



NOVEMBER 2025

Monthly Report

# SNAPSHOT YTD NOV 2025/2024



HOW MANY ARRIVALS?

1,368,587

5.8%



HOW MANY CRUISE TOURISM?

810,383

5.0%

Compared to 2024



HOW LONG DID THEY STAY?

9,216,036

4.3%



WHAT DID THEY SPEND?\*

Central Bank Aruba (Q1 2025)

Awg. 1,624.50<sup>min</sup>

2.4%

Q1 2024: Awg. 1,587.20 min

\*\*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



1,999,105

NIGHTS

21.7%

% Share

ALL INCLUSIVE



1,204,149

NIGHTS

13.1%

% Share

TIMESHARE



2,474,835

NIGHTS

26.9%

% Share

OTHERS



3,537,947

NIGHTS

38.4%

% Share



# ARRIVALS YTD NOVEMBER 2025/2024

**1,368,587**  
ARRIVALS

**5.8%**  
GROWTH

	2024	Growth	2025	% Growth	Marketshare 2024	Marketshare 2025
USA	970,875	19,220	990,095	2.0%	75.1%	72.3%
Canada	60,874	7,980	68,854	13.1%	4.7%	5.0%
<b>NA</b>	<b>1,031,749</b>	<b>27,200</b>	<b>1,058,949</b>	<b>2.6%</b>	<b>79.8%</b>	<b>77.4%</b>
Venezuela	3,249	365	3,614	11.2%	0.3%	0.3%
Colombia	58,847	-5,274	53,573	-9.0%	4.5%	3.9%
Brazil	14,864	11,349	26,213	76.4%	1.1%	1.9%
Argentina	25,024	38,763	63,787	154.9%	1.9%	4.7%
Chile	13,181	-1,249	11,932	-9.5%	1.0%	0.9%
Ecuador	10,635	-1,362	9,273	-12.8%	0.8%	0.7%
Peru	17,765	1	17,766	0.0%	1.4%	1.3%
Paraguay	1,132	376	1,508	33.2%	0.1%	0.1%
Uruguay	3,626	817	4,443	22.5%	0.3%	0.3%
Mexico	3,448	-175	3,273	-5.1%	0.3%	0.2%
Others	12,693	2,246	14,939	17.7%	1.0%	1.1%
<b>SA</b>	<b>164,464</b>	<b>45,857</b>	<b>210,321</b>	<b>27.9%</b>	<b>12.7%</b>	<b>15.4%</b>
Netherlands	32,798	447	33,245	1.4%	2.5%	2.4%
UK	7,021	-2,529	4,492	-36.0%	0.5%	0.3%
Germany	4,159	207	4,366	5.0%	0.3%	0.3%
Italy	6,011	301	6,312	5.0%	0.5%	0.5%
Sweden	785	152	937	19.4%	0.1%	0.1%
Belgium	1,465	157	1,622	10.7%	0.1%	0.1%
Austria	550	67	617	12.2%	0.0%	0.0%
Switzerland	1,871	-74	1,797	-4.0%	0.1%	0.1%
Others	8,908	1,998	10,906	22.4%	0.7%	0.8%
<b>Europe</b>	<b>63,568</b>	<b>726</b>	<b>64,294</b>	<b>1.1%</b>	<b>4.9%</b>	<b>4.7%</b>
<b>ROW</b>	<b>33,595</b>	<b>1,428</b>	<b>35,023</b>	<b>4.3%</b>	<b>2.6%</b>	<b>2.6%</b>
<b>Total</b>	<b>1,293,376</b>	<b>75,211</b>	<b>1,368,587</b>	<b>5.8%</b>		
<b>W/O Ven.</b>	<b>1,290,127</b>	<b>74,846</b>	<b>1,364,973</b>	<b>5.8%</b>		

Note: The 2024 figures have been adjusted to reflect a recent correction and may no longer align with the numbers previously published.



# ARRIVALS USA YTD NOVEMBER 2025/2024

**990,095**  
ARRIVALS

**2.0%**  
GROWTH

	2024	Growth	2025	% Growth	Marketshare 2024	Marketshare 2025
New York	193,826	-5,980	187,846	-3.1%	20.0%	19.0%
Massachusetts	114,573	481	115,054	0.4%	11.8%	11.6%
New Jersey	124,347	-336	124,011	-0.3%	12.8%	12.5%
Pennsylvania	57,129	856	57,985	1.5%	5.9%	5.9%
Illinois	22,577	1,251	23,828	5.5%	2.3%	2.4%
Connecticut	36,911	-607	36,304	-1.6%	3.8%	3.7%
Florida	51,833	-423	51,410	-0.8%	5.3%	5.2%
Ohio	27,517	631	28,148	2.3%	2.8%	2.8%
Maryland	31,293	-1,163	30,130	-3.7%	3.2%	3.0%
Michigan	16,008	703	16,711	4.4%	1.6%	1.7%
Virginia	27,392	550	27,942	2.0%	2.8%	2.8%
Georgia	21,528	2,801	24,329	13.0%	2.2%	2.5%
North Carolina	27,943	325	28,268	1.2%	2.9%	2.9%
Texas	28,990	6,970	35,960	24.0%	3.0%	3.6%
California	18,086	-170	17,916	-0.9%	1.9%	1.8%
Other	170,922	13,331	184,253	7.8%	17.6%	18.6%
<b>Total</b>	<b>970,875</b>	<b>19,220</b>	<b>990,095</b>	<b>2.0%</b>		

Note: The 2024 figures have been adjusted to reflect a recent correction and may no longer align with the numbers previously published.



# NIGHTS YTD NOVEMBER 2025/2024

9,216,036  
ARRIVALS

4.3%  
GROWTH

	2024	Growth	2025	% Growth	ALOS 2024	ALOS 2025
USA	6,245,827	-10,881	6,234,946	-0.2%	6.4	6.3
Canada	549,025	47,328	596,353	8.6%	9.0	8.7
<b>NA</b>	<b>6,794,852</b>	<b>36,447</b>	<b>6,831,299</b>	<b>0.5%</b>	<b>6.6</b>	<b>6.5</b>
Venezuela	36,036	3,602	39,638	10.0%	11.1	11.0
Colombia	363,049	-26,800	336,249	-7.4%	6.2	6.3
Brazil	90,454	70,400	160,854	77.8%	6.1	6.1
Argentina	218,116	320,690	538,806	147.0%	8.7	8.4
Chile	98,217	-9,844	88,373	-10.0%	7.5	7.4
Ecuador	46,311	-3,845	42,466	-8.3%	4.4	4.6
Peru	95,484	1,228	96,712	1.3%	5.4	5.4
Paraguay	7,279	2,308	9,587	31.7%	6.4	6.4
Uruguay	27,905	5,710	33,615	20.5%	7.7	7.6
Mexico	38,530	-14,365	24,165	-37.3%	11.2	7.4
Others	84,890	10,007	94,897	11.8%	6.7	6.4
<b>SA</b>	<b>1,106,271</b>	<b>359,091</b>	<b>1,465,362</b>	<b>32.5%</b>	<b>6.7</b>	<b>7.0</b>
Netherlands	472,579	-25,232	447,347	-5.3%	14.4	13.5
UK	62,925	-22,022	40,903	-35.0%	9.0	9.1
Germany	42,403	-559	41,844	-1.3%	10.2	9.6
Italy	43,992	2,724	46,716	6.2%	7.3	7.4
Sweden	7,514	1,763	9,277	23.5%	9.6	9.9
Belgium	19,098	2,175	21,273	11.4%	13.0	13.1
Austria	5,026	474	5,500	9.4%	9.1	8.9
Switzerland	15,601	-678	14,923	-4.3%	8.3	8.3
Others	78,854	16,375	95,229	20.8%	8.9	8.7
<b>Europe</b>	<b>747,992</b>	<b>-24,980</b>	<b>723,012</b>	<b>-3.3%</b>	<b>11.8</b>	<b>11.2</b>
<b>ROW</b>	<b>183,403</b>	<b>12,960</b>	<b>196,363</b>	<b>7.1%</b>	<b>5.5</b>	<b>5.6</b>
<b>Total</b>	<b>8,832,518</b>	<b>383,518</b>	<b>9,216,036</b>	<b>4.3%</b>	<b>6.8</b>	<b>6.7</b>

Note: The 2024 figures have been adjusted to reflect a recent correction and may no longer align with the numbers previously published.



# ACCOMMODATIONS YTD NOVEMBER 2025/2024

**1,368,587**  
ARRIVALS

**5.8%**  
GROWTH

## ARRIVALS BY ACCOMMODATION

	2024	Growth	2025	% Growth	Marketshare 2024	Marketshare 2025
EP	336,566	30,433	366,999	9.0%	26.0%	26.8%
All Inclusive	209,751	-3,808	205,943	-1.8%	16.2%	15.0%
Timeshare	326,973	-6,714	320,259	-2.1%	25.3%	23.4%
Others	420,086	55,300	475,386	13.2%	32.5%	34.7%
<b>Total</b>	<b>1,293,376</b>	75,211	<b>1,368,587</b>	<b>5.8%</b>		

## NIGHTS BY ACCOMMODATION

	2024	Growth	2025	% Growth	Marketshare 2024	Marketshare 2025
EP	1,864,563	134,542	1,999,105	7.2%	21.1%	21.7%
All Inclusive	1,243,580	-39,431	1,204,149	-3.2%	14.1%	13.1%
Timeshare	2,543,985	-69,150	2,474,835	-2.7%	28.8%	26.9%
Others	3,180,390	357,557	3,537,947	11.2%	36.0%	38.4%
<b>Total</b>	<b>8,832,518</b>	383,518	<b>9,216,036</b>	<b>4.3%</b>		

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

Note: The 2024 figures have been adjusted to reflect a recent correction and may no longer align with the numbers previously published.



