

DECEMBER 2023

Monthly Report



★ 2023 PERFORMANCE

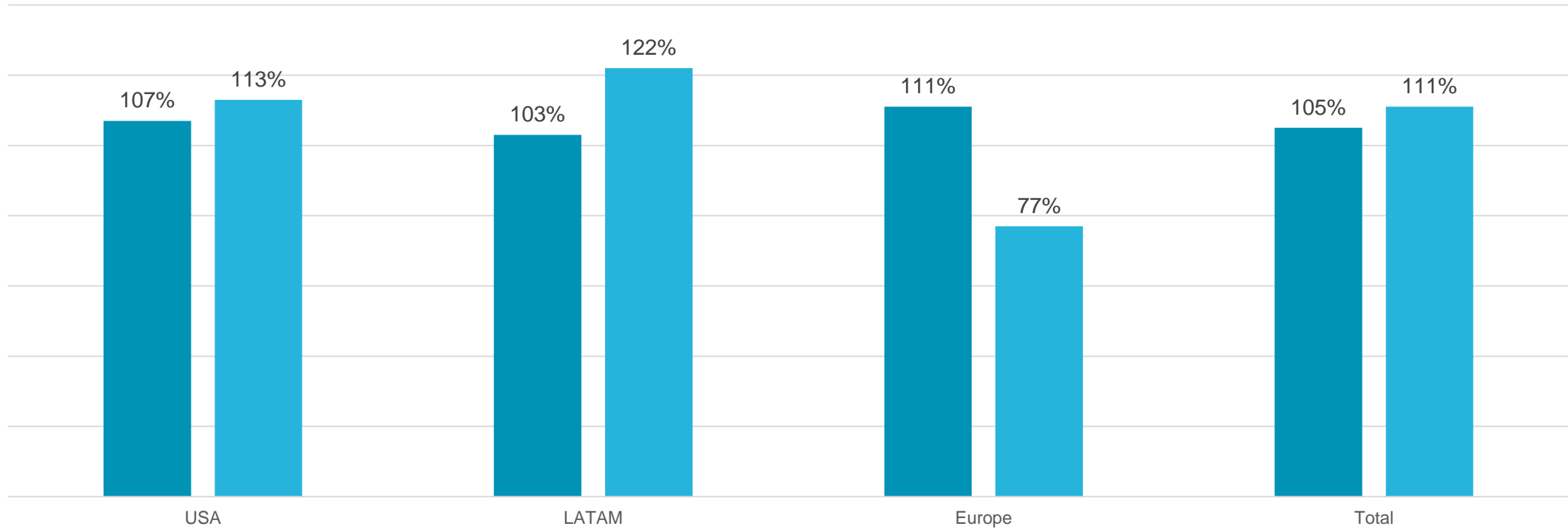
Recovery vs 2019

111%

Corporate Plan Target

105%

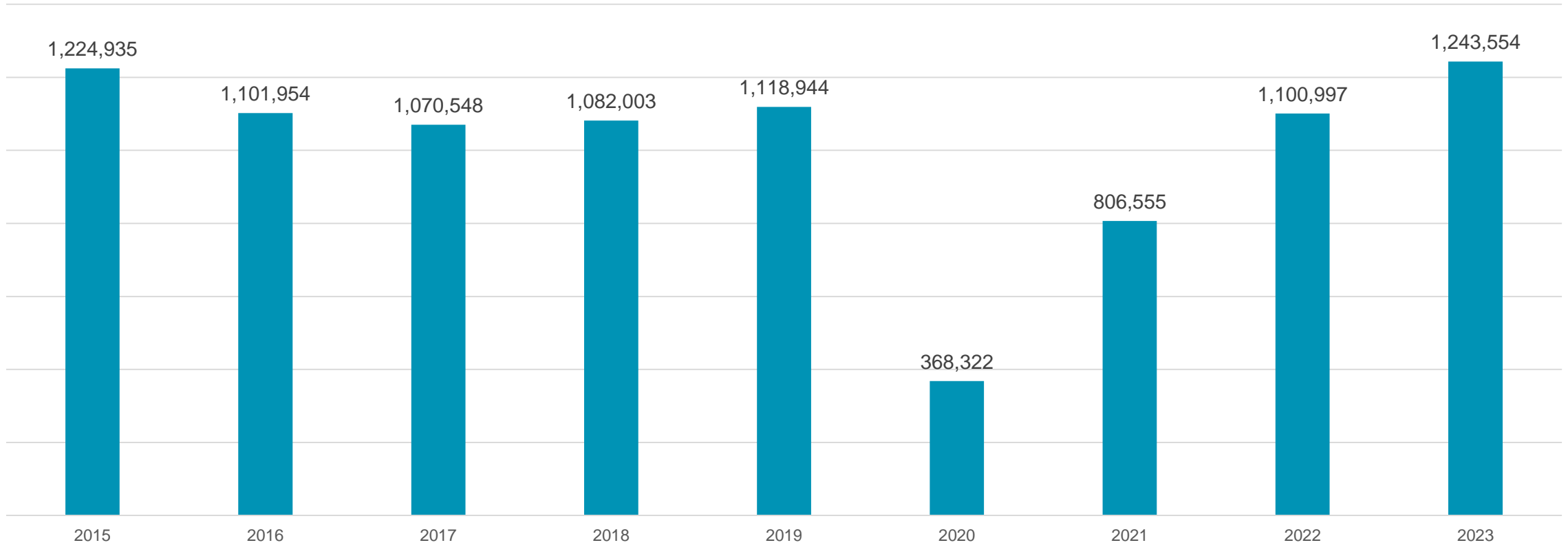
■ Corporate Plan 2023 Target ■ YER 2023





2015- 2023 STAY OVER ARRIVALS

Arrivals



★ STAY-OVER VISITOR ARRIVALS RECOVERY VS 2019

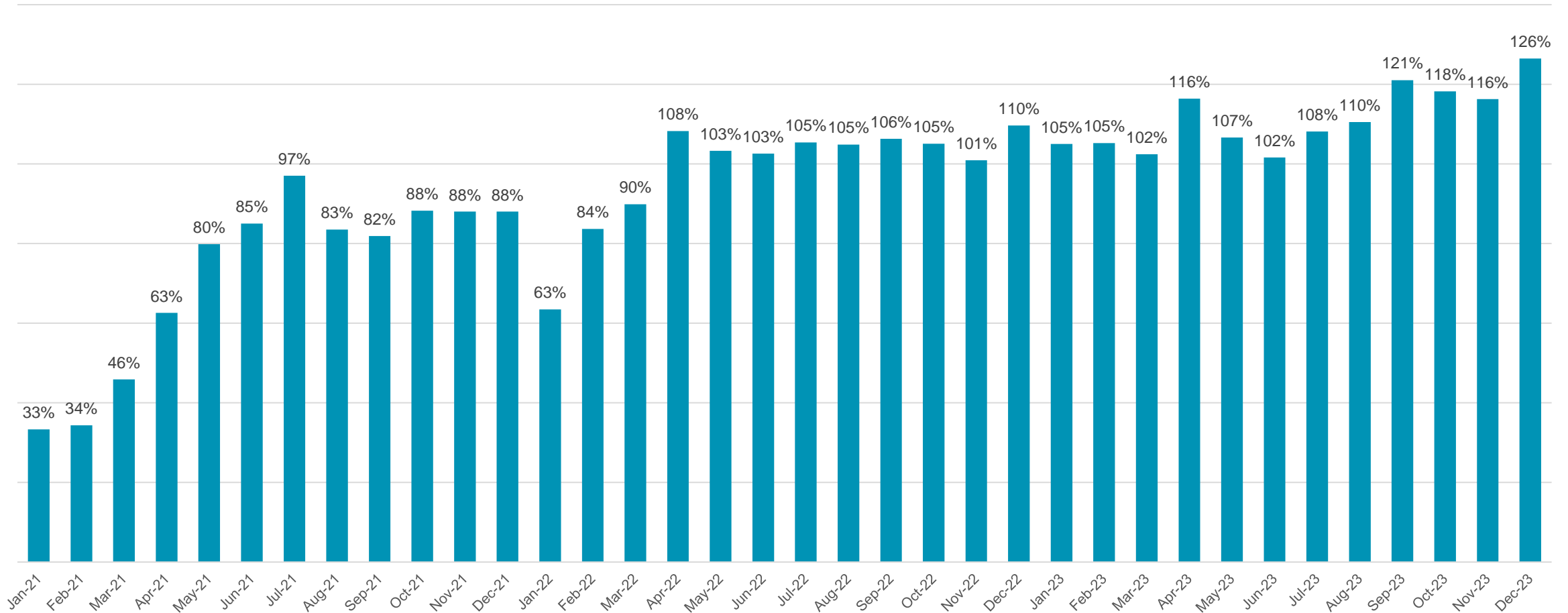
Recovery vs 2019

111%

% MONTHLY RECOVERY TOTAL

Corporate Plan Target

105%



★ STAY-OVER VISITOR ARRIVALS RECOVERY VS 2019

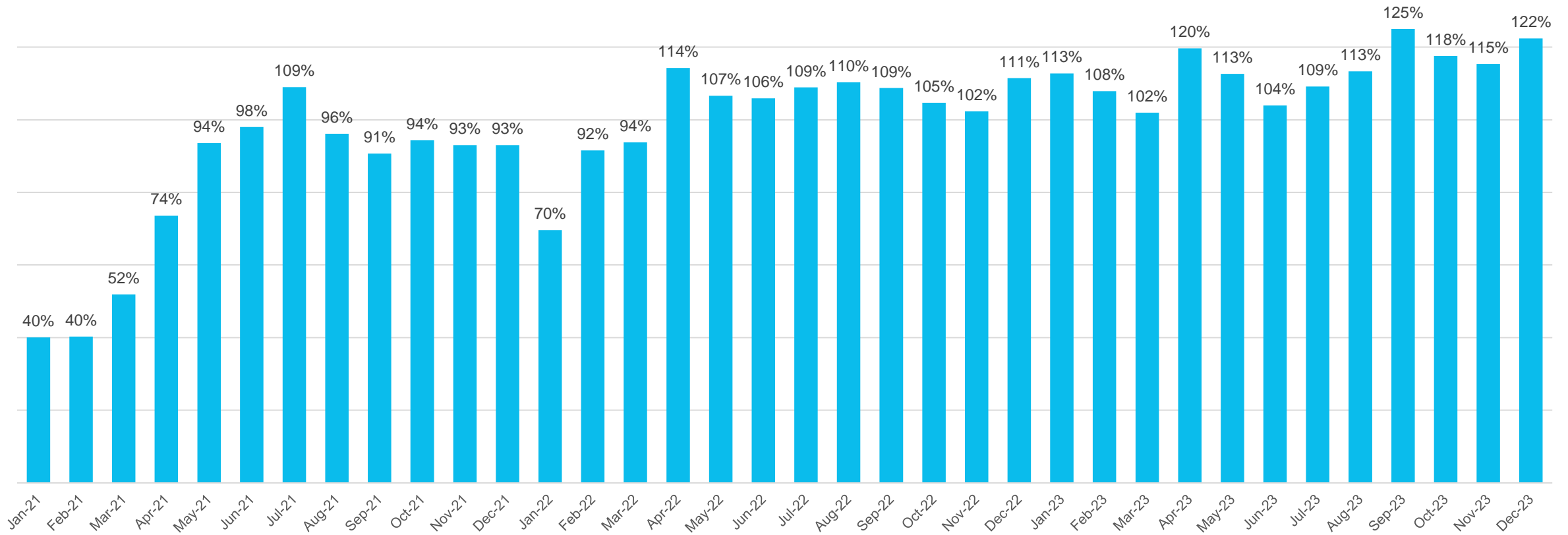
Recovery vs 2019

113%

% MONTHLY RECOVERY USA

Corporate Plan Target

107%



★ STAY-OVER VISITOR ARRIVALS RECOVERY VS 2019

Recovery vs 2019

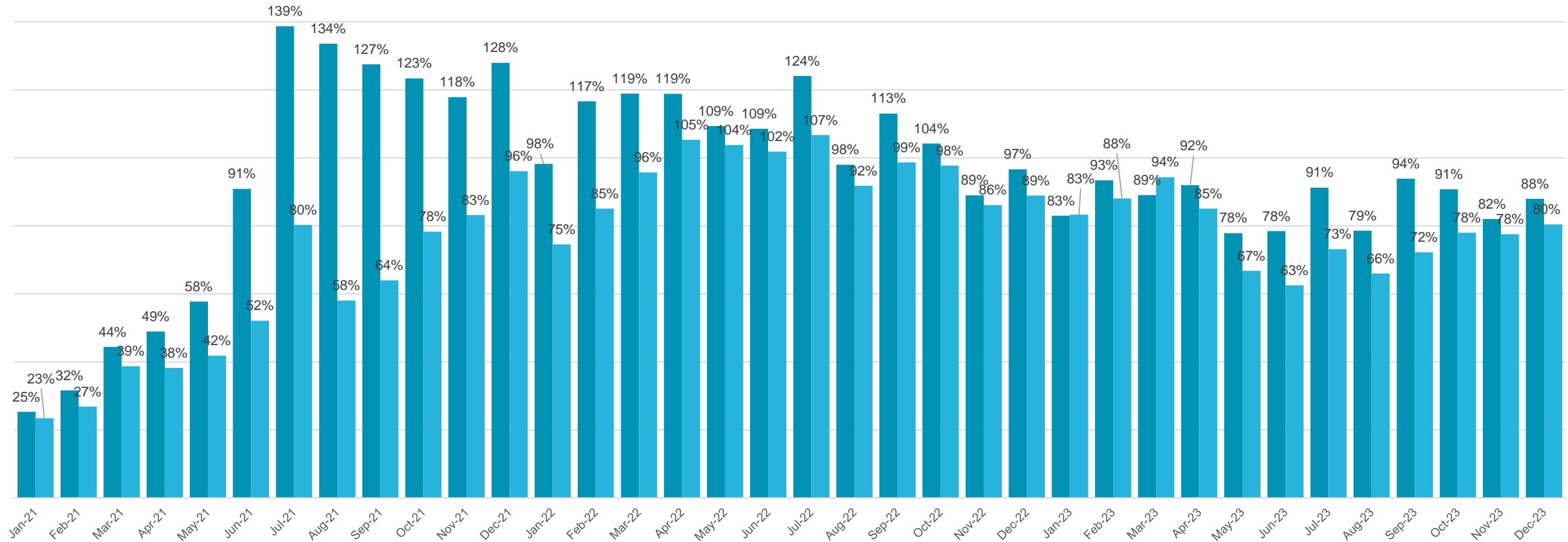
77%

% MONTHLY RECOVERY EUROPE

Corporate Plan Target

111%

■ Holland ■ Europe



★ STAY-OVER VISITOR ARRIVALS RECOVERY VS 2019

Recovery vs 2019

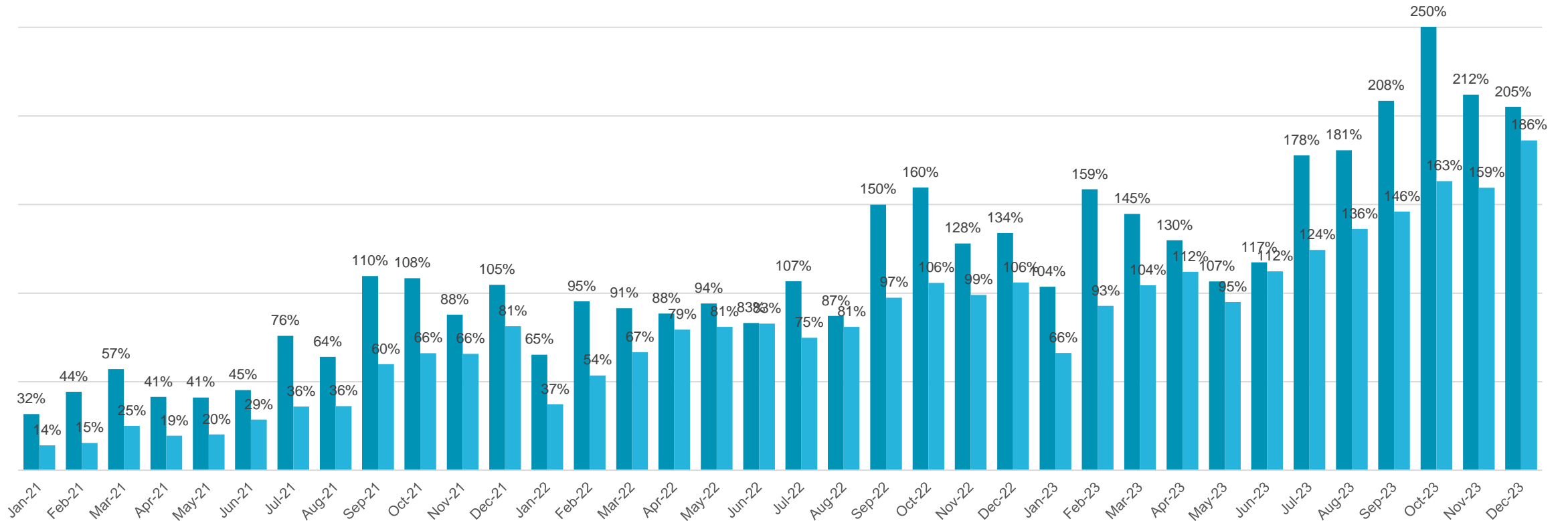
122%

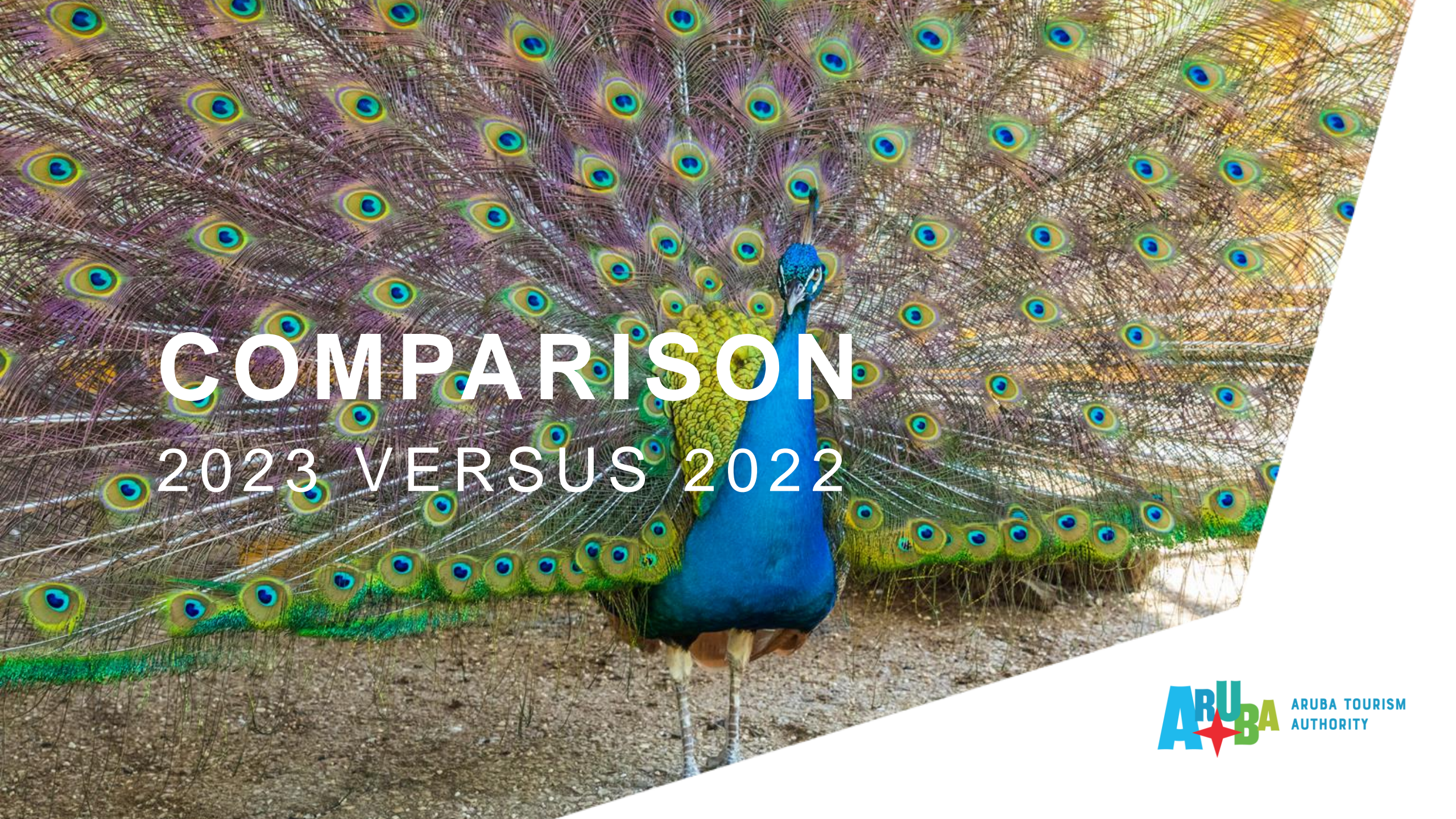
% MONTHLY RECOVERY LATAM

Corporate Plan Target

103%

■ Colombia ■ LATAM





COMPARISON

2023 VERSUS 2022

SNAPSHOT YTD DEC 2023/2022



HOW MANY ARRIVALS?

1,243,554

12.9%



HOW LONG DID THEY STAY?

8,764,832

9.7%



WHAT DID THEY SPEND?*

Central Bank Aruba
(Q1 – Q3 2023)

Avg. 3451.6 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



1,920,883

NIGHTS

10.8%

ALL INCLUSIVE



1,337,118

NIGHTS

4.6%

TIMESHARE



2,712,665

NIGHTS

3.6%

OTHERS



2,794,166

NIGHTS

18.3%



ARRIVALS YTD DECEMBER 2023/2022

1,243,554
ARRIVALS

12.9%
GROWTH

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
USA	858,563	88,184	946,747	10.3%	78.0%	76.1%
Canada	41,372	20,844	62,216	50.4%	3.8%	5.0%
NA	899,935	109,028	1,008,963	12.1%	81.7%	81.1%
Venezuela	2,205	906	3,111	41.1%	0.2%	0.3%
Colombia	33,400	18,298	51,698	54.8%	3.0%	4.2%
Brazil	9,594	4,213	13,807	43.9%	0.9%	1.1%
Argentina	12,601	6,154	18,755	48.8%	1.1%	1.5%
Chile	6,259	2,136	8,395	34.1%	0.6%	0.7%
Ecuador	2,880	4,752	7,632	165.0%	0.3%	0.6%
Peru	3,373	3,994	7,367	118.4%	0.3%	0.6%
Paraguay	1,204	-16	1,188	-1.3%	0.1%	0.1%
Uruguay	1,765	202	1,967	11.4%	0.2%	0.2%
Mexico	1,582	1,642	3,224	103.8%	0.1%	0.3%
Others	8,726	4,148	12,874	47.5%	0.8%	1.0%
SA	83,589	46,429	130,018	55.5%	7.6%	10.5%
Netherlands	46,255	-9,087	37,168	-19.6%	4.2%	3.0%
UK	11,149	-4,369	6,780	-39.2%	1.0%	0.5%
Germany	5,584	-187	5,397	-3.3%	0.5%	0.4%
Italy	8,255	-1,701	6,554	-20.6%	0.7%	0.5%
Sweden	1,957	179	2,136	9.1%	0.2%	0.2%
Belgium	2,532	-669	1,863	-26.4%	0.2%	0.1%
Austria	664	11	675	1.7%	0.1%	0.1%
Switzerland	1,997	-208	1,789	-10.4%	0.2%	0.1%
Others	9,752	-588	9,164	-6.0%	0.9%	0.7%
Europe	88,145	-16,619	71,526	-18.9%	8.0%	5.8%
ROW	29,328	3,719	33,047	12.7%	2.7%	2.7%
Total	1,100,997	142,557	1,243,554	12.9%		
W/O Ven.	1,098,792	141,000	1,240,443	12.9%		



ARRIVALS USA YTD DECEMBER 2023/2022

946,747
ARRIVALS

10.3%
GROWTH

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
New York	186,326	-138	186,188	-0.1%	21.7%	19.7%
Massachusetts	105,280	14,011	119,291	13.3%	12.3%	12.6%
New Jersey	116,127	-982	115,145	-0.8%	13.5%	12.2%
Pennsylvania	49,742	5,883	55,625	11.8%	5.8%	5.9%
Illinois	21,947	4,066	26,013	18.5%	2.6%	2.7%
Connecticut	31,993	2,703	34,696	8.4%	3.7%	3.7%
Florida	47,614	3,688	51,302	7.7%	5.5%	5.4%
Ohio	21,171	5,568	26,739	26.3%	2.5%	2.8%
Maryland	27,121	2,313	29,434	8.5%	3.2%	3.1%
Michigan	16,220	2,172	18,392	13.4%	1.9%	1.9%
Virginia	20,996	5,323	26,319	25.4%	2.4%	2.8%
Georgia	23,173	-239	22,934	-1.0%	2.7%	2.4%
North Carolina	22,322	5,104	27,426	22.9%	2.6%	2.9%
Texas	24,368	4,176	28,544	17.1%	2.8%	3.0%
California	15,939	1,782	17,721	11.2%	1.9%	1.9%
Other	128,224	32,754	160,978	25.5%	14.9%	17.0%
Total	858,563	88,184	946,747	10.3%		



NIGHTS YTD DECEMBER 2023/2022

8,764,832
ARRIVALS

9.7%
GROWTH

	2022	Growth	2023	% Growth	ALOS 2022	ALOS 2023
USA	5,796,668	519,849	6,316,517	9.0%	6.8	6.7
Canada	410,208	176,342	586,550	43.0%	9.9	9.4
NA	6,206,876	696,191	6,903,067	11.2%	6.9	6.8
Venezuela	29,351	5,967	35,318	20.3%	13.3	11.4
Colombia	250,886	95,348	346,234	38.0%	7.5	6.7
Brazil	60,198	26,361	86,559	43.8%	6.3	6.3
Argentina	114,626	52,704	167,330	46.0%	9.1	8.9
Chile	48,865	16,526	65,391	33.8%	7.8	7.8
Ecuador	17,509	18,957	36,466	108.3%	6.1	4.8
Peru	24,241	21,702	45,943	89.5%	7.2	6.2
Paraguay	8,302	-514	7,788	-6.2%	6.9	6.6
Uruguay	13,787	1,459	15,246	10.6%	7.8	7.8
Mexico	11,035	8,218	19,253	74.5%	7.0	6.0
Others	66,442	20,916	87,358	31.5%	7.6	6.8
SA	645,242	267,644	912,886	41.5%	7.7	7.0
Netherlands	553,299	-102,946	450,353	-18.6%	12.0	12.1
UK	119,388	-55,854	63,534	-46.8%	10.7	9.4
Germany	58,429	-10,932	47,497	-18.7%	10.5	8.8
Italy	64,433	-14,424	50,009	-22.4%	7.8	7.6
Sweden	24,056	897	24,953	3.7%	12.3	11.7
Belgium	28,152	-6,405	21,747	-22.8%	11.1	11.7
Austria	6,692	-50	6,642	-0.7%	10.1	9.8
Switzerland	20,022	-3,652	16,370	-18.2%	10.0	9.2
Others	101,300	-10,738	90,562	-10.6%	10.4	9.9
Europe	975,771	-204,104	771,667	-20.9%	11.1	10.8
ROW	163,759	13,453	177,212	8.2%	5.6	5.4
Total	7,991,648	773,184	8,764,832	9.7%	7.3	7.0



