

JUNE 2024

Monthly Report



SNAPSHOT YTD JUNE 2024



HOW MANY ARRIVALS?

737,691

19.0%



HOW MANY CRUISE TOURISM?

543,215

3.5%

Compared to 2023



HOW LONG DID THEY STAY?

6,699,805

14.6%



WHAT DID THEY SPEND? **
Central Bank Aruba (Q1- Q3 2023)

Avg. 3,451.6 min

15%

Q1-Q3 2022: 2,993.70

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

WHERE DID THEY STAY?

EP



1,221,534

NIGHTS

21.4%

% Share

ALL INCLUSIVE



774,354

NIGHTS

13.6%

TIMESHARE



1,615,203

NIGHTS

28.3%

OTHERS



2,088,714

NIGHTS

36.6%



ARRIVALS YTD JUNE 2024

737,691
ARRIVALS

19.0%
GROWTH

| | 2023 | | Growth | 2024 | % Growth | Marketshare 2023 | Marketshare 2024 |
|-----------------|----------------|---------------|----------------|----------------|--------------|------------------|------------------|
| USA | 480,672 | | 82,347 | 563,019 | 17.1% | 77.6% | 76.3% |
| Canada | 33,065 | | 5,704 | 38,769 | 17.3% | 5.3% | 5.3% |
| NA | 513,737 | | 88,051 | 601,788 | 17.1% | 82.9% | 81.6% |
| Venezuela | 886 | | 581 | 1,467 | 65.6% | 0.1% | 0.2% |
| Colombia | 21,558 | | 10,098 | 31,656 | 46.8% | 3.5% | 4.3% |
| Brazil | 5,703 | | 1,871 | 7,574 | 32.8% | 0.9% | 1.0% |
| Argentina | 8,475 | | 4,376 | 12,851 | 51.6% | 1.4% | 1.7% |
| Chile | 3,886 | | 3,622 | 7,508 | 93.2% | 0.6% | 1.0% |
| Ecuador | 2,560 | | 2,976 | 5,536 | 116.3% | 0.4% | 0.8% |
| Peru | 2,425 | | 6,420 | 8,845 | 264.7% | 0.4% | 1.2% |
| Paraguay | 472 | | 61 | 533 | 12.9% | 0.1% | 0.1% |
| Uruguay | 739 | | 671 | 1,410 | 90.8% | 0.1% | 0.2% |
| Mexico | 1,373 | | 467 | 1,840 | 34.0% | 0.2% | 0.2% |
| Others | 5,782 | | 836 | 6,618 | 14.5% | 0.9% | 0.9% |
| SA | 53,859 | | 31,979 | 85,838 | 59.4% | 8.7% | 11.6% |
| Netherlands | 19,480 | -1,551 | | 17,929 | -8.0% | 3.1% | 2.4% |
| UK | 2,743 | | 1,058 | 3,801 | 38.6% | 0.4% | 0.5% |
| Germany | 3,003 | -883 | | 2,120 | -29.4% | 0.5% | 0.3% |
| Italy | 1,755 | -67 | | 1,688 | -3.8% | 0.3% | 0.2% |
| Sweden | 1,641 | -1,159 | | 482 | -70.6% | 0.3% | 0.1% |
| Belgium | 990 | -89 | | 901 | -9.0% | 0.2% | 0.1% |
| Austria | 324 | -19 | | 305 | -5.9% | 0.1% | 0.0% |
| Switzerland | 906 | | 47 | 953 | 5.2% | 0.1% | 0.1% |
| Others | 4,863 | -61 | | 4,802 | -1.3% | 0.8% | 0.7% |
| Europe | 35,705 | -2,724 | | 32,981 | -7.6% | 5.8% | 4.5% |
| ROW | 16,418 | | 666 | 17,084 | 4.1% | 2.6% | 2.3% |
| Total | 619,719 | | 117,972 | 737,691 | 19.0% | | |
| W/O Ven. | 618,833 | | 117,972 | 736,224 | 19.0% | | |