# VISITORS BY AGE YTD NOVEMBER 2025/2024

**1,368,587**  
ARRIVALS

**5.8%**  
GROWTH

	2024	Growth	2025	% Growth
0 - 11	90,322	7,380	97,702	8.2%
12-19	89,591	7,154	96,745	8.0%
20 - 29	157,107	7,609	164,716	4.8%
30 - 39	207,905	6,681	214,586	3.2%
40 - 49	215,336	15,867	231,203	7.4%
50 - 59	236,800	9,766	246,566	4.1%
60 - 69	194,323	12,321	206,644	6.3%
70 +	101,961	8,444	110,405	8.3%
Not Stated	31	-11	20	-35.5%
<b>Total</b>	<b>1,293,376</b>	<b>75,211</b>	<b>1,368,587</b>	<b>5.8%</b>

Note: The 2024 figures have been adjusted to reflect a recent correction and may no longer align with the numbers previously published.



# GENERATIONS YTD NOVEMBER 2025/2024

**1,368,587**  
VISITORS

**5.8%**  
GROWTH

	2024	Growth	2025	% Growth	Marketshare 2024	Marketshare 2025
Gen A	71,144	5,872	77,016	8.3%	5.5%	5.6%
Gen Z	192,178	14,454	206,632	7.5%	14.9%	15.1%
Millennials	327,048	11,476	338,524	3.5%	25.3%	24.7%
Gen X	339,248	19,931	359,179	5.9%	26.2%	26.2%
Baby Boomers	327,081	19,571	346,652	6.0%	25.3%	25.3%
Silent Generations	36,646	3,918	40,564	10.7%	2.8%	3.0%
Age not specified	31	-11	20	-35.5%	0.0%	0.0%
<b>Total</b>	<b>1,293,376</b>	75,211	<b>1,368,587</b>	<b>5.8%</b>		

Note: The 2024 figures have been adjusted to reflect a recent correction and may no longer align with the numbers previously published.



# CARRIERS YTD NOVEMBER 2025/2024

**1,368,587**  
VISITORS

**5.8%**  
GROWTH

	2024	Growth	2025	% Growth	Marketshare 2024	Marketshare 2025
JETBLUE	321,455	-10,045	311,410	-3.1%	24.9%	22.8%
AMERICAN AIRLINES	245,615	4,720	250,335	1.9%	19.0%	18.3%
UNITED AIRLINES	171,765	14,665	186,430	8.5%	13.3%	13.6%
DELTA AIRLINES	146,612	5,473	152,085	3.7%	11.3%	11.1%
AVIANCA	59,154	8,863	68,017	15.0%	4.6%	5.0%
COPA AIRLINES	57,971	5,227	63,198	9.0%	4.5%	4.6%
SOUTHWEST AIRLINES	60,602	2,491	63,093	4.1%	4.7%	4.6%
WESTJET AIRLINES	28,591	13,182	41,773	46.1%	2.2%	3.1%
LATAM AIRLINES PERU	20,388	14,005	34,393	68.7%	1.6%	2.5%
KLM	27,612	5,695	33,307	20.6%	2.1%	2.4%
WINGO	28,001	-553	27,448	-2.0%	2.2%	2.0%
DIVI DIVI AIR	17,309	2,037	19,346	11.8%	1.3%	1.4%
SPIRIT AIRLINES	27,395	-11,212	16,183	-40.9%	2.1%	1.2%
AIR CANADA	12,485	1,246	13,731	10.0%	1.0%	1.0%
GOL	0	13,480	13,480	-	0.0%	1.0%
EZ AIR	10,685	1,436	12,121	13.4%	0.8%	0.9%
TUI FLY NL	12,085	-1,754	10,331	-14.5%	0.9%	0.8%
PRIVATE	8,407	1,923	10,330	22.9%	0.7%	0.8%
WINAIR	5,111	4,728	9,839	92.5%	0.4%	0.7%
CHARTER/NON-SCHEDULED	2,737	6,615	9,352	241.7%	0.2%	0.7%
SURINAM AIRWAYS	5,432	915	6,347	16.8%	0.4%	0.5%
SUNWING AIRLINES	11,522	-6,295	5,227	-54.6%	0.9%	0.4%
SUN COUNTRY AIRLINES	2,888	1,475	4,363	51.1%	0.2%	0.3%
FRONTIER AIRLINES	0	2,371	2,371	-	0.0%	0.2%
ARAJET	1,820	175	1,995	9.6%	0.1%	0.1%
AIR CENTURY	828	-115	713	-13.9%	0.1%	0.1%
Others	6,906	-5,537	1,369	-80.2%	0.5%	0.1%
<b>Total</b>	<b>1,293,376</b>	<b>75,211</b>	<b>1,368,587</b>	<b>5.8%</b>		

Note: The 2024 figures have been adjusted to reflect a recent correction and may no longer align with the numbers previously published.



# CARRIERS YTD NOVEMBER 2025/2024

**1,368,587**  
VISITORS

**5.8%**  
GROWTH

City	APO Code	YTD JAN-NOV'25	Mkt Share	YTD JAN-NOV'24	Mkt Share	25 vs 24
JFK NY	JFK	206,225	15.1%	214,100	16.6%	-3.7%
Boston	BOS	157,206	11.5%	147,468	11.4%	6.6%
Newark	EWR	143,987	10.5%	148,318	11.5%	-2.9%
Miami	MIA	96,019	7.0%	96,281	7.4%	-0.3%
Charlotte	CLT	89,788	6.6%	89,528	6.9%	0.3%
Bogota	BOG	78,497	5.7%	65,838	5.1%	19.2%
Atlanta	ATL	74,801	5.5%	69,283	5.4%	8.0%
Panama City	PTY	63,331	4.6%	58,053	4.5%	9.1%
Toronto	YYZ	60,775	4.4%	52,649	4.1%	15.4%
Philadelphia	PHL	55,691	4.1%	48,863	3.8%	14.0%
Orlando	MCO	45,909	3.4%	43,951	3.4%	4.5%
Amsterdam	AMS	43,574	3.2%	39,632	3.1%	9.9%
G.Bush DC	IAD	39,621	2.9%	38,865	3.0%	1.9%
Curacao	CUR	38,045	2.8%	33,096	2.6%	15.0%
Lima, Peru	LIM	34,396	2.5%	20,388	1.6%	68.7%
Houston International	IAH	18,635	1.4%	8,814	0.7%	111.4%
Baltimore	BWI	17,208	1.3%	16,790	1.3%	2.5%
Fort Lauderdale	FLL	16,562	1.2%	27,949	2.2%	-40.7%
Chicago	ORD	16,455	1.2%	15,828	1.2%	4.0%
Sao Paolo	GRU	13,480	1.0%	21	0.0%	64090.5%
Medellin	MDE	13,215	1.0%	15,865	1.2%	-16.7%
Sint Maarten	SXM	9639	0.7%	5,115	0.4%	88.4%
Minneapolis St. Paul Inter Airp	MSP	8,857	0.6%	2,544	0.2%	248.2%
Johan A. Pengel Int Airport, Suriname	PBM	6,171	0.5%	5,018	0.4%	23.0%
Dallas Fort Worth Int Airport	DFW	5,534	0.4%	4,850	0.4%	14.1%
	Others	14,966	1.1%	24,269	1.9%	-38.3%
<b>Total</b>		<b>1,368,587</b>	<b>100.0%</b>	<b>1,293,376</b>	<b>100.0%</b>	<b>5.8%</b>

Note: The 2024 figures have been adjusted to reflect a recent correction and may no longer align with the numbers previously published.