ACCOMMODATIONS YTD DECEMBER 2023/2022

1,243,554
ARRIVALS

12.9%
GROWTH

ARRIVALS BY ACCOMMODATION

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
EP	299,296	39,263	338,559	13.1%	27.2%	27.2%
All Inclusive	202,863	16,161	219,024	8.0%	18.4%	17.6%
Timeshare	323,846	14,391	338,237	4.4%	29.4%	27.2%
Others	274,992	72,742	347,734	26.5%	25.0%	28.0%
Total	1,100,997	142,557	1,243,554	12.9%		

NIGHTS BY ACCOMMODATION

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
EP	1,734,058	186,825	1,920,883	10.8%	21.7%	21.9%
All Inclusive	1,278,310	58,808	1,337,118	4.6%	16.0%	15.3%
Timeshare	2,618,078	94,587	2,712,665	3.6%	32.8%	30.9%
Others	2,361,202	432,964	2,794,166	18.3%	29.5%	31.9%
Total	7,991,648	773,184	8,764,832	9.7%		



VISITORS BY AGE YTD DECEMBER 2023/2022

1,243,554
ARRIVALS

12.9%
GROWTH

	2022	Growth	2023	% Growth
0 - 11	76,122	7,928	84,050	10.4%
12-19	79,085	5,663	84,748	7.2%
20 - 29	145,842	3,417	149,259	2.3%
30 - 39	185,005	11,842	196,847	6.4%
40 - 49	181,882	22,745	204,627	12.5%
50 - 59	207,737	30,263	238,000	14.6%
60 - 69	150,529	37,570	188,099	25.0%
70 +	74,751	23,109	97,860	30.9%
Not Stated	44	20	64	45.5%
Total	1,100,997	142,557	1,243,554	12.9%



GENERATIONS YTD DECEMBER 2023/2022

1,243,554
VISITORS

12.9%
GROWTH

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
Gen A	59,671	6,605	66,276	11.1%	5.4%	5.3%
Gen Z	171,567	9,929	181,496	5.8%	15.6%	14.6%
Millennials	293,300	17,313	310,613	5.9%	26.6%	25.0%
Gen X	292,262	38,109	330,371	13.0%	26.5%	26.6%
Baby Boomers	259,448	60,594	320,042	23.4%	23.6%	25.7%
Silent Generations	24,706	9,986	34,692	40.4%	2.2%	2.8%
Age not specified	43	21	64	48.8%	0.0%	0.0%
Total	1,100,997	142,557	1,243,554	12.9%		



PURPOSE OF VISIT YTD DECEMBER 2023/2022

1,243,554
VISITORS

12.9%
GROWTH

	2023	Mkt Share	2022	Mkt Share	% Growth
Sun,Sand,Sea	1,031,697	83.0%	922,315	83.8%	11.9%
Business	21,371	1.7%	18,408	1.7%	16.1%
Conference	7,908	0.6%	5,851	0.5%	35.2%
Honeymoon	38,500	3.1%	42,304	3.8%	-9.0%
Diving	4,262	0.3%	3,799	0.3%	12.2%
Incentive	11,113	0.9%	10,919	1.0%	1.8%
Meeting	8,196	0.7%	6,114	0.6%	34.1%
Not specified	82,524	6.6%	57,046	5.2%	44.7%
Shopping	8,314	0.7%	6,284	0.6%	32.3%
Wedding	29,669	2.4%	27,957	2.5%	6.1%
Total	1,243,554	100.0%	1,100,997	100.0%	12.9%



CARRIERS YTD DECEMBER 2023/2022

1,243,554 VISITORS

12.9% GROWTH

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
JETBLUE	324,381	-27,013	297,368	-8.3%	29.5%	23.9%
AMERICAN AIRLINES	227,172	42,875	270,047	18.9%	20.6%	21.7%
UNITED AIRLINES	146,290	16,930	163,220	11.6%	13.3%	13.1%
DELTA AIRLINE	120,787	21,684	142,471	18.0%	11.0%	11.5%
SOUTHWEST AIRLINES	49,248	8,812	58,060	17.9%	4.5%	4.7%
AVIANCA	33,853	22,871	56,724	67.6%	3.1%	4.6%
COPA AIRLINE	32,821	14,487	47,308	44.1%	3.0%	3.8%
KLM ROYAL DUTCH	44,109	-11,464	32,645	-26.0%	4.0%	2.6%
AERO REPUBLICA/ WINGO	12,941	9,637	22,578	74.5%	1.2%	1.8%
SPIRIT AIRLINES	7,797	14,120	21,917	181.1%	0.7%	1.8%
WESTJET AIRLINES	12,586	9,046	21,632	71.9%	1.1%	1.7%
DIVI DIVI AIR	15,003	2,392	17,395	15.9%	1.4%	1.4%
AIR CANADA	7,047	9,051	16,098	128.4%	0.6%	1.3%
SUNWING AIRLINES	10,615	4,265	14,880	40.2%	1.0%	1.2%
TUI NL	17,934	-6,709	11,225	-37.4%	1.6%	0.9%
EZ AIR	8,846	2,016	10,862	22.8%	0.8%	0.9%
PRIVATE	3,730	3,400	7,130	91.2%	0.3%	0.6%
SURINAM AIRWAYS	4,374	1,696	6,070	38.8%	0.4%	0.5%
BRITISH AIRWAYS / TUI UK	7,098	-2,297	4,801	-32.4%	0.6%	0.4%
TUI FLY NL	398	3,334	3,732	837.7%	0.0%	0.3%
CHARTER	2,411	921	3,332	38.2%	0.2%	0.3%
SUN COUNTRY	2,581	177	2,758	6.9%	0.2%	0.2%
WINAIR	1,495	995	2,490	66.6%	0.1%	0.2%
JETAIR CARIBBEAN	2,449	-262	2,187	-10.7%	0.2%	0.2%
LATAM	0	1,843	1,843	-	0.0%	0.1%
ARAJET	366	855	1,221	233.6%	0.0%	0.1%
Others	4,665	-1,105	3,560	-23.7%	0.4%	0.3%
Total	1,100,997	142,557	1,243,554	12.9%		



CARRIERS YTD DECEMBER 2023/2022

1,243,554
VISITORS

12.9%
GROWTH

City	APO Code	Jan-Dec 2023	Mkt Share	Jan-Dec 22	Mkt Share	23 vs 22
JFK NY	JFK	217,299	17.5%	197,097	17.9%	10.2%
Boston	BOS	147,193	11.8%	116,533	10.6%	26.3%
Newark	EWR	123,082	9.9%	151,729	13.8%	-18.9%
Charlotte	CLT	103,424	8.3%	83,252	7.6%	24.2%
Miami	MIA	98,924	8.0%	83,925	7.6%	17.9%
Bogota	BOG	68,853	5.5%	44,888	4.1%	53.4%
Atlanta	ATL	63,785	5.1%	58,281	5.3%	9.4%
Philadelphia	PHL	54,213	4.4%	48,163	4.4%	12.6%
Toronto	YYZ	52,683	4.2%	30,459	2.8%	73.0%
Amsterdam	AMS	47,084	3.8%	62,051	5.6%	-24.1%
Orlando	MCO	46,908	3.8%	24,161	2.2%	94.1%
Panama City	PTY	47,346	3.8%	32,853	3.0%	44.1%
Curacao	CUR	34,873	2.8%	28,245	2.6%	23.5%
G.Bush DC	IAD	28,803	2.3%	21,396	1.9%	34.6%
Fort Lauderdale	FLL	22,506	1.8%	36,085	3.3%	-37.6%
Chicago	ORD	17,317	1.4%	13,180	1.2%	31.4%
Baltimore	BWI	11,209	0.9%	25,122	2.3%	-55.4%
Houston International	IAH	9,418	0.8%	8,890	0.8%	5.9%
Medellin	MDE	7,924	0.6%	2,979	0.3%	166.0%
Dallas Forth Worth	DFW	5,653	0.5%	4,502	0.4%	25.6%
Paramaribo	PBM	5,142	0.4%	4,394	0.4%	17.0%
La Guardi, NY	LGA	5,109	0.4%	4,387	0.4%	16.5%
Gatwick, UK	LGW	4,693	0.4%	7,098	0.6%	-33.9%
St Paul, Minneappolis	MSP	2,758	0.2%	2,263	0.2%	21.9%
Bonaire	BON	2,370	0.2%	1,375	0.1%	72.4%
	Others	14,985	1.2%	7,689	0.7%	94.9%
Total		1,243,554	100.0%	1,100,997	100.0%	12.9%

DECEMBER RESULT 2023

NORTH AMERICA



101,976

80.1%

SOUTH AMERICA



15,726

12.4%

EUROPE



6,014

4.7%

OTHERS



3,615

2.8%

TOTAL ARRIVALS

127,331

100%



ARRIVALS DECEMBER 2023/2022

127,331
ARRIVALS

15.3%
GROWTH

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
USA	83,185	8,160	91,345	9.8%	75.3%	71.7%
Canada	8,602	2,029	10,631	23.6%	7.8%	8.3%
NA	91,787	10,189	101,976	11.1%	83.1%	80.1%
Venezuela	372	261	633	70.2%	0.3%	0.5%
Colombia	4,675	2,473	7,148	52.9%	4.2%	5.6%
Brazil	968	648	1,616	66.9%	0.9%	1.3%
Argentina	746	607	1,353	81.4%	0.7%	1.1%
Chile	370	482	852	130.3%	0.3%	0.7%
Ecuador	276	376	652	136.2%	0.2%	0.5%
Peru	277	1,386	1,663	500.4%	0.3%	1.3%
Paraguay	95	12	107	12.6%	0.1%	0.1%
Uruguay	38	88	126	231.6%	0.0%	0.1%
Mexico	226	83	309	36.7%	0.2%	0.2%
Others	909	358	1,267	39.4%	0.8%	1.0%
SA	8,952	6,774	15,726	75.7%	8.1%	12.4%
Netherlands	3,439	-309	3,130	-9.0%	3.1%	2.5%
UK	345	92	437	26.7%	0.3%	0.3%
Germany	393	67	460	17.0%	0.4%	0.4%
Italy	446	37	483	8.3%	0.4%	0.4%
Sweden	755	-563	192	-74.6%	0.7%	0.2%
Belgium	129	-2	127	-1.6%	0.1%	0.1%
Austria	47	16	63	34.0%	0.0%	0.0%
Switzerland	153	2	155	1.3%	0.1%	0.1%
Others	943	24	967	2.5%	0.9%	0.8%
Europe	6,650	-636	6,014	-9.6%	6.0%	4.7%
ROW	3,046	569	3,615	18.7%	2.8%	2.8%
Total	110,435	16,896	127,331	15.3%		
W/O Ven.	110,063	16,635	126,698	15.1%		



ARRIVALS USA DECEMBER 2023/2022

91,345
ARRIVALS

9.8%
GROWTH

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
New York	16,947	240	17,187	1.4%	20.4%	18.8%
Massachusetts	10,466	879	11,345	8.4%	12.6%	12.4%
New Jersey	9,553	1,113	10,666	11.7%	11.5%	11.7%
Pennsylvania	4,915	110	5,025	2.2%	5.9%	5.5%
Illinois	3,874	202	4,076	5.2%	4.7%	4.5%
Connecticut	2,521	116	2,637	4.6%	3.0%	2.9%
Florida	4,459	577	5,036	12.9%	5.4%	5.5%
Ohio	2,294	419	2,713	18.3%	2.8%	3.0%
Maryland	2,657	22	2,679	0.8%	3.2%	2.9%
Michigan	2,085	198	2,283	9.5%	2.5%	2.5%
Virginia	2,547	309	2,856	12.1%	3.1%	3.1%
Georgia	1,919	281	2,200	14.6%	2.3%	2.4%
North Carolina	2,336	514	2,850	22.0%	2.8%	3.1%
Texas	2,262	168	2,430	7.4%	2.7%	2.7%
California	1,652	111	1,763	6.7%	2.0%	1.9%
Other	12,698	2,901	15,599	22.8%	15.3%	17.1%
Total	83,185	8,160	91,345	9.8%		



NIGHTS DECEMBER 2023/2022

956,937
NIGHTS

9.8%
GROWTH

	2022	Growth	2023	% Growth	ALOS 2022	ALOS 2023
USA	591,783	37,945	629,728	6.4%	7.1	6.9
Canada	87,609	15,619	103,228	17.8%	10.2	9.7
NA	679,392	53,564	732,956	7.9%	7.4	7.2
Venezuela	6,602	2,131	8,733	32.3%	17.7	13.8
Colombia	45,983	14,929	60,912	32.5%	9.8	8.5
Brazil	6,883	4,176	11,059	60.7%	7.1	6.8
Argentina	7,153	6,059	13,212	84.7%	9.6	9.8
Chile	3,039	3,808	6,847	125.3%	8.2	8.0
Ecuador	1,901	1,255	3,156	66.0%	6.9	4.8
Peru	2,226	8,000	10,226	359.4%	8.0	6.1
Paraguay	725	39	764	5.4%	7.6	7.1
Uruguay	348	593	941	170.4%	9.2	7.5
Mexico	1,528	518	2,046	33.9%	6.8	6.6
Others	8,775	1,368	10,143	15.6%	9.7	8.0
SA	85,163	42,876	128,039	50.3%	9.5	8.1
Netherlands	48,683	-4,272	44,411	-8.8%	14.2	14.2
UK	3,759	488	4,247	13.0%	10.9	9.7
Germany	4,682	-524	4,158	-11.2%	11.9	9.0
Italy	4,965	-383	4,582	-7.7%	11.1	9.5
Sweden	9,797	-7,495	2,302	-76.5%	13.0	12.0
Belgium	1,612	87	1,699	5.4%	12.5	13.4
Austria	712	189	901	26.5%	15.1	14.3
Switzerland	1,616	-117	1,499	-7.2%	10.6	9.7
Others	10,203	-40	10,163	-0.4%	10.8	10.5
Europe	86,029	-12,067	73,962	-14.0%	12.9	12.3
ROW	20,828	1,152	21,980	5.5%	6.8	6.1
Total	871,412	85,525	956,937	9.8%	7.9	7.5



ACCOMMODATIONS DECEMBER 2023/2022

127,331
ARRIVALS

15.3%
GROWTH

ARRIVALS BY ACCOMMODATION

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
EP	28,990	3,593	32,583	12.4%	26.3%	25.6%
All Inclusive	17,633	1,437	19,070	8.1%	16.0%	15.0%
Timeshare	29,948	2,421	32,369	8.1%	27.1%	25.4%
Others	33,864	9,445	43,309	27.9%	30.7%	34.0%
Total	110,435	16,896	127,331	15.3%		

NIGHTS BY ACCOMMODATION

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
EP	177,216	14,277	191,493	8.1%	20.3%	20.0%
All Inclusive	115,902	4,268	120,170	3.7%	13.3%	12.6%
Timeshare	255,651	15,186	270,837	5.9%	29.3%	28.3%
Others	322,643	51,794	374,437	16.1%	37.0%	39.1%
Total	871,412	85,525	956,937	9.8%		



VISITORS BY AGE DECEMBER 2023/2022

127,331
ARRIVALS

15.3%
GROWTH

	2022	Growth	2023	% Growth
0 - 11	9,024	1,228	10,252	13.6%
12-19	10,134	1,564	11,698	15.4%
20 - 29	15,932	2,104	18,036	13.2%
30 - 39	16,463	2,524	18,987	15.3%
40 - 49	17,452	3,031	20,483	17.4%
50 - 59	19,938	2,597	22,535	13.0%
60 - 69	13,764	2,355	16,119	17.1%
70 +	7,716	1,501	9,217	19.5%
Not Stated	12	-8	4	-66.7%
Total	110,435	16,896	127,331	15.3%



GENERATIONS DECEMBER 2023/2022

127,331
ARRIVALS

15.3%
GROWTH

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
Gen A	7,128	911	8,039	12.8%	6.5%	6.3%
Gen Z	21,337	3,342	24,679	15.7%	19.3%	19.4%
Millennials	26,570	3,776	30,346	14.2%	24.1%	23.8%
Gen X	28,367	4,572	32,939	16.1%	25.7%	25.9%
Baby Boomers	24,193	3,517	27,710	14.5%	21.9%	21.8%
Silent Generations	2,829	785	3,614	27.7%	2.6%	2.8%
Age not specified	11	-7	4	-63.6%	0.0%	0.0%
Total	110,435	16,896	127,331	15.3%		



PURPOSE OF VISIT DECEMBER 2023/2022

127,331
ARRIVALS

15.3%
GROWTH

	2023	Mkt Share	2022	Mkt Share	% Growth
Sun, Sand, Sea	112,370	88.3%	97,364	88.2%	15.4%
Business	1,214	1.0%	1,213	1.1%	0.1%
Conference	325	0.3%	573	0.5%	-43.3%
Honeymoon	2,705	2.1%	2,671	2.4%	1.3%
Diving	488	0.4%	497	0.5%	-1.8%
Incentive	725	0.6%	857	0.8%	-15.4%
Meeting	650	0.5%	598	0.5%	8.7%
Not specified	6,693	5.3%	5,086	4.6%	31.6%
Shopping	802	0.6%	803	0.7%	-0.1%
Wedding	1,359	1.1%	773	0.7%	75.8%
Total	127,331	100.0%	110,435	100.0%	15.3%



CARRIERS DECEMBER 2023/2022

127,331
ARRIVALS

15.3%
GROWTH

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
JETBLUE	29,230	-924	28,306	-3.2%	26.5%	22.2%
AMERICAN AIRLINES	25,570	-1,671	23,899	-6.5%	23.2%	18.8%
UNITED AIRLINES	12,639	4,254	16,893	33.7%	11.4%	13.3%
DELTA AIRLINE	11,969	3,441	15,410	28.7%	10.8%	12.1%
AVIANCA	3,569	1,734	5,303	48.6%	3.2%	4.2%
COPA AIRLINE	3,044	1,875	4,919	61.6%	2.8%	3.9%
SOUTHWEST AIRLINES	4,292	18	4,310	0.4%	3.9%	3.4%
SPIRIT AIRLINES	609	3,122	3,731	512.6%	0.6%	2.9%
WESTJET AIRLINES	2,152	1,476	3,628	68.6%	1.9%	2.8%
AIR CANADA	3,175	135	3,310	4.3%	2.9%	2.6%
AERO REPUBLICA/ WINGO	1,891	1,212	3,103	64.1%	1.7%	2.4%
KLM ROYAL DUTCH	3,551	-958	2,593	-27.0%	3.2%	2.0%
SUNWING AIRLINES	1,761	341	2,102	19.4%	1.6%	1.7%
LATAM	0	1,843	1,843	-	0.0%	1.4%
DIVI DIVI AIR	1,217	280	1,497	23.0%	1.1%	1.2%
PRIVATE	399	795	1,194	199.2%	0.4%	0.9%
TUI FLY NL	1,263	-137	1,126	-10.8%	1.1%	0.9%
EZ AIR	968	86	1,054	8.9%	0.9%	0.8%
SURINAM AIRWAYS	349	245	594	70.2%	0.3%	0.5%
JETAIR CARIBBEAN	435	83	518	19.1%	0.4%	0.4%
SUN COUNTRY	457	46	503	10.1%	0.4%	0.4%
WINAIR	82	353	435	430.5%	0.1%	0.3%
BRITISH AIRWAYS	0	329	329	-	0.0%	0.3%
CHARTER	648	-338	310	-52.2%	0.6%	0.2%
ARAJET	184	-2	182	-1.1%	0.2%	0.1%
SKY HIGH AVIATION	31	127	158	409.7%	0.0%	0.1%
OTHERS	950	-869	81	-91.5%	0.9%	0.1%
Total	110,435	16,896	127,331	15.3%		



CARRIERS DECEMBER 2023/2022

127,331
ARRIVALS

15.3%
GROWTH

City	APO Code	DEC 2023	Mkt Share	DEC 2022	Mkt Share	23 vs 22
JFK NY	JFK	17,736	13.9%	17,880	16.2%	-0.8%
Boston	BOS	14,110	11.1%	12,166	11.0%	16.0%
Newark	EWR	13,967	11.0%	11,163	10.1%	25.1%
Toronto	YYZ	9,075	7.1%	7,280	6.6%	24.7%
Charlotte	CLT	8,138	6.4%	9,761	8.8%	-16.6%
Miami	MIA	8,109	6.4%	7,992	7.2%	1.5%
Atlanta	ATL	7,861	6.2%	5,019	4.5%	56.6%
Bogota	BOG	6,645	5.2%	4,729	4.3%	40.5%
Philadelphia	PHL	5,482	4.3%	5,583	5.1%	-1.8%
Panama City	PTY	4,932	3.9%	3,048	2.8%	61.8%
Chicago	ORD	4,301	3.4%	3,963	3.6%	8.5%
Curacao	CUR	4,018	3.2%	2,693	2.4%	49.2%
Fort Lauderdale	FLL	3,816	3.0%	2,551	2.3%	49.6%
Amsterdam	AMS	3,770	3.0%	4,817	4.4%	-21.7%
Orlando	MCO	3,654	2.9%	3,331	3.0%	9.7%
G.Bush DC	IAD	2,747	2.2%	2,104	1.9%	30.6%
Lima, Peru	LIM	1,843	1.4%	0	0.0%	—
Cali, Colombia	CLO	1,055	0.8%	4	0.0%	26275.0%
Dallas Fort Worth Int Airport	DFW	773	0.6%	733	0.7%	5.5%
Medellin	MDE	740	0.6%	827	0.7%	-10.5%
Houston International	IAH	718	0.6%	695	—	—
LaGuardia Airport, NY	LGA	663	0.5%	710	0.6%	-6.6%
Baltimore	BWI	661	0.5%	966	0.9%	-31.6%
Minneapolis St. Paul Inter Airp	MSP	503	0.4%	463	0.4%	8.6%
Sint Maarten	SXM	442	0.3%	82	0.1%	439.0%
	Others	1,572	1.2%	1,875	1.7%	-16.2%
Total		127,331	100.0%	110,435	100.0%	15.3%

A woman with long dark hair, wearing a light blue short-sleeved shirt and shorts, is walking away from the camera on a sandy dune. The dune is covered with sparse green vegetation. In the background, there are more dunes and a rocky coastline under a bright, hazy sunset sky. The overall scene is peaceful and scenic.

COMPARISON 2023 VERSUS 2019

SNAPSHOT YTD DEC 2023/2019



HOW MANY ARRIVALS?

1,243,554

11.1%



HOW LONG DID THEY STAY?

8,764,832

6.3%



WHAT DID THEY SPEND?*

Central Bank Aruba
(Q1 – Q3 2023)

Avg. 3451.6 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



1,920,883

NIGHTS

-14.0%

ALL INCLUSIVE



1,337,118

NIGHTS

4.1%

TIMESHARE



2,712,665

NIGHTS

11.8%

OTHERS



2,794,166

NIGHTS

21.3%



ARRIVALS YTD DECEMBER 2023/2019

1,243,554
ARRIVALS

11.1%
GROWTH

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
USA	838,288	108,459	946,747	12.9%	74.9%	76.1%
Canada	52,215	10,001	62,216	19.2%	4.7%	5.0%
NA	890,503	118,460	1,008,963	13.3%	79.6%	81.1%
Venezuela	14,958	-11,847	3,111	-79.2%	1.3%	0.3%
Colombia	32,278	19,420	51,698	60.2%	2.9%	4.2%
Brazil	11,323	2,484	13,807	21.9%	1.0%	1.1%
Argentina	15,515	3,240	18,755	20.9%	1.4%	1.5%
Chile	9,518	-1,123	8,395	-11.8%	0.9%	0.7%
Ecuador	1,590	6,042	7,632	380.0%	0.1%	0.6%
Peru	5,312	2,055	7,367	38.7%	0.5%	0.6%
Paraguay	2,110	-922	1,188	-43.7%	0.2%	0.1%
Uruguay	2,049	-82	1,967	-4.0%	0.2%	0.2%
Mexico	1,676	1,548	3,224	92.4%	0.1%	0.3%
Others	10,350	2,524	12,874	24.4%	0.9%	1.0%
SA	106,679	23,339	130,018	21.9%	9.5%	10.5%
Netherlands	42,946	-5,778	37,168	-13.5%	3.8%	3.0%
UK	10,882	-4,102	6,780	-37.7%	1.0%	0.5%
Germany	6,958	-1,561	5,397	-22.4%	0.6%	0.4%
Italy	11,266	-4,712	6,554	-41.8%	1.0%	0.5%
Sweden	5,142	-3,006	2,136	-58.5%	0.5%	0.2%
Belgium	2,349	-486	1,863	-20.7%	0.2%	0.1%
Austria	806	-131	675	-16.3%	0.1%	0.1%
Switzerland	2,158	-369	1,789	-17.1%	0.2%	0.1%
Others	10,797	-1,633	9,164	-15.1%	1.0%	0.7%
Europe	93,304	-21,778	71,526	-23.3%	8.3%	5.8%
ROW	28,458	4,589	33,047	16.1%	2.5%	2.7%
Total	1,118,944	124,610	1,243,554	11.1%		
W/O Ven.	1,103,986	136,000	1,240,443	12.4%		



ARRIVALS USA YTD DECEMBER 2023/2019

946,747
ARRIVALS

12.9%
GROWTH

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
New York	166,433	19,755	186,188	11.9%	19.9%	19.7%
Massachusetts	95,387	23,904	119,291	25.1%	11.4%	12.6%
New Jersey	98,981	16,164	115,145	16.3%	11.8%	12.2%
Pennsylvania	48,463	7,162	55,625	14.8%	5.8%	5.9%
Illinois	23,254	2,759	26,013	11.9%	2.8%	2.7%
Connecticut	27,773	6,923	34,696	24.9%	3.3%	3.7%
Florida	48,974	2,328	51,302	4.8%	5.8%	5.4%
Ohio	23,855	2,884	26,739	12.1%	2.8%	2.8%
Maryland	26,937	2,497	29,434	9.3%	3.2%	3.1%
Michigan	16,230	2,162	18,392	13.3%	1.9%	1.9%
Virginia	19,922	6,397	26,319	32.1%	2.4%	2.8%
Georgia	20,676	2,258	22,934	10.9%	2.5%	2.4%
North Carolina	19,368	8,058	27,426	41.6%	2.3%	2.9%
Texas	24,767	3,777	28,544	15.3%	3.0%	3.0%
California	18,043	-322	17,721	-1.8%	2.2%	1.9%
Other	159,225	1,753	160,978	1.1%	19.0%	17.0%
Total	838,288	108,459	946,747	12.9%		



