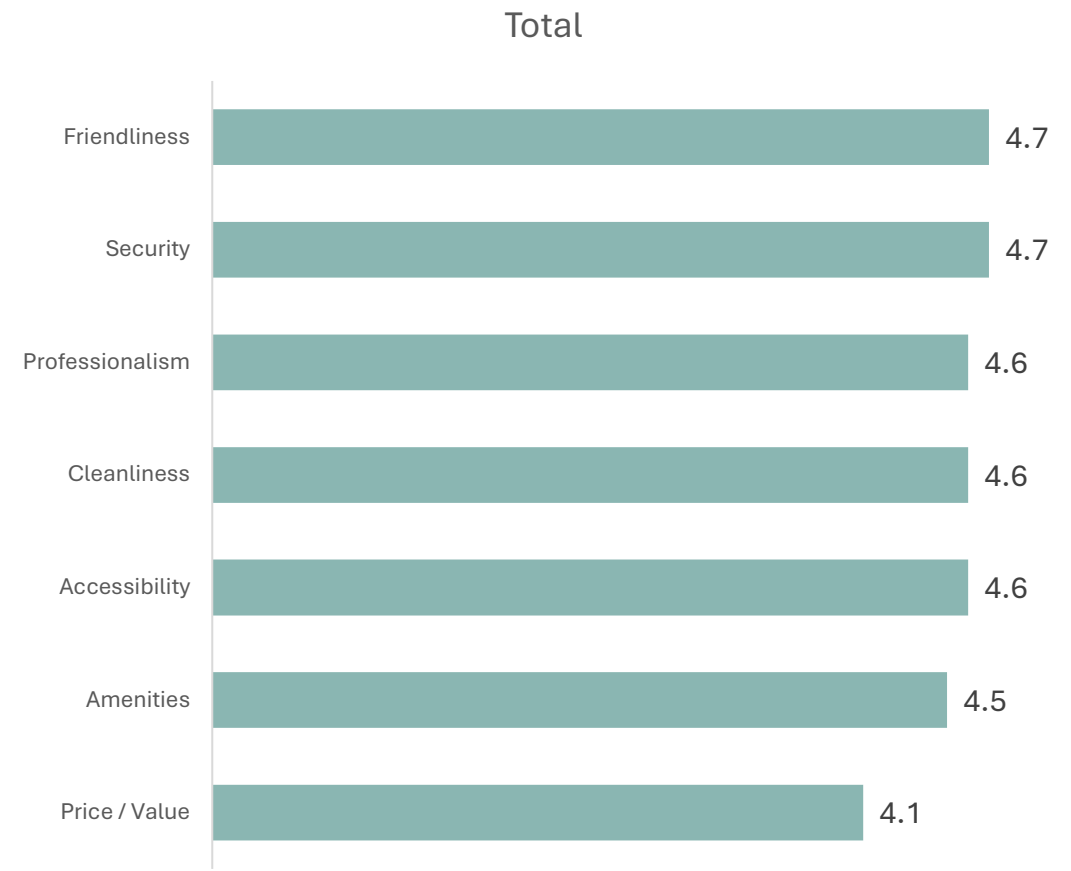
Accommodation

Overall results

Rating



Q: What was the main type of accommodation used during your visit to Aruba? Please check one answer only
n=3031