# CRUISE COMPARISON



*One happy island* ✦ [ARUBA.COM](https://www.aruba.com)



# CRUISE YTD NOVEMBER



2024



CRUISE PAX  
**772,612**

CRUISE CALLS  
**288**



2025



CRUISE PAX  
**810,383**

CRUISE CALLS  
**307**

4.89%

6.6%

ABSOLUTE GROWTH PAX YTD NOVEMBER

**37,771**  
4.89%

ABSOLUTE GROWTH CALLS YTD NOVEMBER

**19**  
6.6%

# NOVEMBER RESULT 2025

NORTH AMERICA



93,825

75.8%

SOUTH AMERICA



19,809

16.0%

EUROPE



6,646

5.4%

OTHERS



3,551

2.9%

TOTAL ARRIVALS

123,831

100%



# ARRIVALS NOVEMBER 2025/2024

**123,831**  
ARRIVALS

**15.9%**  
GROWTH

	2024	Growth	2025	% Growth	Marketshare 2024	Marketshare 2025
USA	76,338	7,434	83,772	9.7%	71.4%	67.7%
Canada	7,502	2,551	10,053	34.0%	7.0%	8.1%
<b>NA</b>	<b>83,840</b>	<b>9,985</b>	<b>93,825</b>	<b>11.9%</b>	<b>78.5%</b>	<b>75.8%</b>
Venezuela	299	-81	218	-27.1%	0.3%	0.2%
Colombia	4,688	504	5,192	10.8%	4.4%	4.2%
Brazil	1,827	976	2,803	53.4%	1.7%	2.3%
Argentina	2,004	4,807	6,811	239.9%	1.9%	5.5%
Chile	872	-118	754	-13.5%	0.8%	0.6%
Ecuador	1,065	-351	714	-33.0%	1.0%	0.6%
Peru	1,414	-111	1,303	-7.9%	1.3%	1.1%
Paraguay	111	-21	90	-18.9%	0.1%	0.1%
Uruguay	245	36	281	14.7%	0.2%	0.2%
Mexico	248	61	309	24.6%	0.2%	0.2%
Others	1,265	69	1,334	5.5%	1.2%	1.1%
<b>SA</b>	<b>14,038</b>	<b>5,771</b>	<b>19,809</b>	<b>41.1%</b>	<b>13.1%</b>	<b>16.0%</b>
Netherlands	3,071	215	3,286	7.0%	2.9%	2.7%
UK	519	-166	353	-32.0%	0.5%	0.3%
Germany	450	140	590	31.1%	0.4%	0.5%
Italy	503	58	561	11.5%	0.5%	0.5%
Sweden	70	45	115	64.3%	0.1%	0.1%
Belgium	139	1	140	0.7%	0.1%	0.1%
Austria	37	38	75	102.7%	0.0%	0.1%
Switzerland	224	25	249	11.2%	0.2%	0.2%
Others	924	353	1,277	38.2%	0.9%	1.0%
<b>Europe</b>	<b>5,937</b>	<b>709</b>	<b>6,646</b>	<b>11.9%</b>	<b>5.6%</b>	<b>5.4%</b>
<b>ROW</b>	<b>3,053</b>	<b>498</b>	<b>3,551</b>	<b>16.3%</b>	<b>2.9%</b>	<b>2.9%</b>
<b>Total</b>	<b>106,868</b>	<b>16,963</b>	<b>123,831</b>	<b>15.9%</b>		
<b>W/O Ven.</b>	<b>106,569</b>	<b>17,044</b>	<b>123,613</b>	<b>16.0%</b>		

Note: The 2024 figures have been adjusted to reflect a recent correction and may no longer align with the numbers previously published.



# ARRIVALS USA NOVEMBER 2025/2024

**83,772**  
ARRIVALS

**9.7%**  
GROWTH

	2024	Growth	2025	% Growth	Marketshare 2024	Marketshare 2025
New York	12,221	2,443	14,664	20.0%	16.0%	17.5%
Massachusetts	8,613	1,343	9,956	15.6%	11.3%	11.9%
New Jersey	10,437	2,136	12,573	20.5%	13.7%	15.0%
Pennsylvania	4,204	998	5,202	23.7%	5.5%	6.2%
Illinois	1,868	313	2,181	16.8%	2.4%	2.6%
Connecticut	2,395	458	2,853	19.1%	3.1%	3.4%
Florida	3,693	772	4,465	20.9%	4.8%	5.3%
Ohio	1,861	543	2,404	29.2%	2.4%	2.9%
Maryland	2,262	316	2,578	14.0%	3.0%	3.1%
Michigan	1,264	381	1,645	30.1%	1.7%	2.0%
Virginia	1,991	303	2,294	15.2%	2.6%	2.7%
Georgia	1,393	454	1,847	32.6%	1.8%	2.2%
North Carolina	1,746	406	2,152	23.3%	2.3%	2.6%
Texas	2,113	528	2,641	25.0%	2.8%	3.2%
California	1,091	181	1,272	16.6%	1.4%	1.5%
Other	19,186	-4,141	15,045	-21.6%	25.1%	18.0%
<b>Total</b>	<b>76,338</b>	<b>7,434</b>	<b>83,772</b>	<b>9.7%</b>		

Note: The 2024 figures have been adjusted to reflect a recent correction and may no longer align with the numbers previously published.



# NIGHTS NOVEMBER 2025/2024

**836,417**  
NIGHTS

**20.6%**  
GROWTH

	2024		Growth	2025	% Growth	ALOS 2024	ALOS 2025
USA	462,176		66,787	528,963	14.5%	6.1	6.3
Canada	60,295		23,776	84,071	39.4%	8.0	8.4
<b>NA</b>	<b>522,471</b>		<b>90,563</b>	<b>613,034</b>	<b>17.3%</b>	6.2	6.5
Venezuela	3,615	-1,071		2,544	-29.6%	12.1	11.7
Colombia	28,417		1,975	30,392	7.0%	6.1	5.9
Brazil	11,774		5,360	17,134	45.5%	6.4	6.1
Argentina	16,015		39,402	55,417	246.0%	8.0	8.1
Chile	6,511	-1,478		5,033	-22.7%	7.5	6.7
Ecuador	4,719	-948		3,771	-20.1%	4.4	5.3
Peru	7,469	-415		7,054	-5.6%	5.3	5.4
Paraguay	704	-126		578	-17.9%	6.3	6.4
Uruguay	1,764		332	2,096	18.8%	7.2	7.5
Mexico	1,985		518	2,503	26.1%	8.0	8.1
Others	7,205		48	7,253	0.7%	5.7	5.4
<b>SA</b>	<b>90,178</b>		<b>43,597</b>	<b>133,775</b>	<b>48.3%</b>	6.4	6.8
Netherlands	39,375		3,593	42,968	9.1%	12.8	13.1
UK	3,873	-1,130		2,743	-29.2%	7.5	7.8
Germany	4,722		776	5,498	16.4%	10.5	9.3
Italy	3,291		934	4,225	28.4%	6.5	7.5
Sweden	848		180	1,028	21.2%	12.1	8.9
Belgium	1,676	-133		1,543	-7.9%	12.1	11.0
Austria	283		698	981	246.6%	7.6	13.1
Switzerland	1,826		77	1,903	4.2%	8.2	7.6
Others	7,862		2,348	10,210	29.9%	8.5	8.0
<b>Europe</b>	<b>63,756</b>		<b>7,343</b>	<b>71,099</b>	<b>11.5%</b>	10.7	10.7
<b>ROW</b>	<b>17,317</b>		<b>1,192</b>	<b>18,509</b>	<b>6.9%</b>	5.7	5.2
<b>Total</b>	<b>693,722</b>		<b>142,695</b>	<b>836,417</b>	<b>20.6%</b>	6.5	6.8

Note: The 2024 figures have been adjusted to reflect a recent correction and may no longer align with the numbers previously published.



# ACCOMMODATIONS NOVEMBER 2025/2024

**123,831**  
ARRIVALS

**15.9%**  
GROWTH

## ARRIVALS BY ACCOMMODATION

	2024	Growth	2025	% Growth	Marketshare 2024	Marketshare 2025
EP	26,111	6,727	32,838	25.8%	24.4%	26.5%
All Inclusive	17,355	2,653	20,008	15.3%	16.2%	16.2%
Timeshare	28,261	987	29,248	3.5%	26.4%	23.6%
Others	35,141	6,596	41,737	18.8%	32.9%	33.7%
<b>Total</b>	<b>106,868</b>	16,963	<b>123,831</b>	<b>15.9%</b>		

## NIGHTS BY ACCOMMODATION

	2024	Growth	2025	% Growth	Marketshare 2024	Marketshare 2025
EP	134,066	43,068	177,134	32.1%	19.3%	21.2%
All Inclusive	96,856	19,687	116,543	20.3%	14.0%	13.9%
Timeshare	210,039	20,163	230,202	9.6%	30.3%	27.5%
Others	252,761	59,777	312,538	23.6%	36.4%	37.4%
<b>Total</b>	<b>693,722</b>	142,695	<b>836,417</b>	<b>20.6%</b>		

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

Note: The 2024 figures have been adjusted to reflect a recent correction and may no longer align with the numbers previously published.