ARRIVALS USA YTD JUNE 2024

563,019
ARRIVALS

17.1%
GROWTH

| | 2023 | Growth | 2024 | % Growth | Marketshare 2023 | Marketshare 2024 |
|----------------|----------------|---------------|----------------|--------------|------------------|------------------|
| New York | 88,340 | 18,597 | 106,937 | 21.1% | 18.4% | 19.0% |
| Massachusetts | 67,989 | 4,706 | 72,695 | 6.9% | 14.1% | 12.9% |
| New Jersey | 51,458 | 14,322 | 65,780 | 27.8% | 10.7% | 11.7% |
| Pennsylvania | 28,833 | 5,518 | 34,351 | 19.1% | 6.0% | 6.1% |
| Illinois | 13,005 | 1,092 | 14,097 | 8.4% | 2.7% | 2.5% |
| Connecticut | 18,443 | 3,763 | 22,206 | 20.4% | 3.8% | 3.9% |
| Florida | 24,892 | 4,643 | 29,535 | 18.7% | 5.2% | 5.2% |
| Ohio | 14,349 | 2,850 | 17,199 | 19.9% | 3.0% | 3.1% |
| Maryland | 14,452 | 2,844 | 17,296 | 19.7% | 3.0% | 3.1% |
| Michigan | 10,653 | 503 | 11,156 | 4.7% | 2.2% | 2.0% |
| Virginia | 13,405 | 2,393 | 15,798 | 17.9% | 2.8% | 2.8% |
| Georgia | 11,572 | 816 | 12,388 | 7.1% | 2.4% | 2.2% |
| North Carolina | 13,815 | 2,515 | 16,330 | 18.2% | 2.9% | 2.9% |
| Texas | 13,604 | 1,473 | 15,077 | 10.8% | 2.8% | 2.7% |
| California | 8,654 | 1,466 | 10,120 | 16.9% | 1.8% | 1.8% |
| Other | 87,208 | 14,846 | 102,054 | 17.0% | 18.1% | 18.1% |
| Total | 480,672 | 82,347 | 563,019 | 17.1% | | |



NIGHTS YTD JUNE 2024

5,699,805
ARRIVALS

14.6%
GROWTH

| | 2023 | Growth | 2024 | % Growth | ALOS 2023 | ALOS 2024 |
|---------------|------------------|----------------|------------------|--------------|-------------|-------------|
| USA | 3,653,034 | 483,787 | 4,136,821 | 13.2% | 7.6 | 7.3 |
| Canada | 349,184 | 47,965 | 397,149 | 13.7% | 10.6 | 10.2 |
| NA | 4,002,218 | 531,752 | 4,533,970 | 13.3% | 7.8 | 7.5 |
| Venezuela | 9,049 | 8,316 | 17,365 | 91.9% | 10.2 | 11.8 |
| Colombia | 154,318 | 55,198 | 209,516 | 35.8% | 7.2 | 6.6 |
| Brazil | 35,672 | 11,835 | 47,507 | 33.2% | 6.3 | 6.3 |
| Argentina | 77,819 | 38,460 | 116,279 | 49.4% | 9.2 | 9.0 |
| Chile | 30,423 | 26,545 | 56,968 | 87.3% | 7.8 | 7.6 |
| Ecuador | 13,494 | 10,377 | 23,871 | 76.9% | 5.3 | 4.3 |
| Peru | 17,682 | 32,875 | 50,557 | 185.9% | 7.3 | 5.7 |
| Paraguay | 3,266 | 105 | 3,371 | 3.2% | 6.9 | 6.3 |
| Uruguay | 5,712 | 5,404 | 11,116 | 94.6% | 7.7 | 7.9 |
| Mexico | 8,126 | 7,065 | 15,191 | 86.9% | 5.9 | 8.3 |
| Others | 40,000 | 4,245 | 44,245 | 10.6% | 6.9 | 6.7 |
| SA | 395,561 | 200,425 | 595,986 | 50.7% | 7.3 | 6.9 |
| Netherlands | 304,717 | -6,082 | 298,635 | -2.0% | 15.6 | 16.7 |
| UK | 23,930 | 12,446 | 36,376 | 52.0% | 8.7 | 9.6 |
| Germany | 26,063 | -4,482 | 21,581 | -17.2% | 8.7 | 10.2 |
| Italy | 16,035 | -1,377 | 14,658 | -8.6% | 9.1 | 8.7 |
| Sweden | 20,131 | -14,985 | 5,146 | -74.4% | 12.3 | 10.7 |
| Belgium | 12,804 | 1,883 | 14,687 | 14.7% | 12.9 | 16.3 |
| Austria | 3,258 | 347 | 3,605 | 10.7% | 10.1 | 11.8 |
| Switzerland | 8,563 | 412 | 8,975 | 4.8% | 9.5 | 9.4 |
| Others | 51,280 | -7,677 | 43,603 | -15.0% | 10.5 | 9.1 |
| Europe | 466,781 | -19,515 | 447,266 | -4.2% | 13.1 | 13.6 |
| ROW | 108,674 | 13,909 | 122,583 | 12.8% | 6.6 | 7.2 |
| Total | 4,973,234 | 726,571 | 5,699,805 | 14.6% | 8.0 | 7.7 |



