

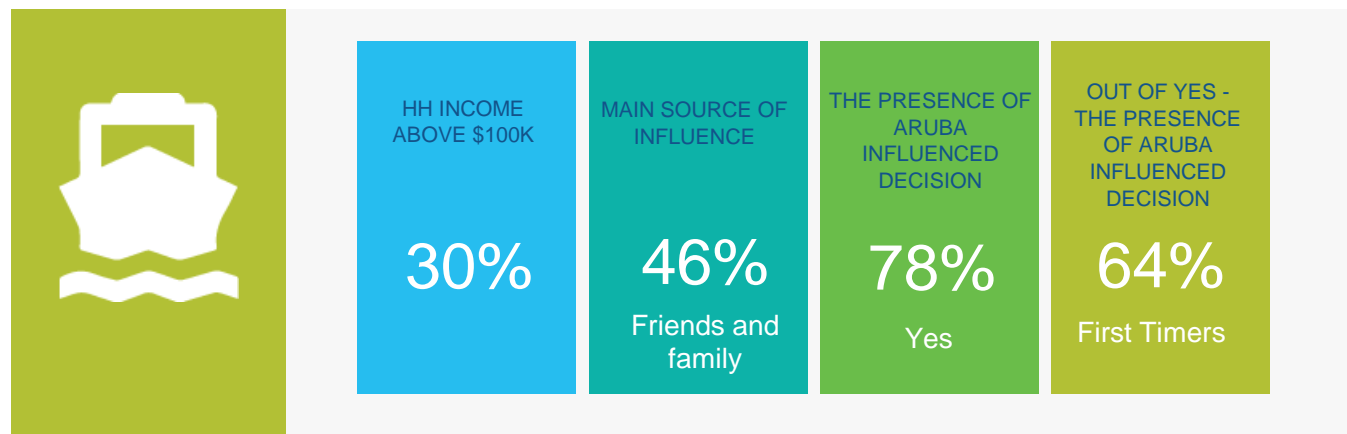
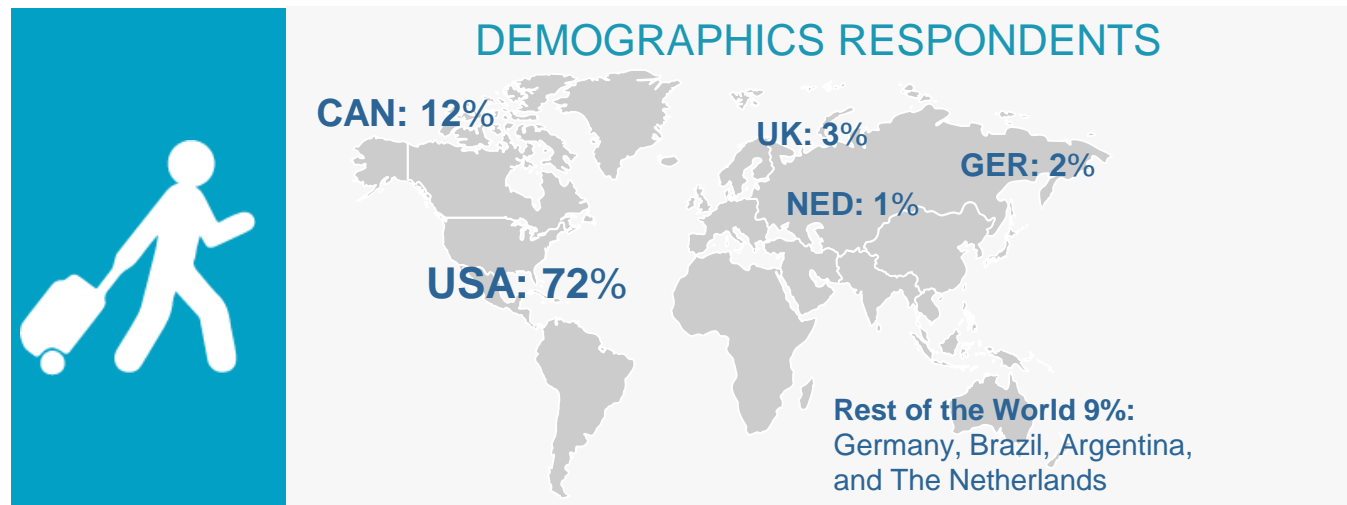


MARCH 2024

Monthly Report

HIGHLIGHTS CRUISE SURVEY 2023 (part 1)

The Cruise Report shares information about the on-island spending pattern of our cruise visitors, their on-island experience, cruise travel habits and motivations and the likelihood of returning to Aruba as stay-over visitor. The Aruba Tourism Authority conducted monthly face-to-face surveys from April 29 – December 27, 2023, in the visitor center at the Aruba Port Authority. In total 2345 surveys were collected.



A photograph of a mangrove forest. The foreground is filled with a dense network of thin, brown, vertical roots extending from the water. The water is a deep blue, and white foam from waves is visible crashing against the roots. The background shows a clear blue sky and a distant horizon line. The overall scene is bright and natural.

UPDATED ARRIVALS 2023

Note:

The 2023 numbers have been slightly adjusted from the previously reported figures. This can occur once we re-run the data. The error margin remains significantly below the acceptable margin.



UPDATED ARRIVALS 2023

2023 after re-run	Jan-23	Feb-23	Mar-23	Apr-23	May-23	Jun-23	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23	Total
USA	74,420	74,846	87,086	87,365	76,063	80,892	87,374	80,845	65,921	69,139	77,534	92,315	953,800
Canada	8,233	7,567	7,739	4,607	2,914	2,005	2,980	2,976	2,516	3,998	6,847	10,872	63,254
NA	82,653	82,413	94,825	91,972	78,977	82,897	90,354	83,821	68,437	73,137	84,381	103,187	1,017,054
Venezuela	160	101	114	179	159	173	245	567	420	216	190	641	3,165
Colombia	3,490	2,468	3,164	3,928	3,040	5,468	4,976	5,030	3,804	5,202	4,874	7,221	52,665
Brazil	1,025	874	710	955	986	1,153	1,707	1,033	1,697	1,020	1,205	1,637	14,002
Argentina	1,680	1,431	1,280	1,418	1,358	1,308	1,993	2,008	1,988	1,565	1,477	1,360	18,866
Chile	611	954	556	540	469	756	824	766	863	634	597	863	8,433
Ecuador	208	454	534	472	450	442	563	911	955	1,021	997	661	7,668
Peru	262	397	454	381	554	377	722	646	580	655	719	1,706	7,453
Paraguay	147	68	60	91	68	38	32	83	263	117	118	109	1,194
Uruguay	125	101	132	113	117	151	235	295	223	213	147	129	1,981
Mexico	111	192	228	335	311	196	320	415	357	233	275	335	3,308
Others	664	798	847	1,360	983	1,130	1,049	1,263	1,518	1,117	1,164	1,309	13,202
SA	8,483	7,838	8,079	9,772	8,495	11,192	12,666	13,017	12,668	11,993	11,763	15,971	131,937
Netherlands	3,657	3,720	3,342	3,450	2,906	2,405	3,477	2,770	2,959	3,403	3,478	3,242	38,809
UK	284	297	508	503	525	626	632	1,043	850	686	572	459	6,985
Germany	426	335	1,122	416	370	334	317	359	435	465	520	501	5,600
Italy	415	303	176	190	255	416	643	1,980	856	507	423	505	6,669
Sweden	698	685	106	68	33	51	51	20	25	119	126	192	2,174
Belgium	191	138	177	237	134	113	216	120	143	178	144	136	1,927
Austria	50	74	77	52	49	22	74	49	51	61	74	66	699
Switzerland	135	146	193	187	159	86	149	131	146	158	177	158	1,825
Others	1,050	1,092	858	662	574	627	700	754	638	605	952	997	9,509
Europe	6,906	6,790	6,559	5,765	5,005	4,680	6,259	7,226	6,103	6,182	6,466	6,256	74,197
ROW	2,474	2,385	2,954	2,967	2,889	2,749	3,595	3,339	2,953	3,684	3,336	3,889	37,214
Total	100,516	99,426	112,417	110,476	95,366	101,518	112,874	107,403	90,161	94,996	105,946	129,303	1,260,402



UPDATED NIGHTS 2023

2023 after re-run	Jan-23	Feb-23	Mar-23	Apr-23	May-23	Jun-23	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23	Total
USA	669,110	600,205	640,182	623,690	538,032	581,815	642,997	581,820	513,898	558,826	600,492	715,530	7,266,597
Canada	110,367	86,695	67,379	41,087	25,586	18,070	28,056	28,656	24,779	44,199	75,683	116,448	667,005
NA	779,477	686,900	707,561	664,777	563,618	599,885	671,053	610,476	538,677	603,025	676,175	831,978	7,933,602
Venezuela	1,389	834	1,195	1,562	1,934	2,135	3,116	7,374	3,991	3,121	2,002	9,138	37,791
Colombia	25,543	20,119	21,934	27,055	20,564	39,103	40,037	33,929	24,535	30,793	31,868	64,346	379,826
Brazil	6,343	5,225	4,098	5,914	5,856	8,236	11,507	6,258	10,387	6,033	7,241	11,413	88,511
Argentina	16,684	12,282	11,117	12,351	12,472	12,913	19,119	18,148	17,891	14,214	14,283	14,408	175,882
Chile	4,981	7,465	4,060	3,913	3,847	6,157	6,873	5,904	7,078	4,621	5,163	7,121	67,183
Ecuador	1,219	2,428	3,342	2,368	2,237	1,900	3,017	4,269	4,390	4,299	4,728	3,522	37,719
Peru	2,127	3,211	4,306	2,515	3,254	2,269	4,992	3,777	5,601	3,569	3,857	11,446	50,924
Paraguay	1,118	432	390	646	438	242	198	508	2,067	673	685	764	8,161
Uruguay	990	754	1,034	883	852	1,199	2,044	2,213	1,692	1,594	1,070	941	15,266
Mexico	738	1,479	1,218	1,826	1,713	1,152	2,030	2,452	1,966	1,622	1,471	2,048	19,715
Others	6,220	5,343	6,478	9,086	5,835	7,038	7,714	10,273	11,597	8,472	7,475	10,670	96,201
SA	67,352	59,572	59,172	68,119	59,002	82,344	100,647	95,105	91,195	79,011	79,843	135,817	977,179
Netherlands	62,386	54,973	40,596	53,066	42,050	51,646	93,583	57,969	46,694	50,796	59,184	56,065	669,008
UK	3,195	2,323	3,624	4,804	4,440	5,544	6,555	10,868	8,620	7,128	7,491	4,249	68,841
Germany	5,406	3,350	5,991	4,187	3,584	3,545	3,211	4,552	4,992	4,595	5,271	8,191	56,875
Italy	4,496	2,610	1,585	1,610	2,136	3,598	5,197	16,678	5,230	5,453	2,845	4,766	56,204
Sweden	9,006	9,119	778	500	291	437	546	210	327	1,537	1,370	2,302	26,423
Belgium	3,383	2,159	2,023	2,334	1,573	1,332	2,206	2,513	1,647	2,387	2,518	2,205	26,280
Austria	799	765	719	418	387	170	733	416	574	614	610	1,224	7,429
Switzerland	1,763	1,195	1,600	1,875	1,362	768	1,356	973	1,138	1,541	1,588	1,499	16,658
Others	13,050	10,029	7,772	5,970	8,079	6,380	7,756	7,367	6,659	7,267	8,575	10,937	99,841
Europe	103,484	86,523	64,688	74,764	63,902	73,420	121,143	101,546	75,881	81,318	89,452	91,438	1,027,559
ROW	16,034	13,719	14,871	20,405	17,414	26,231	32,544	24,803	18,599	21,699	17,499	30,643	254,461
Total	966,347	846,714	846,292	828,065	703,936	781,880	925,387	831,930	724,352	785,053	862,969	1,089,876	10,192,801

SNAPSHOT YTD MAR 2024/2023



HOW MANY ARRIVALS?

382,723

22.5%



HOW LONG DID THEY STAY?

3,084,943

NIGHTS

16.0%



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

Awg. 3,451.6 min

15%

Q1-Q3 2022: 2,993.70

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

WHERE DID THEY STAY?