# VISITORS BY AGE NOVEMBER 2025/2024

**123,831**  
ARRIVALS

**15.9%**  
GROWTH

	2024	Growth	2025	% Growth
0 - 11	7,163	1,422	8,585	19.9%
12-19	4,984	576	5,560	11.6%
20 - 29	10,546	2,112	12,658	20.0%
30 - 39	17,597	3,112	20,709	17.7%
40 - 49	18,228	3,492	21,720	19.2%
50 - 59	19,753	2,662	22,415	13.5%
60 - 69	18,372	2,484	20,856	13.5%
70 +	10,222	1,102	11,324	10.8%
Not Stated	3	1	4	33.3%
<b>Total</b>	<b>106,868</b>	<b>16,963</b>	<b>123,831</b>	<b>15.9%</b>



# GENERATIONS NOVEMBER 2025/2024

**123,831**  
ARRIVALS

**15.9%**  
GROWTH

	2024	Growth	2025	% Growth	Marketshare 2024	Marketshare 2025
Gen A	5,730	1,253	6,983	21.9%	5.4%	5.6%
Gen Z	11,299	1,851	13,150	16.4%	10.6%	10.6%
Millennials	27,205	4,972	32,177	18.3%	25.5%	26.0%
Gen X	28,142	4,508	32,650	16.0%	26.3%	26.4%
Baby Boomers	30,680	4,098	34,778	13.4%	28.7%	28.1%
Silent Generations	3,809	280	4,089	7.4%	3.6%	3.3%
Age not specified	3	1	4	33.3%	0.0%	0.0%
<b>Total</b>	<b>106,868</b>	16,963	<b>123,831</b>	<b>15.9%</b>		

Note: The 2024 figures have been adjusted to reflect a recent correction and may no longer align with the numbers previously published.



# CARRIERS NOVEMBER 2025/2024

## 123,831 ARRIVALS

## 15.9% GROWTH

	2024	Growth	2025	% Growth	Marketshare 2024	Marketshare 2025
JETBLUE	25,087	2,479	27,566	9.9%	23.5%	22.3%
AMERICAN AIRLINES	19,647	2,864	22,511	14.6%	18.4%	18.2%
UNITED AIRLINES	15,448	699	16,147	4.5%	14.5%	13.0%
DELTA AIRLINES	9,672	911	10,583	9.4%	9.1%	8.5%
AVIANCA	4,014	2,851	6,865	71.0%	3.8%	5.5%
WESTJET AIRLINES	4,276	2,138	6,414	50.0%	4.0%	5.2%
COPA AIRLINES	5,189	276	5,465	5.3%	4.9%	4.4%
SOUTHWEST AIRLINES	4,239	906	5,145	21.4%	4.0%	4.2%
KLM	3,297	192	3,489	5.8%	3.1%	2.8%
LATAM AIRLINES PERU	2,710	628	3,338	23.2%	2.5%	2.7%
AIR CANADA	2,097	977	3,074	46.6%	2.0%	2.5%
WINGO	2,147	601	2,748	28.0%	2.0%	2.2%
DIVI DIVI AIR	1,677	192	1,869	11.4%	1.6%	1.5%
SPIRIT AIRLINES	1,893	-362	1,531	-19.1%	1.8%	1.2%
PRIVATE	1,034	337	1,371	32.6%	1.0%	1.1%
GOL	0	1,160	1,160	-	0.0%	0.9%
EZ AIR	996	146	1,142	14.7%	0.9%	0.9%
TUI FLY NL	848	194	1,042	22.9%	0.8%	0.8%
WINAIR	423	430	853	101.7%	0.4%	0.7%
CHARTER/NON-SCHEDULED	312	256	568	82.1%	0.3%	0.5%
SURINAM AIRWAYS	550	-56	494	-10.2%	0.5%	0.4%
ARAJET	184	24	208	13.0%	0.2%	0.2%
AIR CENTURY	23	65	88	282.6%	0.0%	0.1%
FRONTIER AIRLINES	0	88	88	-	0.0%	0.1%
SKY HIGH AVIATION	86	-14	72	-16.3%	0.1%	0.1%
ARUBA AIRLINES	1	-1	0	-100.0%	0.0%	0.0%
OTHERS	1,018	-1,018	0	-100.0%	1.0%	0.0%
<b>Total</b>	<b>106,868</b>	<b>16,963</b>	<b>123,831</b>	<b>15.9%</b>		

Note: The 2024 figures have been adjusted to reflect a recent correction and may no longer align with the numbers previously published.



# CARRIERS NOVEMBER 2025/2024

**123,831**  
ARRIVALS

**15.9%**  
GROWTH

City	APO Code	YTD NOV'25	Mkt Share	YTD NOV'24	Mkt Share	25 vs 24
JFK NY	JFK	19,069	15.4%	17,709	16.6%	7.7%
Boston	BOS	12,837	10.4%	11,777	11.0%	9.0%
Newark	EWR	10,834	8.7%	10,317	9.7%	5.0%
Toronto	YYZ	9,525	7.7%	7,106	6.6%	34.0%
Miami	MIA	8,340	6.7%	8,285	7.8%	0.7%
Bogota	BOG	7,841	6.3%	4,842	4.5%	61.9%
Charlotte	CLT	7,695	6.2%	6,009	5.6%	28.1%
Atlanta	ATL	5,584	4.5%	4,723	4.4%	18.2%
Panama City	PTY	5,489	4.4%	5,193	4.9%	5.7%
Philadelphia	PHL	5,432	4.4%	4,470	4.2%	21.5%
Curacao	CUR	4,663	3.8%	3,505	3.3%	33.0%
G.Bush DC	IAD	4,630	3.7%	4,338	4.1%	6.7%
Amsterdam	AMS	4,531	3.7%	4,145	3.9%	9.3%
Orlando	MCO	4,015	3.2%	3,565	3.3%	12.6%
Lima, Peru	LIM	3,340	2.7%	2,710	2.5%	23.2%
Fort Lauderdale	FLL	1,595	1.3%	1,933	1.8%	-17.5%
Chicago	ORD	1,365	1.1%	1,493	1.4%	-8.6%
Sao Paulo	GRU	1,160	0.9%	12	0.0%	9566.7%
Baltimore	BWI	1,130	0.9%	674	0.6%	67.7%
Cali, Alfonso Bonilla Aragon	CLO	906	0.7%	0	0.0%	—
Medellin	MDE	878	0.7%	1,326	1.2%	-33.8%
Sint Maarten	SXM	658	0.5%	423	0.4%	55.6%
Houston International	IAH	654	0.5%	609	0.6%	7.4%
Dallas Fort Worth Int Airport	DFW	559	0.5%	339	0.3%	64.9%
Johan A. Pengel Int Airport, Suriname	PBM	479	0.4%	495	0.5%	-3.2%
	Others	622	0.5%	870	0.8%	-28.5%
<b>Total</b>		<b>123,831</b>	<b>100.0%</b>	<b>106,868</b>	<b>100.0%</b>	<b>15.9%</b>

Note: The 2024 figures have been adjusted to reflect a recent correction and may no longer align with the numbers previously published.



# CRUISE COMPARISON



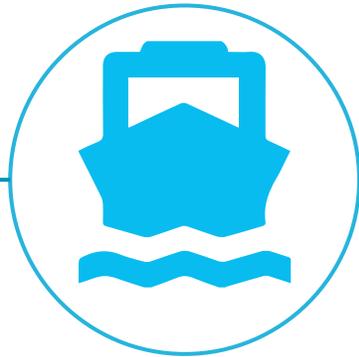
*One happy island* ✦ [ARUBA.COM](https://www.aruba.com)