ACCOMMODATIONS

YTD JUNE 2024

737,691
ARRIVALS

19.0%
GROWTH

ARRIVALS BY ACCOMMODATION

| | 2023 | Growth | 2024 | % Growth | Marketshare 2023 | Marketshare 2024 |
|---------------|----------------|---------|----------------|--------------|------------------|------------------|
| EP | 168,831 | 28,644 | 197,475 | 17.0% | 27.2% | 26.8% |
| All Inclusive | 109,606 | 5,876 | 115,482 | 5.4% | 17.7% | 15.7% |
| Timeshare | 164,308 | 17,025 | 181,333 | 10.4% | 26.5% | 24.6% |
| Others | 176,974 | 66,427 | 243,401 | 37.5% | 28.6% | 33.0% |
| Total | 619,719 | 117,972 | 737,691 | 19.0% | | |

NIGHTS BY ACCOMMODATION

| | 2023 | Growth | 2024 | % Growth | Marketshare 2023 | Marketshare 2024 |
|---------------|------------------|---------|------------------|--------------|------------------|------------------|
| EP | 1,077,181 | 144,353 | 1,221,534 | 13.4% | 21.7% | 21.4% |
| All Inclusive | 748,915 | 25,439 | 774,354 | 3.4% | 15.1% | 13.6% |
| Timeshare | 1,492,363 | 122,840 | 1,615,203 | 8.2% | 30.0% | 28.3% |
| Others | 1,654,775 | 433,939 | 2,088,714 | 26.2% | 33.3% | 36.6% |
| Total | 4,973,234 | 726,571 | 5,699,805 | 14.6% | | |