NIGHTS YTD DECEMBER 2023/2019

8,764,832
ARRIVALS

6.3%
GROWTH

	2019		Growth	2023	% Growth	ALOS 2019	ALOS 2023
USA	5,620,182		696,335	6,316,517	12.4%	6.7	6.7
Canada	458,687		127,863	586,550	27.9%	8.8	9.4
NA	6,078,869		824,198	6,903,067	13.6%	6.8	6.8
Venezuela	209,429	-174,111		35,318	-83.1%	14.0	11.4
Colombia	287,618		58,616	346,234	20.4%	8.9	6.7
Brazil	75,132		11,427	86,559	15.2%	6.6	6.3
Argentina	138,708		28,622	167,330	20.6%	8.9	8.9
Chile	71,443	-6,052		65,391	-8.5%	7.5	7.8
Ecuador	12,282		24,184	36,466	196.9%	7.7	4.8
Peru	36,437		9,506	45,943	26.1%	6.9	6.2
Paraguay	13,675	-5,887		7,788	-43.0%	6.5	6.6
Uruguay	16,081	-835		15,246	-5.2%	7.8	7.8
Mexico	12,428		6,825	19,253	54.9%	7.4	6.0
Others	74,266		13,092	87,358	17.6%	7.2	6.8
SA	947,499	-34,613		912,886	-3.7%	8.9	7.0
Netherlands	558,654	-108,301		450,353	-19.4%	13.0	12.1
UK	116,766	-53,232		63,534	-45.6%	10.7	9.4
Germany	65,117	-17,620		47,497	-27.1%	9.4	8.8
Italy	86,253	-36,244		50,009	-42.0%	7.7	7.6
Sweden	61,924	-36,971		24,953	-59.7%	12.0	11.7
Belgium	24,923	-3,176		21,747	-12.7%	10.6	11.7
Austria	7,090	-448		6,642	-6.3%	8.8	9.8
Switzerland	18,806	-2,436		16,370	-13.0%	8.7	9.2
Others	101,887	-11,325		90,562	-11.1%	9.4	9.9
Europe	1,041,420	-269,753		771,667	-25.9%	11.2	10.8
ROW	180,060	-2,848		177,212	-1.6%	6.3	5.4
Total	8,247,848		516,984	8,764,832	6.3%	7.4	7.0



ACCOMMODATIONS YTD DECEMBER 2023/2019

1,243,554
ARRIVALS

11.1%
GROWTH

ARRIVALS BY ACCOMMODATION

	2019		Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
EP	376,279	-37,720	20,716	338,559	-10.0%	33.6%	27.2%
All Inclusive	198,308		38,128	219,024	10.4%	17.7%	17.6%
Timeshare	300,109		103,486	338,237	12.7%	26.8%	27.2%
Others	244,248		124,610	347,734	42.4%	21.8%	28.0%
Total	1,118,944			1,243,554	11.1%		

NIGHTS BY ACCOMMODATION

	2019		Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
EP	2,233,320	-312,437	52,176	1,920,883	-14.0%	27.1%	21.9%
All Inclusive	1,284,942		285,833	1,337,118	4.1%	15.6%	15.3%
Timeshare	2,426,832		491,412	2,712,665	11.8%	29.4%	30.9%
Others	2,302,754		516,984	2,794,166	21.3%	27.9%	31.9%
Total	8,247,848			8,764,832	6.3%		



VISITORS BY AGE YTD DECEMBER 2023/2019

1,243,554
ARRIVALS

11.1%
GROWTH

	2019	Growth	2023	% Growth
0 - 11	77,493	6,557	84,050	8.5%
12-19	76,738	8,010	84,748	10.4%
20 - 29	140,067	9,192	149,259	6.6%
30 - 39	175,962	20,885	196,847	11.9%
40 - 49	188,459	16,168	204,627	8.6%
50 - 59	221,636	16,364	238,000	7.4%
60 - 69	159,468	28,631	188,099	18.0%
70 +	78,942	18,918	97,860	24.0%
Not Stated	179	-115	64	-64.2%
Total	1,118,944	124,610	1,243,554	11.1%



GENERATIONS YTD DECEMBER 2023/2019

1,243,554
VISITORS

11.1%
GROWTH

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
Gen A	—		66,276	#VALUE!	0.0%	5.3%
Gen Z	174,354	7,142	181,496	4.1%	15.6%	14.6%
Millennials	262,203	48,410	310,613	18.5%	23.4%	25.0%
Gen X	290,776	39,595	330,371	13.6%	26.0%	26.6%
Baby Boomers	335,533		320,042	-4.6%	30.0%	25.7%
Silent Generations	55,899		34,692	-37.9%	5.0%	2.8%
Age not specified	179	-115	64	-64.2%	0.0%	0.0%
Total	1,118,944	124,610	1,243,554	11.1%		



PURPOSE OF VISIT YTD DECEMBER 2023/2019

1,243,554
VISITORS

11.1%
GROWTH

	2023	Mkt Share	2019	Mkt Share	% Growth
Sun,Sand,Sea	1,031,697	83.0%	718,485	64.2%	43.6%
Business	21,371	1.7%	21,493	1.9%	-0.6%
Conference	7,908	0.6%	5,750	0.5%	37.5%
Honeymoon	38,500	3.1%	30,220	2.7%	27.4%
Diving	4,262	0.3%	6,531	0.6%	-34.7%
Incentive	11,113	0.9%	8,416	0.8%	32.0%
Meeting	8,196	0.7%	1,999	0.2%	310.0%
Not specified	82,524	6.6%	260,424	23.3%	-68.3%
Shopping	8,314	0.7%	45,579	4.1%	-81.8%
Wedding	29,669	2.4%	20,047	1.8%	48.0%
Total	1,243,554	100.0%	1,118,944	100.0%	11.1%



CARRIERS YTD DECEMBER 2023/2019

1,243,554
VISITORS

11.1%
GROWTH

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
JETBLUE	254,635	42,733	297,368	16.8%	22.8%	23.9%
AMERICAN AIRLINES	208,020	62,027	270,047	29.8%	18.6%	21.7%
UNITED AIRLINES	155,258	7,962	163,220	5.1%	13.9%	13.1%
DELTA AIRLINE	140,517	1,954	142,471	1.4%	12.6%	11.5%
SOUTHWEST AIRLINES	77,687	-19,627	58,060	-25.3%	6.9%	4.7%
AVIANCA	49,163	7,561	56,724	15.4%	4.4%	4.6%
COPA AIRLINE	37,261	10,047	47,308	27.0%	3.3%	3.8%
KLM ROYAL DUTCH	32,884	-239	32,645	-0.7%	2.9%	2.6%
AERO REPUBLICA/ WINGO	3,824	18,754	22,578	490.4%	0.3%	1.8%
SPIRIT AIRLINES	10,637	11,280	21,917	106.0%	1.0%	1.8%
WESTJET AIRLINES	10,909	10,723	21,632	98.3%	1.0%	1.7%
DIVI DIVI AIR	8,848	8,547	17,395	96.6%	0.8%	1.4%
AIR CANADA	16,988	-890	17,395	96.6%	1.5%	1.3%
SUNWING AIRLINES	15,560	-680	16,098	-5.2%	1.4%	1.2%
TUI FLY NL / ARKEFLIGHT	16,433	-1,476	14,880	-4.4%	1.5%	1.2%
EZ AIR	3,195	7,667	14,957	-9.0%	0.3%	0.9%
PRIVATE	3,951	3,179	10,862	240.0%	0.4%	0.6%
SURINAM AIRWAYS	5,672	398	7,130	80.5%	0.5%	0.5%
BRITISH AIRWAYS	6,630	-1,829	6,070	7.0%	0.6%	0.4%
CHARTER	22,016	-18,662	4,801	-27.6%	2.0%	0.3%
SUN COUNTRY	3,102	-344	3,354	-84.8%	0.3%	0.2%
WINAIR	6,774	-4,284	2,758	-11.1%	0.6%	0.2%
JETAIR CARIBBEAN	0	2,187	2,490	-63.2%	0.0%	0.2%
LATAM	0	1,843	2,187	-	0.0%	0.1%
ARAJET	0	1,221	1,843	-	0.0%	0.1%
SUNCLASS AIRLINES	0	1,158	1,221	-	0.0%	0.1%
Others	28,980	-26,600	1,158	-	2.6%	0.2%
Total	1,118,944	124,610	1,243,554	11.1%		



CARRIERS YTD DECEMBER 2023/2019

1,243,554
VISITORS

11.1%
GROWTH

CityC	APO Code	YTD DEC 2023	Mkt Share	YTD DEC 2019	Mkt Share	23 vs 19
JFK NY	JFK	217,299	17.5%	170,837	15.3%	27.2%
Boston	BOS	147,193	11.8%	109,844	9.8%	34.0%
Newark	EWR	123,082	9.9%	125,534	11.2%	-2.0%
Charlotte	CLT	103,424	8.3%	76,480	6.8%	35.2%
Miami	MIA	98,924	8.0%	90,807	8.1%	8.9%
Bogota	BOG	68,853	5.5%	56,798	5.1%	21.2%
Atlanta	ATL	63,785	5.1%	72,580	6.5%	-12.1%
Philadelphia	PHL	54,213	4.4%	32,399	2.9%	67.3%
Toronto	YYZ	52,683	4.2%	42,568	3.8%	23.8%
Amsterdam	AMS	47,084	3.8%	48,871	4.4%	-3.7%
Orlando	MCO	46,908	3.8%	74	0.0%	63289.2%
Panama City	PTY	47,346	3.8%	37,420	3.3%	26.5%
Curacao	CUR	34,873	2.8%	26,453	2.4%	31.8%
G.Bush DC	IAD	28,803	2.3%	8,589	0.8%	235.3%
Fort Lauderdale	FLL	22,506	1.8%	86,518	7.7%	-74.0%
Chicago	ORD	17,317	1.4%	14,904	1.3%	16.2%
Baltimore	BWI	11,209	0.9%	39,577	3.5%	-71.7%
Houston International	IAH	9,418	0.8%	8,389	0.7%	12.3%
Medellin	MDE	7,924	0.6%	104	0.0%	7519.2%
Dallas Forth Worth	DFW	5,653	0.5%	5,999	0.5%	-5.8%
Paramaribo	PBM	5,142	0.4%	5,083	0.5%	1.2%
La Guardia, NY	LGA	5,109	0.4%	2,319	0.2%	120.3%
Gatwick, UK	LGW	4,693	0.4%	6,631	0.6%	-29.2%
St Paul, Minneapolis	MSP	2,758	0.2%	5,915	0.5%	-53.4%
Bonaire	BON	2,370	0.2%	5,736	0.5%	-58.7%
	Others	14,985	1.2%	38,515	3.4%	-61.1%
Total		1,243,554	100.0%	1,118,944	100.0%	11.1%

DECEMBER RESULT 2023

NORTH AMERICA



101,976

80.1%

SOUTH AMERICA



15,726

12.4%

EUROPE



6,014

4.7%

OTHERS



3,615

2.8%

TOTAL ARRIVALS

127,331

100%



ARRIVALS DECEMBER 2023/2019

127,331
ARRIVALS

26.4%
GROWTH

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
USA	74,630	16,715	91,345	22.4%	74.1%	71.7%
Canada	7,515	3,116	10,631	41.5%	7.5%	8.3%
NA	82,145	19,831	101,976	24.1%	81.6%	80.1%
Venezuela	1,510	-877	633	-58.1%	1.5%	0.5%
Colombia	3,490	3,658	7,148	104.8%	3.5%	5.6%
Brazil	906	710	1,616	78.4%	0.9%	1.3%
Argentina	632	721	1,353	114.1%	0.6%	1.1%
Chile	230	622	852	270.4%	0.2%	0.7%
Ecuador	62	590	652	951.6%	0.1%	0.5%
Peru	295	1,368	1,663	463.7%	0.3%	1.3%
Paraguay	55	52	107	94.5%	0.1%	0.1%
Uruguay	61	65	126	106.6%	0.1%	0.1%
Mexico	140	169	309	120.7%	0.1%	0.2%
Others	1,065	202	1,267	19.0%	1.1%	1.0%
SA	8,446	7,280	15,726	86.2%	8.4%	12.4%
Netherlands	3,560	-430	3,130	-12.1%	3.5%	2.5%
UK	260	177	437	68.1%	0.3%	0.3%
Germany	478	-18	460	-3.8%	0.5%	0.4%
Italy	682	-199	483	-29.2%	0.7%	0.4%
Sweden	1,166	-974	192	-83.5%	1.2%	0.2%
Belgium	154	-27	127	-17.5%	0.2%	0.1%
Austria	61	2	63	3.3%	0.1%	0.0%
Switzerland	169	-14	155	-8.3%	0.2%	0.1%
Others	947	20	967	2.1%	0.9%	0.8%
Europe	7,477	-1,463	6,014	-19.6%	7.4%	4.7%
ROW	2,645	970	3,615	36.7%	2.6%	2.8%
Total	100,713	26,618	127,331	26.4%		
W/O Ven.	99,203	27,495	126,698	27.7%		



ARRIVALS USA DECEMBER 2023/2019

91,345
ARRIVALS

22.4%
GROWTH

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
New York	15,316	1,871	17,187	12.2%	20.5%	18.8%
Massachusetts	8,907	2,438	11,345	27.4%	11.9%	12.4%
New Jersey	8,251	2,415	10,666	29.3%	11.1%	11.7%
Pennsylvania	4,100	925	5,025	22.6%	5.5%	5.5%
Illinois	3,357	719	4,076	21.4%	4.5%	4.5%
Connecticut	1,992	645	2,637	32.4%	2.7%	2.9%
Florida	4,110	926	5,036	22.5%	5.5%	5.5%
Ohio	2,175	538	2,713	24.7%	2.9%	3.0%
Maryland	2,462	217	2,679	8.8%	3.3%	2.9%
Michigan	1,752	531	2,283	30.3%	2.3%	2.5%
Virginia	1,919	937	2,856	48.8%	2.6%	3.1%
Georgia	1,632	568	2,200	34.8%	2.2%	2.4%
North Carolina	1,840	1,010	2,850	54.9%	2.5%	3.1%
Texas	1,905	525	2,430	27.6%	2.6%	2.7%
California	1,500	263	1,763	17.5%	2.0%	1.9%
Other	13,412	2,187	15,599	16.3%	18.0%	17.1%
Total	74,630	16,715	91,345	22.4%		



NIGHTS DECEMBER 2023/2019

956,937
NIGHTS

16.4%
GROWTH

	2019		Growth	2023	% Growth	ALOS 2019	ALOS 2023
USA	532,708		97,020	629,728	18.2%	7.1	6.9
Canada	70,248		32,980	103,228	46.9%	9.3	9.7
NA	602,956		130,000	732,956	21.6%	7.3	7.2
Venezuela	27,474	-18,741		8,733	-68.2%	18.2	13.8
Colombia	46,146		14,766	60,912	32.0%	13.2	8.5
Brazil	6,538		4,521	11,059	69.1%	7.2	6.8
Argentina	5,862		7,350	13,212	125.4%	9.3	9.8
Chile	2,046		4,801	6,847	234.7%	8.9	8.0
Ecuador	752		2,404	3,156	319.7%	12.1	4.8
Peru	2,730		7,496	10,226	274.6%	9.3	6.1
Paraguay	401		363	764	90.5%	7.3	7.1
Uruguay	533		408	941	76.5%	8.7	7.5
Mexico	1,169		877	2,046	75.0%	8.4	6.6
Others	8,978		1,165	10,143	13.0%	8.4	8.0
SA	102,629		25,410	128,039	24.8%	12.2	8.1
Netherlands	51,178	-6,767		44,411	-13.2%	14.4	14.2
UK	2,773		1,474	4,247	53.2%	10.7	9.7
Germany	4,862	-704		4,158	-14.5%	10.2	9.0
Italy	7,004	-2,422		4,582	-34.6%	10.3	9.5
Sweden	15,229	-12,927		2,302	-84.9%	13.1	12.0
Belgium	1,999	-300		1,699	-15.0%	13.0	13.4
Austria	591		310	901	52.5%	9.7	14.3
Switzerland	1,705	-206		1,499	-12.1%	10.1	9.7
Others	10,548	-385		10,163	-3.6%	11.1	10.5
Europe	95,889	-21,927		73,962	-22.9%	12.8	12.3
ROW	20,336		1,644	21,980	8.1%	7.7	6.1
Total	821,810		135,127	956,937	16.4%	8.2	7.5



ACCOMMODATIONS DECEMBER 2023/2019

127,331
ARRIVALS

26.4%
GROWTH

ARRIVALS BY ACCOMMODATION

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
EP	32,252	331	32,583	1.0%	32.0%	25.6%
All Inclusive	16,047	3,023	19,070	18.8%	15.9%	15.0%
Timeshare	26,223	6,146	32,369	23.4%	26.0%	25.4%
Others	26,191	17,118	43,309	65.4%	26.0%	34.0%
Total	100,713	26,618	127,331	26.4%		

NIGHTS BY ACCOMMODATION

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
EP	206,556	-15,063	191,493	-7.3%	25.1%	20.0%
All Inclusive	108,573	11,597	120,170	10.7%	13.2%	12.6%
Timeshare	225,024	45,813	270,837	20.4%	27.4%	28.3%
Others	281,657	92,780	374,437	32.9%	34.3%	39.1%
Total	821,810	135,127	956,937	16.4%		



VISITORS BY AGE DECEMBER 2023/2019

127,331
ARRIVALS

26.4%
GROWTH

	2019	Growth	2023	% Growth
0 - 11	8,265	1,987	10,252	24.0%
12-19	9,305	2,393	11,698	25.7%
20 - 29	14,448	3,588	18,036	24.8%
30 - 39	14,019	4,968	18,987	35.4%
40 - 49	15,723	4,760	20,483	30.3%
50 - 59	18,792	3,743	22,535	19.9%
60 - 69	12,934	3,185	16,119	24.6%
70 +	7,214	2,003	9,217	27.8%
Not Stated	13	-9	4	-69.2%
Total	100,713	26,618	127,331	26.4%



GENERATIONS DECEMBER 2023/2019

127,331
ARRIVALS

26.4%
GROWTH

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
Gen A	—		8,039	#VALUE!	0.0%	6.3%
Gen Z	20,476	4,203	24,679	20.5%	20.3%	19.4%
Millennials	22,858	7,488	30,346	32.8%	22.7%	23.8%
Gen X	24,438	8,501	32,939	34.8%	24.3%	25.9%
Baby Boomers	27,592	118	27,710	0.4%	27.4%	21.8%
Silent Generations	5,336		3,614	-32.3%	5.3%	2.8%
Age not specified	13	-9	4	-69.2%	0.0%	0.0%
Total	100,713	26,618	127,331	26.4%		



PURPOSE OF VISIT DECEMBER 2023/2019

127,331
ARRIVALS

26.4%
GROWTH

	2023	Mkt Share	2022	Mkt Share	% Growth
Sun , Sand , Sea	112,370	88.3%	51,948	51.6%	116.3%
Business	1,214	1.0%	1,013	1.0%	19.8%
Conference	325	0.3%	160	0.2%	103.1%
Honeymoon	2,705	2.1%	773	0.8%	249.9%
Diving	488	0.4%	385	0.4%	26.8%
Incentive	725	0.6%	272	0.3%	166.5%
Meeting	650	0.5%	788	0.8%	-17.5%
Not specified	6,693	5.3%	41,962	41.7%	-84.0%
Shopping	802	0.6%	2,976	3.0%	-73.1%
Wedding	1,359	1.1%	436	0.4%	211.7%
Total	127,331	100.0%	100,713	100.0%	26.4%



CARRIERS DECEMBER 2023/2019

127,331
ARRIVALS

26.4%
GROWTH

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
JETBLUE	21,360	6,946	28,306	32.5%	21.2%	22.2%
AMERICAN AIRLINES	18,600	5,299	23,899	28.5%	18.5%	18.8%
UNITED AIRLINES	14,816	2,077	16,893	14.0%	14.7%	13.3%
DELTA AIRLINE	12,856	2,554	15,410	19.9%	12.8%	12.1%
AVIANCA	3,706	1,597	5,303	43.1%	3.7%	4.2%
COPA AIRLINE	2,500	2,419	4,919	96.8%	2.5%	3.9%
SOUTHWEST AIRLINES	7,331	-3,021	4,310	-41.2%	7.3%	3.4%
SPIRIT AIRLINES	610	3,121	3,731	511.6%	0.6%	2.9%
WESTJET AIRLINES	1,649	1,979	3,628	120.0%	1.6%	2.8%
AIR CANADA	2,396	914	3,628	120.0%	2.4%	2.6%
AERO REPUBLICA/ WINGO	743	2,360	3,310	38.1%	0.7%	2.4%
KLM ROYAL DUTCH	2,698	-105	3,103	317.6%	2.7%	2.0%
SUNWING AIRLINES	2,119	-17	2,593	-3.9%	2.1%	1.7%
LATAM	0	1,843	2,102	-0.8%	0.0%	1.4%
DIVI DIVI AIR	0	1,497	1,843	-	0.0%	1.2%
PRIVATE	436	758	1,497	-	0.4%	0.9%
TUI FLY NL / ARKEFLIGHT	1,462	-336	1,194	173.9%	1.5%	0.9%
EZ AIR	2	1,052	1,126	-23.0%	0.0%	0.8%
SURINAM AIRWAYS	568	26	1,054	52600.0%	0.6%	0.5%
JETAIR CARIBBEAN	0	518	594	4.6%	0.0%	0.4%
SUN COUNTRY	523	-20	518	-	0.5%	0.4%
WINAIR	637	-202	503	-3.8%	0.6%	0.3%
BRITISH AIRWAYS	0	329	435	-31.7%	0.0%	0.3%
CHARTER	3,415	-3,105	329	-	3.4%	0.2%
ARAJET	0	182	310	-90.9%	0.0%	0.1%
SKY HIGH AVIATION	0	32	182	-	0.1%	0.1%
SKY HIGH AVIATION	126	-2,079	158	25.4%	2.1%	0.1%
OTHERS	2,160	26,618	81	-96.3%		
Total	100,713		127,331	26.4%		



CARRIERS DECEMBER 2023/2019

127,331
ARRIVALS

26.4%
GROWTH

CityC	APO Code	DEC 2023	Mkt Share	DEC 2019	Mkt Share	23 vs 19
JFK NY	JFK	17,736	13.9%	14,228	14.1%	24.7%
Newark	BOS	14,110	11.1%	10,264	10.2%	37.5%
Boston	EWR	13,967	11.0%	11,284	11.2%	23.8%
Charlotte	YYZ	9,075	7.1%	6,159	6.1%	47.3%
Miami	CLT	8,138	6.4%	7,122	7.1%	14.3%
Bogota	MIA	8,109	6.4%	8,026	8.0%	1.0%
Toronto	ATL	7,861	6.2%	6,101	6.1%	28.8%
Atlanta	BOG	6,645	5.2%	4,471	4.4%	48.6%
Panama City	PHL	5,482	4.3%	2,812	2.8%	95.0%
Amsterdam	PTY	4,932	3.9%	2,530	2.5%	94.9%
Orlando	ORD	4,301	3.4%	2,438	2.4%	76.4%
Fort Lauderdale	CUR	4,018	3.2%	1,926	1.9%	108.6%
Curacao	FLL	3,816	3.0%	7,073	7.0%	-46.0%
Philadelphia	AMS	3,770	3.0%	4,204	4.2%	-10.3%
G . Bush DC	MCO	3,654	2.9%	3	0.0%	121700.0%
Chicago	IAD	2,747	2.2%	867	0.9%	216.8%
Medellin	LIM	1,843	1.4%	0	0.0%	—
Baltimore	CLO	1,055	0.8%	0	0.0%	—
Houston International	DFW	773	0.6%	510	0.5%	51.6%
Sint Maarten	MDE	740	0.6%	99	0.1%	647.5%
Gatwick, UK	IAH	718	0.6%	557	—	—
Dallas Fort Worth Int Airport	LGA	663	0.5%	293	0.3%	126.3%
Santo Domingo	BWI	661	0.5%	3,691	3.7%	-82.1%
LaGuardia Airport, NY	MSP	503	0.4%	867	0.9%	-42.0%
Bonaire	SXM	442	0.3%	642	0.6%	-31.2%
	Others	1,572	1.2%	4,546	4.5%	-65.4%
Total		127,331	100.0%	100,713	100.0%	26.4%

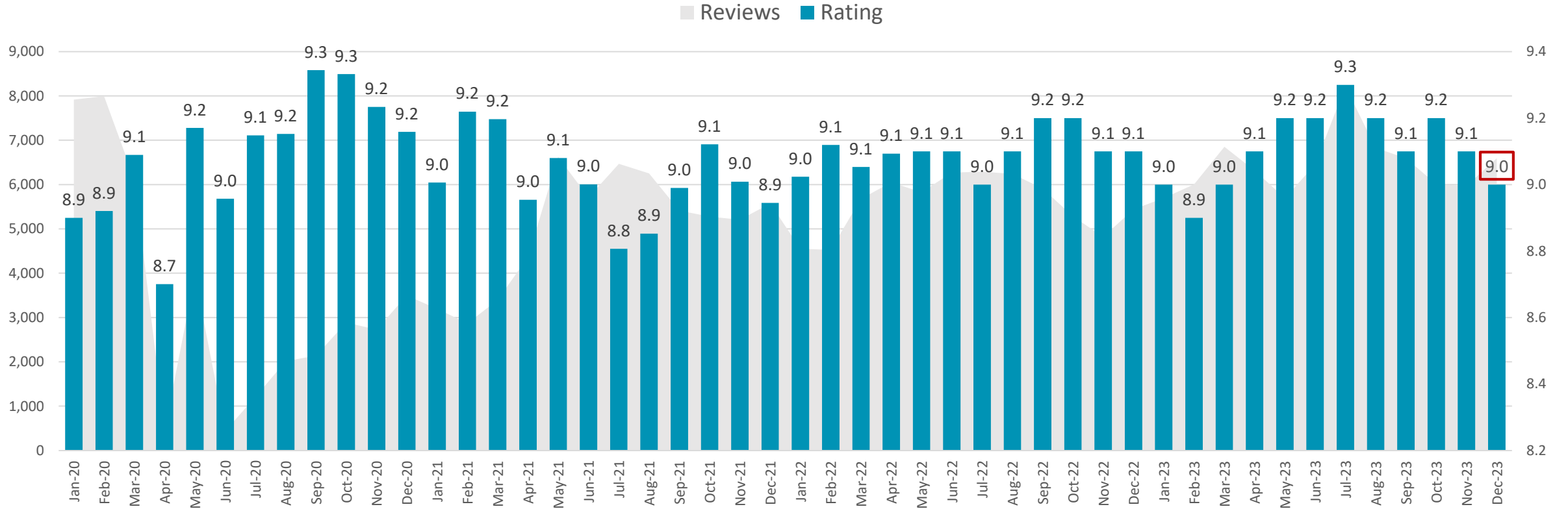


GUEST SATISFACTION



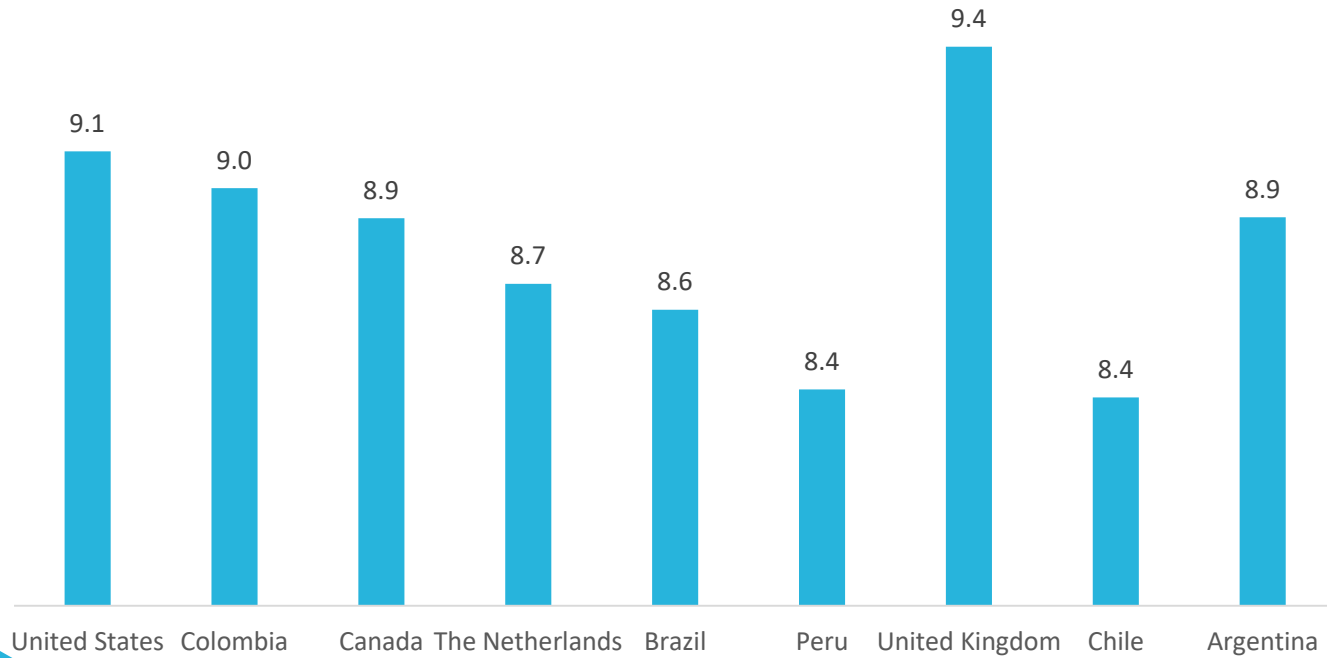
GUEST EXPERIENCE INDEX (GEI)