# CRUISE NOVEMBER



2024



CRUISE PAX  
**75,383**

CRUISE CALLS  
**36**



2025



CRUISE PAX  
**98,980**

31.3%

CRUISE CALLS  
**42**

16.67%

ABSOLUTE GROWTH PAX NOVEMBER

**23,597**  
31.3%

ABSOLUTE GROWTH CALLS NOVEMBER

**6**  
16.67%

# SATISFACTION

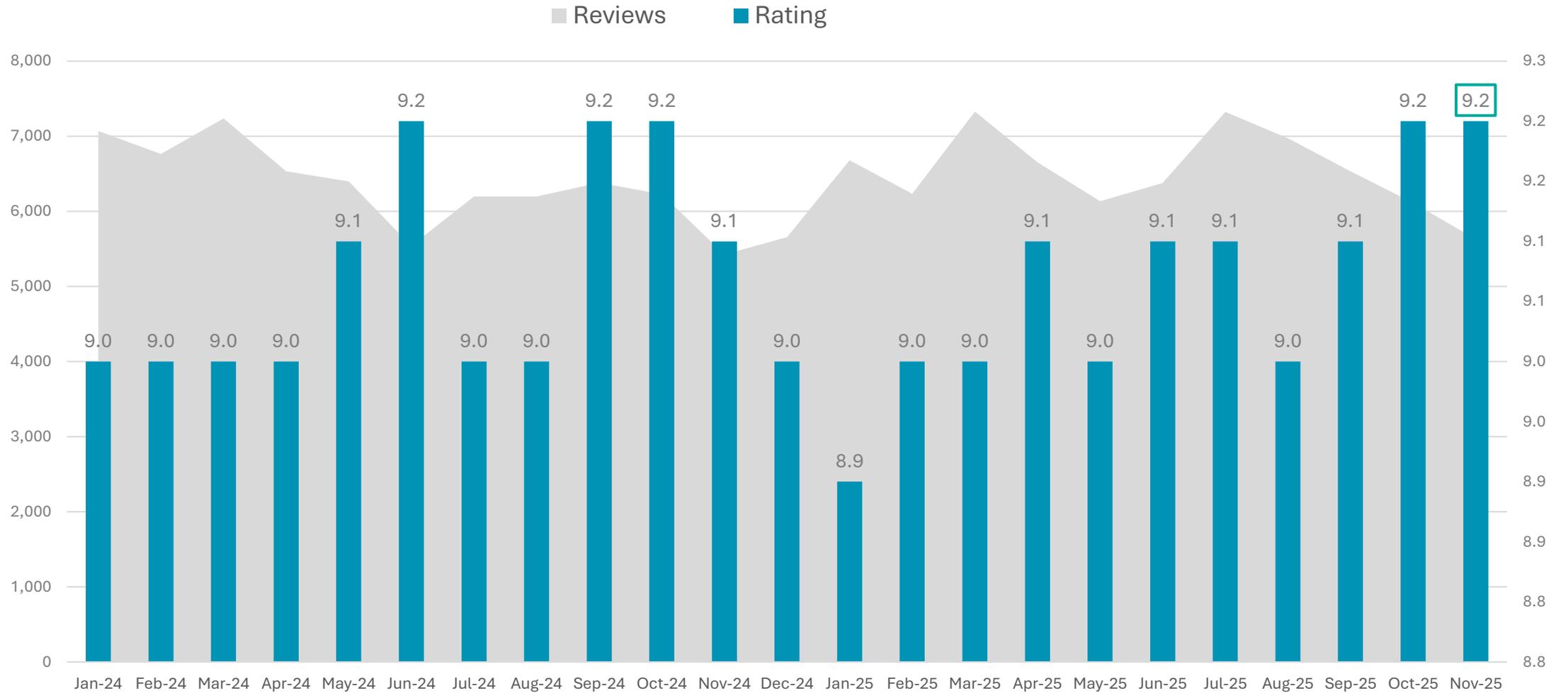
## GUEST





# GUEST EXPERIENCE INDEX (GEI)

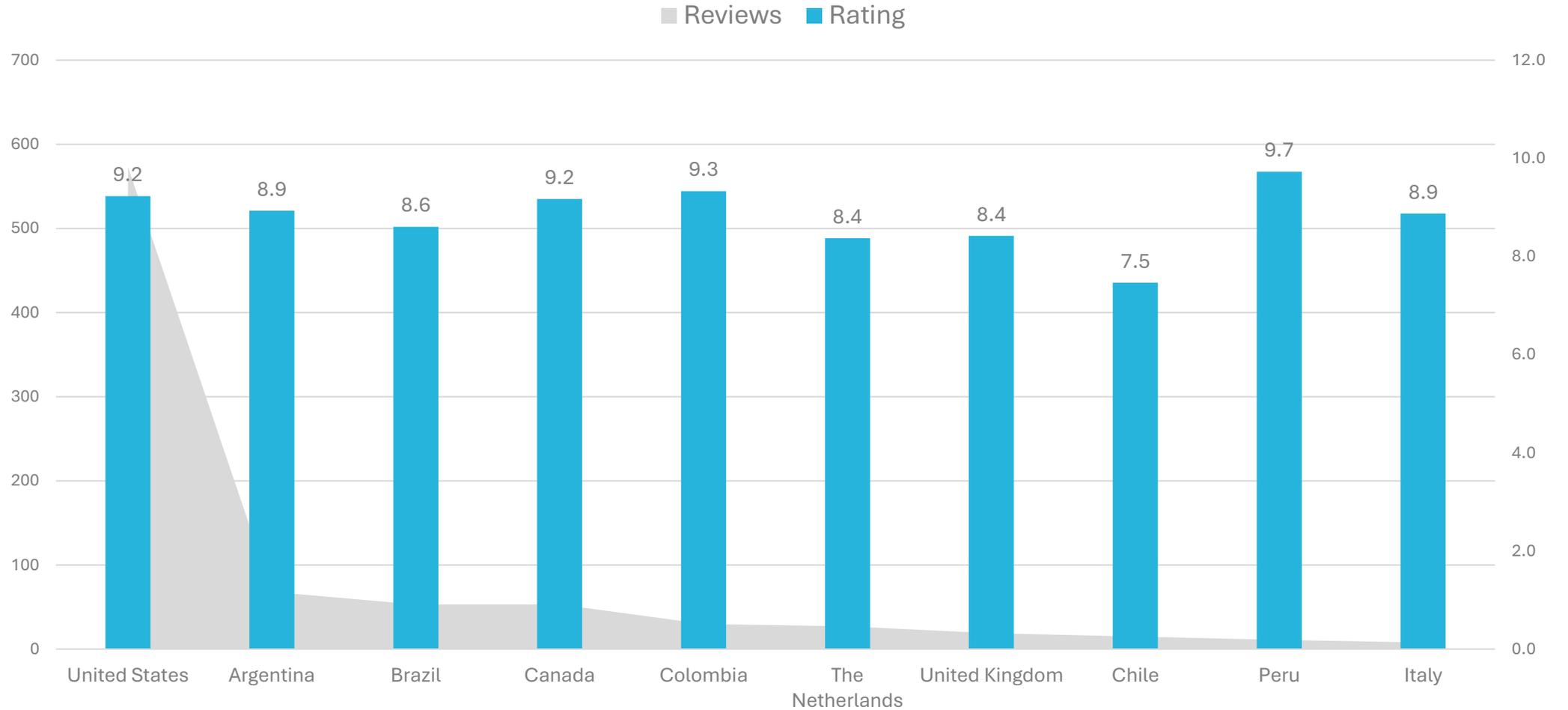
Monthly results





# GEI NOVEMBER 2025

Results by market