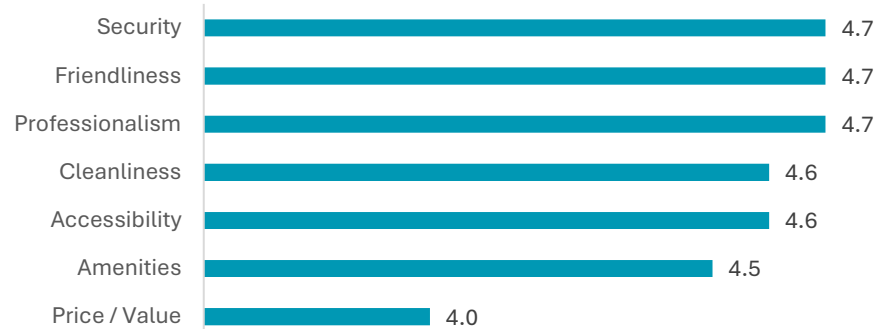


Q: Based on your experience, please rate how your accommodation performed in the following areas. Please rate their influence between 1 and 5 (1 = Extremely dissatisfied and 5 = Extremely satisfied)
n= 3031

Accommodations

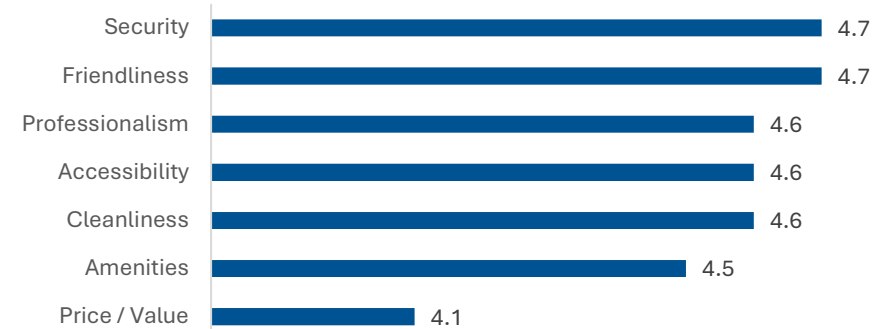
Rating per type of accommodation

Hotel/ Resort



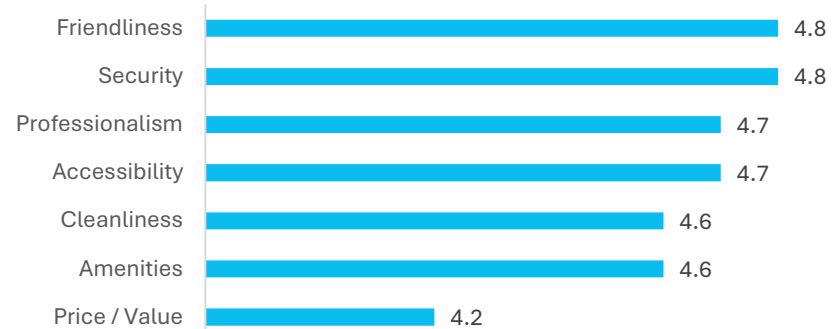
n= 1105

All-inclusive Hotel/Resort



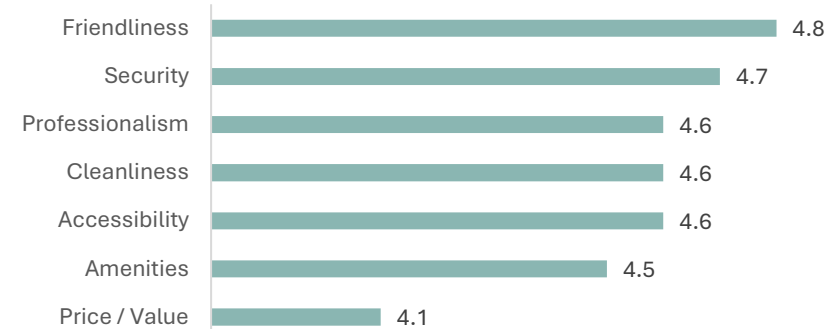
n= 688

Timeshare



n= 550

Other accommodation



n= 688



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

Or

Visit our website www.ata.aw



Disclaimer:

The Aruba Tourism Authority ("A.T.A.") is committed to ensuring the accuracy and timeliness of the information contained in and accessed through this report at the time of publication. However, numerical data in this report is subject to change and may include a margin of error of up to 5%.

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