Reviews and Ratings



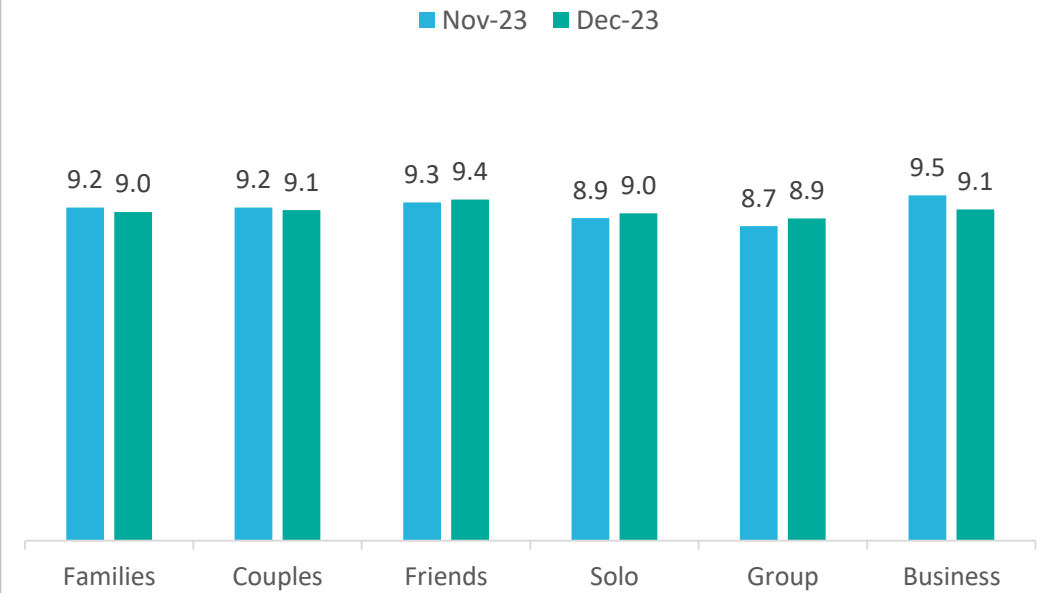


Markets



Travel Party

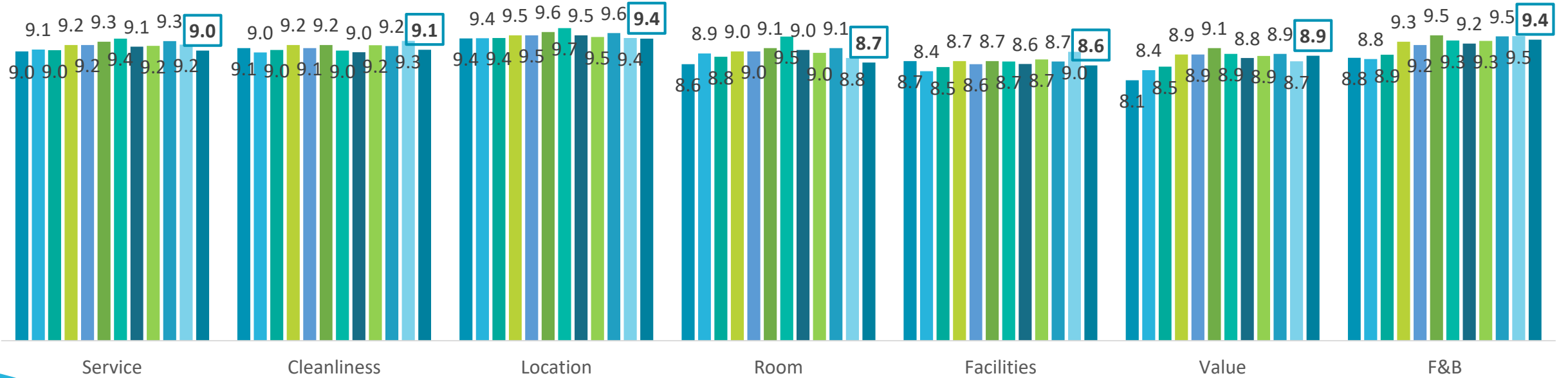
Compared to Previous Month





GEI DEC 2023

■ Jan-23 ■ Feb-23 ■ Mar-23 ■ Apr-23 ■ May-23 ■ Jun-23 ■ Jul-23 ■ Aug-23 ■ Sep-23 ■ Oct-23 ■ Nov-23 ■ Dec-23

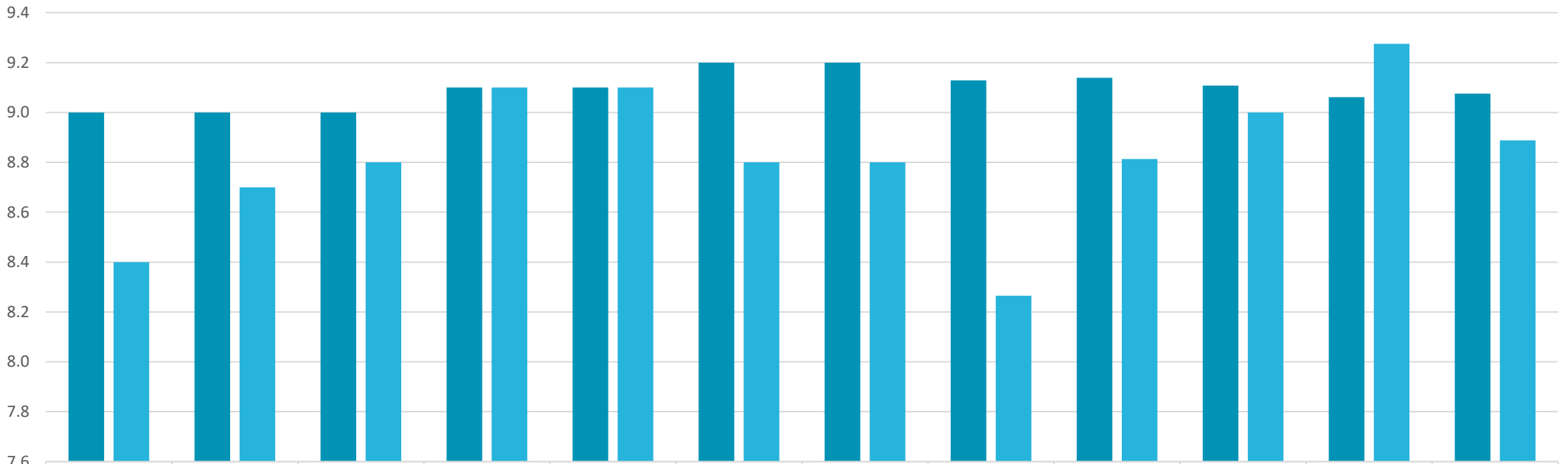




GEI 2023

North America

■ United States ■ Canada



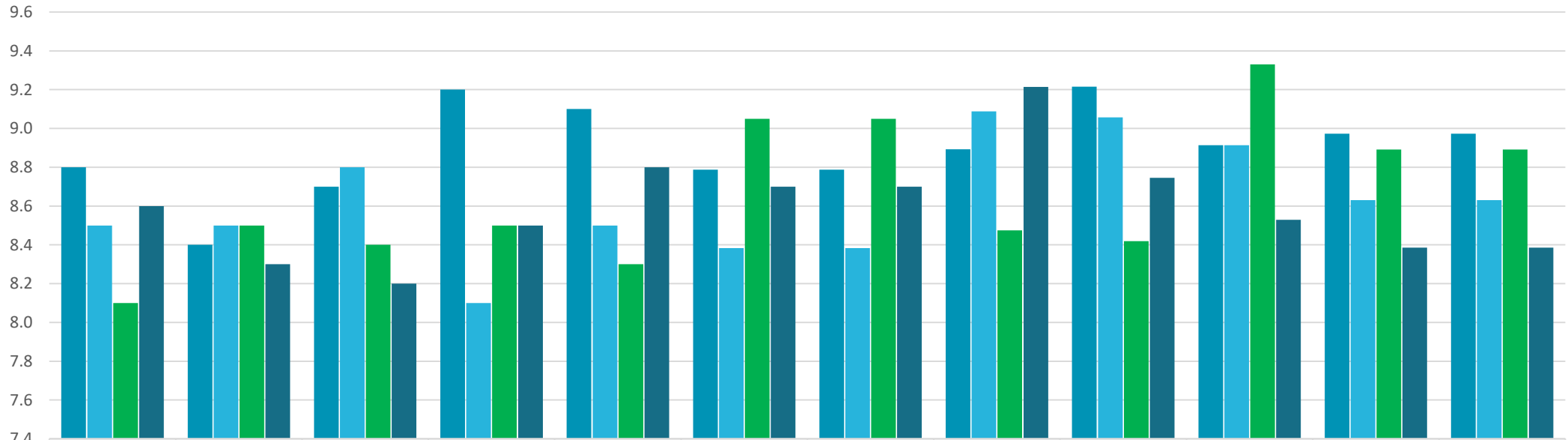
	Jan	Feb	Mar	April	May	June	Jul	Aug	Sept	Oct	Nov	Dec
■ United States	9.0	9.0	9.0	9.1	9.1	9.2	9.2	9.1	9.1	9.1	9.1	9.1
■ Canada	8.4	8.7	8.8	9.1	9.1	8.8	8.8	8.3	8.8	9.0	9.3	8.9



GEI 2023

South America

■ Colombia ■ Brazil ■ Argentina ■ Chile



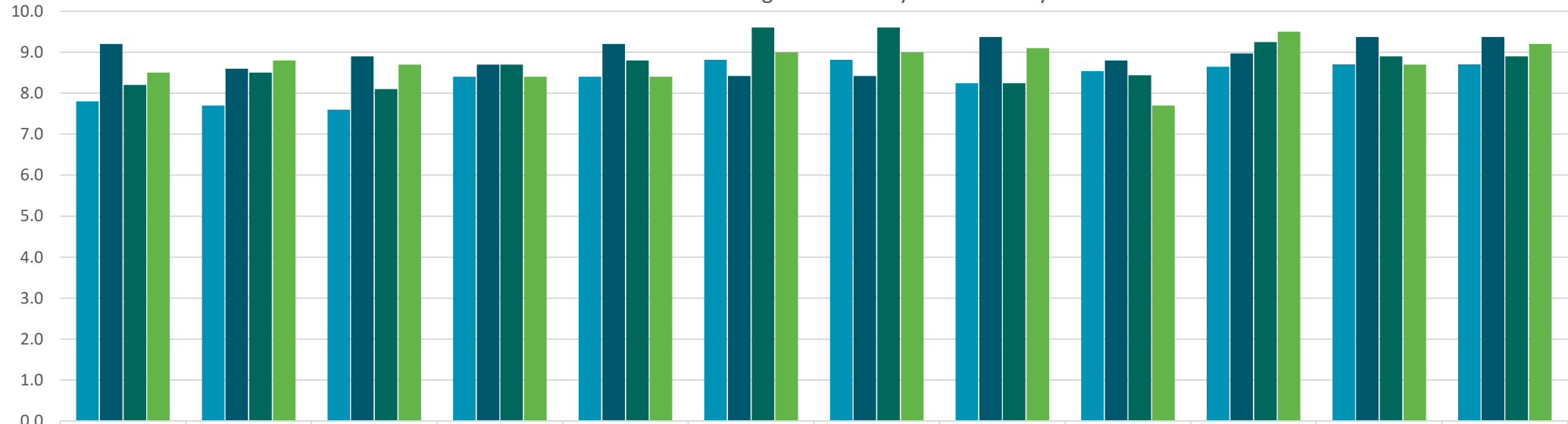
	Jan	Feb	Mar	April	May	June	Jul	Aug	Sept	Oct	Nov	Dec
■ Colombia	8.8	8.4	8.7	9.2	9.1	8.8	8.8	8.9	9.2	8.9	9.0	9.0
■ Brazil	8.5	8.5	8.8	8.1	8.5	8.4	8.4	9.1	9.1	8.9	8.6	8.6
■ Argentina	8.1	8.5	8.4	8.5	8.3	9.1	9.1	8.5	8.4	9.3	8.9	8.9
■ Chile	8.6	8.3	8.2	8.5	8.8	8.7	8.7	9.2	8.7	8.5	8.4	8.4



GEI 2023

Europe

■ The Netherlands ■ United Kingdom ■ Italy ■ Germany



	Jan	Feb	Mar	April	May	June	Jul	Aug	Sept	Oct	Nov	Dec
■ The Netherlands	7.8	7.7	7.6	8.4	8.4	8.8	8.8	8.2	8.5	8.6	8.7	8.7
■ United Kingdom	9.2	8.6	8.9	8.7	9.2	8.4	8.4	9.4	8.8	9.0	9.4	9.4
■ Italy	8.2	8.5	8.1	8.7	8.8	9.6	9.6	8.2	8.4	9.3	8.9	8.9
■ Germany	8.5	8.8	8.7	8.4	8.4	9.0	9.0	9.1	7.7	9.5	8.7	9.2



VACATIONS RENTALS

 **Transparent**

an OTA INSIGHT company

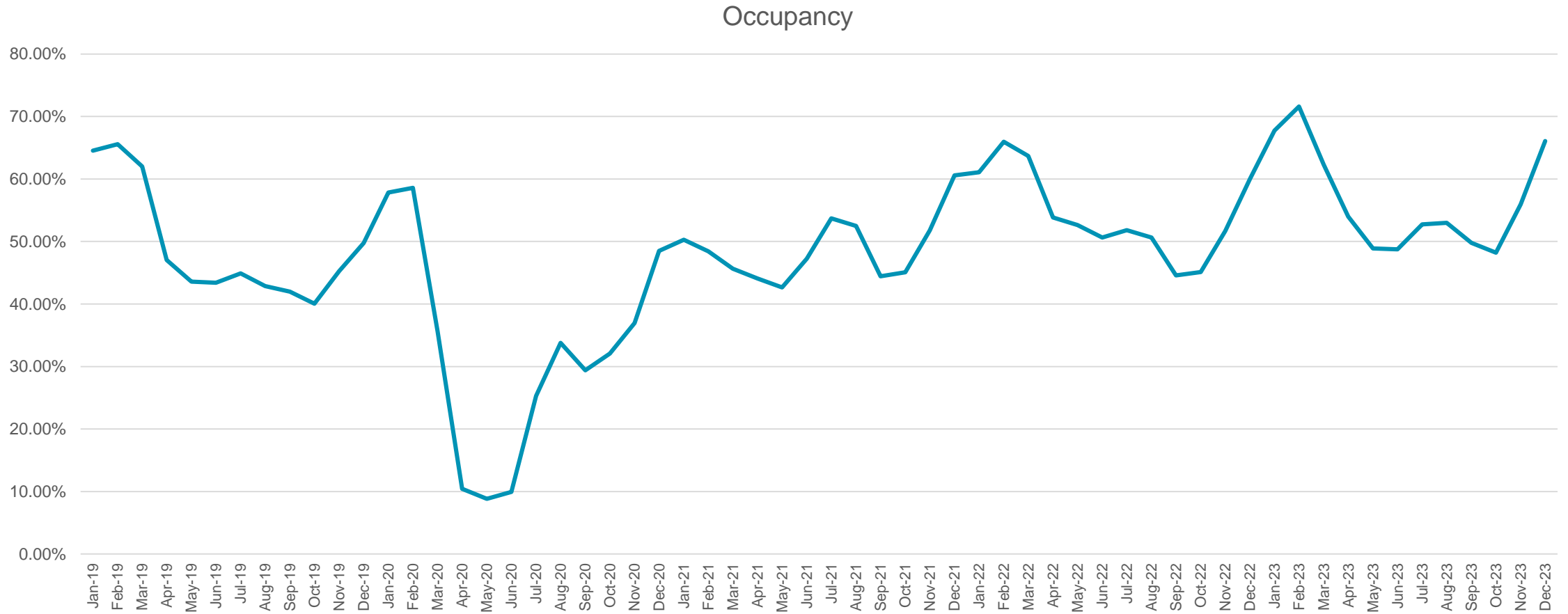
INTRODUCTION

- ▶ 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. can 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 allows direct comparison with similar, contrasting, or competing markets to compare data on occupancy rates, ADR, and booking windows.

Amount of properties reported by Transparent December 2023: 5,271. The amount might include offline listings.

OCCUPANCY

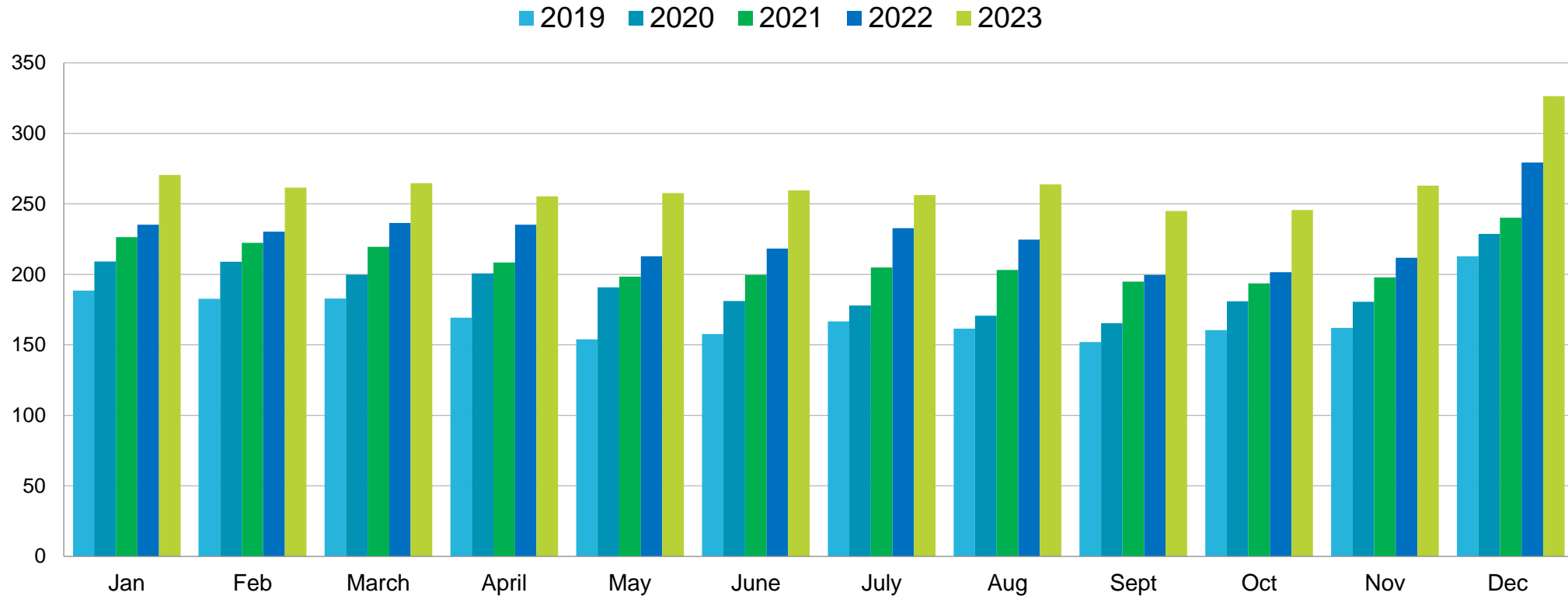
Dec 2023 Occupancy: 66.1% | Dec 2022 Occupancy: 60% | Dec 2019 Occupancy: 49.7%



Note: Amount of properties reported by Transparent December 2023: 5,271. The amount might include offline listings

ADR

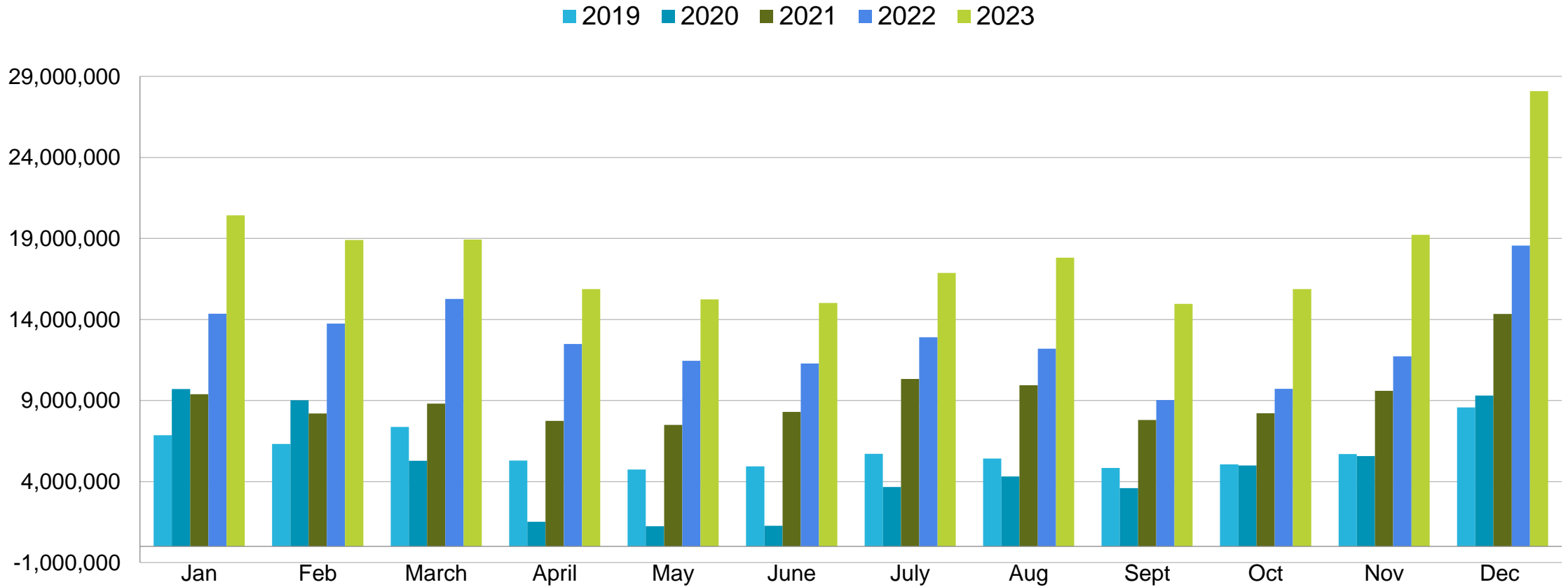
ADR Dec 2023: USD\$326 | ADR Dec 2022: USD\$279 | ADR Dec 2019: USD\$213



Note: Amount of properties reported by Transparent December 2023: 5,271. The amount might include offline listings

REVENUE

Total Revenue Jan – Dec 2023: USD\$217,223,871
Total Revenue Jan – Dec 2022: USD\$152,748,711



Note: Amount of properties reported by Transparent December 2023: 5,271. The amount might include offline listings



TIDBITS

Visitor Sentiment Study

Aruba Tourism Authority
Strategy, Planning, and Research Unit
December 18, 2023

TABLE OF CONTENTS

VISITOR SENTIMENT STUDY

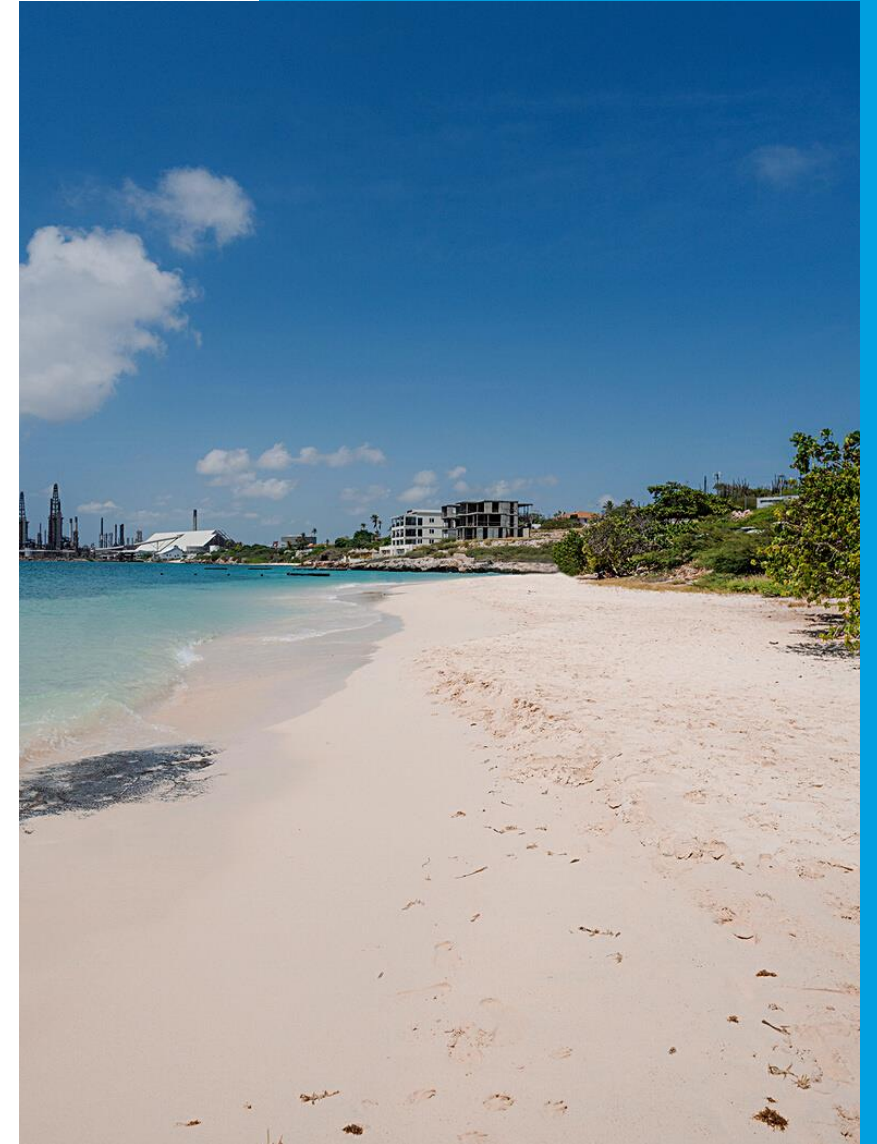
- Study Background
- Study Methodology
- Demographics
- On-site Crowdedness
- Results on the following Locations included: California Lighthouse, Baby Beach, Eagle Beach, and Arashi Beach.