# GEI NOVEMBER 2025

*Results by Category*



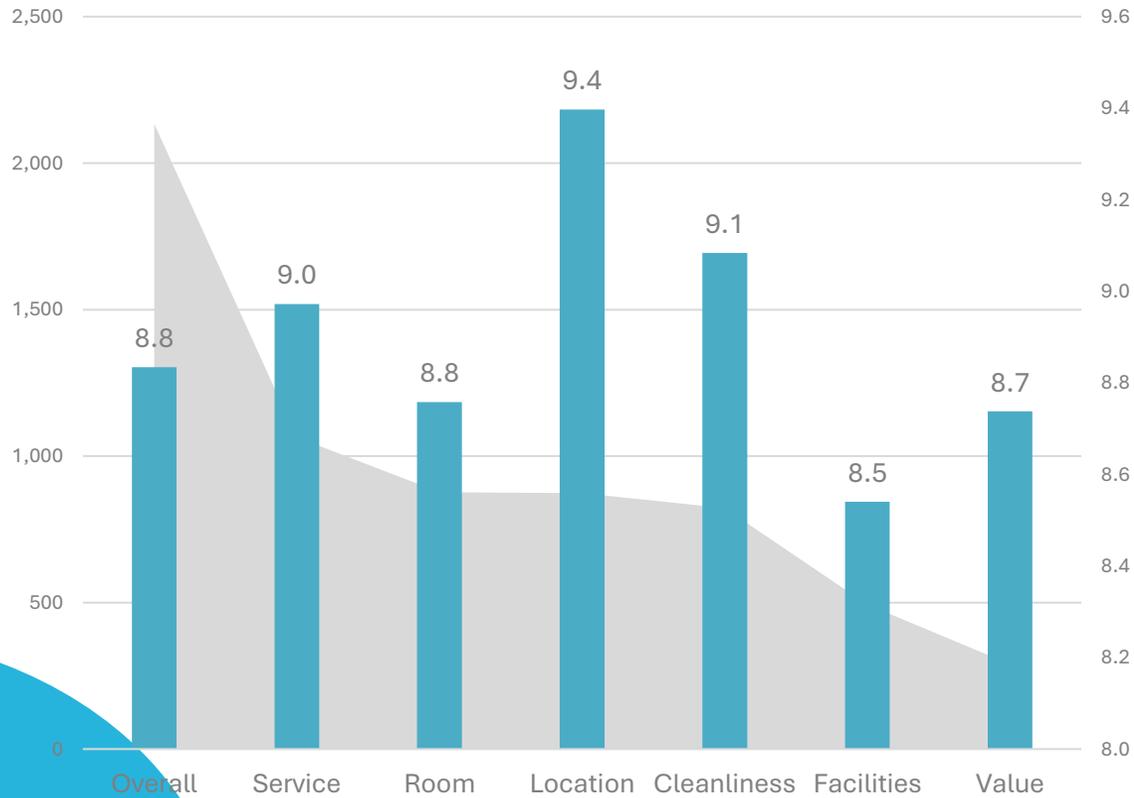


# GEI NOVEMBER 2025

*Results by Category*

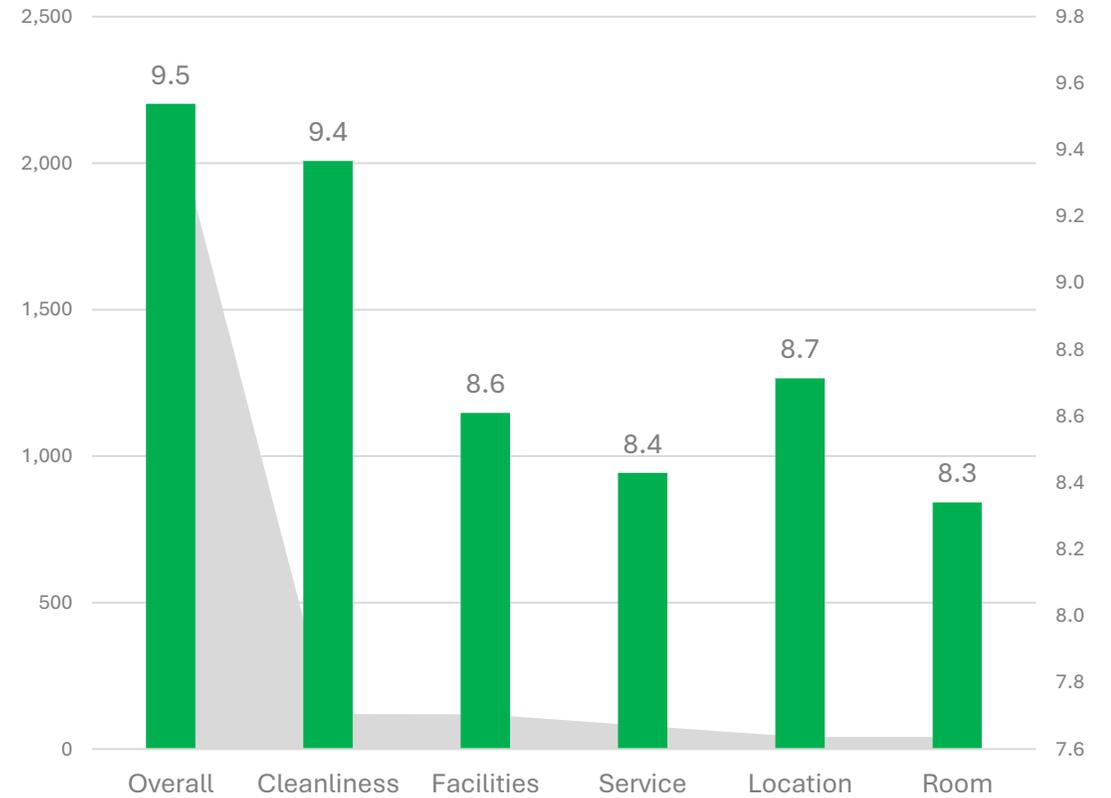
## Accommodation

■ Reviews ■ Rating



## Attractions

■ Reviews ■ Rating





# GEI NOVEMBER 2025

*Results by Category*





# VACATIONS RENTALS

 **Transparent**  
an OTA INSIGHT company

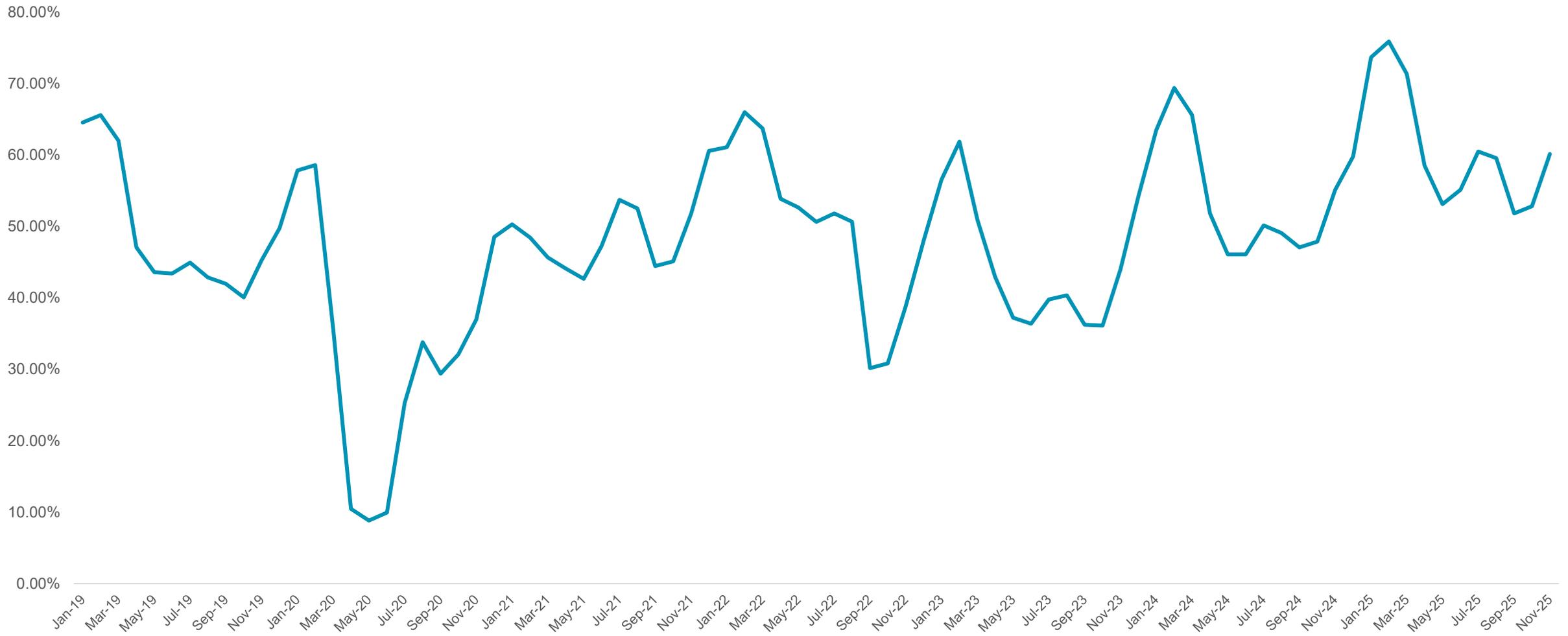
# INTRODUCTION

- ▶ 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.