EP



656,333

NIGHTS

21.3%

ALL INCLUSIVE



379,628

NIGHTS

12.3%

TIMESHARE



847,702

NIGHTS

27.5%

OTHERS



1,201,280

NIGHTS

38.9%



ARRIVALS YTD MARCH 2024/2023

382,723
ARRIVALS

22.5%
GROWTH

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
USA	236,352	51,014	287,366	21.6%	75.7%	75.1%
Canada	23,539	3,932	27,471	16.7%	7.5%	7.2%
NA	259,891	54,946	314,837	21.1%	83.2%	82.3%
Venezuela	375	471	846	125.6%	0.1%	0.2%
Colombia	9,122	5,265	14,387	57.7%	2.9%	3.8%
Brazil	2,609	1,263	3,872	48.4%	0.8%	1.0%
Argentina	4,391	2,671	7,062	60.8%	1.4%	1.8%
Chile	2,121	1,501	3,622	70.8%	0.7%	0.9%
Ecuador	1,196	1,134	2,330	94.8%	0.4%	0.6%
Peru	1,113	3,552	4,665	319.1%	0.4%	1.2%
Paraguay	275	-2	273	-0.7%	0.1%	0.1%
Uruguay	358	156	514	43.6%	0.1%	0.1%
Mexico	531	165	696	31.1%	0.2%	0.2%
Others	2,309	909	3,218	39.4%	0.7%	0.8%
SA	24,400	17,085	41,485	70.0%	7.8%	10.8%
Netherlands	10,719	-1,194	9,525	-11.1%	3.4%	2.5%
UK	1,089	879	1,968	80.7%	0.3%	0.5%
Germany	1,883	-633	1,250	-33.6%	0.6%	0.3%
Italy	894	-14	880	-1.6%	0.3%	0.2%
Sweden	1,489	-1,172	317	-78.7%	0.5%	0.1%
Belgium	506	-9	497	-1.8%	0.2%	0.1%
Austria	201	9	210	4.5%	0.1%	0.1%
Switzerland	474	94	568	19.8%	0.2%	0.1%
Others	3,000	-83	2,917	-2.8%	1.0%	0.8%
Europe	20,255	-2,123	18,132	-10.5%	6.5%	4.7%
ROW	7,813	456	8,269	5.8%	2.5%	2.2%
Total	312,359	70,364	382,723	22.5%		
W/O Ven.	311,984	69,893	381,877	22.4%		



ARRIVALS USA

YTD MARCH 2024/2023

287,366
ARRIVALS

21.6%
GROWTH

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
New York	45,819	12,342	58,161	26.9%	19.4%	20.2%
Massachusetts	37,446	1,685	39,131	4.5%	15.8%	13.6%
New Jersey	22,267	9,860	32,127	44.3%	9.4%	11.2%
Pennsylvania	13,592	3,855	17,447	28.4%	5.8%	6.1%
Illinois	7,382	621	8,003	8.4%	3.1%	2.8%
Connecticut	8,358	920	9,278	11.0%	3.5%	3.2%
Florida	10,718	2,677	13,395	25.0%	4.5%	4.7%
Ohio	7,546	1,864	9,410	24.7%	3.2%	3.3%
Maryland	6,015	1,870	7,885	31.1%	2.5%	2.7%
Michigan	6,953	470	7,423	6.8%	2.9%	2.6%
Virginia	6,169	1,096	7,265	17.8%	2.6%	2.5%
Georgia	4,065	829	4,894	20.4%	1.7%	1.7%
North Carolina	5,653	1,770	7,423	31.3%	2.4%	2.6%
Texas	4,946	831	5,777	16.8%	2.1%	2.0%
California	3,357	728	4,085	21.7%	1.4%	1.4%
Other	46,066	9,596	55,662	20.8%	19.5%	19.4%
Total	236,352	51,014	287,366	21.6%		



NIGHTS YTD MARCH 2024/2023

3,084,943
ARRIVALS

16.0%
GROWTH

	2023		Growth	2024	% Growth	ALOS 2023	ALOS 2024
USA	1,909,497		275,817	2,185,314	14.4%	8.1	7.6
Canada	264,441		35,662	300,103	13.5%	11.2	10.9
NA	2,173,938		311,479	2,485,417	14.3%	8.4	7.9
Venezuela	3,418		5,885	9,303	172.2%	9.1	11.0
Colombia	67,596		28,403	95,999	42.0%	7.4	6.7
Brazil	15,666		10,114	25,780	64.6%	6.0	6.7
Argentina	40,083		25,287	65,370	63.1%	9.1	9.3
Chile	16,506		11,239	27,745	68.1%	7.8	7.7
Ecuador	6,989		4,046	11,035	57.9%	5.8	4.7
Peru	9,644		18,802	28,446	195.0%	8.7	6.1
Paraguay	1,940	-171		1,769	-8.8%	7.1	6.5
Uruguay	2,778		1,399	4,177	50.4%	7.8	8.1
Mexico	3,435		2,466	5,901	71.8%	6.5	8.5
Others	18,041		4,223	22,264	23.4%	7.8	6.9
SA	186,096		111,693	297,789	60.0%	7.6	7.2
Netherlands	157,955	-6,489		151,466	-4.1%	14.7	15.9
UK	9,142		9,991	19,133	109.3%	8.4	9.7
Germany	14,747	-1,411		13,336	-9.6%	7.8	10.7
Italy	8,691	-791		7,900	-9.1%	9.7	9.0
Sweden	18,903	-15,435		3,468	-81.7%	12.7	10.9
Belgium	7,565		1,610	9,175	21.3%	15.0	18.5
Austria	2,283		380	2,663	16.6%	11.4	12.7
Switzerland	4,558		1,075	5,633	23.6%	9.6	9.9
Others	30,851	-4,142		26,709	-13.4%	10.3	9.2
Europe	254,695	-15,212		239,483	-6.0%	12.6	13.2
ROW	44,624		17,630	62,254	39.5%	5.7	7.5
Total	2,659,353		425,590	3,084,943	16.0%	8.5	8.1



ACCOMMODATIONS

YTD MARCH 2024/2023

382,723
ARRIVALS

22.5%
GROWTH

ARRIVALS BY ACCOMMODATION

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
EP	84,568	19,766	104,334	23.4%	27.1%	27.3%
All Inclusive	52,465	3,546	56,011	6.8%	16.8%	14.6%
Timeshare	78,540	9,608	88,148	12.2%	25.1%	23.0%
Others	96,786	37,444	134,230	38.7%	31.0%	35.1%
Total	312,359	70,364	382,723	22.5%		

NIGHTS BY ACCOMMODATION

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
EP	555,906	100,427	656,333	18.1%	20.9%	21.3%
All Inclusive	376,196	3,432	379,628	0.9%	14.1%	12.3%
Timeshare	786,817	60,885	847,702	7.7%	29.6%	27.5%
Others	940,434	260,846	1,201,280	27.7%	35.4%	38.9%
Total	2,659,353	425,590	3,084,943	16.0%		



ACCOMMODATIONS

YTD MARCH 2024/2023

382,723
ARRIVALS

22.5%
GROWTH

	EP			All Inclusive			Timeshare			Others		
	2024	2023	% growth	2024	2023	% growth	2024	2023	% growth	2024	2023	% growth
USA	88,517	72,908	21.4%	43,856	39,981	9.7%	80,166	71,537	12.1%	74,827	51,926	44.1%
Venezuela	163	80	103.8%	5	2	150.0%	99	32	209.4%	579	261	121.8%
Netherlands	881	1,160	-24.1%	336	500	-32.8%	241	310	-22.3%	8,067	8,749	-7.8%
Canada	4,434	3,400	30.4%	5,649	5,878	-3.9%	3,897	3,751	3.9%	13,491	10,510	28.4%
Brazil	1,182	740	59.7%	377	415	-9.2%	298	240	24.2%	2,015	1,214	66.0%
Colombia	1,583	901	75.7%	675	663	1.8%	815	643	26.7%	11,314	6,915	63.6%
Argentina	956	524	82.4%	2,442	2,000	22.1%	902	561	60.8%	2,762	1,306	111.5%
Chile	661	256	158.2%	780	831	-6.1%	352	230	53.0%	1,829	804	127.5%
Peru	714	147	385.7%	570	318	79.2%	285	49	481.6%	3,096	599	416.9%
UK	572	366	56.3%	102	64	59.4%	126	77	63.6%	1,168	582	100.7%
Italy	234	138	69.6%	86	97	-11.3%	67	56	19.6%	493	603	-18.2%
Total mainmkt	99,897	80,620	23.9%	54,878	50,749	8.1%	87,248	77,486	12.6%	119,641	83,469	43.3%
All visitors	104,334	84,568	23.4%	56,011	52,465	6.8%	88,148	78,540	12.2%	134,230	96,786	38.7%



ACCOMMODATIONS

YTD MARCH 2024/2023

382,723
ARRIVALS

22.5%
GROWTH

	EP			All Inclusive			Timeshare			Others		
	2024	2023	% growth	2024	2023	% growth	2024	2023	% growth	2024	2023	% growth
USA	84.8%	86.2%	-1.6%	78.3%	76.2%	2.7%	90.9%	91.1%	-0.2%	55.7%	53.7%	3.9%
Venezuela	0.2%	0.1%	65.1%	0.0%	0.0%	134.2%	0.1%	0.0%	175.7%	0.4%	0.3%	60.0%
Netherlands	0.8%	1.4%	-38.4%	0.6%	1.0%	-37.1%	0.3%	0.4%	-30.7%	6.0%	9.0%	-33.5%
Canada	4.2%	4.0%	5.7%	10.1%	11.2%	-10.0%	4.4%	4.8%	-7.4%	10.1%	10.9%	-7.4%
Brazil	1.1%	0.9%	29.5%	0.7%	0.8%	-14.9%	0.3%	0.3%	10.6%	1.5%	1.3%	19.7%
Colombia	1.5%	1.1%	42.4%	1.2%	1.3%	-4.6%	0.9%	0.8%	12.9%	8.4%	7.1%	18.0%
Argentina	0.9%	0.6%	47.9%	4.4%	3.8%	14.4%	1.0%	0.7%	43.3%	2.1%	1.3%	52.5%
Chile	0.6%	0.3%	109.3%	1.4%	1.6%	-12.1%	0.4%	0.3%	36.4%	1.4%	0.8%	64.0%
Peru	0.7%	0.2%	293.7%	1.0%	0.6%	67.9%	0.3%	0.1%	418.2%	2.3%	0.6%	272.7%
UK	0.5%	0.4%	26.7%	0.2%	0.1%	49.3%	0.1%	0.1%	45.8%	0.9%	0.6%	44.7%
Italy	0.2%	0.2%	37.4%	0.2%	0.2%	-17.0%	0.1%	0.1%	6.6%	0.4%	0.6%	-41.0%
Total mainmkt	95.7%	95.3%	0.4%	98.0%	96.7%	1.3%	99.0%	98.7%	0.3%	89.1%	86.2%	3.4%
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%



VISITORS BY AGE YTD MARCH 2024/2023

382,723
ARRIVALS

22.5%
GROWTH

	2023	Growth	2024	% Growth
0 - 11	19,368	7,699	27,067	39.8%
12-19	17,737	8,864	26,601	50.0%
20 - 29	32,862	10,202	43,064	31.0%
30 - 39	45,167	11,574	56,741	25.6%
40 - 49	47,507	12,731	60,238	26.8%
50 - 59	62,434	8,345	70,779	13.4%
60 - 69	56,306	7,335	63,641	13.0%
70 +	30,940	3,633	34,573	11.7%
Not Stated	38	-19	19	-50.0%
Total	312,359	70,364	382,723	22.5%



GENERATIONS

YTD MARCH 2024/2023

382,723
VISITORS

22.5%
GROWTH

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
Gen A	15,496	5,846	21,342	37.7%	5.0%	5.6%
Gen Z	39,134	16,700	55,834	42.7%	12.5%	14.6%
Millennials	70,714	17,968	88,682	25.4%	22.6%	23.2%
Gen X	80,309	17,208	97,517	21.4%	25.7%	25.5%
Baby Boomers	95,564	11,188	106,752	11.7%	30.6%	27.9%
Silent Generations	11,104	1,473	12,577	13.3%	3.6%	3.3%
Age not specified	38	-19	19	-50.0%	0.0%	0.0%
Total	312,359	70,364	382,723	22.5%		



PURPOSE OF VISIT YTD MARCH 2024/2023

382,723
VISITORS

22.5%
GROWTH

	2024	Market share 2024	2023	Market share 2023	% Growth
Sun, Sand, Sea	331,723	86.7%	261,615	83.8%	26.8%
Business	6,772	1.8%	6,698	2.1%	1.1%
Conference	2,888	0.8%	3,392	1.1%	-14.9%
Honeymoon	6,823	1.8%	6,150	2.0%	10.9%
Diving	1,314	0.3%	1,058	0.3%	24.2%
Incentive	2,938	0.8%	3,174	1.0%	-7.4%
Meeting	2,368	0.6%	2,392	0.8%	-1.0%
Not specified	21,509	5.6%	21,751	7.0%	-1.1%
Shopping	2,397	0.6%	1,916	0.6%	25.1%
Wedding	3,991	1.0%	4,213	1.3%	-5.3%
Total	382,723	100.0%	312,359	100.0%	22.5%



CARRIERS YTD MARCH 2024/2023

382,723
VISITORS

22.5%
GROWTH

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
JETBLUE	68,585	17,623	86,208	25.7%	22.0%	22.5%
AMERICAN AIRLINES	71,409	598	72,007	0.8%	22.9%	18.8%
DELTA AIRLINE	43,914	11,439	55,353	26.0%	14.1%	14.5%
UNITED AIRLINES	33,260	11,277	44,537	33.9%	10.6%	11.6%
SOUTHWEST AIRLINES	13,709	3,396	17,105	24.8%	4.4%	4.5%
COPA AIRLINES	9,648	5,395	15,043	55.9%	3.1%	3.9%
AVIANCA	10,872	3,119	13,991	28.7%	3.5%	3.7%
SPIRIT AIRLINES	3,173	7,890	11,063	248.7%	1.0%	2.9%
WESTJET AIRLINES	6,993	3,754	10,747	53.7%	2.2%	2.8%
AIR CANADA	7,715	310	8,025	4.0%	2.5%	2.1%
KLM ROYAL DUTCH	10,536	-2,797	7,739	-26.5%	3.4%	2.0%
WINGO	4,021	2,968	6,989	73.8%	1.3%	1.8%
SUNWING AIRLINES	5,723	-505	5,218	-8.8%	1.8%	1.4%
LATAM AIRLINES	0	5,126	5,126	-	0.0%	1.3%
DIVI DIVI AIR	4,785	-30	4,755	-0.6%	1.5%	1.2%
TUI FLY NL	3,995	-526	3,469	-13.2%	1.3%	0.9%
PRIVATE	3,898	-537	3,361	-13.8%	1.2%	0.9%
EZ AIR	2,869	-54	2,815	-1.9%	0.9%	0.7%
SUN COUNTRY AIRLINES	1,997	670	2,667	33.6%	0.6%	0.7%
WINAIR	314	1,144	1,458	364.3%	0.1%	0.4%
BRITISH AIRWAYS	72	1,377	1,449	1912.5%	0.0%	0.4%
SURINAM AIRWAYS	1,022	296	1,318	29.0%	0.3%	0.3%
CHARTER	1,397	-469	928	-33.6%	0.4%	0.2%
ARAJET	241	281	522	116.6%	0.1%	0.1%
SKY HIGH AVIATION	149	128	277	85.9%	0.0%	0.1%
AIR CENTURY	112	86	198	76.8%	0.0%	0.1%
OTHERS	1,950	-1,595	355	-81.8%	0.6%	0.1%
Total	312,359	70,364	382,723	22.5%		