BACKGROUND

KEY OUTCOMES

The Aruba Tourism Authority commissioned Business IQ to conduct a visitor sentiment study. The study seeks to provide insights into:

- Visitors' perception of crowding at key attraction sites in Aruba (14 sites);
- Visitors' experience at key attraction sites in Aruba (14 sites);
- Visitors' level of acceptability of crowdedness by key attractions sites in Aruba (14 sites);
- Visitors' likelihood to return to Aruba;
- Visitors' perception of crowding broken down by demographic information (market and income);
- Comparative analysis of visitors' sentiment and perception regarding crowding since the last 2018 study (to sites that were monitored in 2018).



SURVEY METHODOLOGY

DATA COLLECTION

- N = 1522 surveys were conducted among visitors in Aruba.
- The data was collected face-to-face, on-site;
- Each site had an average of 6-8 data collectors, and visitors were approached and invited to participate in the survey;
- The data collectors consisted of Freshmen students of the University of Aruba in the Tourism and hospitality sector and had present with them a data collector supervisor that consisted of lecturers and experienced data collectors hired by BIQ;
- Data was collected from Oct 20 - Nov 4 on weekends and weekdays following a morning (9 am - 11 am), afternoon (2 pm - 4 pm), and early evening schedule (4 pm- 6 pm depending on the location)

SURVEY METHODOLOGY

- The survey consisted of on average **34** questions was available in English;
- The survey had an Aruba pen as a Thank you survey incentive;
- The survey was collected on hard copy paper and was accompanied by a picture of the designated site measuring the crowdedness perception;
- The survey had a 90% completion rate;
- The survey took approximately 8- 10 minutes to complete;

Data collection by site



Site	Frequency	Percentage
California Lighthouse	202	13.3%
Eagle Beach	172	11.3%
Alto Vista	168	11%
Palm Beach	156	10.2%
Arashi Beach	149	9.8%
Baby Beach	128	8.4%
Conchi	103	6.8%

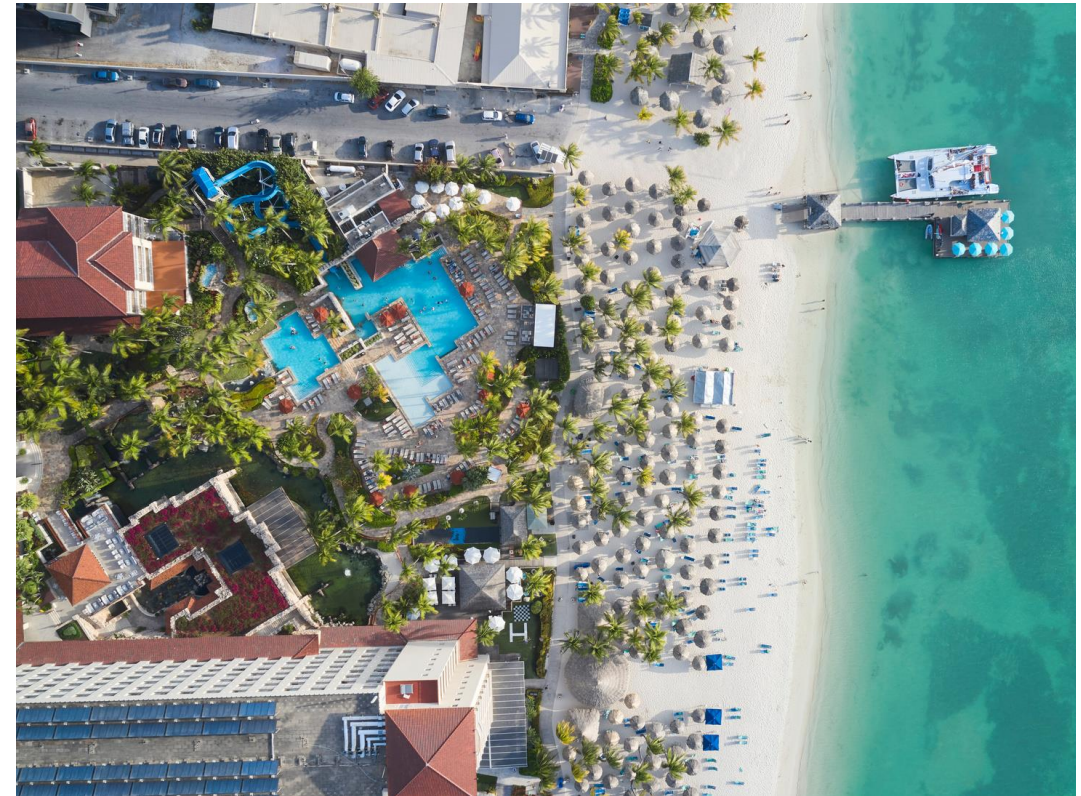
VISITOR SENTIMENT STUDY | 2023

Site	Frequency	Percentage
Bushiribana	97	6.4%
Mangel Halto	87	5.7%
Ayo	79	5.2%
Casibari	76	5%
Fontein Cave	45	3%
Quadirikiri Cave	41	2.7%
Rodger's Beach	19	1.2%

SAMPLE REPRESENTATIVENESS

STAY-OVER VISITORS

- As per year-end 2022, Aruba welcomed 1,100,997 stay-over visitors and 876,314 cruise visitors;
- At 95% confidence level and an error margin between 3 -3.5%, a 785 - 1067 sample size is needed;
- In this study, we have a sample size of 1522- meaning the study has a representative sample of our visitors.

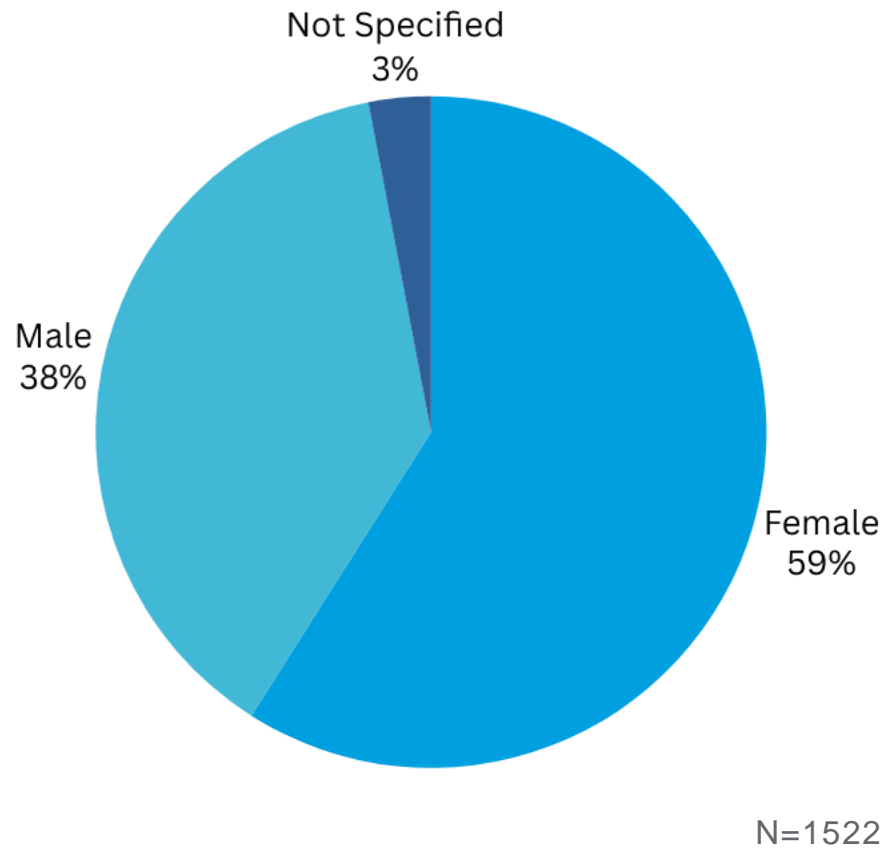




DEMOGRAPHICS

DEMOGRAPHICS

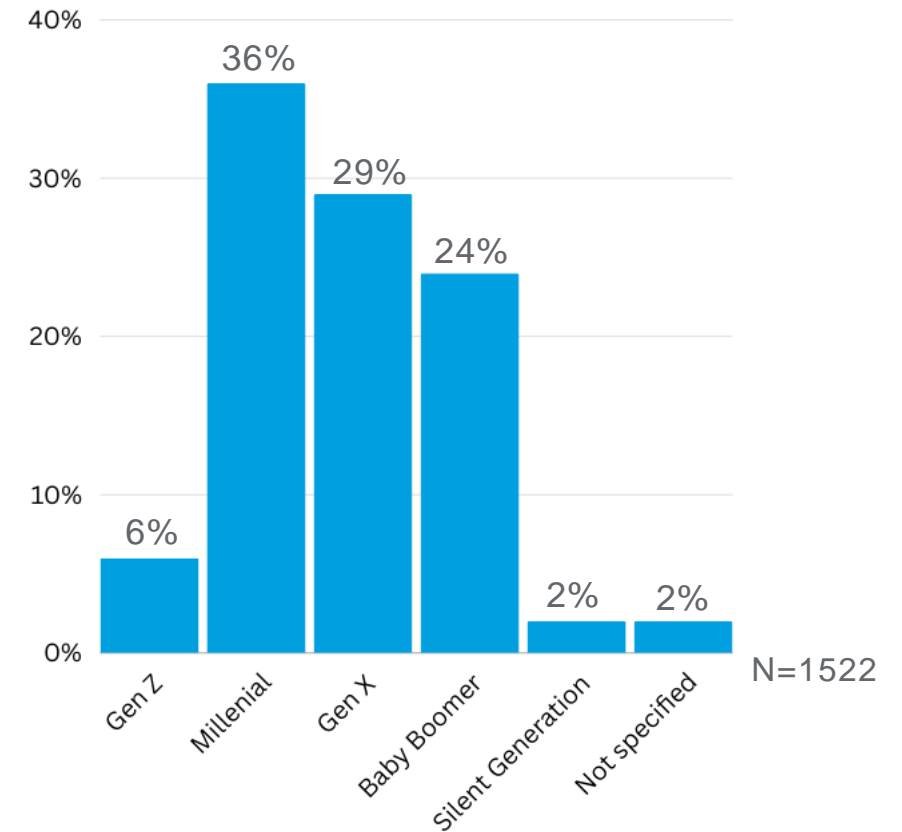
GENDER



GENERATION

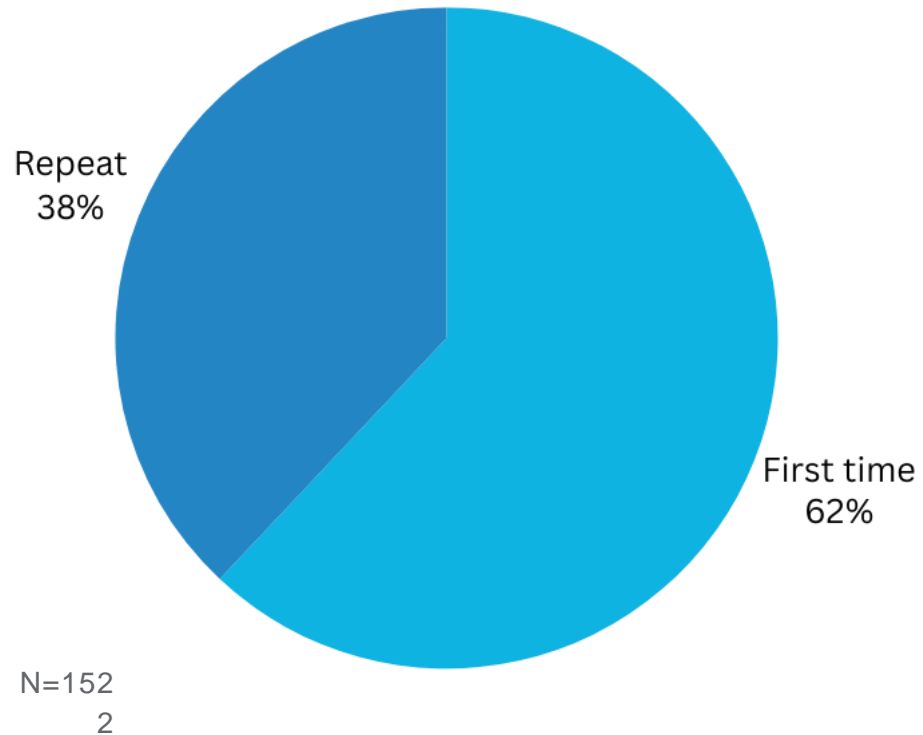


AVERAGE AGE 46 YEARS OLD

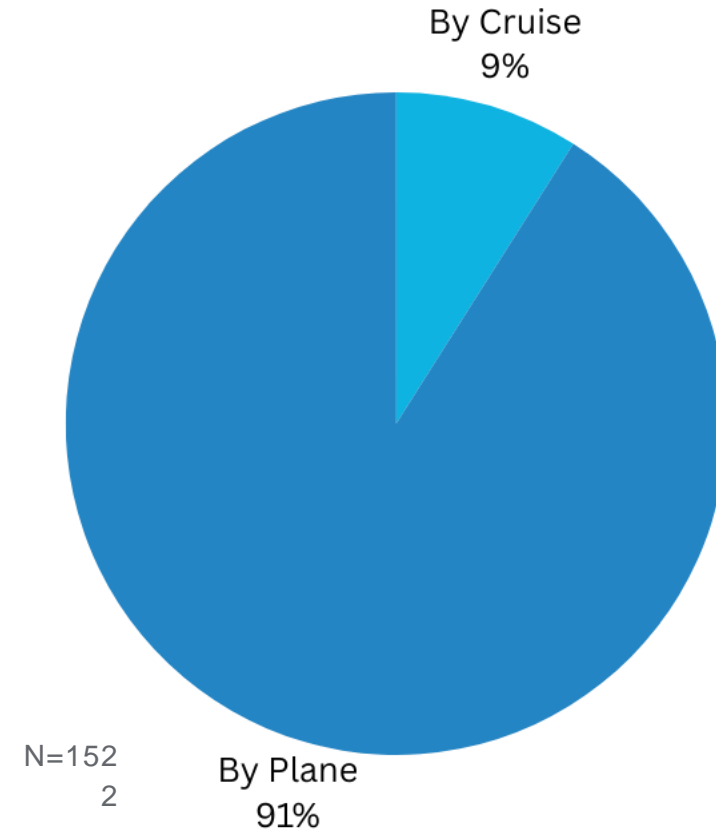


STAY-OVER VISITORS

Q: IS THIS YOUR FIRST VISIT TO ARUBA?

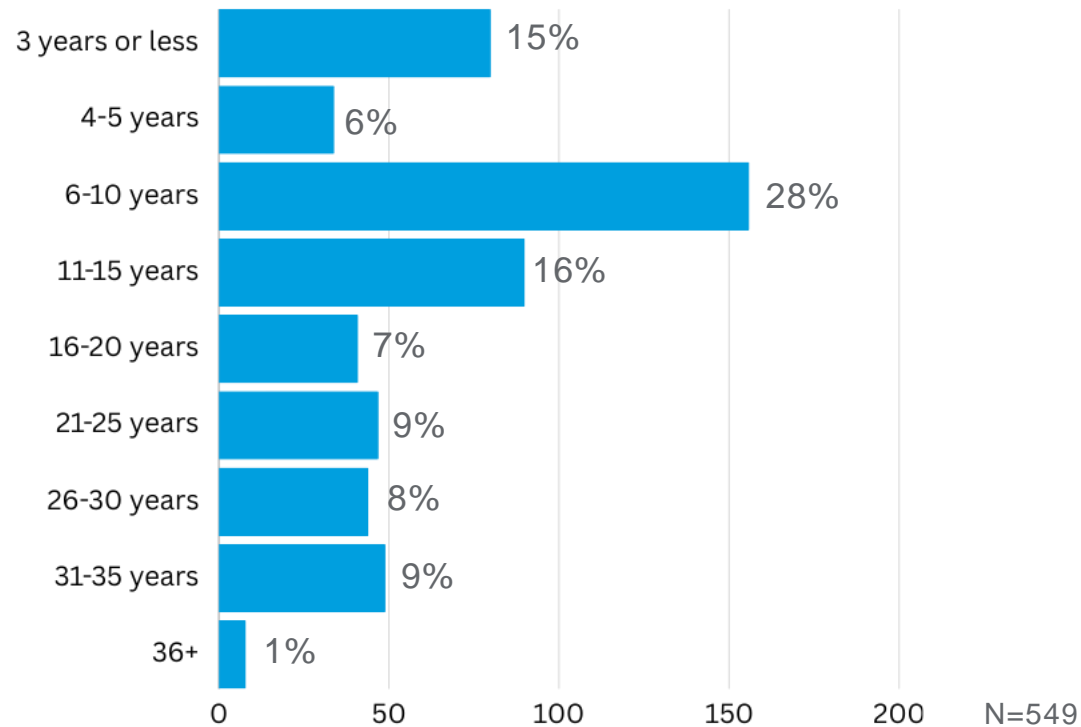


Q: DID YOU ARRIVE BY PLANE OR SHIP?

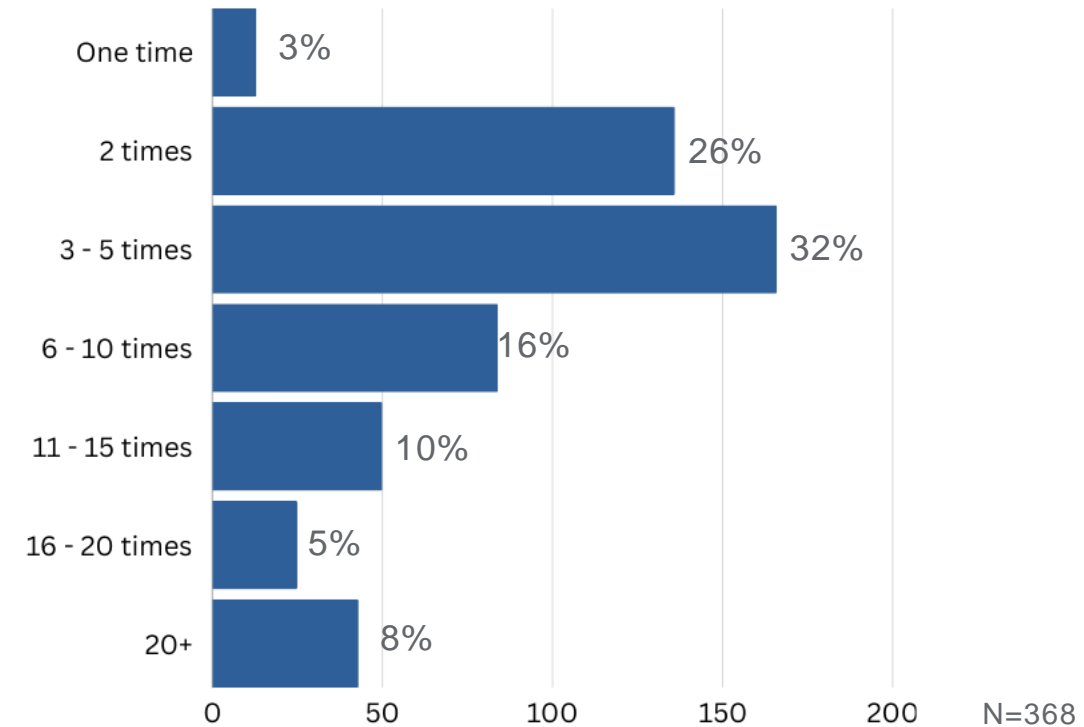


VISITATION

Q: WHAT YEAR WAS FIRST VISIT?

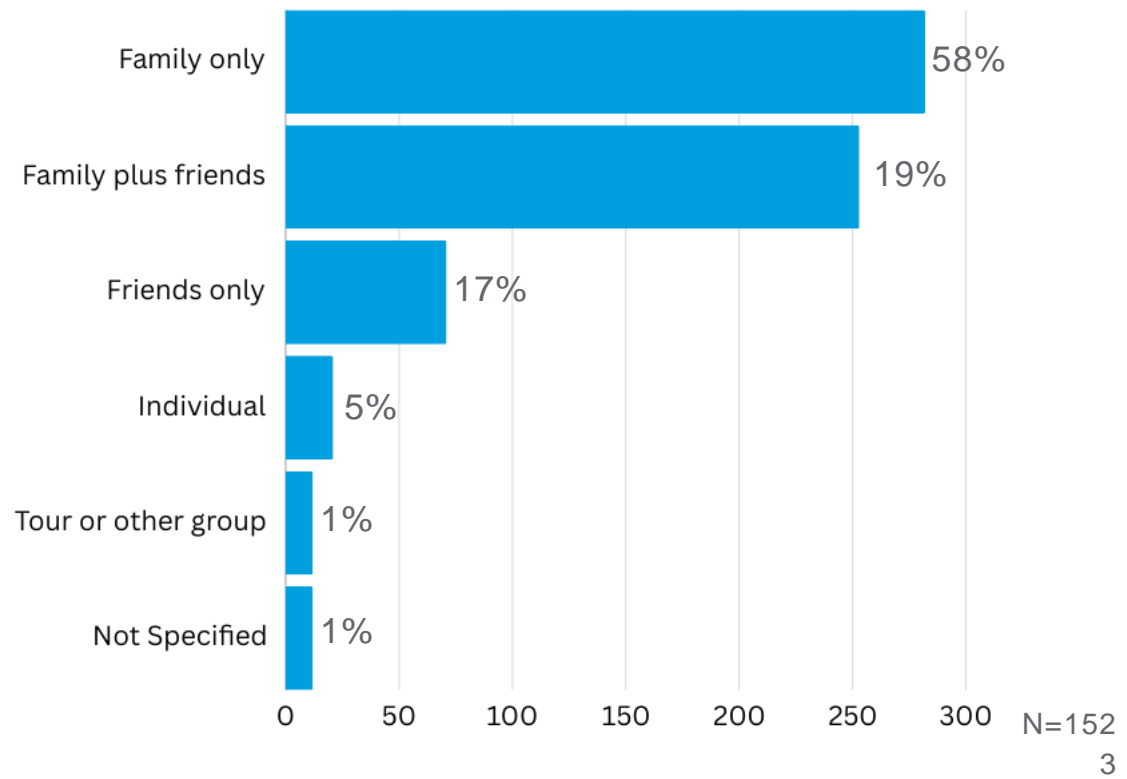


Q: HOW MANY TIMES HAVE YOU VISITED



STAY-OVER VISITORS

Q: PLEASE SELECT THE BEST CHOICE THAT DESCRIBES YOUR TRAVELING PARTY



Q: HOW MANY PEOPLE INCLUDING YOURSELF ARE IN YOUR TRAVELING GROUP



5 PEOPLE

N=1450

Q: HOW MANY DAYS ARE YOU SPENDING IN ARUBA

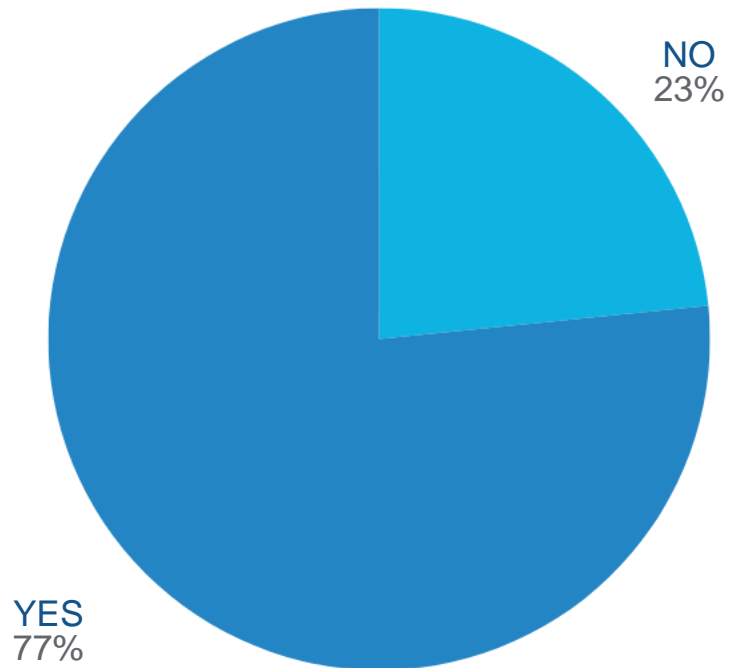


8.8 DAYS

N=1477

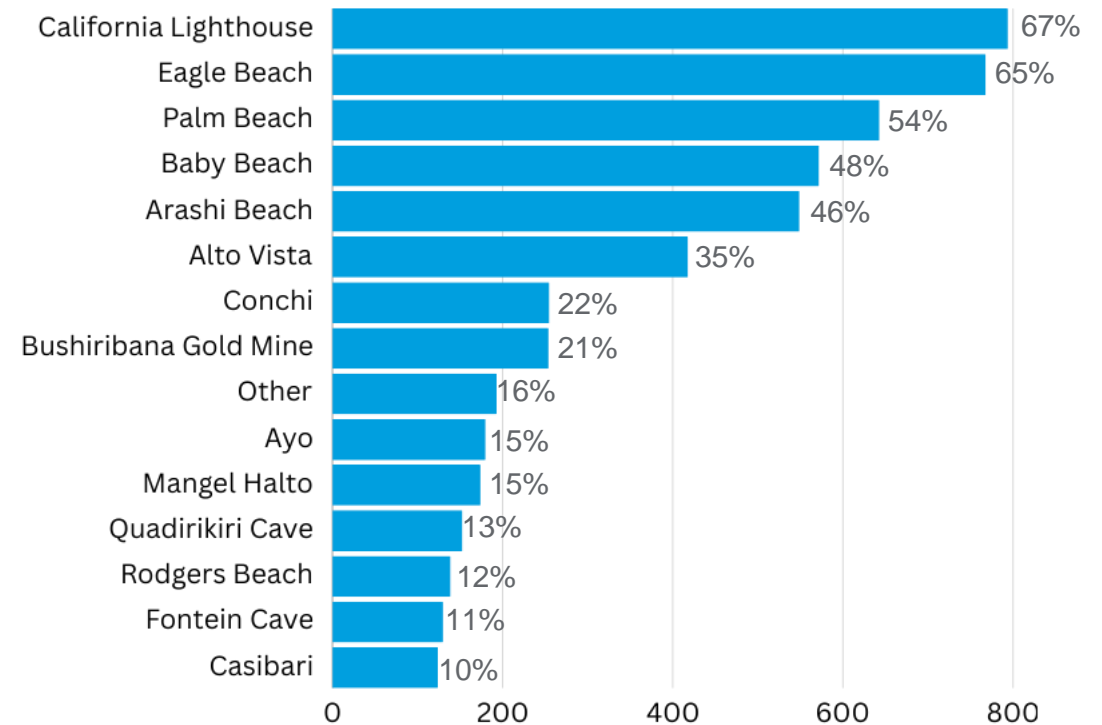
ON-ISLAND BEHAVIOUR

Q: UNTIL NOW (DURING YOUR STAY IN ARUBA), HAVE YOU VISITED MULTIPLE LOCATIONS?