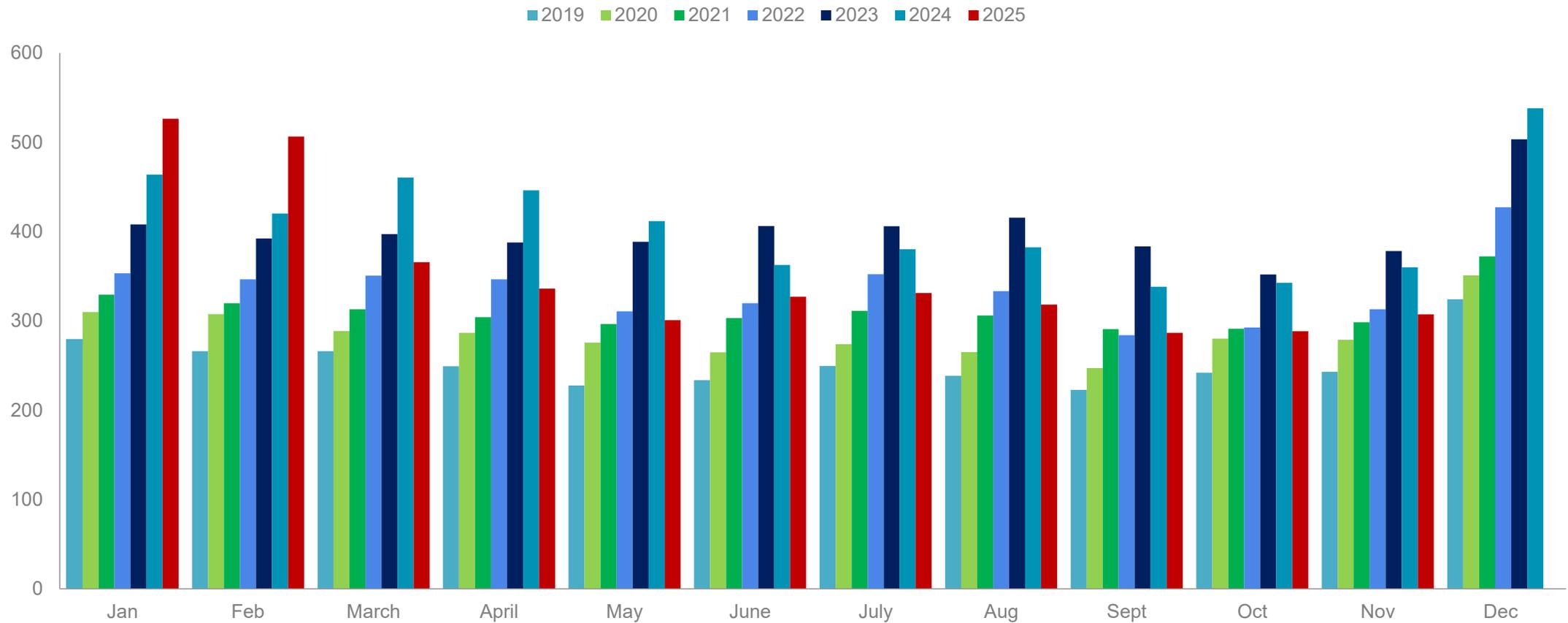
# OCCUPANCY

Nov 2024 Occupancy: 55% | Nov 2025 Occupancy: 60%



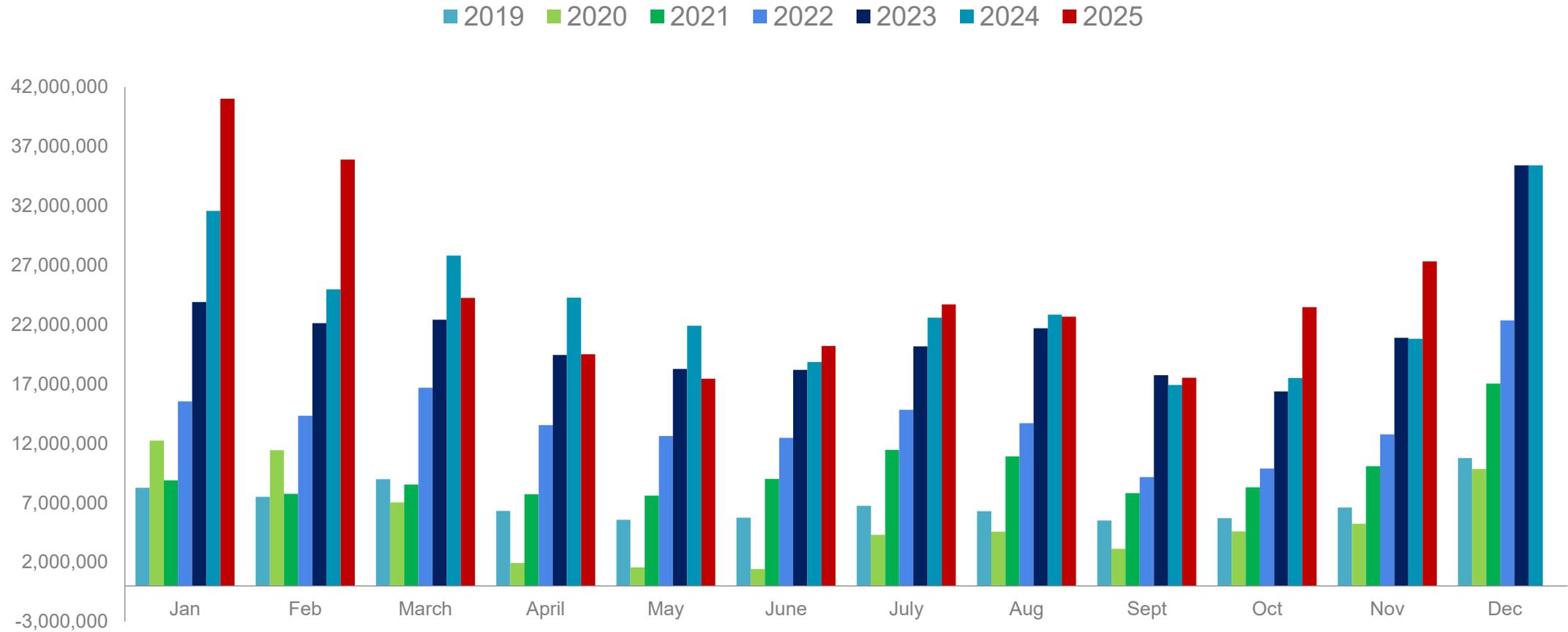
# ADR

Nov 2024 ADR: \$360 | Nov 2025 ADR: \$307



# REVENUE

Total Revenue YTD NOV 2024: USD\$ 229,271,934 | Total Revenue YTD NOV 2025: USD\$ 273,025,865





# VISA CREDIT CARD

# Metrics Definition & Scope

## METHODOLOGICAL OVERVIEW

---

### Data scope definition

- The Visa Destination Insights reports **sales volume for international Visa Cardholders visiting Aruba.**
- The data is sourced from VisaNet, which contains **all transactions conducted using Visa-branded cards and settled through Visa's network “physically” present on Aruba.** Visa Destination Insights data is empirical, based on verified transaction data from VisaNet, includes all Visa credit, debit, prepaid, commercial and small business transactions, as well as ATM cash transactions processed through Visa’s PLUS ATM Network on Aruba.
- Data are selected with **the following criteria:**
  - ✓ The Visa card was issued by a **foreign bank.**
  - ✓ The transaction was conducted **in Aruba during Q3 2025.**
  - ✓ The transaction was **conducted face-to-face**, not through the Internet or as a telephone transaction. *Online booking* of accommodations, travel packages and attractions are not included in the data.
  - ✓ The transaction **excluded the following merchant categories:** *Direct Marketing, Catalog Marketing, Telemarketing, Airlines, Schools, colleges and universities.*
- Any cardholder whose purchase history indicates that they are a **long-term resident** rather than a tourist will have all their transactions excluded (based on consecutive spending on the last 3 months and/or in specific categories such as electrical, phone, water, self storage or insurance...).
- No individual cardholder or merchant data is ever displayed or analyzed.

# Metrics Definition & Scope

## METHODOLOGICAL OVERVIEW

---



### Metrics Definition

- **Consumer / Commercial:** based on the type of Visa card used in the transaction. All business cards are aggregated as "Commercial"; all personal cards are aggregated as "Consumer".
- **Originating Country:** the home of the cardholder of the Visa card used in the transaction.
- **Quarter:** the calendar quarter, based on the date of the transaction.
- **Cardholder Count:** the number of distinct Visa cards used. Note that this is a **count of cards**, not persons. One person using multiple cards will be counted for each different card used. If there were fewer than 10 distinct cardholders from a given Country, the value for that Country is shown as "< 10".
- **Sales Amount / Total Spend Amount:** the value (\$US) of purchases at the point of sale.
- **Transaction Count:** the number of Visa transactions.
- **Avg Ticket:** the average dollar value of each transaction (Total Spend Amount / Transaction Count).
- **Cash withdrawal:** the total value (\$US) of cash withdrawn using a Visa card at an ATM or bank. Spend categories with cash are not tracked.

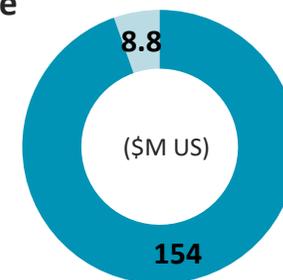
# Spending Trends

OVERALL SPENDING & Y/Y EVOLUTIONS

<i>Sales transactions</i>	# of Issuer Countries	Total Spend Amount	Y/Y Growth	Average Ticket / transaction	Spend / Cardholder
Q3 2025	129	\$ 163 045 346	⬆️ 12.3%	\$ 107	\$ 641

## Spend by Card Type

- Consumer (95%)
- Business (5%)



## Q3 2025 – Card transactions

## Y/Y Growth

	Cardholder Count (Net)	Total Spend Amount	Spend per Cardholder	Trans Count	Avg Ticket	Cardholder Count (Net)	Total Spend Amount	Spend per Cardholder	Trans Count	Avg Ticket
<b>Consumer</b>	245 178	\$154 207 277	\$629	1 500 471	\$103	12.9%	12.3%	-0.6%	15.7%	-3.0%
<b>Business</b>	9 083	\$8 838 069	\$973	50 403	\$175	9.2%	13.2%	3.6%	13.3%	-0.1%
<b>Total</b>	<b>254 261</b>	<b>\$163 045 346</b>	<b>\$641</b>	<b>1 550 874</b>	<b>\$105</b>	<b>12.8%</b>	<b>12.3%</b>	<b>-0.4%</b>	<b>15.7%</b>	<b>-2.9%</b>

## Cash withdrawal

\$14 707 145

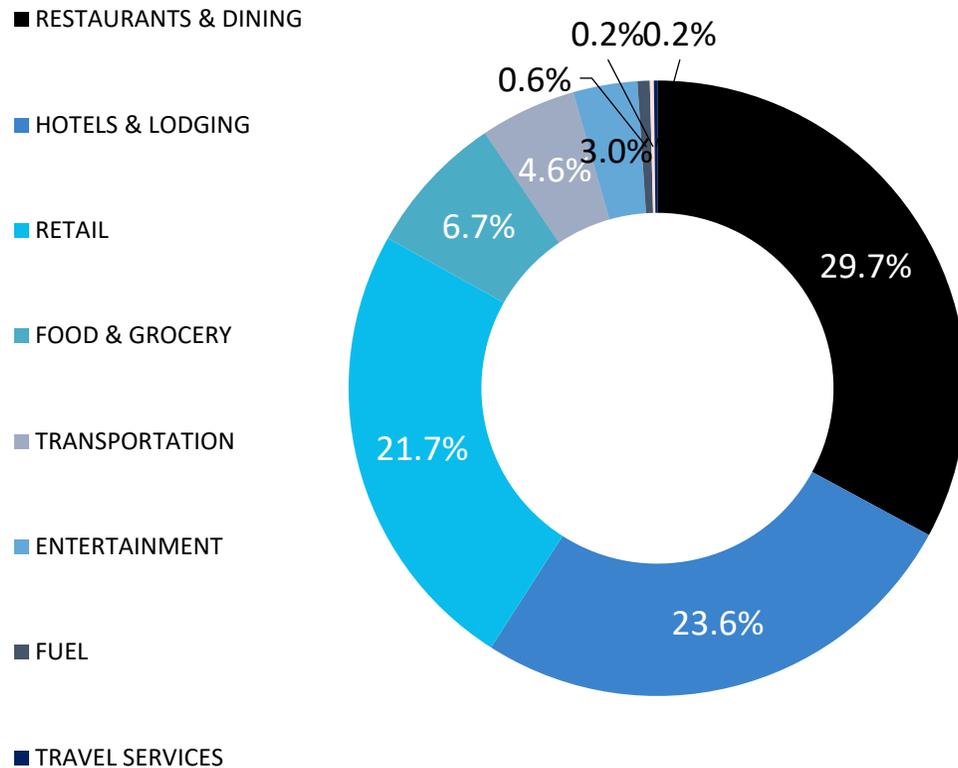


In Q3 2025, Aruba welcomed **254 261** VISA cardholders from **129** issuing countries, who spent a total of **\$163 million** (+12.3% YoY). Growth was supported by a **12.8%** increase in **cardholders** and a **15.7%** rise in **transactions**, while **cash withdrawals** reached **US\$15 million**. Despite this strong performance, the **average ticket fell by 2.9%** and **spend per cardholder declined slightly** (-0.4%) compared with Q3 2024.