CARRIERS YTD MARCH 2024/2023

382,723
VISITORS

22.5%
GROWTH

City	APO Code	YTD March '24	Market share 2024	YTD March '23	Market share 2023	2024 vs 2023
JFK NY	JFK	54,897	14.3%	49,655	15.9%	10.6%
Boston	BOS	50,802	13.3%	47,867	15.3%	6.1%
Newark	EWR	41,925	11.0%	20,471	6.6%	104.8%
Miami	MIA	27,164	7.1%	25,051	8.0%	8.4%
Charlotte	CLT	24,340	6.4%	24,358	7.8%	-0.1%
Toronto	YYZ	24,005	6.3%	20,444	6.5%	17.4%
Atlanta	ATL	23,871	6.2%	14,715	4.7%	62.2%
Bogota	BOG	16,719	4.4%	13,101	4.2%	27.6%
Philadelphia	PHL	16,533	4.3%	17,709	5.7%	-6.6%
Panama City	PTY	15,074	3.9%	9,656	3.1%	56.1%
Orlando	MCO	12,807	3.3%	11,425	3.7%	12.1%
Fort Lauderdale	FLL	11,306	3.0%	3,428	1.1%	229.8%
Amsterdam	AMS	11,213	2.9%	13,922	4.5%	-19.5%
Curacao	CUR	8,535	2.2%	9,352	3.0%	-8.7%
G.Bush DC	IAD	7,677	2.0%	8,264	2.6%	-7.1%
Chicago	ORD	7,583	2.0%	5,119	1.6%	48.1%
Lima, Peru	LIM	5,126	1.3%	0	0.0%	—
Baltimore	BWI	4,311	1.1%	2,304	0.7%	87.1%
Medellin	MDE	3,062	0.8%	1,859	0.6%	64.7%
Minneapolis St. Paul Inter Airp	MSP	2,323	0.6%	1,997	0.6%	16.3%
Houston International	IAH	1,558	0.4%	1,693	0.5%	-8.0%
Sint Maarten	SXM	1452	0.4%	361	0.1%	—
Gatwick Airport , UK	LGW	1,450	0.4%	72	0.0%	—
Cali, Alfonso Bonilla Aragon	CLO	1,315	0.3%	4	0.0%	32775.0%
Johan A. Pengel Int Airport, Suriname	PBM	1,230	0.3%	1,054	0.3%	16.7%
	Others	6,445	1.7%	8,478	2.7%	-24.0%
Total		382,723	100.0%	312,359	100.0%	22.5%

MARCH RESULT 2024

NORTH AMERICA



118,675

83.9%

SOUTH AMERICA



14,016

9.9%

EUROPE



5,804

4.1%

OTHERS



2,885

2.6%

TOTAL ARRIVALS

141,380

100%



ARRIVALS MARCH 2024/2023

141,380
ARRIVALS

25.8%
GROWTH

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
USA	87,086	22,795	109,881	26.2%	77.5%	77.7%
Canada	7,739	1,055	8,794	13.6%	6.9%	6.2%
NA	94,825	23,850	118,675	25.2%	84.4%	83.9%
Venezuela	114	221	335	193.9%	0.1%	0.2%
Colombia	3,164	1,666	4,830	52.7%	2.8%	3.4%
Brazil	710	357	1,067	50.3%	0.6%	0.8%
Argentina	1,280	1,021	2,301	79.8%	1.1%	1.6%
Chile	556	508	1,064	91.4%	0.5%	0.8%
Ecuador	534	363	897	68.0%	0.5%	0.6%
Peru	454	1,294	1,748	285.0%	0.4%	1.2%
Paraguay	60	12	72	20.0%	0.1%	0.1%
Uruguay	132	91	223	68.9%	0.1%	0.2%
Mexico	228	62	290	27.2%	0.2%	0.2%
Others	847	342	1,189	40.4%	0.8%	0.8%
SA	8,079	5,937	14,016	73.5%	7.2%	9.9%
Netherlands	3,342	-472	2,870	-14.1%	3.0%	2.0%
UK	508	235	743	46.3%	0.5%	0.5%
Germany	1,122	-589	533	-52.5%	1.0%	0.4%
Italy	176	14	190	8.0%	0.2%	0.1%
Sweden	106	-13	93	-12.3%	0.1%	0.1%
Belgium	177	10	187	5.6%	0.2%	0.1%
Austria	77	-20	57	-26.0%	0.1%	0.0%
Switzerland	193	5	198	2.6%	0.2%	0.1%
Others	858	75	933	8.7%	0.8%	0.7%
Europe	6,559	-755	5,804	-11.5%	5.8%	4.1%
ROW	2,954	-69	2,885	-2.3%	2.6%	2.0%
Total	112,417	28,963	141,380	25.8%		
W/O Ven.	112,303	28,742	141,045	25.6%		



ARRIVALS USA

MARCH 2024/2023

109,881
ARRIVALS

26.2%
GROWTH

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
New York	13,558	5,343	18,901	39.4%	15.6%	17.2%
Massachusetts	14,971	-301	14,670	-2.0%	17.2%	13.4%
New Jersey	7,916	5,694	13,610	71.9%	9.1%	12.4%
Pennsylvania	4,751	1,901	6,652	40.0%	5.5%	6.1%
Illinois	2,737	159	2,896	5.8%	3.1%	2.6%
Connecticut	3,178	171	3,349	5.4%	3.6%	3.0%
Florida	4,457	997	5,454	22.4%	5.1%	5.0%
Ohio	3,101	778	3,879	25.1%	3.6%	3.5%
Maryland	2,168	1,307	3,475	60.3%	2.5%	3.2%
Michigan	3,042	37	3,079	1.2%	3.5%	2.8%
Virginia	2,187	1,192	3,379	54.5%	2.5%	3.1%
Georgia	1,749	276	2,025	15.8%	2.0%	1.8%
North Carolina	2,214	1,040	3,254	47.0%	2.5%	3.0%
Texas	2,248	264	2,512	11.7%	2.6%	2.3%
California	1,301	229	1,530	17.6%	1.5%	1.4%
Other	17,508	3,708	21,216	21.2%	20.1%	19.3%
Total	87,086	22,795	109,881	26.2%		



NIGHTS MARCH 2024/2023

1,024,579
NIGHTS

21.1%
GROWTH

	2023	Growth	2024	% Growth	ALOS 2023	ALOS 2024
USA	640,182	123,774	763,956	19.3%	7.4	7.0
Canada	67,379	10,694	78,073	15.9%	8.7	8.9
NA	707,561	134,468	842,029	19.0%	7.5	7.1
Venezuela	1,195	2,681	3,876	224.4%	10.5	11.6
Colombia	21,934	12,000	33,934	54.7%	6.9	7.0
Brazil	4,098	2,525	6,623	61.6%	5.8	6.2
Argentina	11,117	9,134	20,251	82.2%	8.7	8.8
Chile	4,060	3,937	7,997	97.0%	7.3	7.5
Ecuador	3,342	908	4,250	27.2%	6.3	4.7
Peru	4,306	5,090	9,396	118.2%	9.5	5.4
Paraguay	390	64	454	16.4%	6.5	6.3
Uruguay	1,034	523	1,557	50.6%	7.8	7.0
Mexico	1,218	1,706	2,924	140.1%	5.3	10.1
Others	6,478	1,134	7,612	17.5%	7.6	6.4
SA	59,172	39,702	98,874	67.1%	7.3	7.1
Netherlands	40,596	-2,747	37,849	-6.8%	12.1	13.2
UK	3,624	2,924	6,548	80.7%	7.1	8.8
Germany	5,991	-761	5,230	-12.7%	5.3	9.8
Italy	1,585	-156	1,429	-9.8%	9.0	7.5
Sweden	778	177	955	22.8%	7.3	10.3
Belgium	2,023	885	2,908	43.7%	11.4	15.6
Austria	719	-179	540	-24.9%	9.3	9.5
Switzerland	1,600	-106	1,494	-6.6%	8.3	7.5
Others	7,772	40	7,812	0.5%	9.1	8.4
Europe	64,688	77	64,765	0.1%	9.9	11.2
ROW	14,871	4,040	18,911	27.2%	5.0	6.6
Total	846,292	178,287	1,024,579	21.1%	7.5	7.2



ACCOMMODATIONS

MARCH 2024/2023

141,380
ARRIVALS

25.8%
GROWTH

ARRIVALS BY ACCOMMODATION

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
EP	31,254	7,930	39,184	25.4%	27.8%	27.7%
All Inclusive	18,713	1,781	20,494	9.5%	16.6%	14.5%
Timeshare	27,679	5,788	33,467	20.9%	24.6%	23.7%
Others	34,771	13,464	48,235	38.7%	30.9%	34.1%
Total	112,417	28,963	141,380	25.8%		

NIGHTS BY ACCOMMODATION

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
EP	192,595	40,998	233,593	21.3%	22.8%	22.8%
All Inclusive	123,434	8,449	131,883	6.8%	14.6%	12.9%
Timeshare	251,805	34,398	286,203	13.7%	29.8%	27.9%
Others	278,458	94,442	372,900	33.9%	32.9%	36.4%
Total	846,292	178,287	1,024,579	21.1%		



ACCOMMODATIONS

MARCH 2024/2023

141,380
ARRIVALS

25.8%
GROWTH

	EP			All Inclusive			Timeshare			Others		
	2024	2023	% growth	2024	2023	% growth	2024	2023	% growth	2024	2023	% growth
USA	34,174	27,238	25.5%	16,399	15,169	8.1%	30,593	25,278	21.0%	28,715	19,401	48.0%
Venezuela	48	13	269.2%	1	1	0.0%	39	15	160.0%	247	85	190.6%
Netherlands	299	373	-19.8%	96	161	-40.4%	69	79	-12.7%	2,406	2,729	-11.8%
Canada	1,474	1,215	21.3%	1,748	1,652	5.8%	1,569	1,432	9.6%	4,003	3,440	16.4%
Brazil	263	180	46.1%	83	113	-26.5%	58	62	-6.5%	663	355	86.8%
Colombia	490	270	81.5%	323	253	27.7%	308	246	25.2%	3,709	2,395	54.9%
Argentina	253	118	114.4%	712	550	29.5%	252	141	78.7%	1,084	471	130.1%
Chile	150	74	102.7%	239	192	24.5%	100	56	78.6%	575	234	145.7%
Peru	253	55	360.0%	275	136	102.2%	99	19	421.1%	1,121	244	359.4%
UK	214	192	11.5%	40	31	29.0%	48	29	65.5%	441	256	72.3%
Italy	45	28	60.7%	16	15	6.7%	18	16	12.5%	111	117	-5.1%
Total mainmkt	37,663	29,756	26.6%	19,932	18,273	9.1%	33,153	27,373	21.1%	43,075	29,727	44.9%
All visitors	39,184	31,254	25.4%	20,494	18,713	9.5%	33,467	27,679	20.9%	48,235	34,771	38.7%



ACCOMMODATIONS

MARCH 2024/2023

141,380
ARRIVALS

25.8%
GROWTH

	EP			All Inclusive			Timeshare			Others		
	2024	2023	% growth	2024	2023	% growth	2024	2023	% growth	2024	2023	% growth
USA	87.2%	87.2%	0.1%	80.0%	81.1%	-1.3%	91.4%	91.3%	0.1%	59.5%	55.8%	6.7%
Venezuela	0.1%	0.0%	194.5%	0.0%	0.0%	-8.7%	0.1%	0.1%	115.0%	0.5%	0.2%	109.5%
Netherlands	0.8%	1.2%	-36.1%	0.5%	0.9%	-45.6%	0.2%	0.3%	-27.8%	5.0%	7.8%	-36.4%
Canada	3.8%	3.9%	-3.2%	8.5%	8.8%	-3.4%	4.7%	5.2%	-9.4%	8.3%	9.9%	-16.1%
Brazil	0.7%	0.6%	16.5%	0.4%	0.6%	-32.9%	0.2%	0.2%	-22.6%	1.4%	1.0%	34.6%
Colombia	1.3%	0.9%	44.8%	1.6%	1.4%	16.6%	0.9%	0.9%	3.5%	7.7%	6.9%	11.6%
Argentina	0.6%	0.4%	71.0%	3.5%	2.9%	18.2%	0.8%	0.5%	47.8%	2.2%	1.4%	65.9%
Chile	0.4%	0.2%	61.7%	1.2%	1.0%	13.7%	0.3%	0.2%	47.7%	1.2%	0.7%	77.1%
Peru	0.6%	0.2%	266.9%	1.3%	0.7%	84.6%	0.3%	0.1%	330.9%	2.3%	0.7%	231.2%
UK	0.5%	0.6%	-11.1%	0.2%	0.2%	17.8%	0.1%	0.1%	36.9%	0.9%	0.7%	24.2%
Italy	0.1%	0.1%	28.2%	0.1%	0.1%	-2.6%	0.1%	0.1%	-7.0%	0.2%	0.3%	-31.6%
Total main mkt	96.1%	95.2%	1.0%	97.3%	97.6%	-0.4%	99.1%	98.9%	0.2%	89.3%	85.5%	4.5%
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%