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



ACCOMMODATIONS YTD JUNE 2024

737,691
ARRIVALS

19.0%
GROWTH

| | EP | | | All Inclusive | | | Timeshare | | | Others | | |
|---------------------|----------------|----------------|--------------|----------------|----------------|-------------|----------------|----------------|--------------|----------------|----------------|--------------|
| | 2024 | 2023 | % growth | 2024 | 2023 | % growth | 2024 | 2023 | % growth | 2024 | 2023 | % growth |
| USA | 191,500 | 146,743 | 30.5% | 71,130 | 88,003 | -19.2% | 164,877 | 150,293 | 9.7% | 135,512 | 95,633 | 41.7% |
| Venezuela | 217 | 203 | 6.9% | 58 | 12 | 383.3% | 159 | 121 | 31.4% | 1,033 | 550 | 87.8% |
| Netherlands | 1,953 | 2,142 | -8.8% | 554 | 1,042 | -46.8% | 728 | 711 | 2.4% | 14,694 | 15,585 | -5.7% |
| Canada | 10,525 | 4,869 | 116.2% | 4,017 | 8,396 | -52.2% | 5,589 | 5,229 | 6.9% | 18,638 | 14,571 | 27.9% |
| Brazil | 2,565 | 1,700 | 50.9% | 350 | 744 | -53.0% | 671 | 627 | 7.0% | 3,988 | 2,632 | 51.5% |
| Colombia | 4,024 | 2,068 | 94.6% | 889 | 1,706 | -47.9% | 3,187 | 2,537 | 25.6% | 23,556 | 15,247 | 54.5% |
| Argentina | 4,875 | 1,192 | 309.0% | 1,239 | 3,824 | -67.6% | 1,753 | 1,071 | 63.7% | 4,984 | 2,388 | 108.7% |
| Chile | 2,339 | 499 | 368.7% | 567 | 1,606 | -64.7% | 962 | 448 | 114.7% | 3,640 | 1,333 | 173.1% |
| Peru | 2,323 | 381 | 509.7% | 684 | 664 | 3.0% | 709 | 242 | 193.0% | 5,129 | 1,138 | 350.7% |
| UK | 1,185 | 904 | 31.1% | 371 | 260 | 42.7% | 291 | 272 | 7.0% | 1,954 | 1,307 | 49.5% |
| Italy | 546 | 366 | 49.2% | 183 | 343 | -46.6% | 144 | 98 | 46.9% | 815 | 948 | -14.0% |
| Total main mkt | 222,052 | 161,067 | 37.9% | 80,042 | 106,600 | -24.9% | 179,070 | 161,649 | 10.8% | 213,943 | 151,332 | 41.4% |
| All visitors | 197,475 | 168,831 | 17.0% | 115,482 | 109,606 | 5.4% | 181,333 | 164,308 | 10.4% | 243,401 | 176,974 | 37.5% |

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



ACCOMMODATIONS YTD JUNE 2024

737,691
ARRIVALS

19.0%
GROWTH

| | EP | | | All Inclusive | | | Timeshare | | | Others | | |
|---------------------|---------------|---------------|-------------|---------------|---------------|-------------|---------------|---------------|-------------|---------------|---------------|-------------|
| | 2024 | 2023 | % growth | 2024 | 2023 | % growth | 2024 | 2023 | % growth | 2024 | 2023 | % growth |
| USA | 97.0% | 86.9% | 11.6% | 61.6% | 80.3% | -23.3% | 90.9% | 91.5% | -0.6% | 55.7% | 54.0% | 3.0% |
| Venezuela | 0.1% | 0.1% | -8.6% | 0.1% | 0.0% | 358.7% | 0.1% | 0.1% | 19.1% | 0.4% | 0.3% | 36.6% |
| Netherlands | 1.0% | 1.3% | -22.0% | 0.5% | 1.0% | -49.5% | 0.4% | 0.4% | -7.2% | 6.0% | 8.8% | -31.4% |
| Canada | 5.3% | 2.9% | 84.8% | 3.5% | 7.7% | -54.6% | 3.1% | 3.2% | -3.2% | 7.7% | 8.2% | -7.0% |
| Brazil | 1.3% | 1.0% | 29.0% | 0.3% | 0.7% | -55.4% | 0.4% | 0.4% | -3.0% | 1.6% | 1.5% | 10.2% |
| Colombia | 2.0% | 1.2% | 66.4% | 0.8% | 1.6% | -50.5% | 1.8% | 1.5% | 13.8% | 9.7% | 8.6% | 12.3% |
| Argentina | 2.5% | 0.7% | 249.7% | 1.1% | 3.5% | -69.2% | 1.0% | 0.7% | 48.3% | 2.0% | 1.3% | 51.8% |
| Chile | 1.2% | 0.3% | 300.7% | 0.5% | 1.5% | -66.5% | 0.5% | 0.3% | 94.6% | 1.5% | 0.8% | 98.5% |
| Peru | 1.2% | 0.2% | 421.3% | 0.6% | 0.6% | -2.2% | 0.4% | 0.1% | 165.5% | 2.1% | 0.6% | 227.7% |
| UK | 0.6% | 0.5% | 12.1% | 0.3% | 0.2% | 35.4% | 0.2% | 0.2% | -3.1% | 0.8% | 0.7% | 8.7% |
| Italy | 0.3% | 0.2% | 27.5% | 0.2% | 0.3% | -49.4% | 0.1% | 0.1% | 33.1% | 0.3% | 0.5% | -37.5% |
| Total main mkt | 112.4% | 95.4% | 17.9% | 69.3% | 97.3% | -28.7% | 98.8% | 98.4% | 0.4% | 87.9% | 85.5% | 2.8% |
| All visitors | 100.0% | 100.0% | 0.0% | 100.0% | 100.0% | 0.0% | 100.0% | 100.0% | 0.0% | 100.0% | 100.0% | 0.0% |