# Top Spend Categories

(% OF TOTAL SPEND AMOUNT)

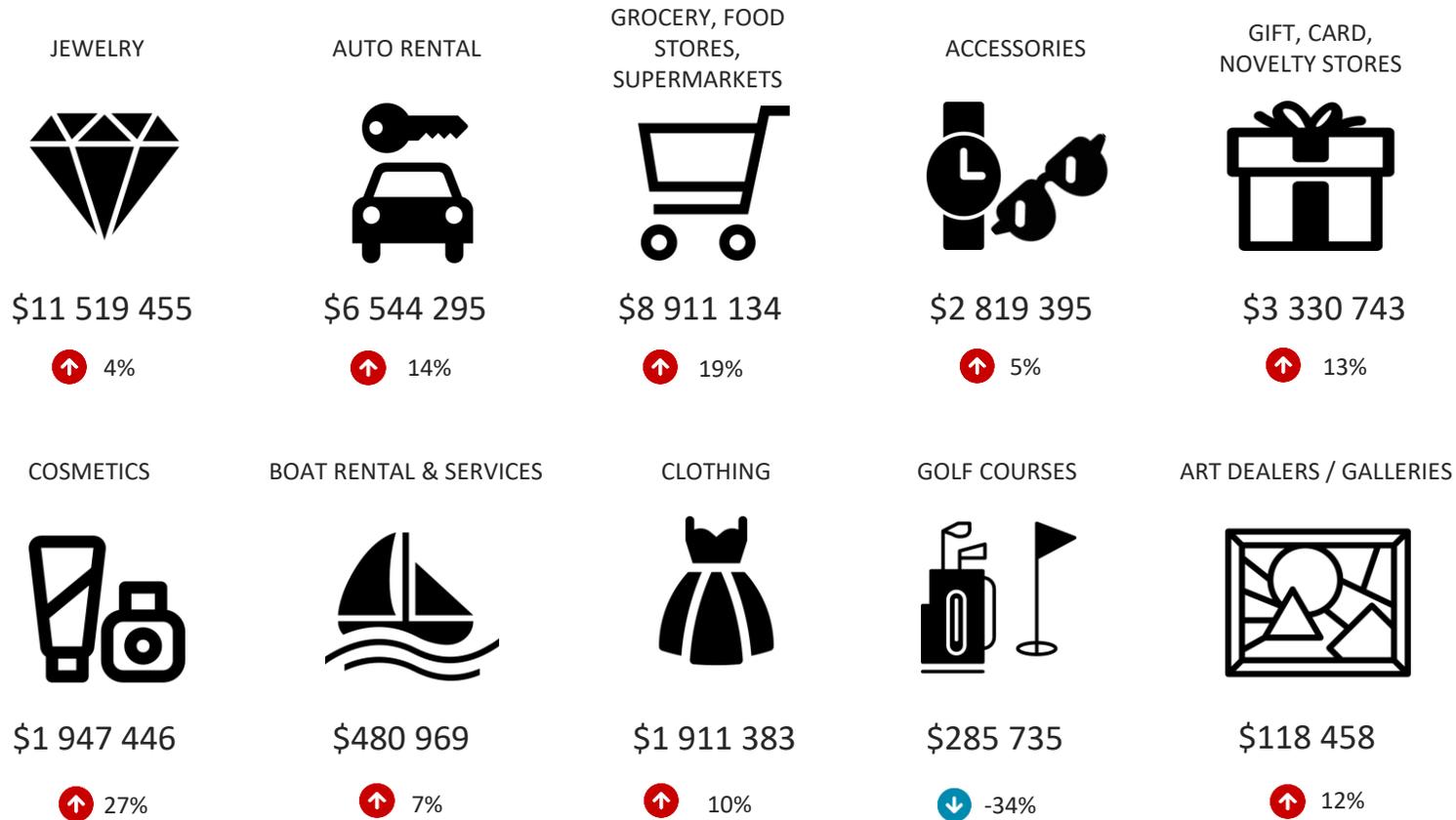
In Q3 2025, **Restaurants & Dining** remained the top spending category in Aruba, with a year-over-year increase of 16.1%. The strongest growth was observed in **Food & Grocery** (+19.3%), followed by **Drug Stores & Pharmacies** (+19.1%), **Transportation** (+14.4%), **Hotels & Lodging** (+13.2%), and **Fuel** (+10.2%). In contrast, spending in **Travel Services** dropped sharply, down 32.3% compared to Q3 2024.



TOP 10 Categories	Spend Amount (US \$)	\$ Y/Y Growth	Cardholder Count	Spend per Cardholder
RESTAURANTS & DINING	\$48 434 617	16.1%	172 247	\$281
HOTELS & LODGING	\$38 466 452	13.2%	39 698	\$969
RETAIL	\$35 388 187	10.2%	146 746	\$241
FOOD & GROCERY	\$10 959 830	19.3%	88 894	\$123
TRANSPORTATION	\$7 426 888	14.4%	33 581	\$221
ENTERTAINMENT	\$4 946 688	-5.2%	28 508	\$174
FUEL	\$943 604	10.2%	26 311	\$36
DRUG STORES & PHARMACIES	\$307 699	19.1%	10 373	\$30
TRAVEL SERVICES	\$270 952	-32.3%	1 567	\$173

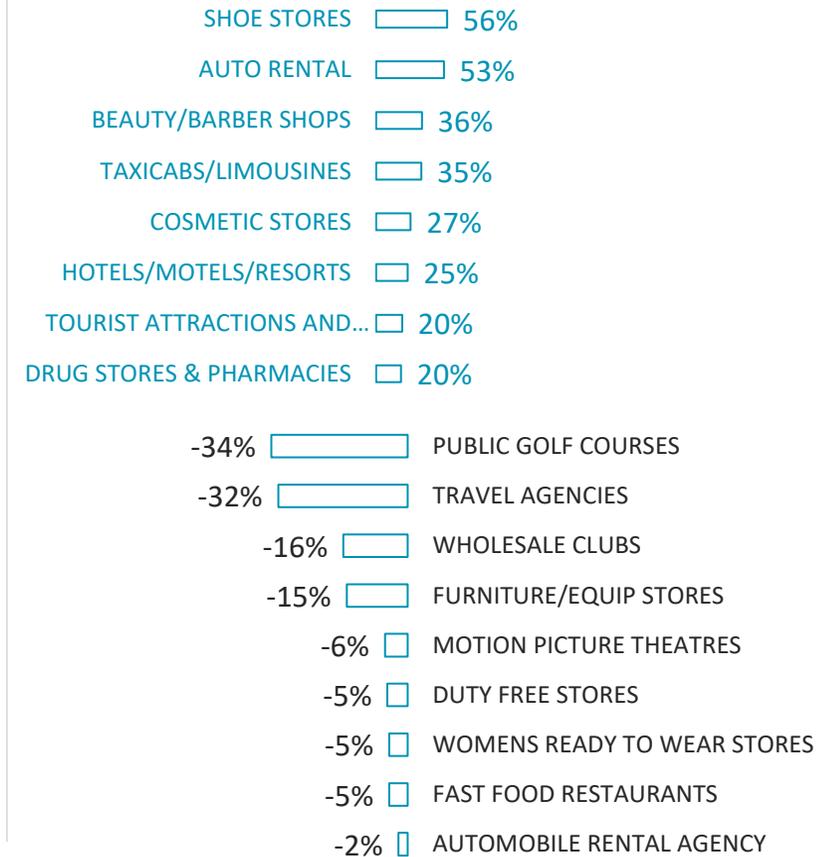
# Focus on Sub-Categories

SPECIFIC MERCHANT CATEGORIES - ZOOM AMONG KEY CATEGORIES SELECTED BY Aruba



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

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





# 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](mailto:m.kelly@aruba.com)

Or visit our website [www.ata.aw](http://www.ata.aw)



### Disclaimer:

The Aruba Tourism Authority ("A.T.A.") is committed to ensuring the accuracy and timeliness of the information contained in and accessed through this report at the time of publication. However, numerical data in this report is subject to change and may include a margin of error of up to 5%. The A.T.A. understands that third parties may use the information herein at their discretion and at their sole risk. A.T.A. assumes no responsibility for any errors, omissions, or consequences resulting from the use of this information.