VISITORS BY AGE MARCH 2024/2023

141,380
ARRIVALS

25.8%
GROWTH

	2023	Growth	2024	% Growth
0 - 11	6,974	4,544	11,518	65.2%
12-19	7,328	5,981	13,309	81.6%
20 - 29	12,415	4,058	16,473	32.7%
30 - 39	16,668	3,505	20,173	21.0%
40 - 49	17,318	6,718	24,036	38.8%
50 - 59	22,218	3,004	25,222	13.5%
60 - 69	18,966	1,113	20,079	5.9%
70 +	10,519	45	10,564	0.4%
Not Stated	11	-5	6	-45.5%
Total	112,417	28,963	141,380	25.8%























GENERATIONS

MARCH 2024/2023

141,380
ARRIVALS

25.8%
GROWTH

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
Gen A	5,485	 3,242	8,727	59.1%	 4.9%	 6.2%
Gen Z	15,635	 10,205	25,840	65.3%	 13.9%	 18.3%
Millennials	25,881	 5,729	31,610	22.1%	 23.0%	 22.4%
Gen X	29,374	 8,036	37,410	27.4%	 26.1%	 26.5%
Baby Boomers	32,174	 1,812	33,986	5.6%	 28.6%	 24.0%
Silent Generations	3,857		3,801	-1.5%	 3.4%	 2.7%
Age not specified	11	-5	6	-45.5%	 0.0%	 0.0%
Total	112,417	 28,963	141,380	25.8%		



PURPOSE OF VISIT MARCH 2024/2023

141,380
ARRIVALS

25.8%
GROWTH

	2024	Market share 2024	2023	Market share 2023	% Growth
Sun, Sand, Sea	125,046	88.4%	92,832	82.6%	34.7%
Business	2,064	1.5%	2,334	2.1%	-11.6%
Conference	481	0.3%	620	0.6%	-22.4%
Honeymoon	2,366	1.7%	2,077	1.8%	13.9%
Diving	517	0.4%	409	0.4%	26.4%
Incentive	1,027	0.7%	1,119	1.0%	-8.2%
Meeting	725	0.5%	773	0.7%	-6.2%
Not specified	6,974	4.9%	9,468	8.4%	-26.3%
Shopping	841	0.6%	705	0.6%	19.3%
Wedding	1,339	0.9%	2,080	1.9%	-35.6%
Total	141,380	100.0%	112,417	100.0%	25.8%



CARRIERS MARCH 2024/2023

141,380
ARRIVALS

25.8%
GROWTH

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
JETBLUE	26,408	7,730	34,138	29.3%	23.5%	24.1%
AMERICAN AIRLINES	25,488	1,647	27,135	6.5%	22.7%	19.2%
DELTA AIRLINE	15,164	5,048	20,212	33.3%	13.5%	14.3%
UNITED AIRLINES	11,957	4,463	16,420	37.3%	10.6%	11.6%
SOUTHWEST AIRLINES	4,975	1,615	6,590	32.5%	4.4%	4.7%
COPA AIRLINES	3,534	1,999	5,533	56.6%	3.1%	3.9%
AVIANCA	3,789	565	4,354	14.9%	3.4%	3.1%
SPIRIT AIRLINES	1,472	2,586	4,058	175.7%	1.3%	2.9%
WESTJET AIRLINES	2,253	1,327	3,580	58.9%	2.0%	2.5%
AIR CANADA	2,787	265	3,052	9.5%	2.5%	2.2%
KLM ROYAL DUTCH	3,298	-817	2,481	-24.8%	2.9%	1.8%
WINGO	1,204	1,071	2,275	89.0%	1.1%	1.6%
LATAM AIRLINES	0	1,865	1,865	-	0.0%	1.3%
DIVI DIVI AIR	1,657	36	1,693	2.2%	1.5%	1.2%
SUNWING AIRLINES	1,501	145	1,646	9.7%	1.3%	1.2%
TUI FLY NL	1,757	-505	1,252	-28.7%	1.6%	0.9%
EZ AIR	1,154	-197	957	-17.1%	1.0%	0.7%
SUN COUNTRY AIRLINES	660	273	933	41.4%	0.6%	0.7%
PRIVATE	1,959	-1,030	929	-52.6%	1.7%	0.7%
BRITISH AIRWAYS	72	476	548	661.1%	0.1%	0.4%
WINAIR	103	407	510	395.1%	0.1%	0.4%
SURINAM AIRWAYS	351	114	465	32.5%	0.3%	0.3%
CHARTER	492	-117	375	-23.8%	0.4%	0.3%
ARAJET	57	161	218	282.5%	0.1%	0.2%
SKY HIGH AVIATION	63	21	84	33.3%	0.1%	0.1%
AIR CENTURY	46	8	54	17.4%	0.0%	0.0%
OTHERS	216	-193	23	-89.4%	0.2%	0.0%
Total	112,417	28,963	141,380	25.8%		



CARRIERS MARCH 2024/2023

141,380
ARRIVALS

25.8%
GROWTH

City	APO Code	March '24	Market share 2024	March'23	Market share 2023	2024 vs 2023
Boston	BOS	20,450	14.5%	20,076	17.9%	1.9%
JFK NY	JFK	20,441	14.5%	16,329	14.5%	25.2%
Newark	EWR	15,047	10.6%	7,466	6.6%	101.5%
Miami	MIA	9,456	6.7%	8,410	7.5%	12.4%
Charlotte	CLT	9,412	6.7%	9,069	8.1%	3.8%
Atlanta	ATL	9,103	6.4%	5,187	4.6%	75.5%
Toronto	YYZ	8,278	5.9%	6,546	5.8%	26.5%
Philadelphia	PHL	6,160	4.4%	6,152	5.5%	0.1%
Panama City	PTY	5,554	3.9%	3,535	3.1%	57.1%
Bogota	BOG	5,191	3.7%	4,443	4.0%	16.8%
Orlando	MCO	4,934	3.5%	4,032	3.6%	22.4%
Fort Lauderdale	FLL	4,123	2.9%	1,507	1.3%	173.6%
Amsterdam	AMS	3,732	2.6%	4,461	4.0%	-16.3%
Chicago	ORD	3,034	2.1%	1,923	1.7%	57.8%
G.Bush DC	IAD	2,860	2.0%	2,706	2.4%	5.7%
Curacao	CUR	2,815	2.0%	3,319	3.0%	-15.2%
Lima, Peru	LIM	1,865	1.3%	0	0.0%	—
Baltimore	BWI	1,662	1.2%	946	0.8%	75.7%
Medellin	MDE	940	0.7%	550	0.5%	70.9%
Minneapolis St. Paul Inter Airp	MSP	933	0.7%	660	0.6%	41.4%
LaGuardia Airport, NY	LGA	811	0.6%	605	0.5%	34.0%
Houston International	IAH	685	0.5%	557	0.5%	23.0%
Dallas Fort Worth Int Airport	DFW	670	0.5%	645	0.6%	—
Gatwick Airport , UK	LGW	548	0.4%	72	0.1%	661.1%
Cali, Alfonso Bonilla Aragon	CLO	511	0.4%	0	0.0%	0
	Others	2,165	1.5%	3,221	2.9%	-32.8%
Total		141,380	100.0%	112,417	100.0%	25.8%

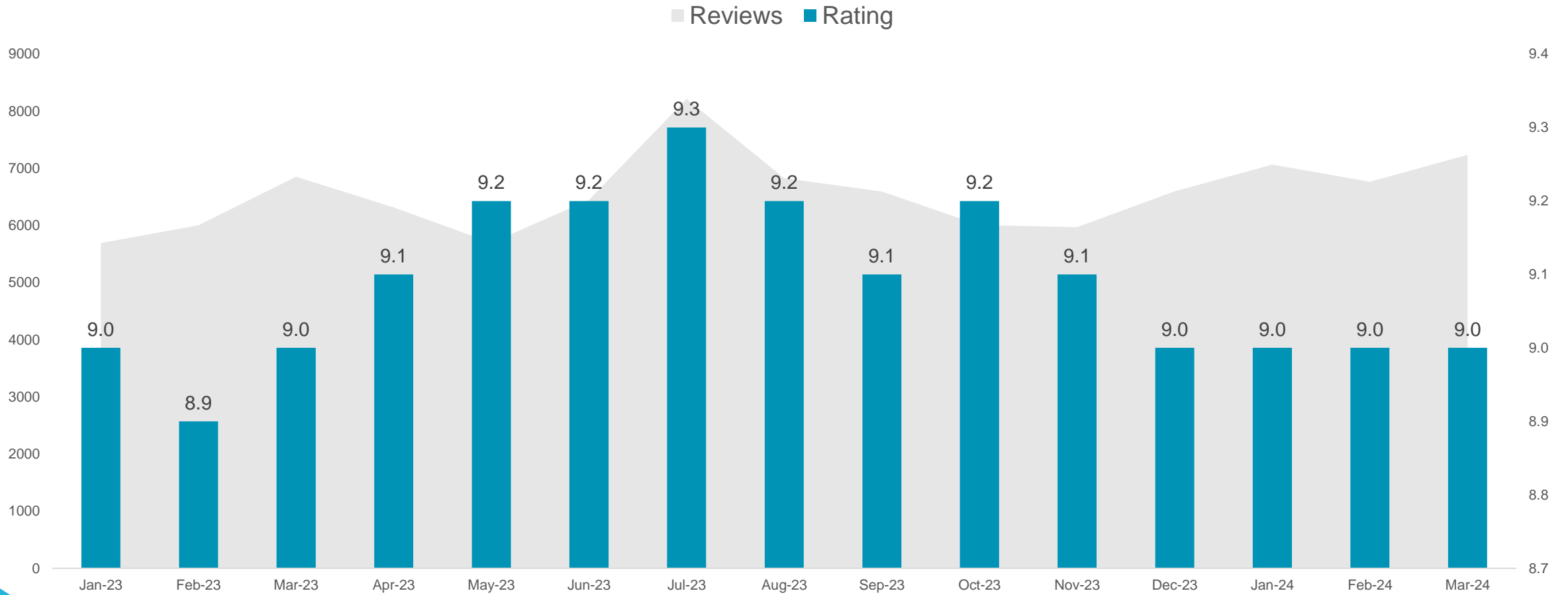
GUEST SATISFACTION





GUEST EXPERIENCE INDEX (GEI)