N=152
2

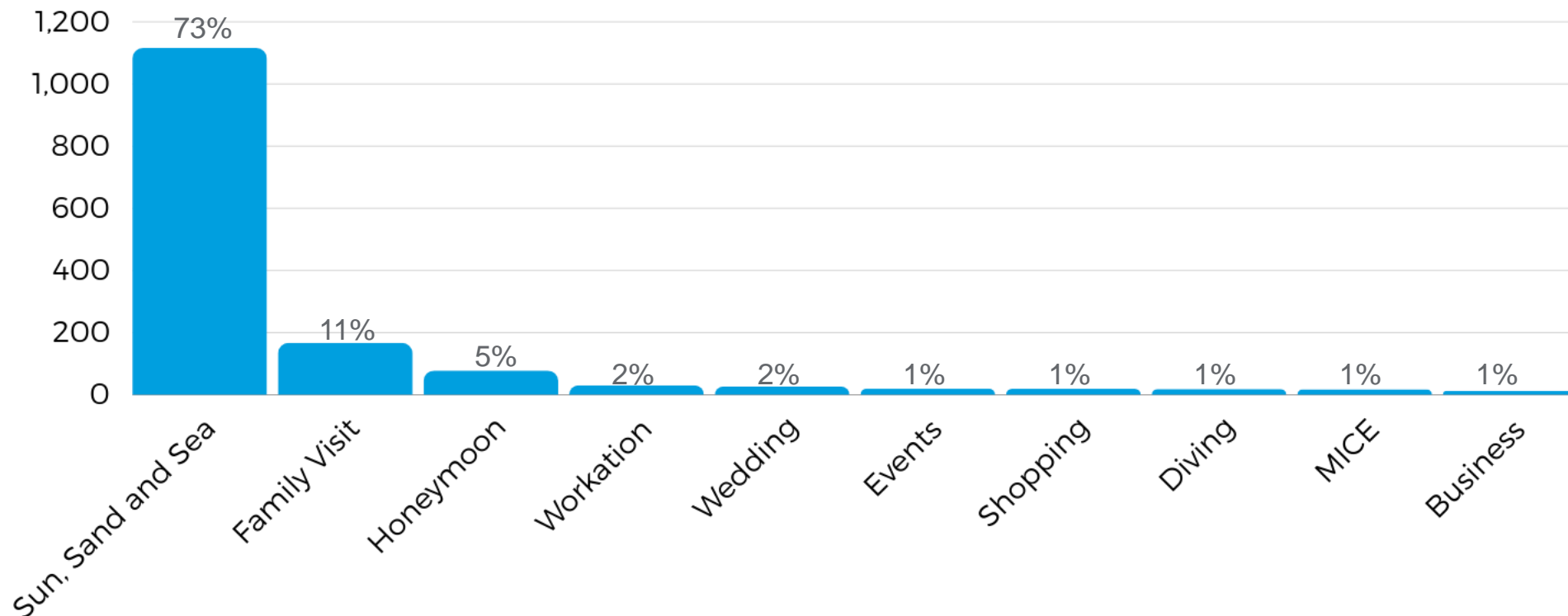
Q: WHICH LOCATIONS?



N=116
6

PURPOSE OF VISIT

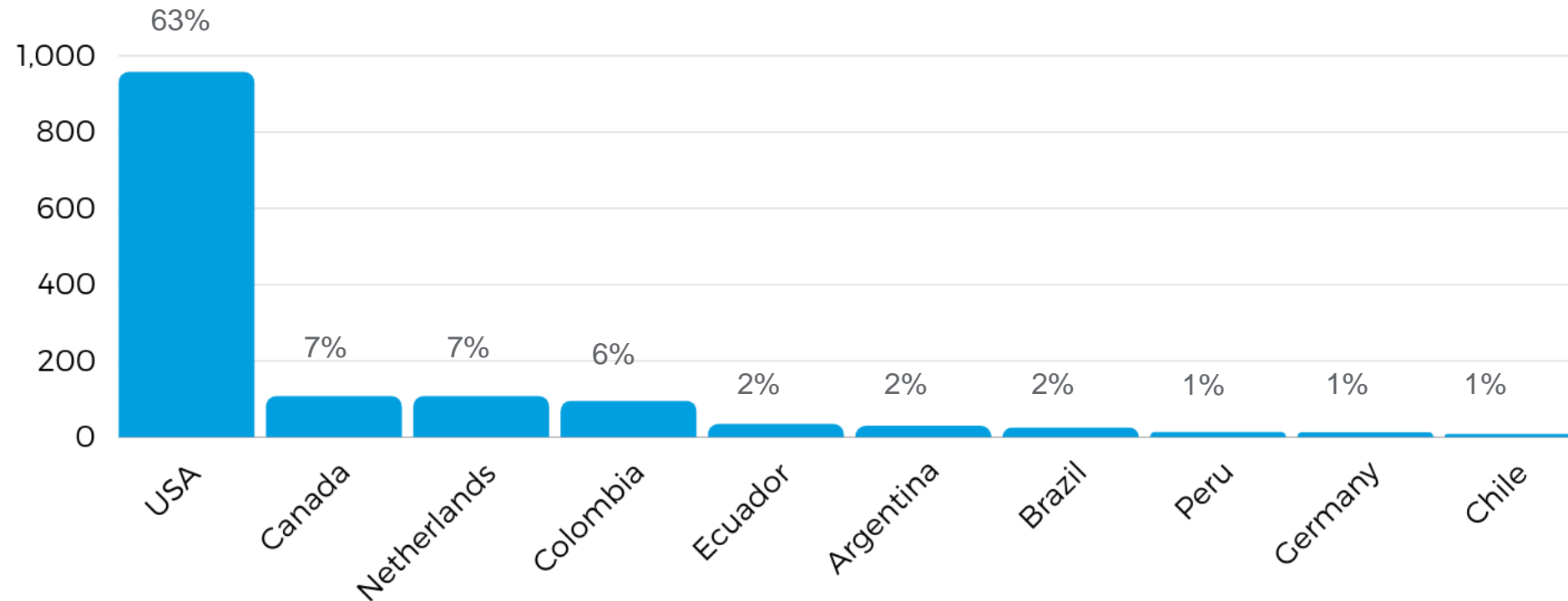
Q: WHAT IS YOUR PRIMARY PURPOSE OF VISIT?



N=1522

TOP 10 COUNTRY OF VISIT

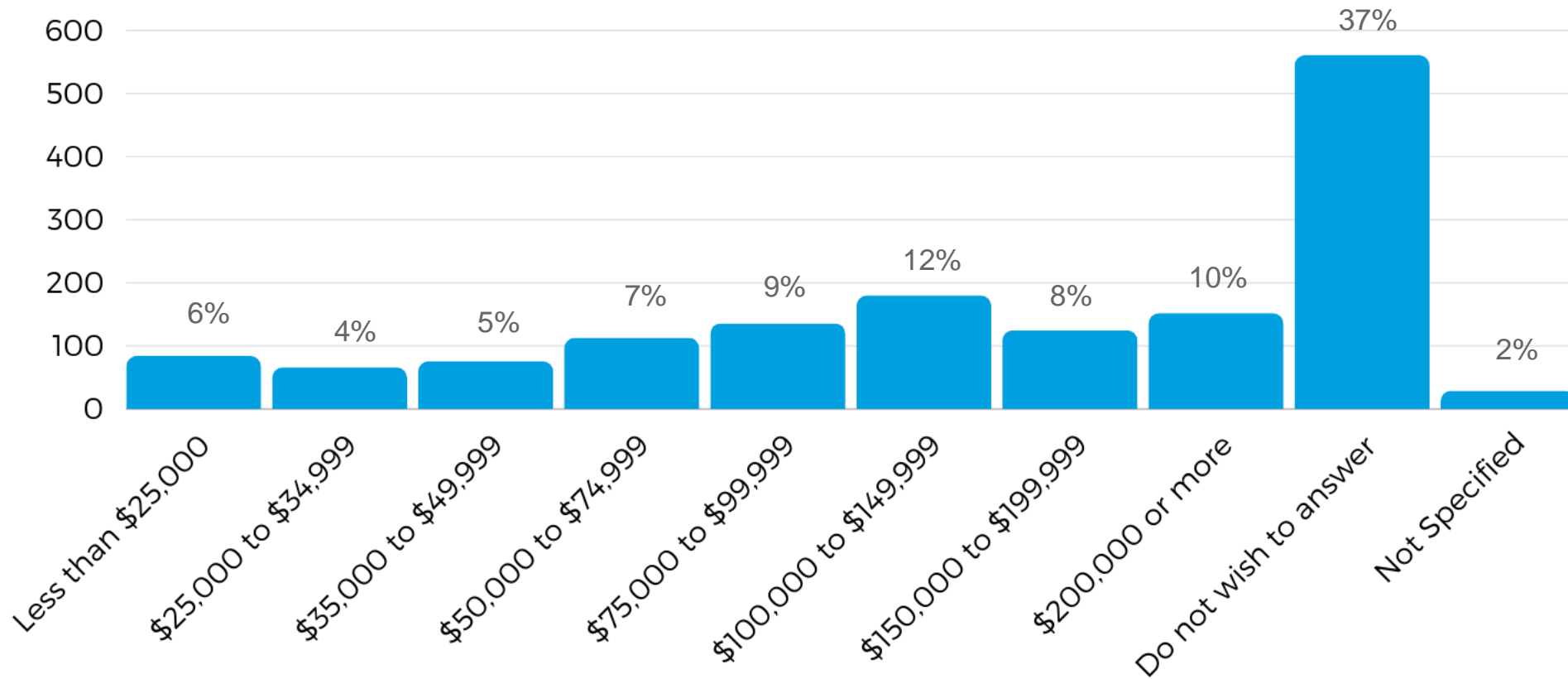
Q: WHICH COUNTRY ARE YOU FROM?



N=1522

VISITOR INCOME

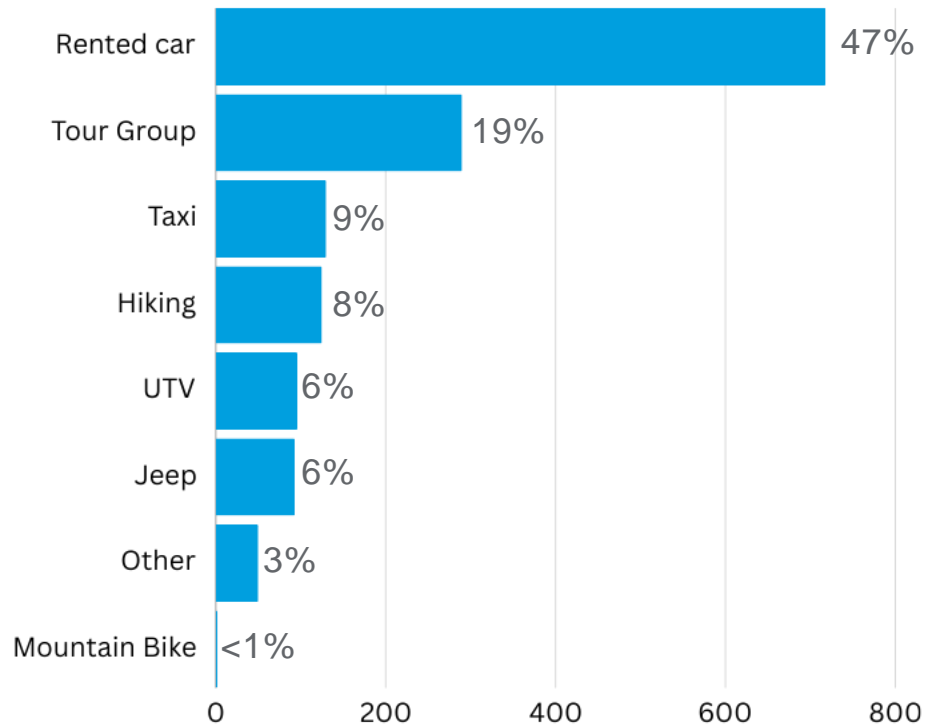
Q: WHICH CATEGORY BEST DESCRIBES YOUR TOTAL ANNUAL HOUSEHOLD INCOME?



N=1523

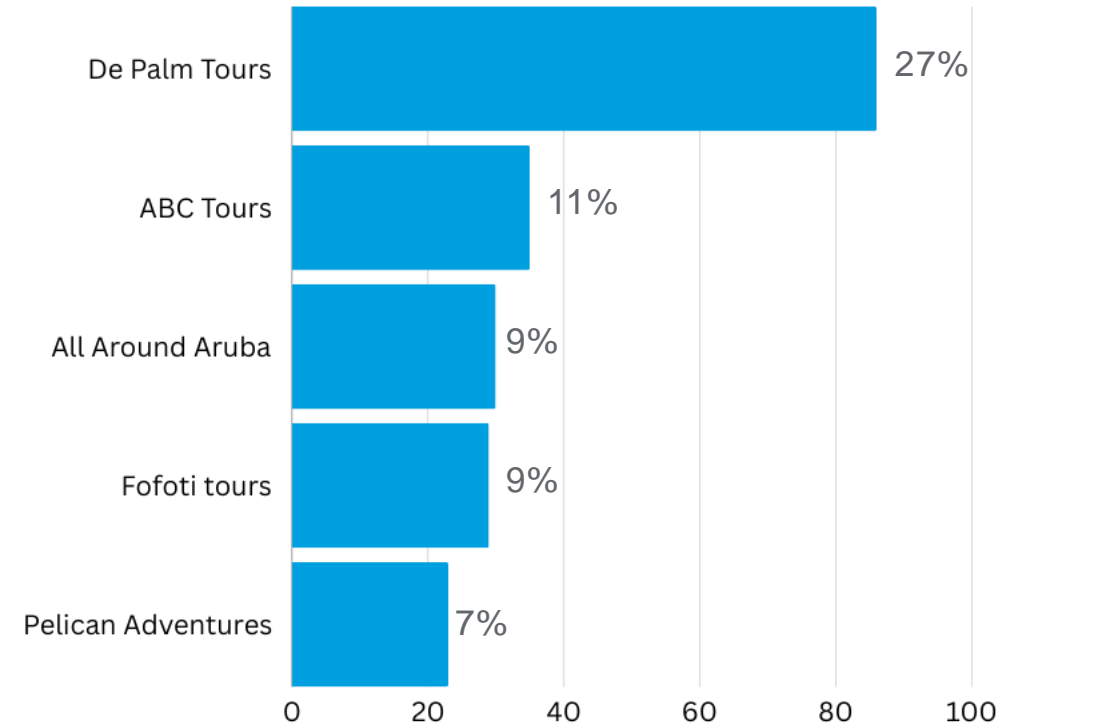
SITE VISITS

Q: HOW DID YOU GET TO THIS SITE TODAY?



N=1523

Q: TOUR - PLEASE SHARE WHICH TOUR COMPANY
TOP 5 TOUR COMPANIES



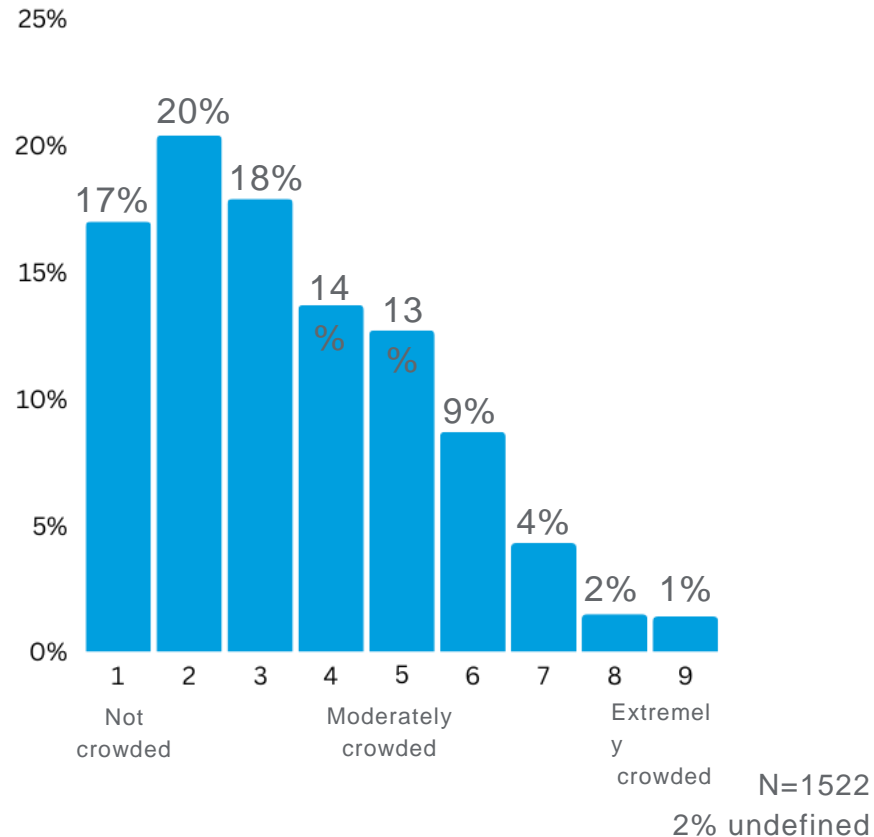
N=332



On-site Crowdedness

ON-SITE CROWDEDNESS

Q: PLEASE RATE THE LEVEL OF CROWDING YOU EXPERIENCED AT THIS LOCATION TODAY



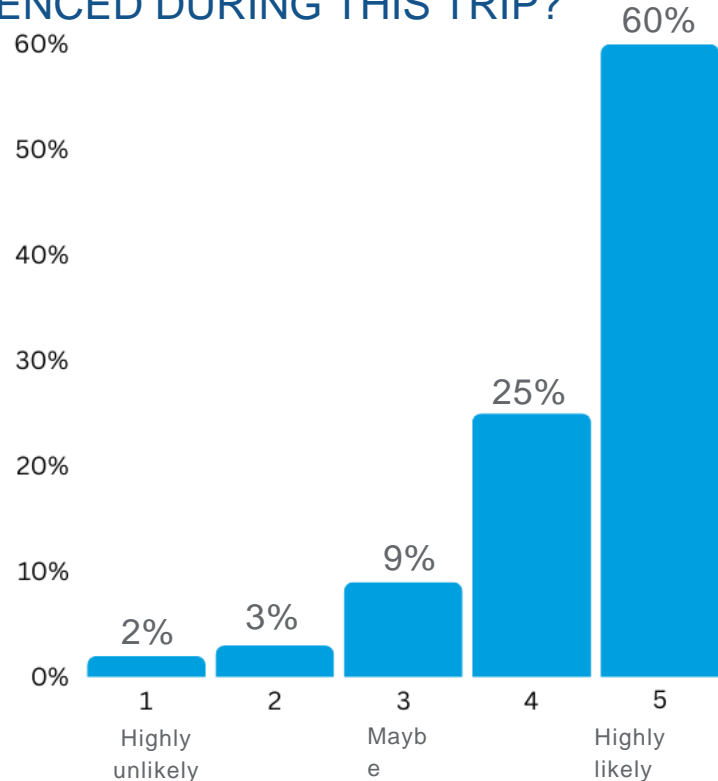
Q: PLEASE RATE THE LEVEL OF CROWDING YOU EXPERIENCED AT THIS LOCATION TODAY



3.3= NOT CROWDED
OVERALL SCORE OF ALL 14 LOCATIONS

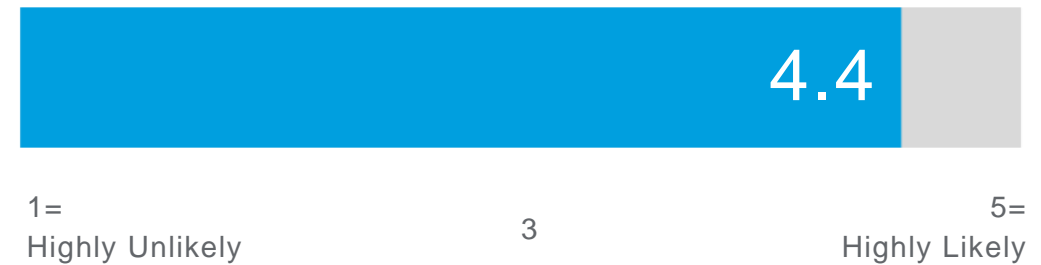
LIKELIHOOD TO RETURN

Q: HOW LIKELY ARE YOU TO RETURN TO ARUBA UNDER THE CURRENT CONDITIONS YOU EXPERIENCED DURING THIS TRIP?



85% HIGHLY LIKELY TO RETURN UNDER CURRENT CONDITIONS

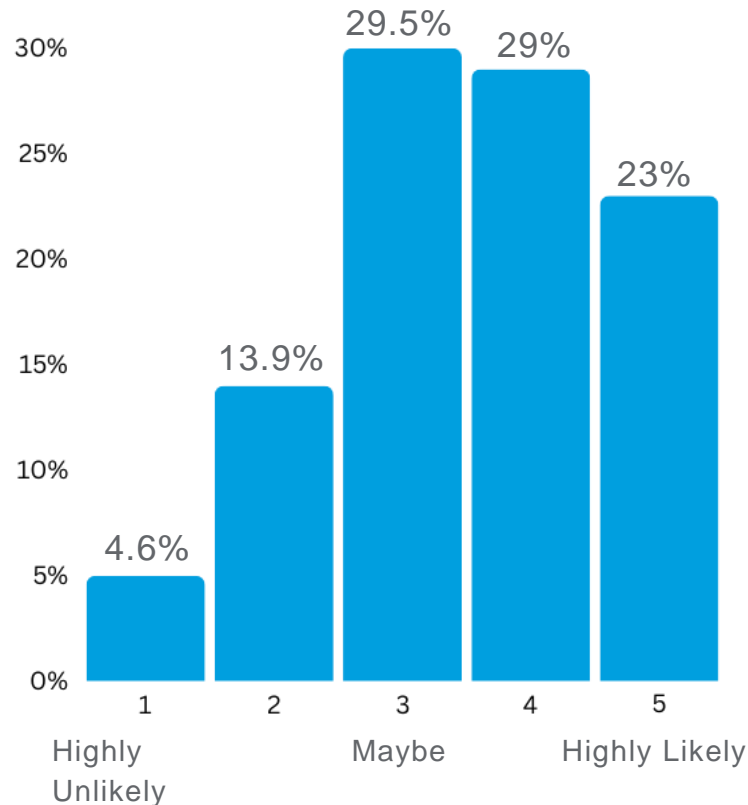
Q: HOW LIKELY ARE YOU TO RETURN TO ARUBA UNDER THE CURRENT CONDITIONS YOU EXPERIENCED DURING THIS TRIP?



4.4 = HIGHLY LIKELY TO RETURN

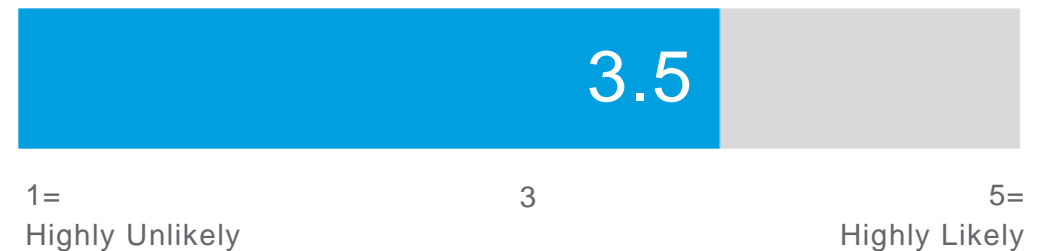
LIKELIHOOD TO RETURN & CROWDENESS

Q: HOW LIKELY ARE YOU TO RETURN TO ARUBA IF CONDITIONS ARE MORE CROWDED?



52% HIGHLY LIKELY TO RETURN IF CONDITIONS MORE CROWDED
VISITOR SENTIMENT STUDY | 2023

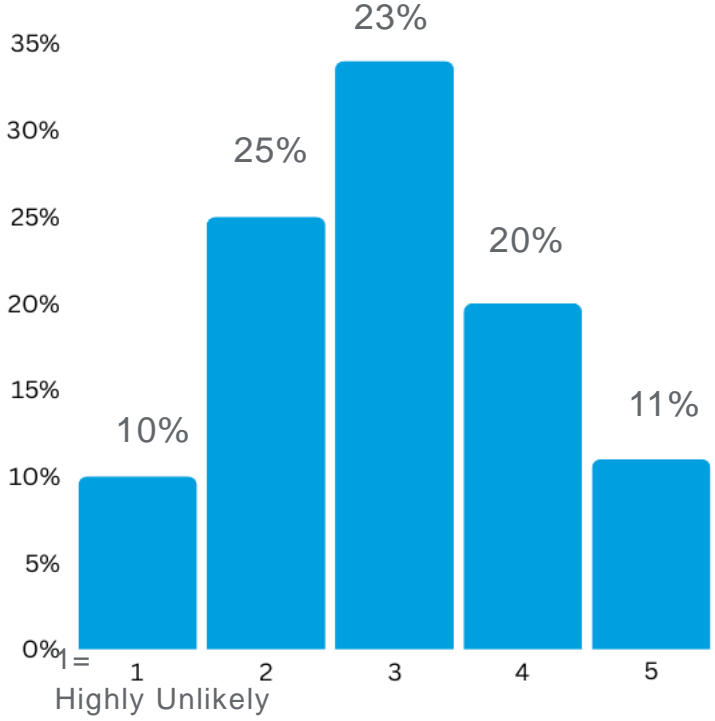
Q: HOW LIKELY ARE YOU TO RETURN TO ARUBA IF CONDITIONS ARE MORE CROWDED?