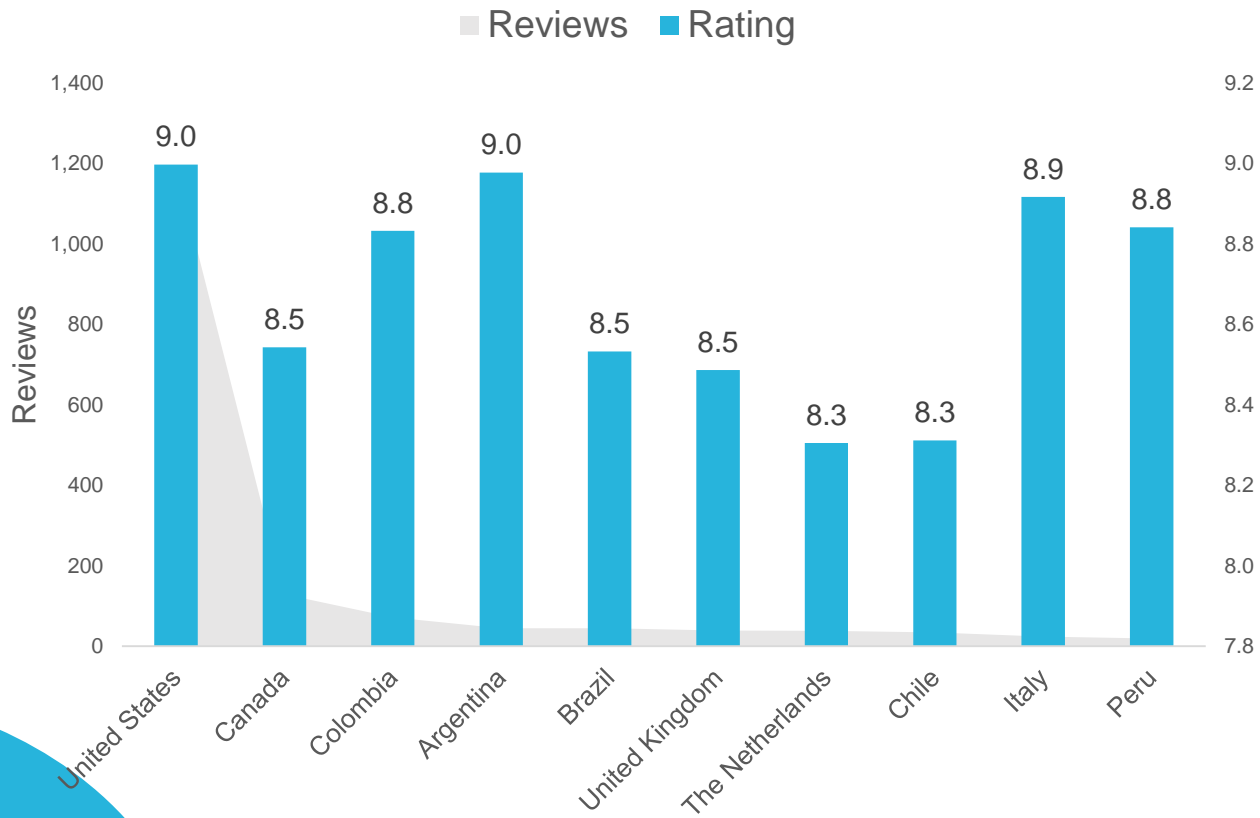
Reviews and Ratings



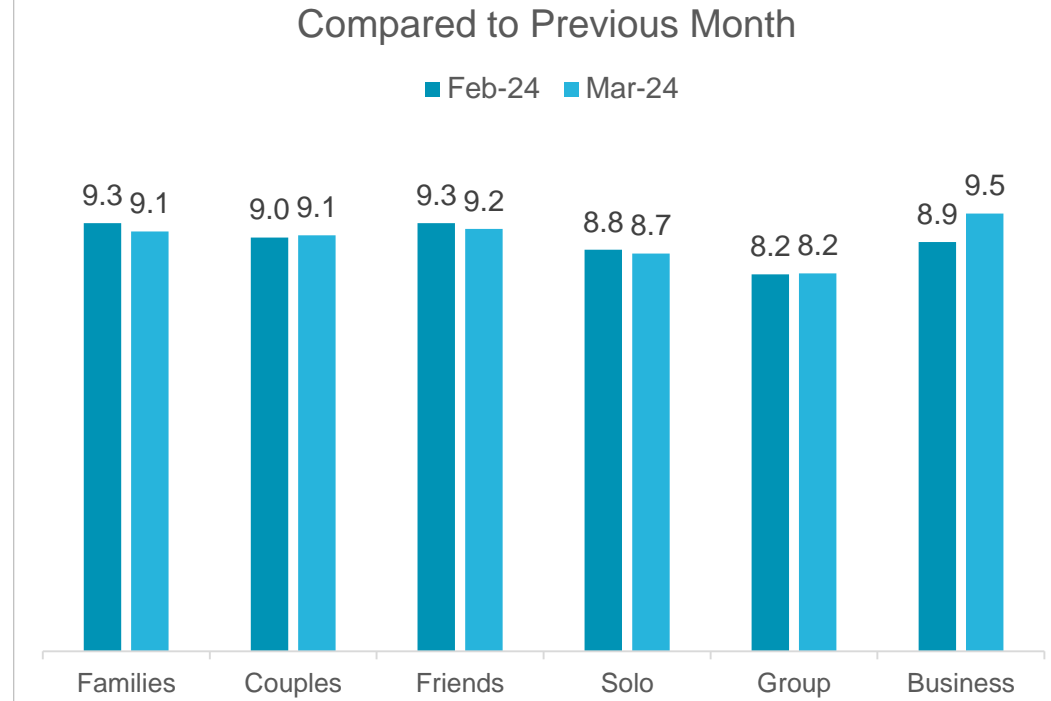


GEI MARCH 2024

MARKETS

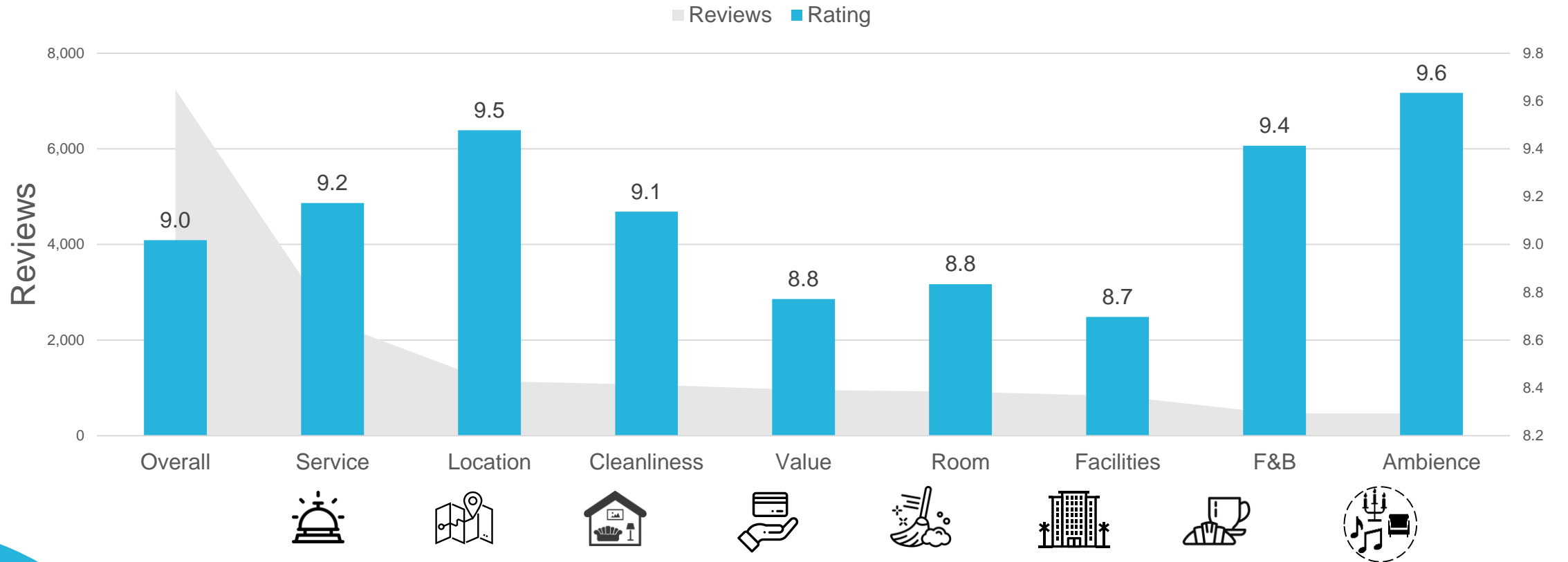


TRAVEL PARTY





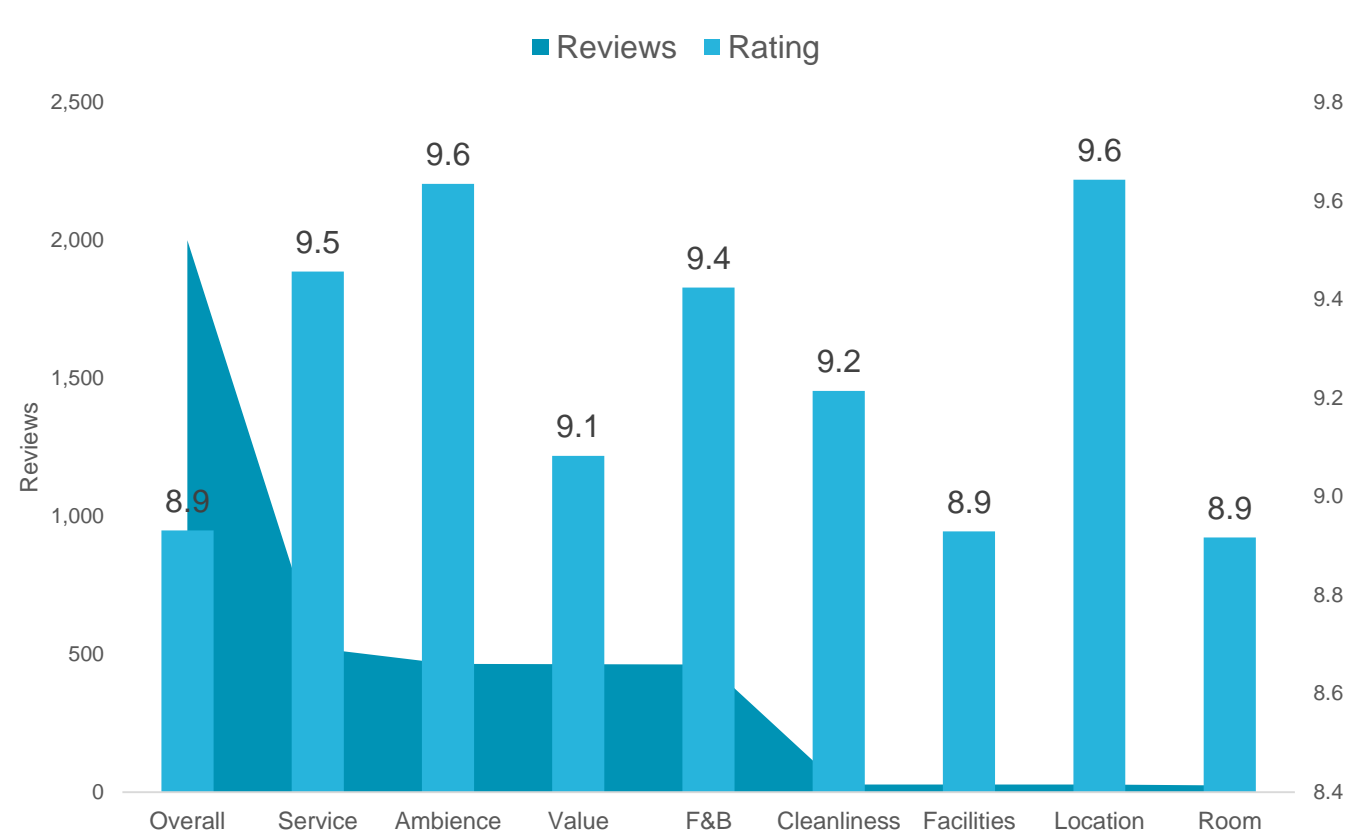
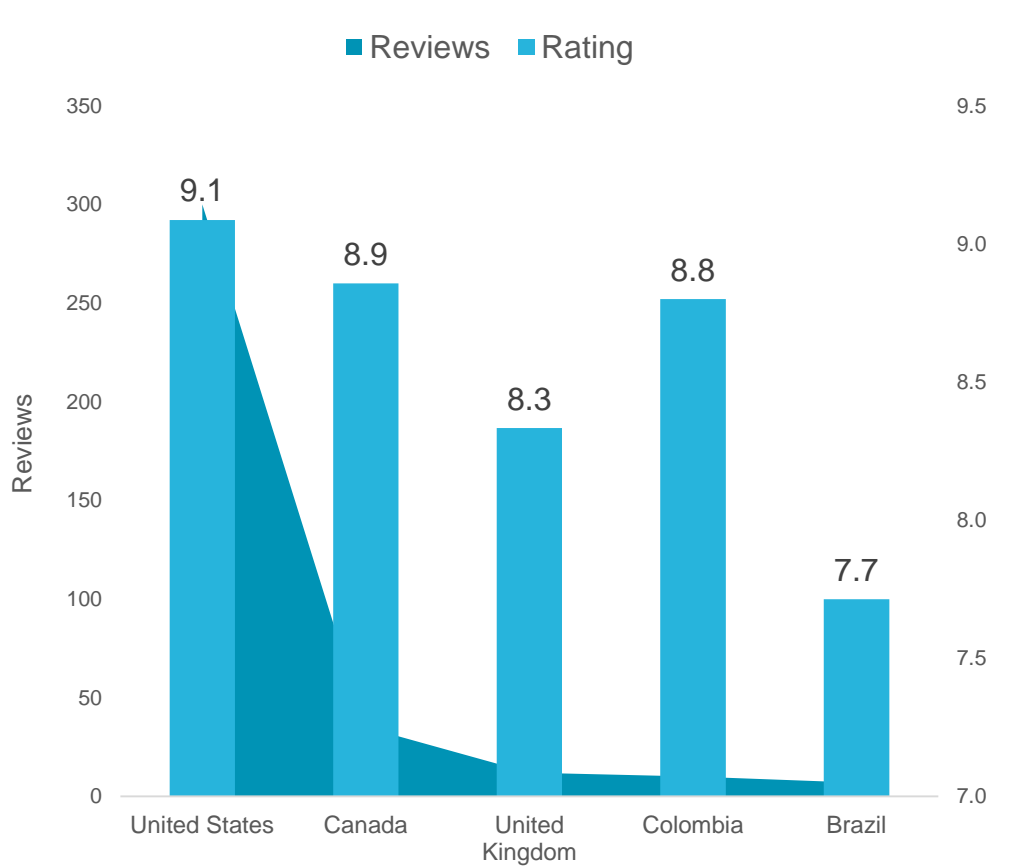
GEI MARCH 2024





RESTAURANT GEI MARCH 2024

MARKETS





VACATIONS RENTALS

 **Transparent**
an OTA INSIGHT company

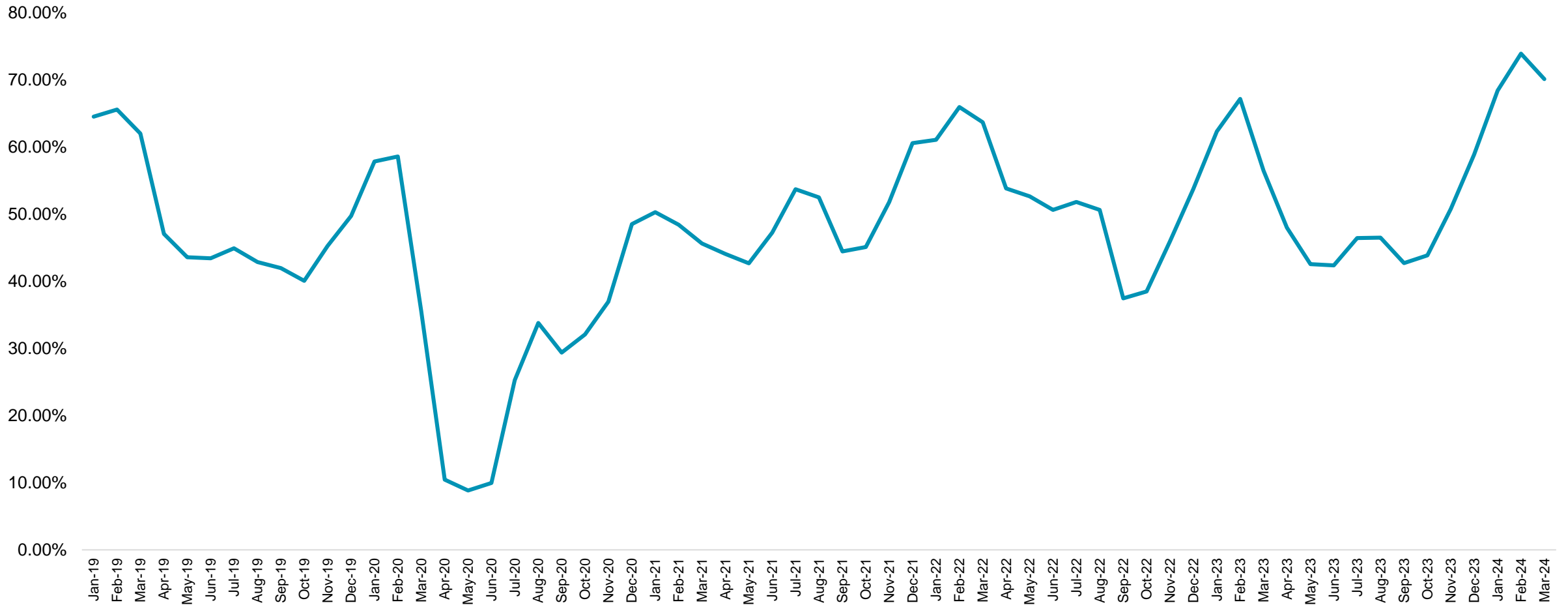
INTRODUCTION

- ▶ 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.



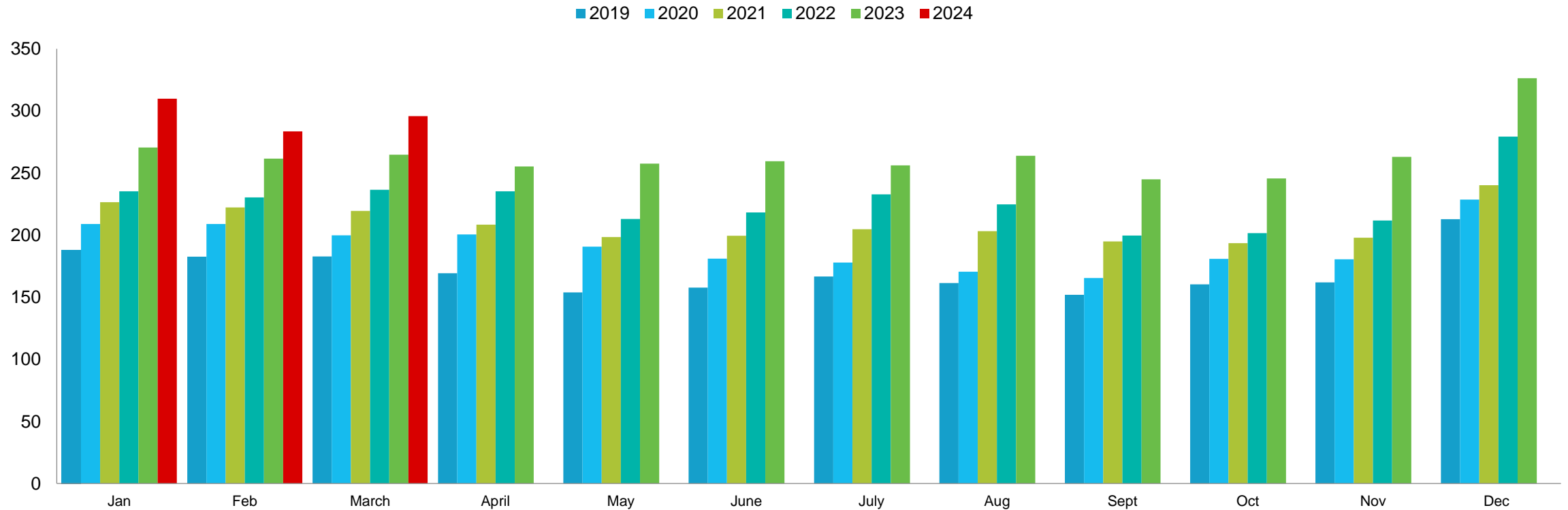
OCCUPANCY

March 2023 Occupancy: 56.5% | March 2024 Occupancy: 70.1%



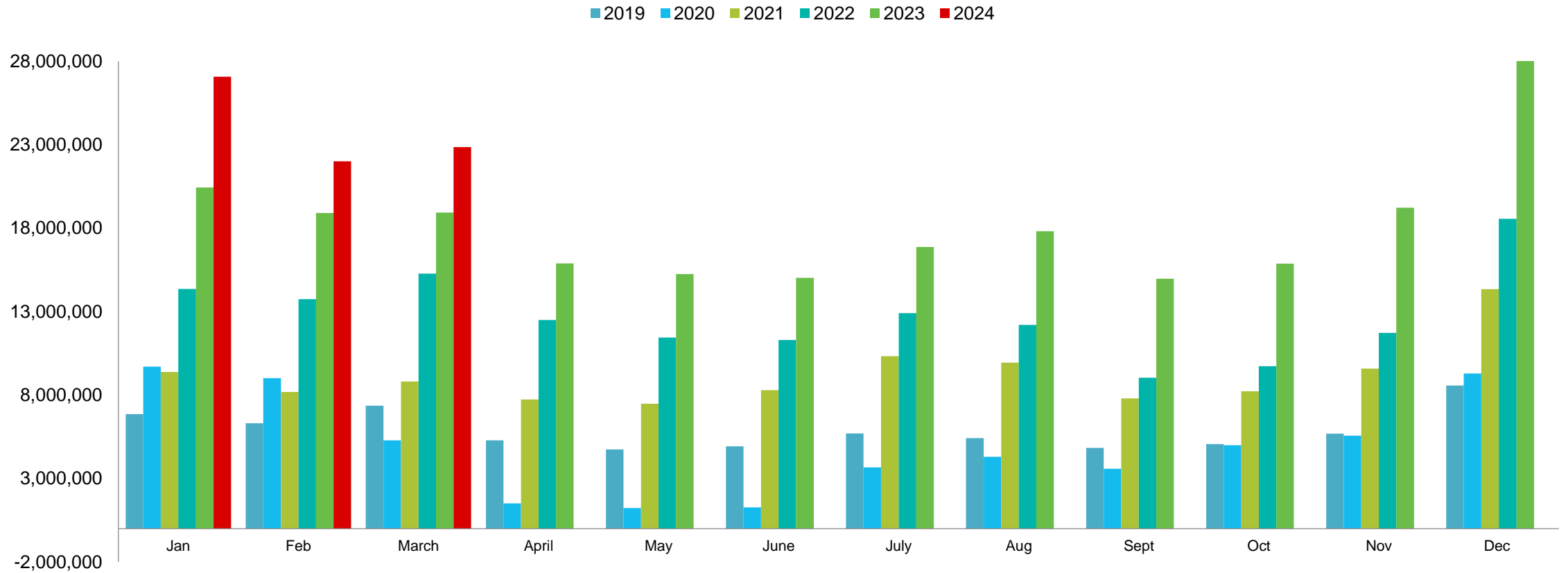
ADR

March 2023 ADR: \$265 | March 2024 ADR: \$296



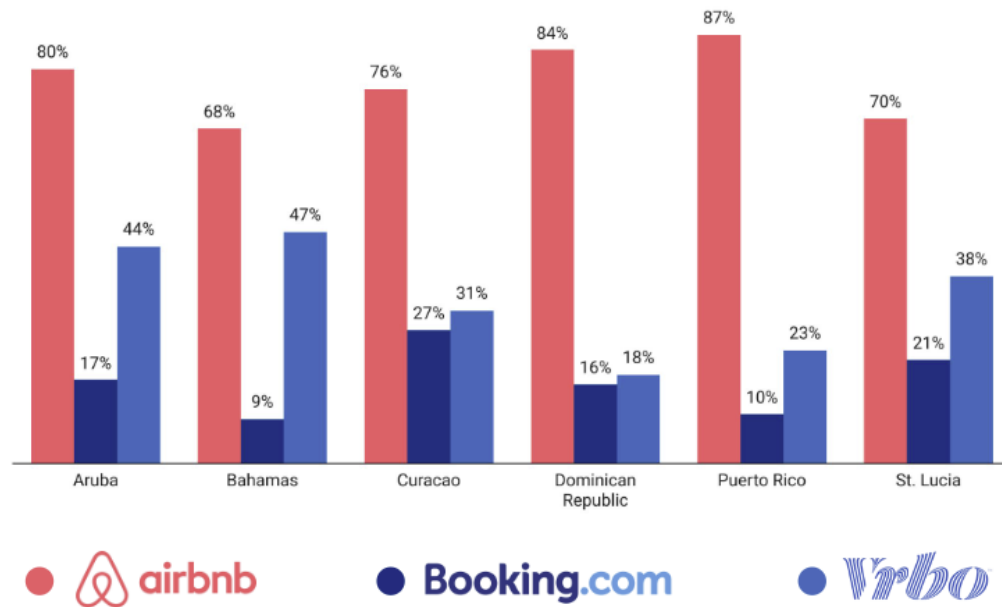
REVENUE

Total Revenue YTD March 2024: USD\$71,938,828 | Total Revenue YTD March 2023: USD\$58,289,641
March 2024: USD\$22,856,992 | March 2023: USD\$18,941,874



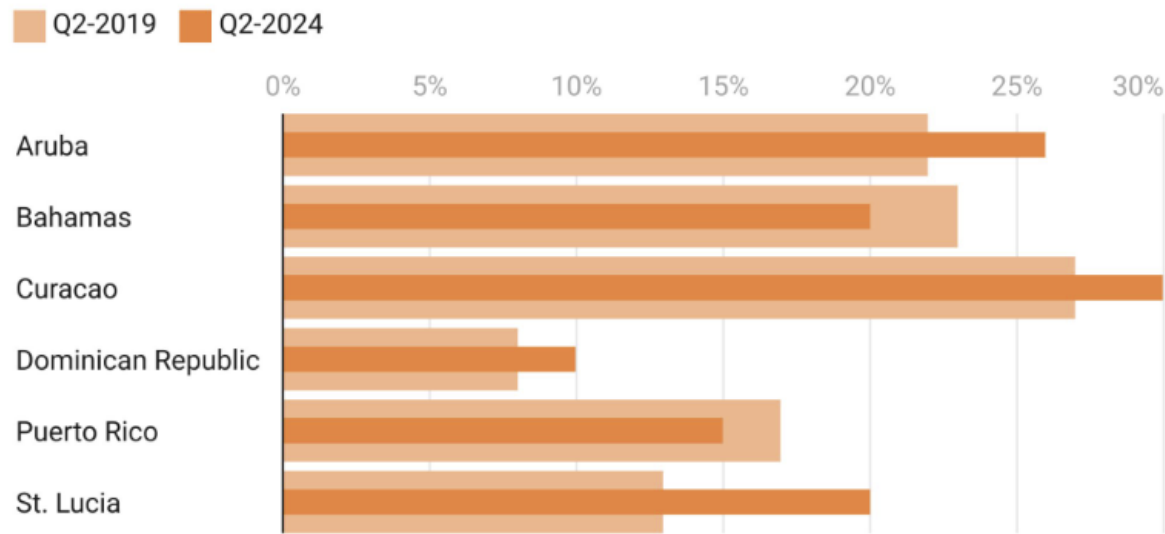
Caribbean destinations & short-term rentals

April 2024



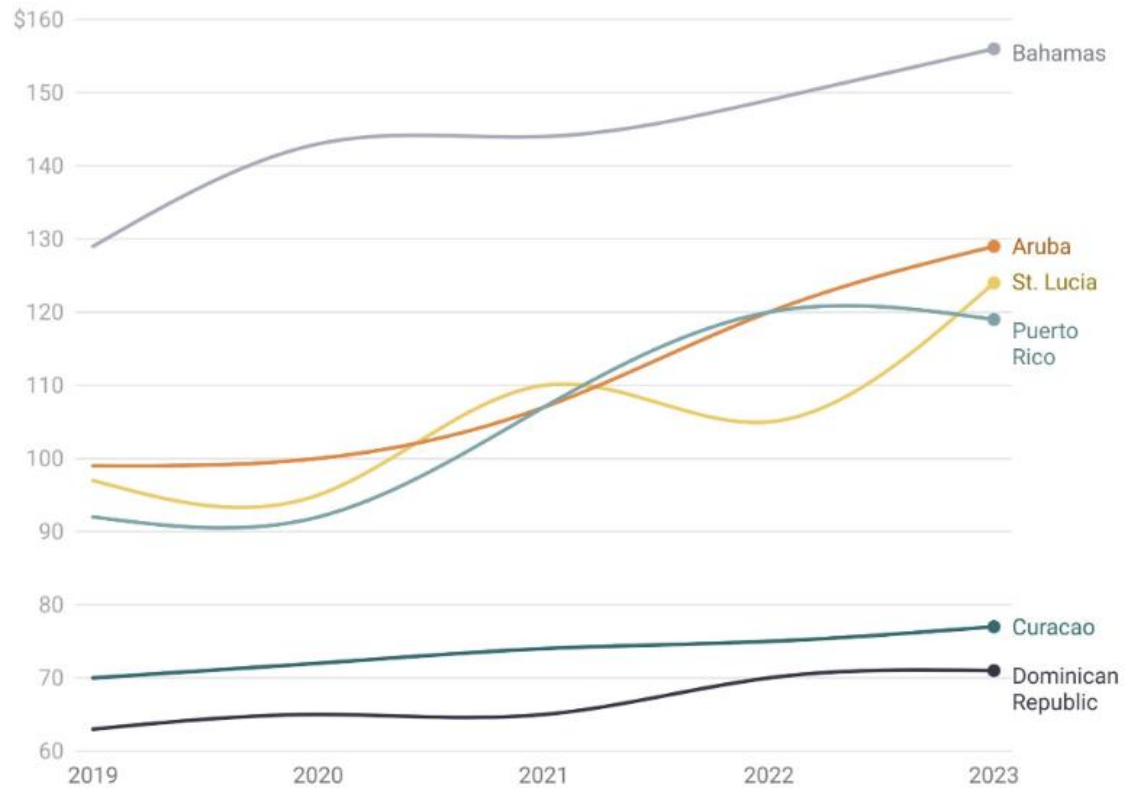
Airbnb lists the lion's share of supply in the Caribbean