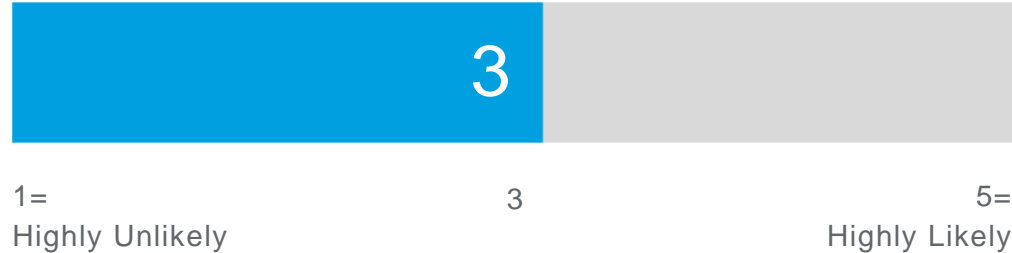
3.5 = LIKELY TO RETURN

LIKELIHOOD TO RETURN & ENVIRONMENT

Q: HOW LIKELY WILL YOU RETURN TO ARUBA IF THE ENVIRONMENTAL CONDITIONS YOU EXPERIENCED TODAY WERE MORE DEGRADED



Q: HOW LIKELY WILL YOU RETURN TO ARUBA IF THE ENVIRONMENTAL CONDITIONS YOU EXPERIENCED TODAY WERE MORE DEGRADED

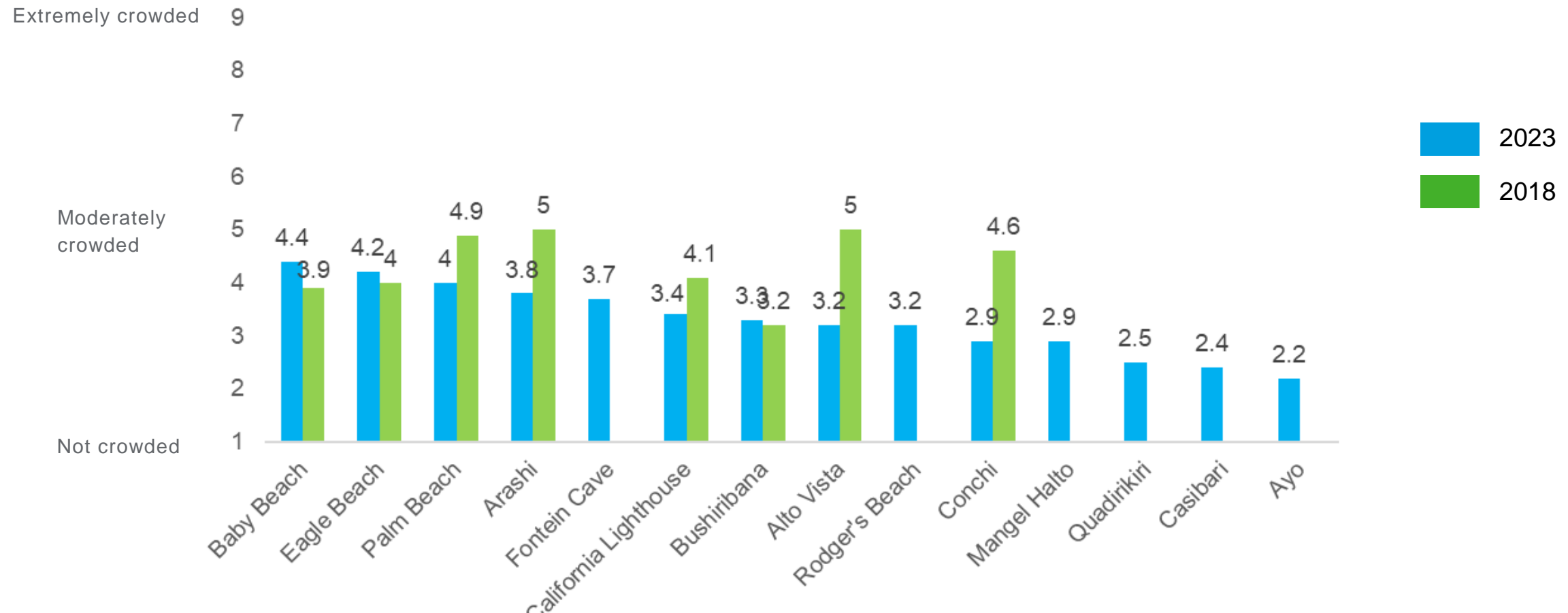


3.0 = MAYBE WILL RETURN

35% HIGHLY UNLIKELY TO RETURN, WHILE 31% HIGHLY LIKELY TO RETURN IF CONDITIONS MORE DEGRADED
VISITOR SENTIMENT STUDY | 2023

CROWDEDNESS BY LOCATION

Q: PLEASE RATE THE LEVEL OF CROWDING YOU EXPERIENCED AT THIS LOCATION TODAY



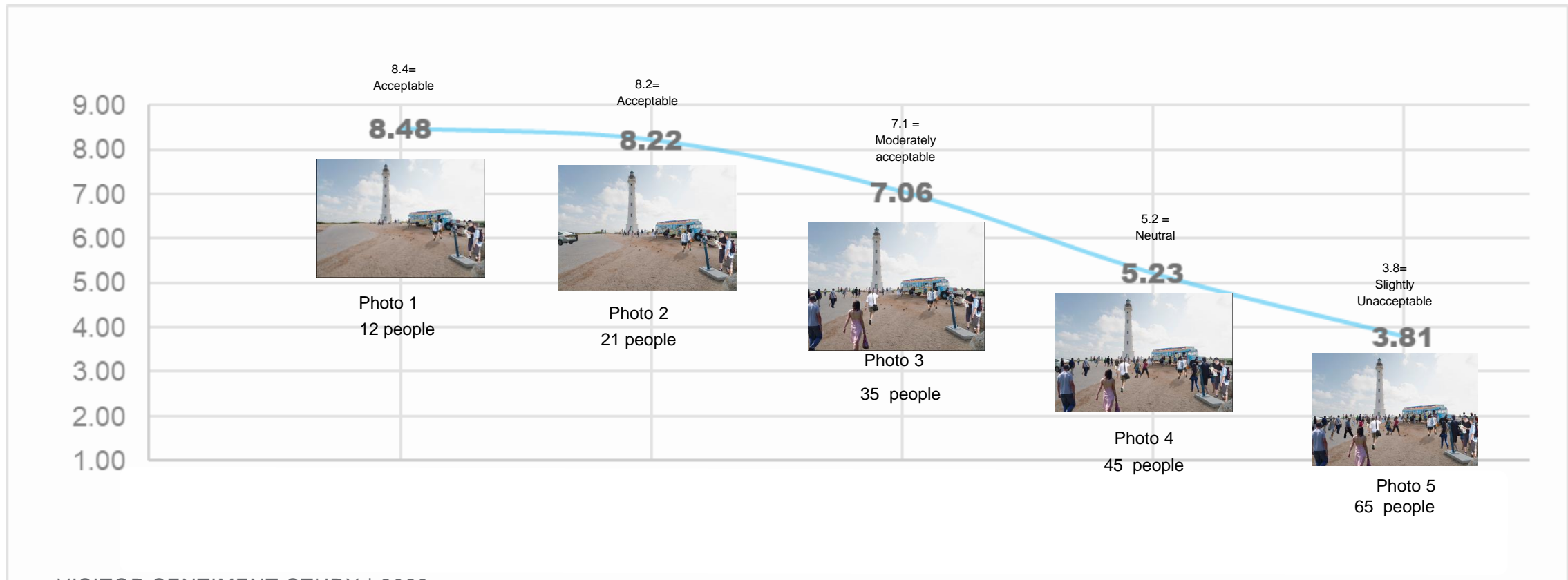
N=1522



CALIFORNIA LIGHTHOUSE
N=202


CALIFORNIA LIGHTHOUSE

Q: PLEASE RATE EACH PHOTOGRAPH BY INDICATING HOW ACCEPTABLE YOU THINK IT IS BASED ON THE NUMBER OF PEOPLE SHOWN IN THE PICTURE





SITE EXPLANATION


LINES COLOR:

 Demonstrate the number of people visitors indicated to have experienced today at the site (through pictures)

 Demonstrate the number of people visitors believe Aruba should take action to improve the location

 Demonstrate the number of people visitors believe are so unacceptable they would no longer use location

 Demonstrate the number of people visitors believe Aruba should allow

 Demonstrate the number of people visitors expected on the site



12 people



21 people



35 people

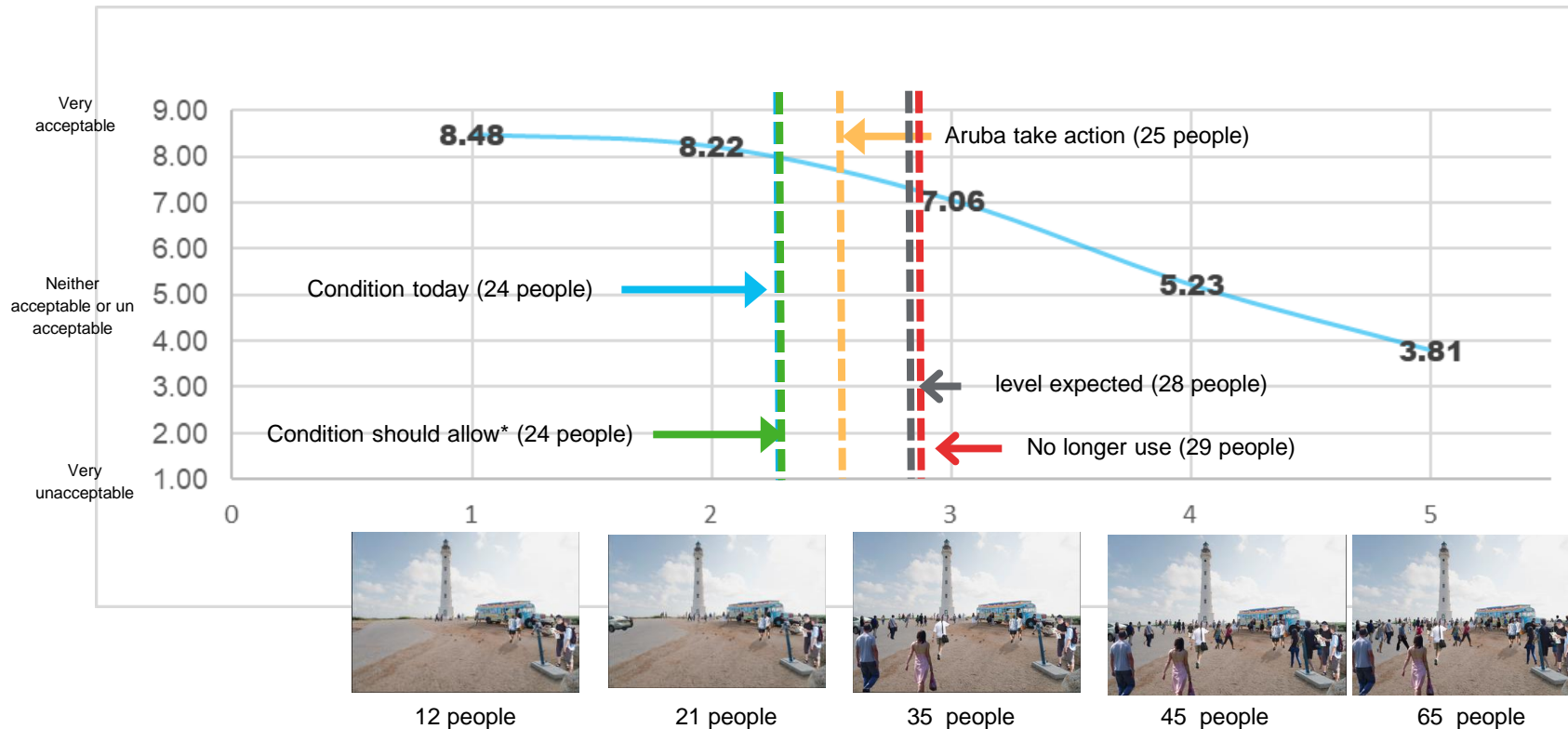


45 people



65 people

CALIFORNIA LIGHTHOUSE



The average Mean of the condition experienced = 24 people
 mean of condition expected 28 people

Tipping point: 24 -29 people*

- 24% believe none of condition are so unacceptable that require action
- 48% believe none of conditions are so unacceptable that they would no longer come
- 48% believe none of conditions are so unacceptable or that visitors should be limited

CALIFORNIA LIGHTHOUSE

PLEASE RATE THE LEVEL OF CROWDING YOU EXPERIENCED AT THIS LOCATION TODAY:



3.4 =
Not Crowded

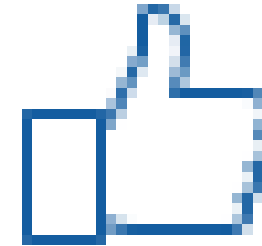
ON AVERAGE HOW MUCH MONEY DID YOU SPEND ON THE SITE:



26.2%
\$5 - \$20

*35% NA

HOW WOULD YOU RATE YOUR EXPERIENCE TODAY AT THIS SITE:



8.5/10

ON AVERAGE HOW MUCH TIME YOU SPENT ON LOCATION



42%
20 Min

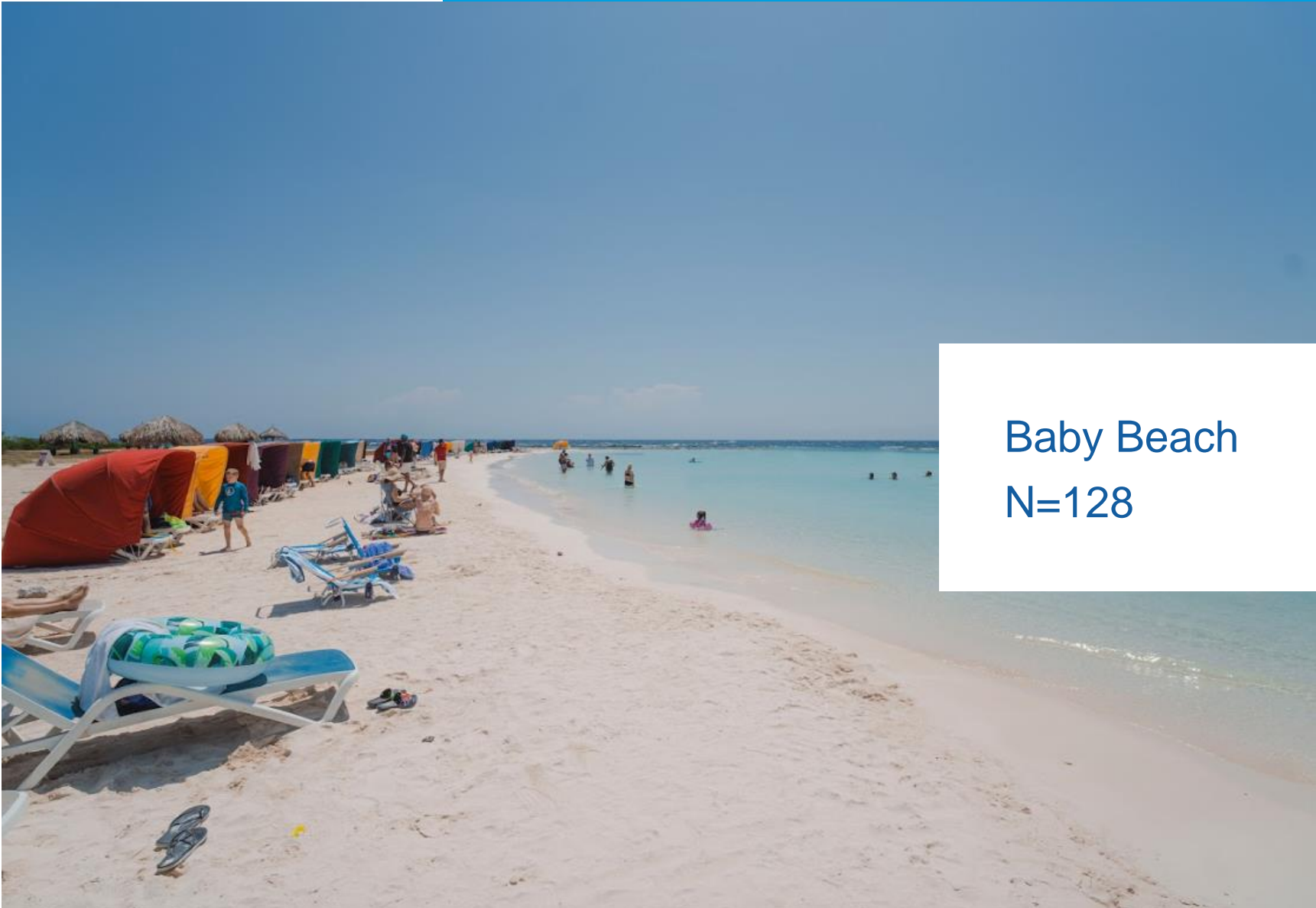
PLEASE SHARE WITH US ON WHICH COMPONENT:



50%
Food &
Beverages



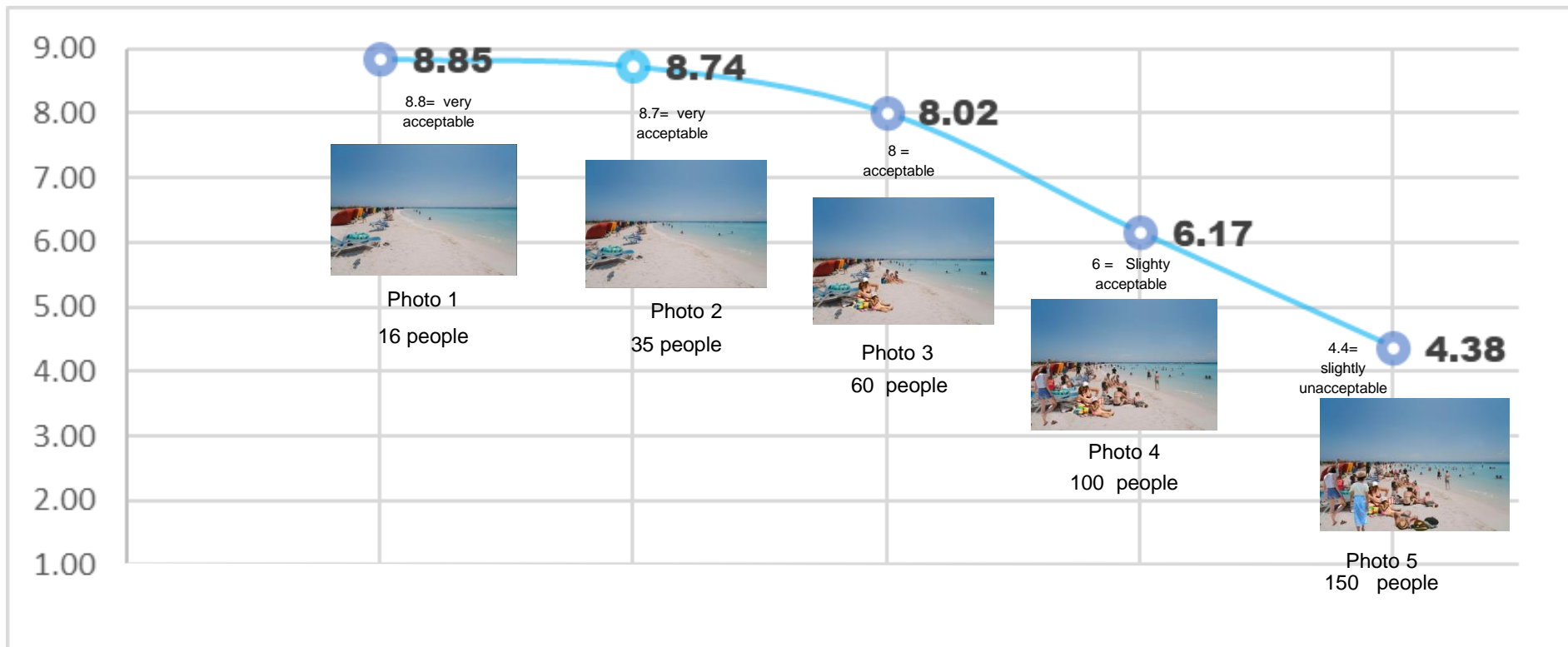
11.4%
Souvenirs



Baby Beach
N=128

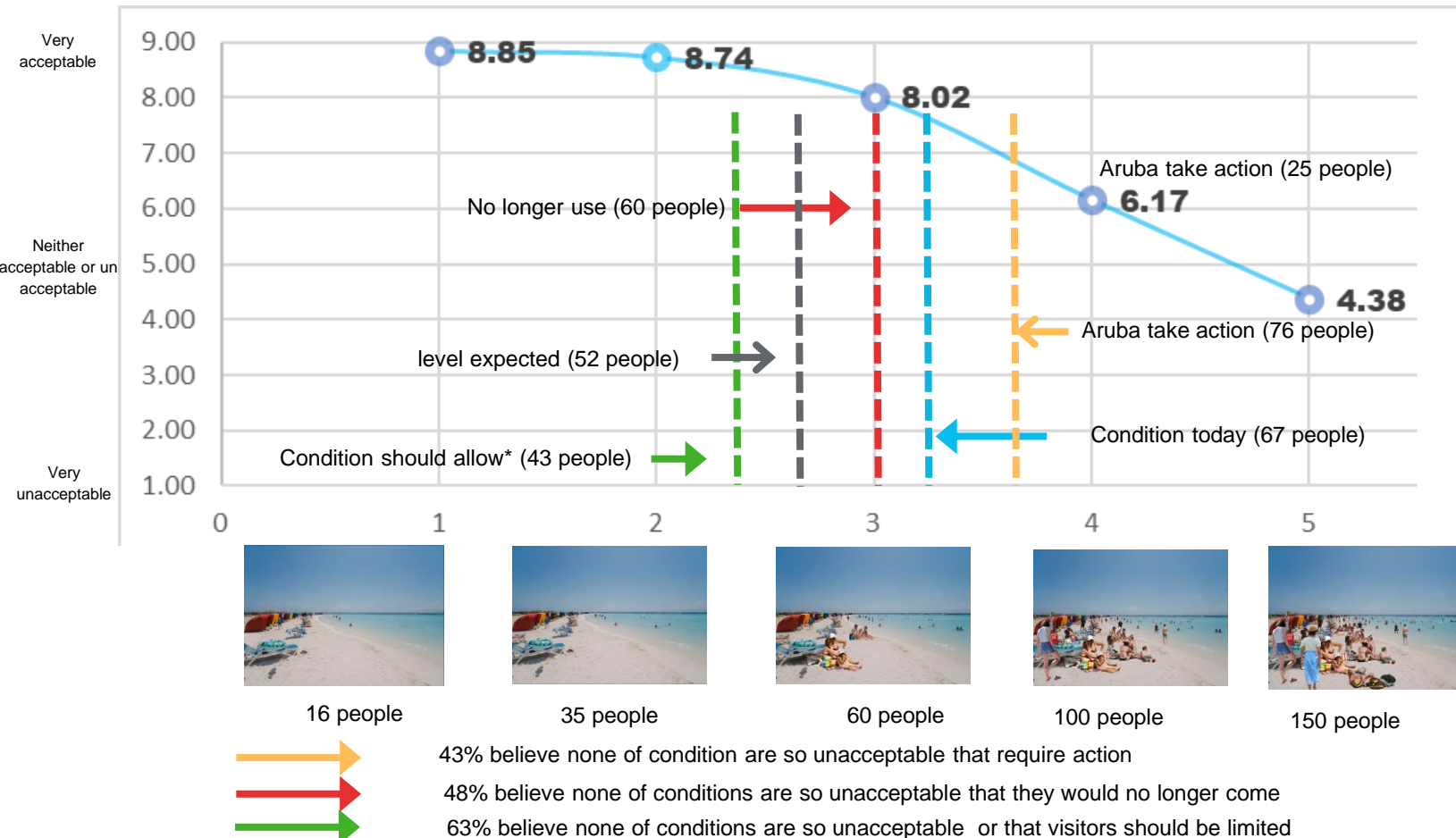
BABY BEACH

Q: PLEASE RATE EACH PHOTOGRAPH BY INDICATING HOW ACCEPTABLE YOU THINK IT IS BASED ON THE NUMBER OF PEOPLE SHOWN IN THE PICTURE



BABY BEACH

Q: PLEASE RATE EACH PHOTOGRAPH BY INDICATING HOW ACCEPTABLE YOU THINK IT IS BASED ON THE NUMBER OF PEOPLE SHOWN IN THE PICTURE



Average Mean of condition experienced = 67 people is more than the mean of condition expected 52 people

Tipping point: 43 - 60 people*

BABY BEACH



PLEASE RATE THE LEVEL OF CROWDING YOUR EXPERIENCED AT THIS LOCATION TODAY:



4.4 =
Moderately
crowded

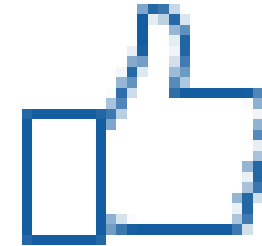
ON AVERAGE HOW MUCH MONEY DID YOU SPEND ON THE SITE:



16%
\$5- \$20

*34% NA

HOW WOULD YOU RATE YOUR EXPERIENCE TODAY AT THIS SITE:



8.9/10

ON AVERAGE HOW MUCH TIME YOU SPENT ON LOCATION



84%
More than
60 Min

PLEASE SHARE WITH US ON WHICH COMPONENT:



58%
Food &
Beverages



16%
Beach chairs

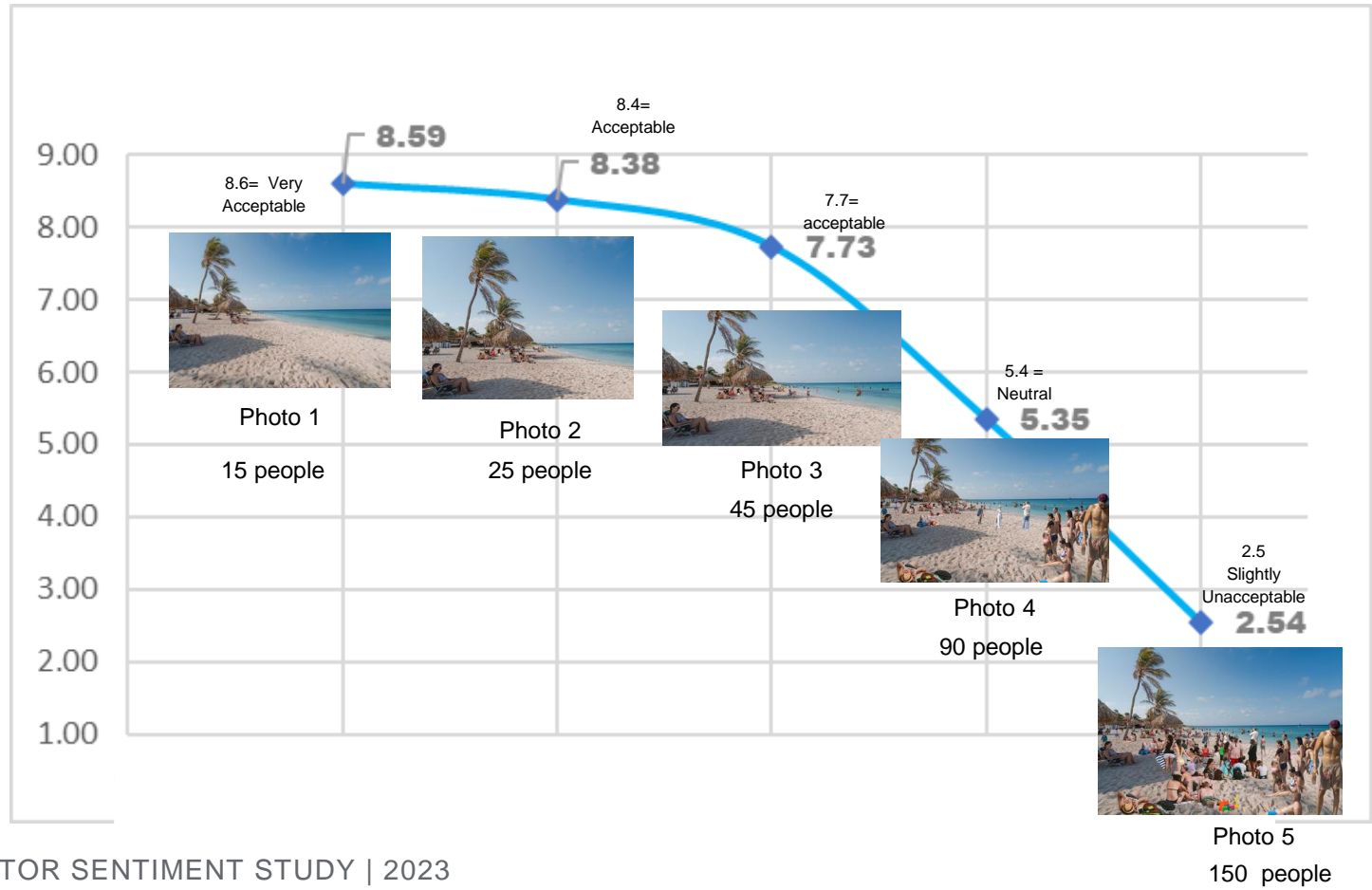


ARASHI Beach

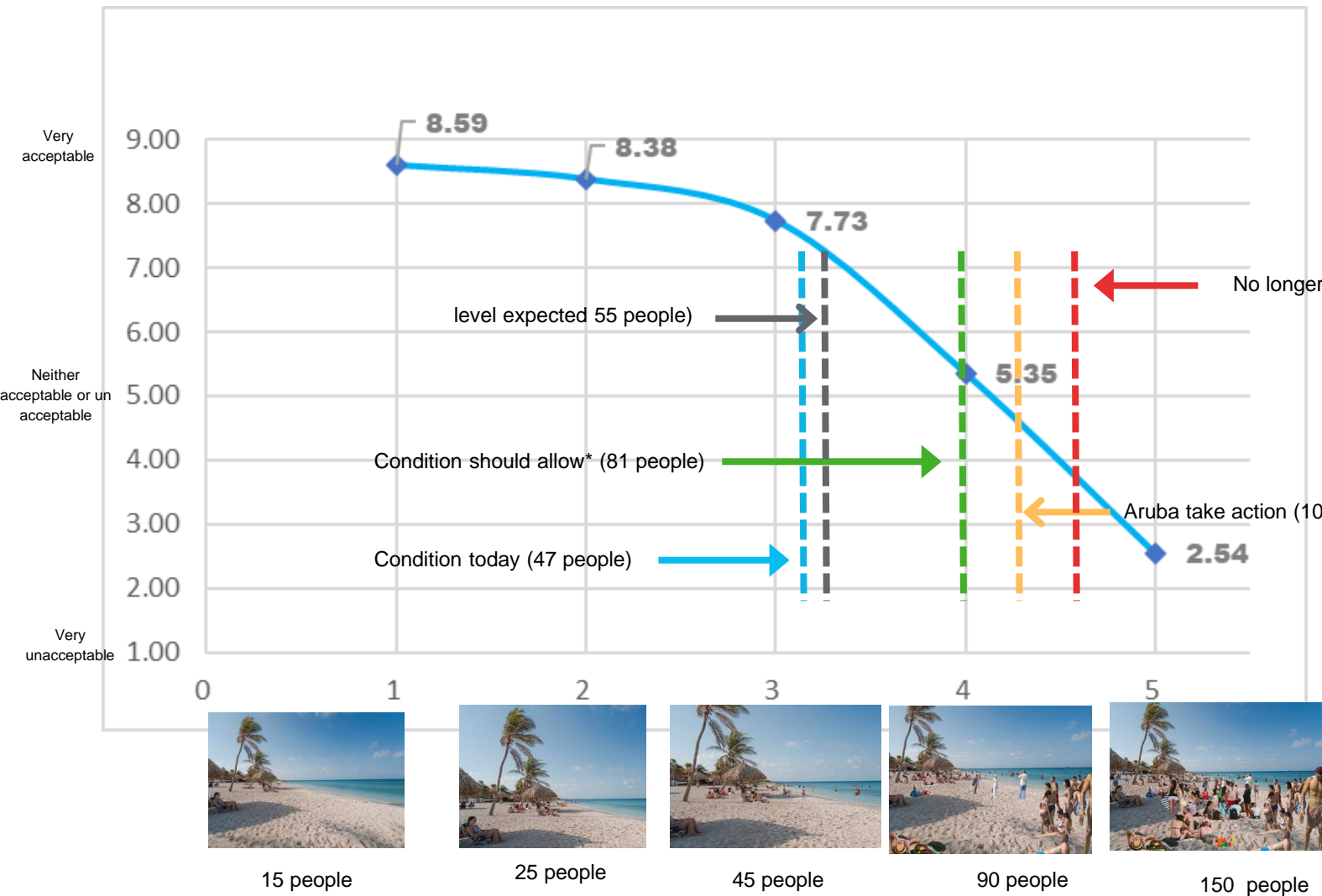
N= 149

ARASHI BEACH

Q: PLEASE RATE EACH PHOTOGRAPH BY INDICATING HOW ACCEPTABLE YOU THINK IT IS BASED ON THE NUMBER OF PEOPLE SHOWN IN THE PICTURE



ARASHI BEACH



The average Mean of condition experienced = 47 people is less than the mean of condition expected 55 people

Tipping point: 81 -117 people*

- 6% believe none of conditions are so unacceptable that require action
- 13% believe none of conditions are so unacceptable that they would no longer come
- 14% believe none of conditions are so unacceptable or that visitors should be limited

ARASHI BEACH

PLEASE RATE THE LEVEL OF CROWDING YOU EXPERIENCED AT THIS LOCATION TODAY:



3.8 =
Moderately
Crowded

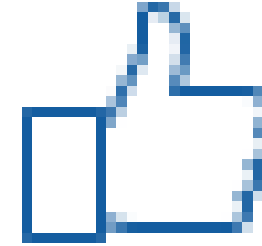
ON AVERAGE HOW MUCH MONEY DID YOU SPEND ON THE SITE:



17%
\$5- \$20

*20% NA

HOW WOULD YOU RATE YOUR EXPERIENCE TODAY AT THIS SITE:



8.7/10

ON AVERAGE HOW MUCH TIME YOU SPENT ON LOCATION



64%
More than
60 Min

PLEASE SHARE WITH US ON WHICH COMPONENT:



63%
Food &
Beverages



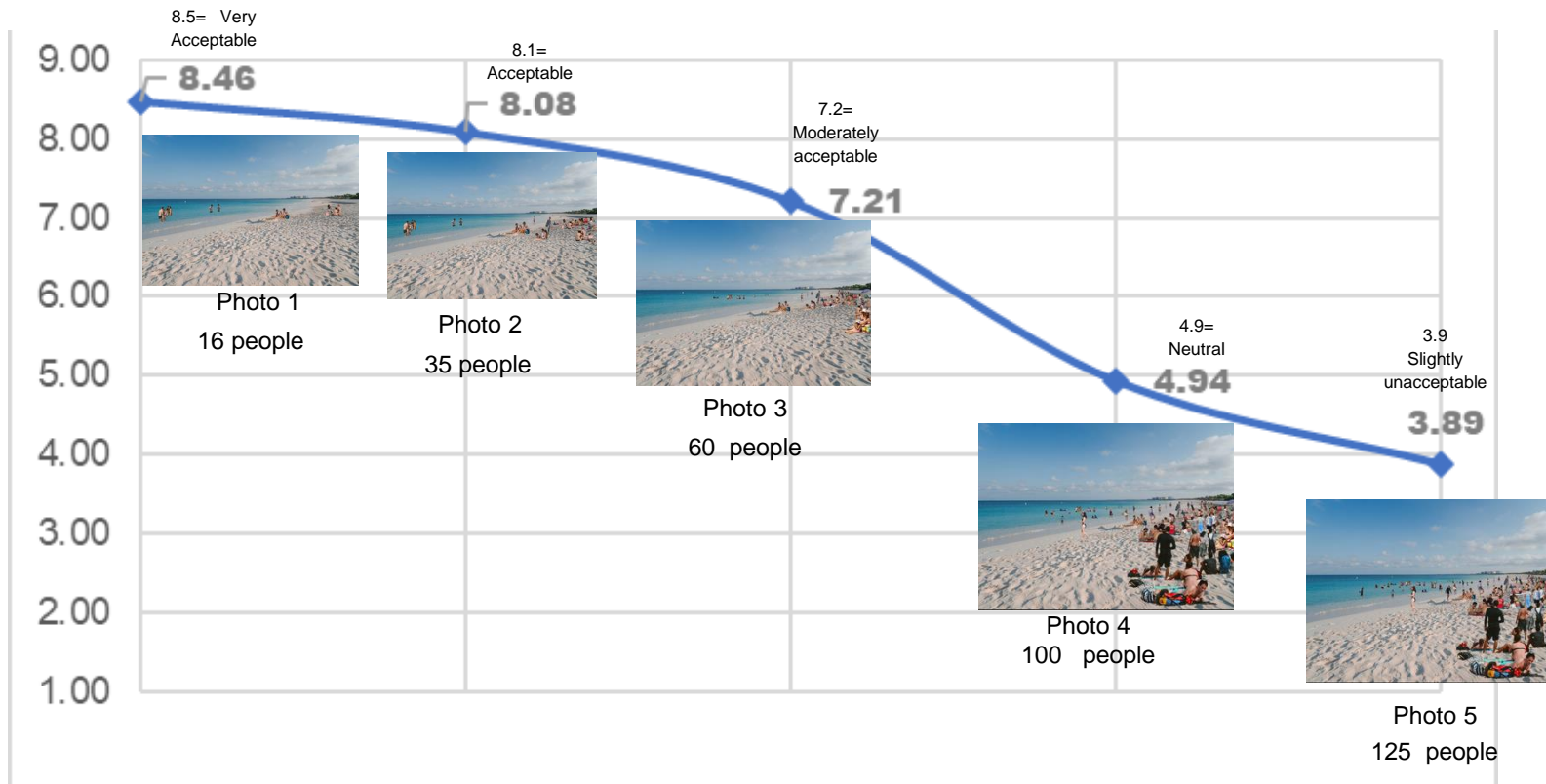
11%
Beach chairs
& Palapas



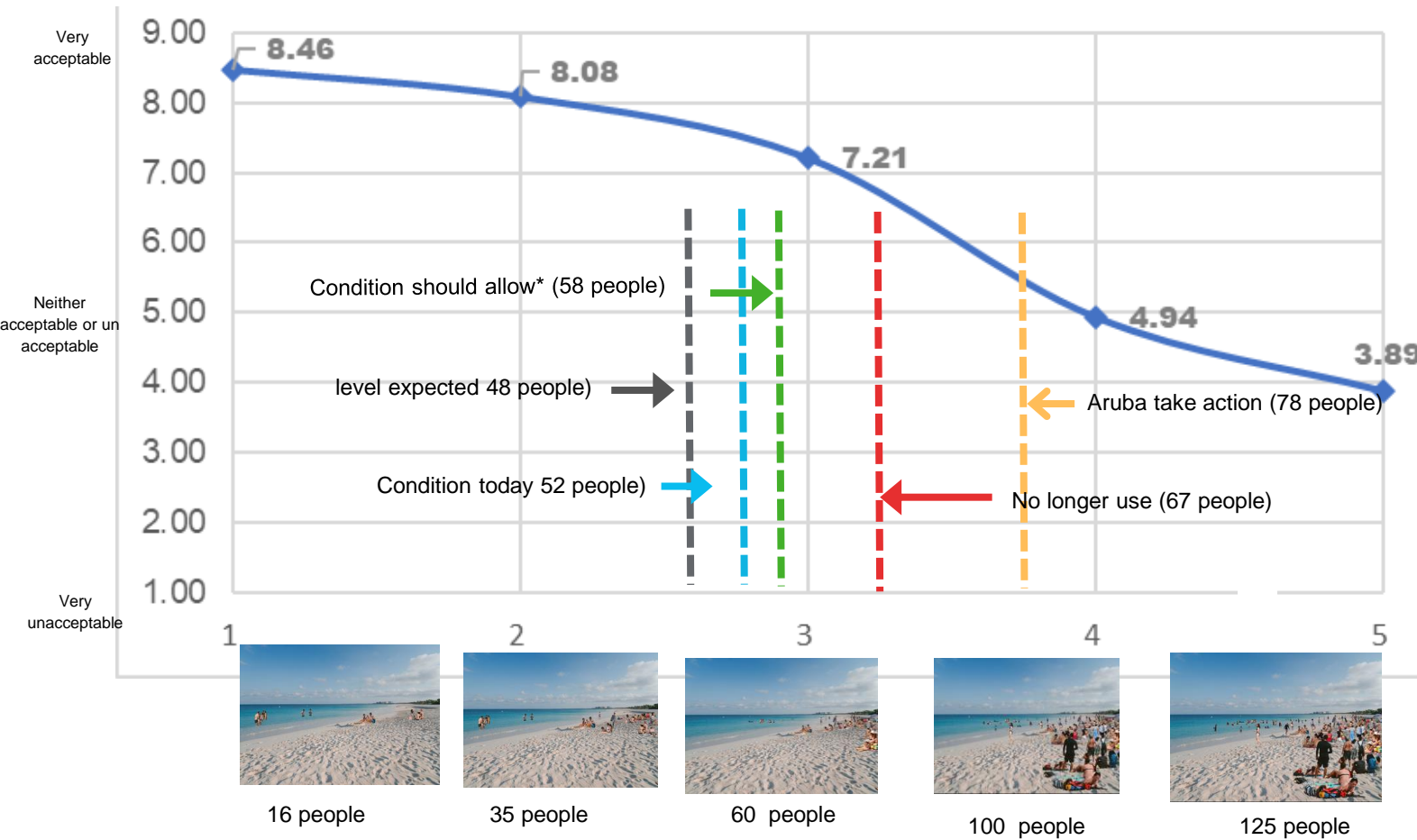
Eagle Beach
N= 172

EAGLE BEACH

Q: PLEASE RATE EACH PHOTOGRAPH BY INDICATING HOW ACCEPTABLE YOU THINK IT IS BASED ON THE NUMBER OF PEOPLE SHOWN IN THE PICTURE






EAGLE BEACH



The average Mean of condition experienced = 52 people is more than the mean of condition expected 48 people

Tipping point: 48- 78 people*

-  28% believe none of the conditions are so unacceptable that require action
-  38% believe none of conditions are so unacceptable that they would no longer come
-  30% believe none of the conditions are so unacceptable or that visitors should be limited

EAGLE BEACH



PLEASE RATE THE LEVEL OF CROWDING YOU EXPERIENCED AT THIS LOCATION TODAY:



4.1 =
Moderately
Crowded

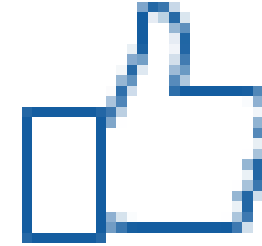
ON AVERAGE HOW MUCH MONEY DID YOU SPEND ON THE SITE:



19%
Less than \$5

*34% NA

HOW WOULD YOU RATE YOUR EXPERIENCE TODAY AT THIS SITE:



8.8/10

ON AVERAGE HOW MUCH TIME YOU SPENT ON LOCATION



89%
More than 60
minutes

PLEASE SHARE WITH US ON WHICH COMPONENT:



47%
Food &
Beverages



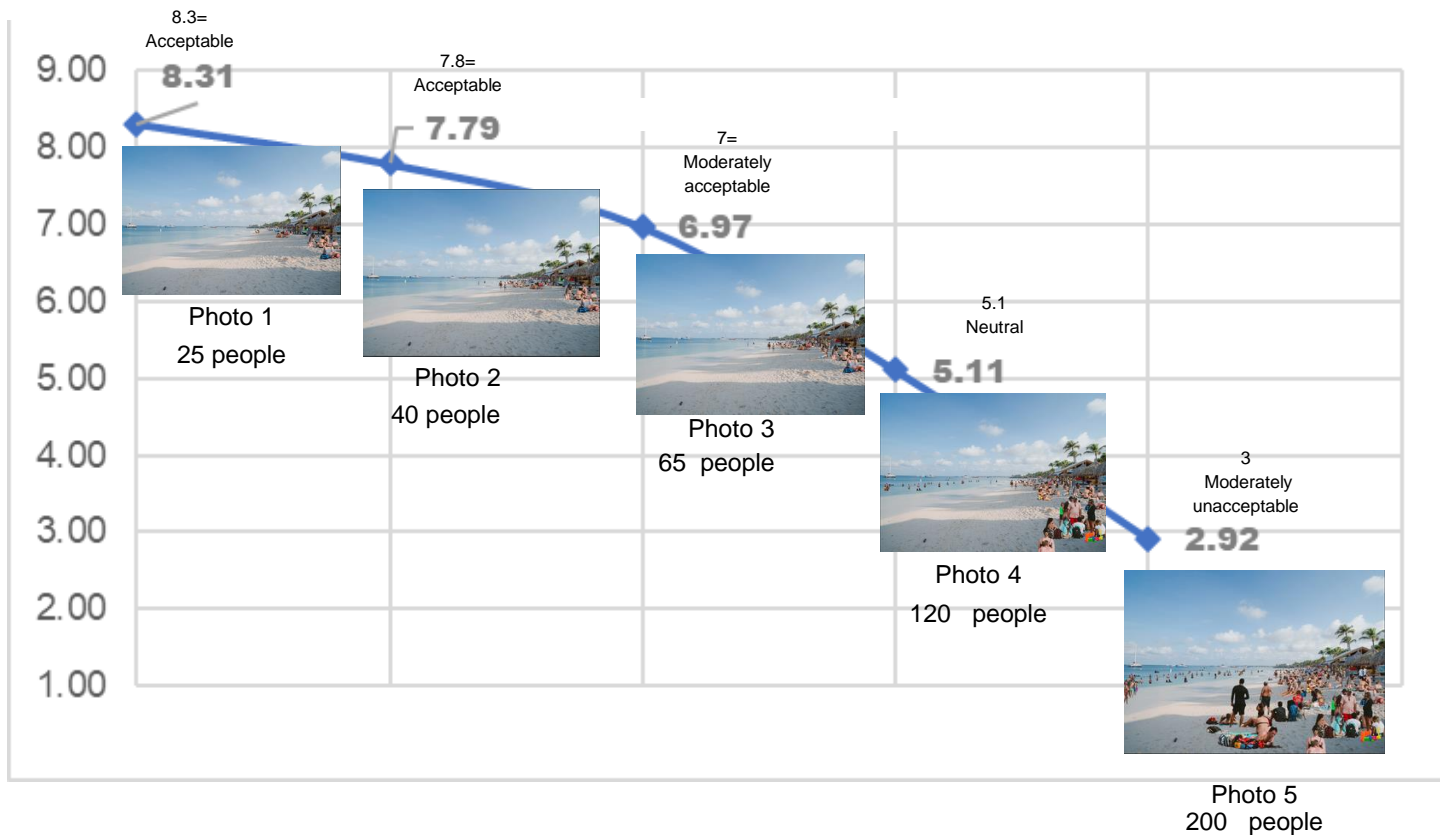
21%
Beach
Chairs



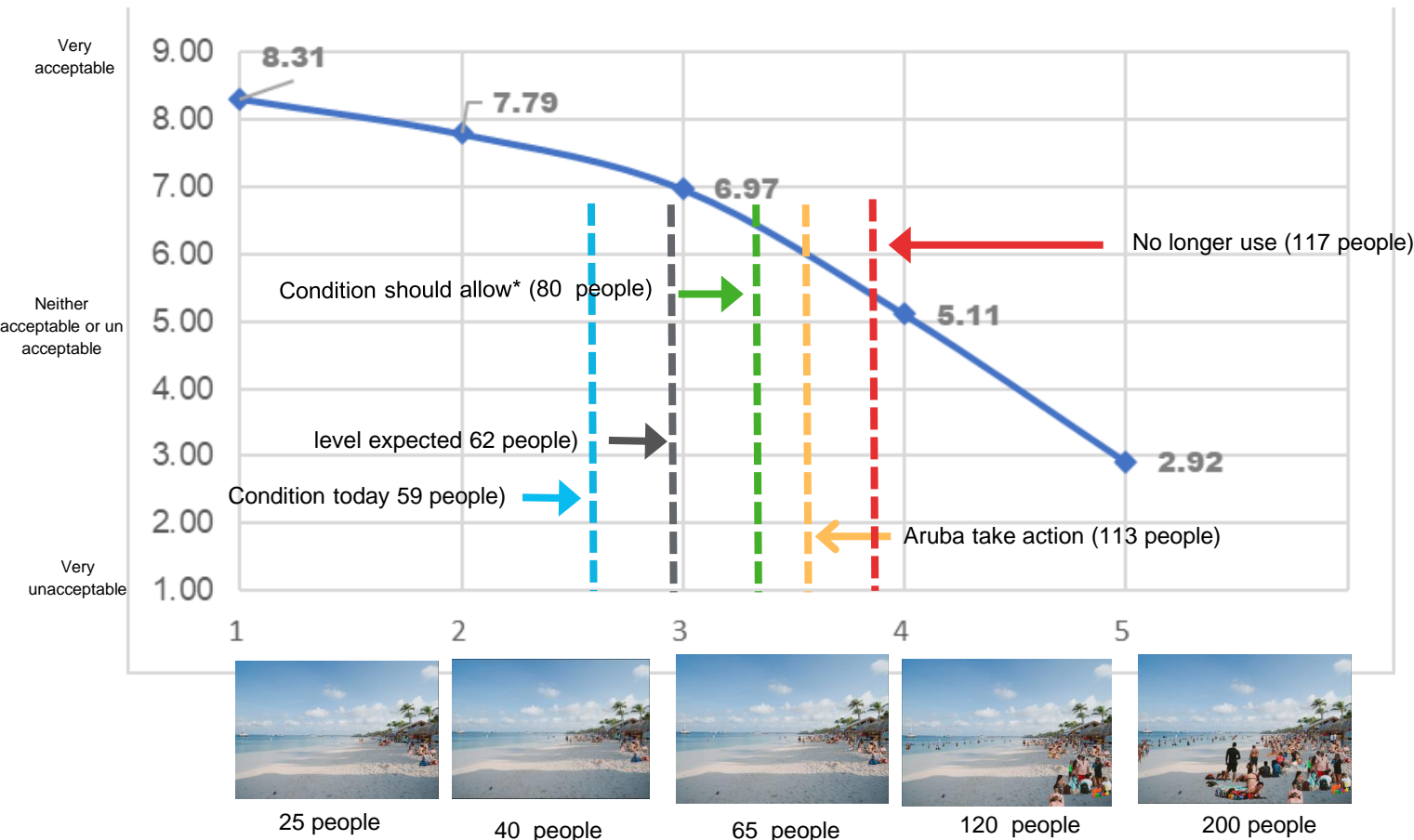
Palm Beach
N= 156

PALM BEACH

Q: PLEASE RATE EACH PHOTOGRAPH BY INDICATING HOW ACCEPTABLE YOU THINK IT IS BASED ON THE NUMBER OF PEOPLE SHOWN IN THE PICTURE



PALM BEACH



The average Mean of condition experienced = 59 people is less than the mean of condition expected 62 people

Tipping point: 80- 117 people*

- 25% believe none of the conditions are so unacceptable that require action
- 36% believe none of conditions are so unacceptable that they would no longer come
- 37% believe none of the conditions are so unacceptable or that visitors should be limited

PALM BEACH



PLEASE RATE THE LEVEL OF CROWDING YOU EXPERIENCED AT THIS LOCATION TODAY:



4=
Moderately crowded

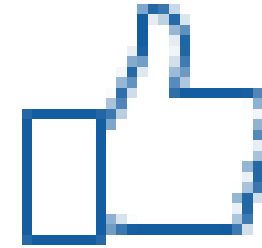
ON AVERAGE HOW MUCH MONEY DID YOU SPEND ON THE SITE:



24%
More than \$80

*19% NA

HOW WOULD YOU RATE YOUR EXPERIENCE TODAY AT THIS SITE:



8.9/10

ON AVERAGE HOW MUCH TIME YOU SPENT ON LOCATION



82%
More than 60 Min

PLEASE SHARE WITH US ON WHICH COMPONENT:



65%
Food & Beverages



13%
Beach Chairs

KEY TAKE AWAYS

- Overall we see that study participants indicated that the sites visited are not crowded (Avg. mean of 3.3);
- Study participants indicated on a scale of 1 -5 (1= highly unlikely | 5= highly likely) that visitors are likely to return (avg. mean of 4.4);
- Study participants indicated on a scale of 1 -5 (1= highly unlikely | 5= highly likely) that visitors are likely to return if conditions are more crowded (avg. mean of 3.5);
- Study participants indicated on a scale of 1 -5 (1= highly unlikely | 5= highly likely) that visitors might return if conditions are more environmentally degraded and crowded (avg. mean of 3.0 = maybe);
- Out of the 14 locations - Baby beach was rated as the most crowded, followed by Ealge Beach, Palm Beach, and Arashi, while Ayo and Casibari were rated as the least crowded.

KEY TAKE AWAYS

Location	Tipping point 2023	Tipping point 2018
California Lighthouse	24 - 29 people	25 - 31 people
Baby Beach	43 - 60 people	43 - 52 people
Alto Vista*	13 - 25 people	33 - 43 people*
Arashi Beach	81 - 117 people	33 - 37 people*
Bushiribana	12 - 21 people	21 - 30 people*
Conchi	11 - 14 people	26 - 32 people*
Eagle Beach	48 - 78 people	29 - 33 people*
Palm Beach	80 - 117 people	69 - 71 people*

*note that the percentage of visitors who indicated that none of the conditions are unacceptable was much higher in the 2018 study than 2023 study. In 2023 the tipping point was more accurately depicted

KEY TAKE AWAYS



Location	Tipping point 2023
Ayo	52 - 61 people
Casibari	19- 29 people
Fontein Cave	8 - 17 people
Mangel Halto	13 - 21 people
Quadirikiri	14 - 17 people
Rodger's Beach	14 - 24 people

KEY TAKE AWAYS

- Visitor's experience - is influenced by the actual number of people (experience) rather than - the absolute number - as such we see with the pictures the tipping point is much lower than the absolute number;
- Overall the study participants indicated having a “good” overall experience at the different sites (avg score of 8 - on a scale of 1 - 10 (1- very poor | 10 = excellent));
- Overall the study participants indicated spending more time at beaches than tourist sites.



MASHA DANKI

Thank You

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

Visit our website www.arubainsight.com