% of properties listed per platform shows Airbnb's share has grown 18% since 2019, while Booking and Vrbo have shrunk by 15% and 11% respectively



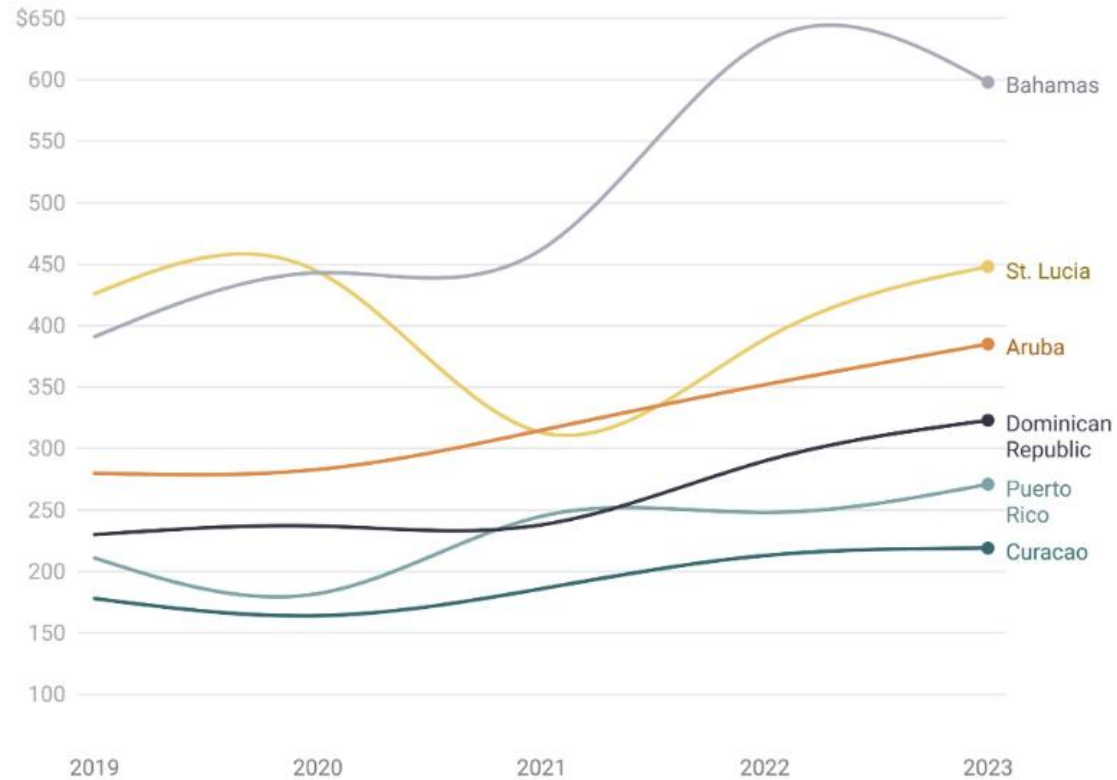
Occupancy on the books for Q2 up 9%

Compared with 2019, occupancy on the books as of February for Q2 is 9% up. While Bahamas and Puerto Rico see a slight drop, St.Lucia is expecting the biggest increase in occupancy (+50%)



Short-term rental rates are up 23%

Average daily rates for 1 bedroom short-term rentals show a general increase in the Caribbean over the last 4 years, over and above occupancy, with Bahamas top (\$156) and Dominican Republic cheapest (\$71)



Hotel rates are up 31%

In addition to growing more, rates for hotels are higher than for short-term rentals too, with Bahamas still the most expensive (\$598), but Curaçao cheapest (\$219)

A large cruise ship, the Jewel of the Seas, is docked in a harbor. The ship is white with blue and green accents. In the background, a coastal town with colorful buildings is visible under a blue sky with scattered white clouds. The water is a clear, vibrant blue. The ship's name "JEWEL OF THE SEAS" is visible on its side.

TIDBITS: Cruise Survey Report 2023 PART 1

Methodology

Research Objectives:

The Cruise Report shares information about the on-island spending pattern of our cruise visitors, their on-island experience, cruise travel habits and motivations and the likelihood of returning to Aruba as stay-over visitor.

The Aruba Tourism Authority conducted monthly face-to-face surveys from April 29 – December 27, 2023, in the visitor center at the Aruba Port Authority.

The targeting audience were cruise visitors who are departing the island prior to boarding their cruise.

In total 2345 surveys were collected. These surveys were then checked for completeness and imported in our survey analyses tool- Qualtrics, where all data is stored and kept.



Methodology

1. Sample Size

Sample size formula: $n = \left(\frac{ZS}{E} \right)^2 \left[\frac{(1.96 * 0.5)}{0.05} \right]^2 = 385$

ATA collected a total of 2345

Z= Z-score corresponding to level of confidence (in ATA's case 1,96 corresponding to 95% level of confidence). S= sample standard deviation or estimate of the population deviation: 0.5 – this is mostly used in surveys. E= acceptable magnitude of error 5%- the level of error we are willing to accept. In our case 5%.

2. Data Cleansing

To cleanse the spend data a new variable was created in SPSS labeled "Total Spend".

From which the Z-score was calculated :

$$Z = \frac{(X - \bar{X})}{sd},$$

Every entry smaller or greater than -3 / 3 was removed as an outlier.

3. Calculations

Per spending category the total average spend per party was calculated, and then weighted by share of on shore visit. For example 44% of the survey respondents reported spending an average of \$25.00 on food and beverages. Spread over the cruise parties that visited Aruba, this represented an average of \$10.99 per party (weighted). ($\$25 \times 44\% = \10.99). The weighted sum of each 15 spending categories is the total spend per party. The total spend per party is divided by the party size, to get the average spend per person.

2.

Demographics



Demographics

CAN: 12%

UK: 3%

GER: 2%

NED: 1%

USA: 72%

Rest of the World 9%:

Germany, Brazil,
Argentina, and The
Netherlands

Top 5 States:

Florida: 20%

New York: 7%

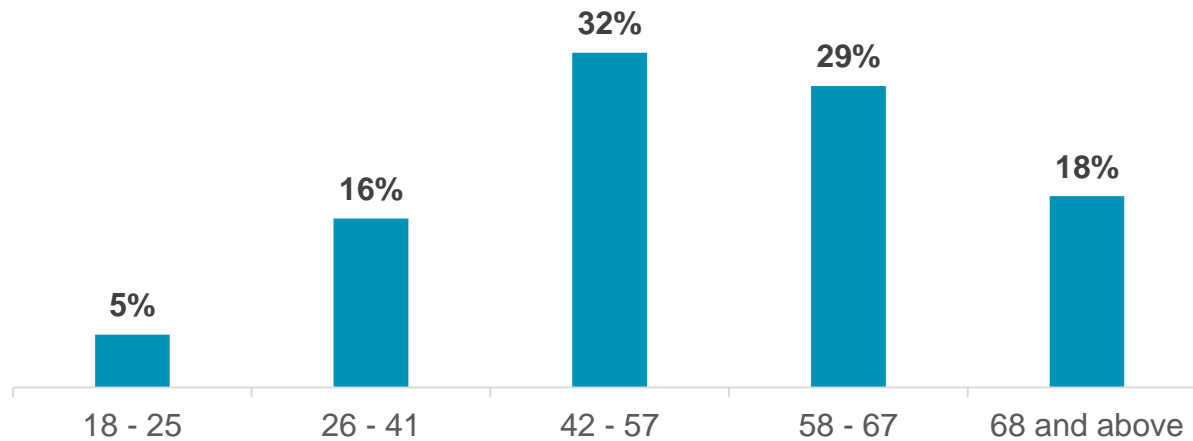
Texas: 5%

North Carolina: 5%

Georgia: 5%

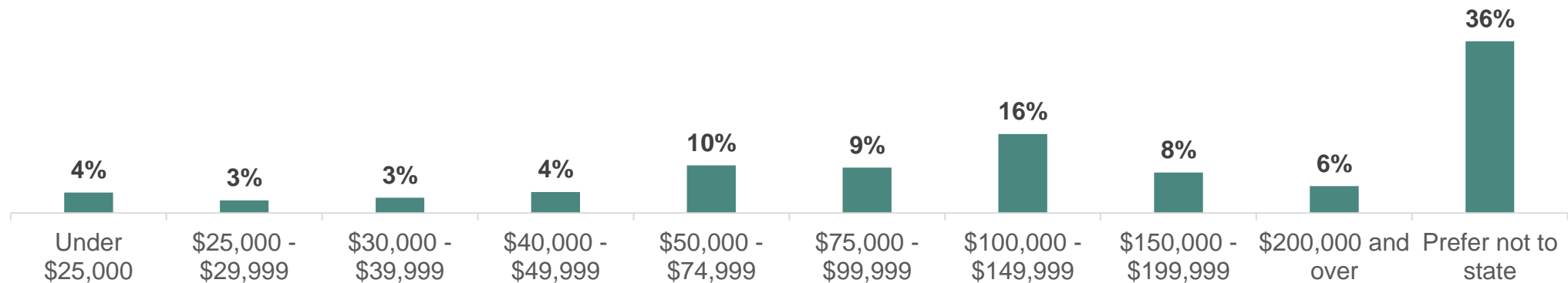
Age Group

The largest group belongs to the Baby Boomer generation, with visitors aged 58+ (47%) of the total. Additionally, there's a significant presence of Generation X visitors aged 42 – 57 (32%), while the younger generation Gen Z (16%).



Household Income

The majority of respondents prefer not to disclose their income (36%). Among those who disclosed, the highest proportion falls within the \$100,000 to \$149,999 income bracket (16%), followed by the \$50,000 to \$74,999 bracket (10%). This suggests a concentration of respondents in the mid to upper-income brackets.



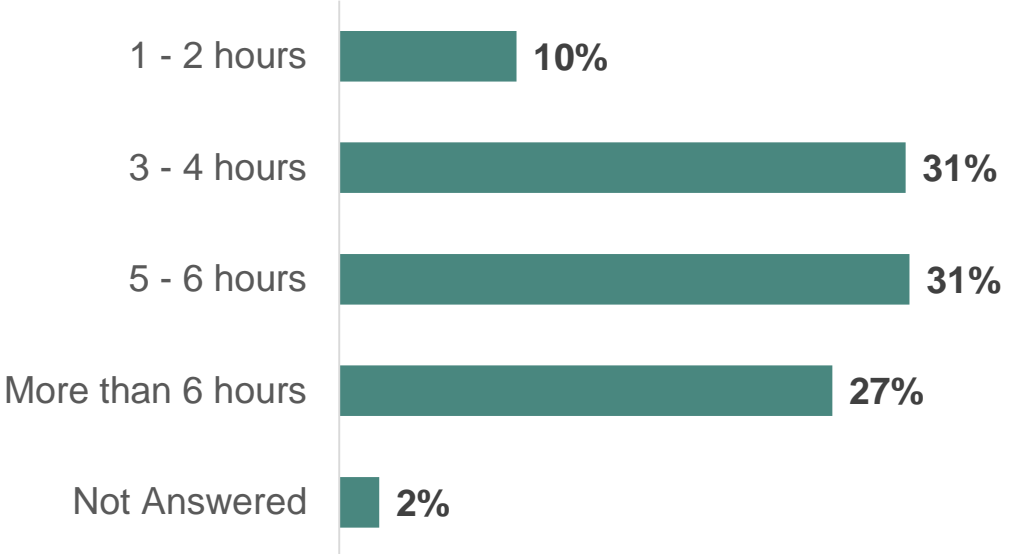
3.

Cruise



Hours on-island

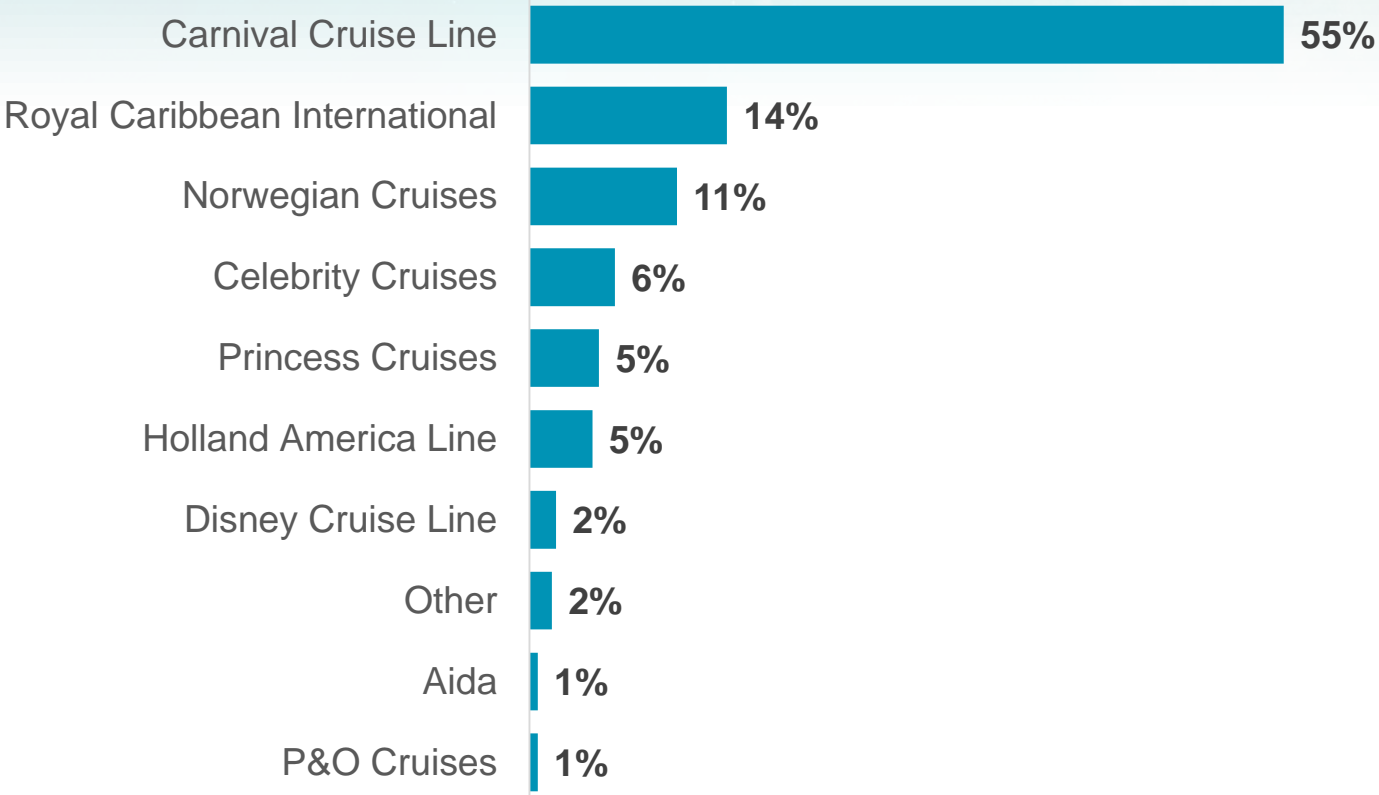
The data illustrates the distribution of cruise visitors' hours spent on the island, with the majority (31%) spending 3-4 hours and an equal percentage (31%) spending 5-6 hours. Interestingly, a significant portion (27%) spend more than 6 hours, suggesting a notable interest in prolonged exploration.



31% of passengers spent between 5-6 hours Ashore.

31% of passengers spent more than 7 hours.

Cruise Lines



55% Carnival Cruise Line: 28% increase compared to 2018 (27%).

14% Royal Caribbean: 3% increase compared to 2018 (11%).

5% indicated to have visited aboard the Princess Cruise with a decline of -7% compared to 2018 (12%)

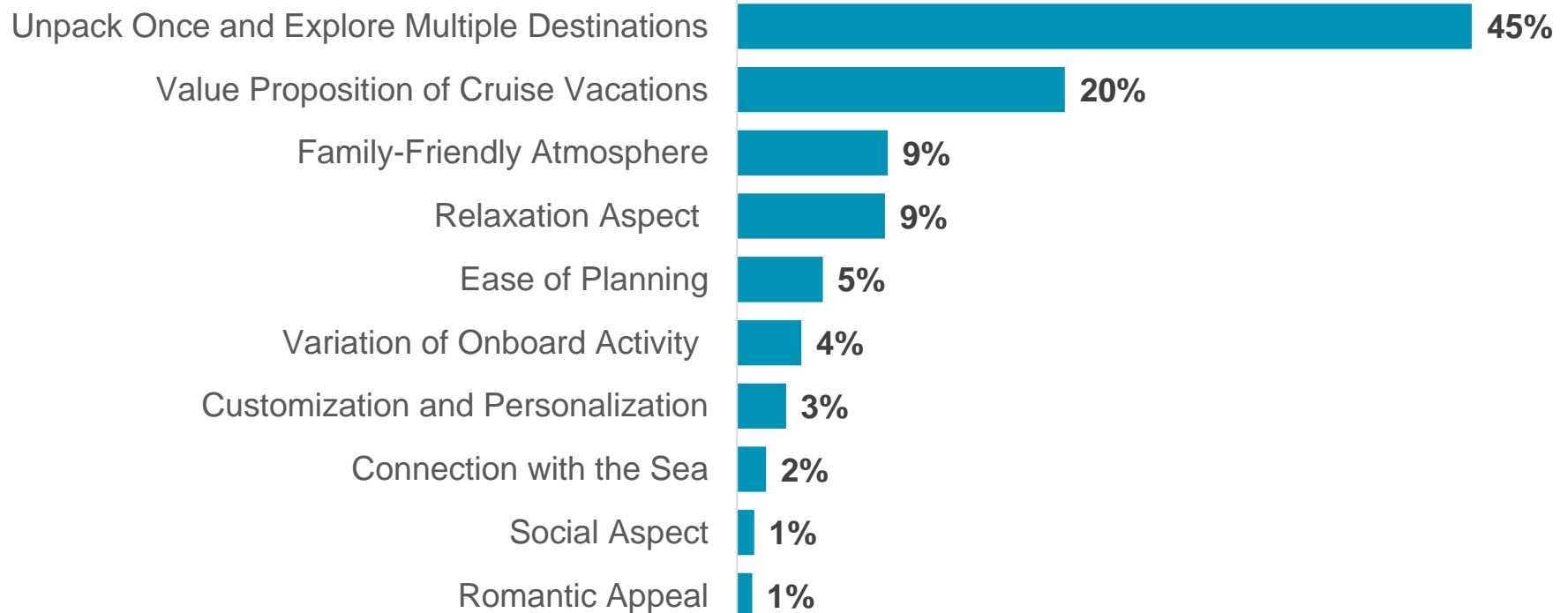
4.

Key Decision Factors



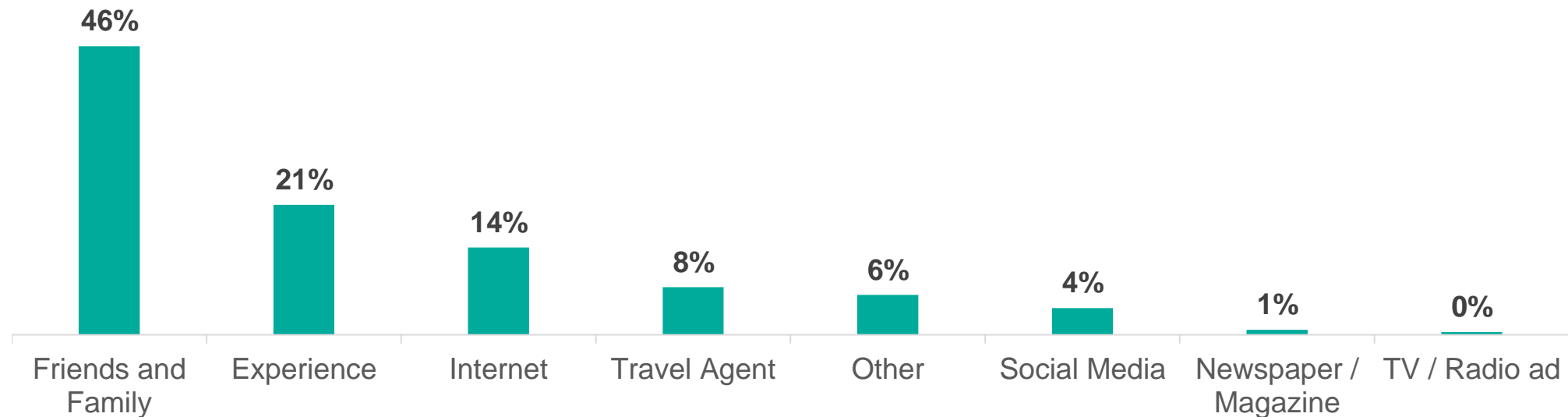
Top Motivations for a Cruise trip

The primary motivator for choosing a cruise vacation is the convenience of unpacking once and exploring multiple destinations (45%). This, as the primary motivator, has been a recurring trend in the past years. As the second top motivator the value proposition of cruise vacations at 20%.



Source of Information

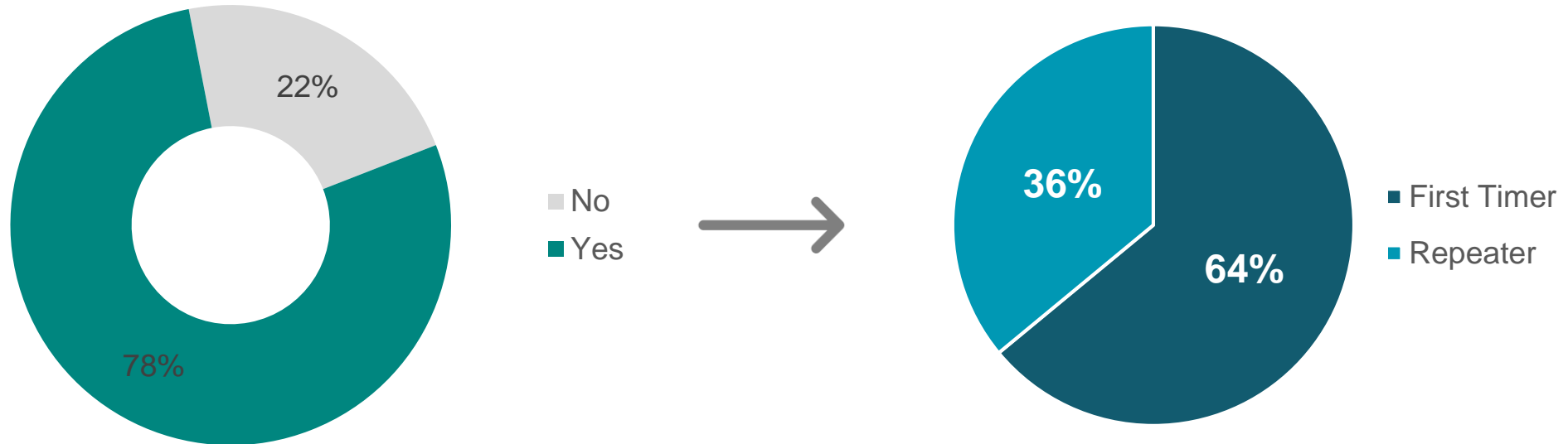
Friends and family play a significant role (46%) in influencing decisions regarding cruises and personal experience (21%), which indicates a reliance on personal recommendations (word-of-mouth). Meanwhile, online resources, such as the internet and social media (18%), reflect the growing influence of digital platforms in travel decision-making. Traditional sources like travel agents, newspapers, and TV/radio ads have a comparatively lesser impact, with only 9% collectively.



Influence of Aruba on Cruise Itinerary

78% of the respondents indicated that Aruba being on the itinerary influenced their decision to take that specific Cruise.

*Further examination through a cross-tab analysis unveiled that among those influenced, 64% were first-timers, while 36% were repeat visitors to Aruba.



Q: Did the presence of Aruba on the itinerary influence you to take the cruise?

*Cross tab between repeat visitor and Aruba on the itinerary

N: 2345

5. Cruise Spend On-island



Cruise Spend

2023

Spending 2023	Average spend per party in \$	% On Island Spend (weighted)	Average spend per party in USD (weighted)
Souvenirs/Local arts	\$ 62.89	65%	\$ 41.11
F&B	\$ 67.92	71%	\$ 48.31
Prepaid Tours	\$ 199.70	46%	\$ 91.29
Tours	\$ 112.06	22%	\$ 24.52
Car Rental	\$ 105.25	4%	\$ 4.31
Taxi	\$ 48.39	20%	\$ 9.64
Public Transport	\$ 32.24	9%	\$ 2.83
Entertainment	\$ 199.89	8%	\$ 15.85
Telephone/Internet	\$ 72.41	8%	\$ 5.53
Retail	\$ 81.73	12%	\$ 10.21
Apparel	\$ 91.65	28%	\$ 25.95
Jewelry	\$ 610.92	14%	\$ 85.97
Watches/Electronics	\$ 646.58	5%	\$ 31.71
Perfume	\$ 73.66	7%	\$ 4.96
Others	\$ 112.00	12%	\$ 12.94
Total Avg. Spend per Party			\$ 415.14
Party size			2.3
Avg. Spend per Person			\$ 177.42

Cruise Spend

Spending in 2018

Spending 2018	Average spend per party in \$	% On Island Spend (weighted)	Average spend per party in USD (weighted)
Local arts & crafts	\$ 56.53	47%	\$ 26.36
F&B	\$ 55.45	35%	\$ 19.17
Prepaid Tours	\$ 161.20	26%	\$ 42.00
Tours	\$ 100.28	31%	\$ 31.07
Car Rental	\$ 117.59	6%	\$ 6.81
Taxi	\$ 36.30	23%	\$ 8.22
Public Transport	\$ 12.69	7%	\$ 0.88
Entertainment	\$ 93.68	4%	\$ 4.09
Telephone	\$ 29.86	1%	\$ 0.32
Retail	\$ 49.23	15%	\$ 7.60
Apparel	\$ 59.85	15%	\$ 8.97
Jewelry	\$ 303.65	6%	\$ 18.02
Watches	\$ 150.65	4%	\$ 6.12
Perfume	\$ 59.03	5%	\$ 3.15
Others	\$62.86	9%	\$5.84
Total Avg. Spend per Party			\$ 188.40
Party size			2.3
Avg. Spend per Person			\$ 81.70



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