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



VISITORS BY AGE YTD JUNE 2024

737,691
ARRIVALS

19.0%
GROWTH

| | 2023 | Growth | 2024 | % Growth |
|--------------|----------------|---------|----------------|--------------|
| 0 - 11 | 39,598 | 11,550 | 51,148 | 29.2% |
| 12-19 | 39,851 | 11,323 | 51,174 | 28.4% |
| 20 - 29 | 71,516 | 17,692 | 89,208 | 24.7% |
| 30 - 39 | 94,723 | 21,071 | 115,794 | 22.2% |
| 40 - 49 | 100,075 | 20,003 | 120,078 | 20.0% |
| 50 - 59 | 122,197 | 14,219 | 136,416 | 11.6% |
| 60 - 69 | 99,695 | 14,882 | 114,577 | 14.9% |
| 70 + | 52,014 | 7,256 | 59,270 | 14.0% |
| Not Stated | 50 | -24 | 26 | -48.0% |
| Total | 619,719 | 117,972 | 737,691 | 19.0% |



GENERATIONS YTD JUNE 2024

737,691
VISITORS

19.0%
GROWTH

| | 2023 | Growth | 2024 | % Growth | Marketshare 2023 | Marketshare 2024 |
|--------------------|----------------|----------------|----------------|--------------|------------------|------------------|
| Gen A | 31,239 | 9,131 | 40,370 | 29.2% | 5.0% | 5.5% |
| Gen Z | 86,304 | 24,054 | 110,358 | 27.9% | 13.9% | 15.0% |
| Millennials | 149,338 | 32,481 | 181,819 | 21.7% | 24.1% | 24.6% |
| Gen X | 164,859 | 26,892 | 191,751 | 16.3% | 26.6% | 26.0% |
| Baby Boomers | 169,652 | 22,476 | 192,128 | 13.2% | 27.4% | 26.0% |
| Silent Generations | 18,277 | 2,962 | 21,239 | 16.2% | 2.9% | 2.9% |
| Age not specified | 50 | -24 | 26 | -48.0% | 0.0% | 0.0% |
| Total | 619,719 | 117,972 | 737,691 | 19.0% | | |



GENERATIONS YTD JUNE 2024

737,691
VISITORS

19.0%
GROWTH

PURPOSE OF VISIT YTD JUNE 2024

| | 2024 | Market share 2024 | 2023 | Market share 2023 | % Growth |
|-------------------|----------------|----------------------|----------------|----------------------|--------------|
| Sun, Sand and Sea | 619,381 | 84.0% | 513,227 | 82.8% | 20.7% |
| Business | 13,323 | 1.8% | 12,623 | 2.0% | 5.5% |
| Conference | 4,869 | 0.7% | 5,069 | 0.8% | -3.9% |
| Honeymoon | 15,789 | 2.1% | 15,724 | 2.5% | 0.4% |
| Diving | 2,346 | 0.3% | 2,155 | 0.3% | 8.9% |
| Incentive | 6,472 | 0.9% | 6,974 | 1.1% | -7.2% |
| Meeting | 4,593 | 0.6% | 4,473 | 0.7% | 2.7% |
| Not specified | 52,562 | 7.1% | 41,737 | 6.7% | 25.9% |
| Shopping | 4,452 | 0.6% | 4,013 | 0.6% | 10.9% |
| Wedding | 13,904 | 1.9% | 13,724 | 2.2% | 1.3% |
| Total | 737,691 | 100.0% | 619,719 | 100.0% | 19.0% |

CONVINCING REASONS FOR VISIT YTD JUNE 2024

| Reasons for Choice | YTD June 2024 | Market Share |
|-----------------------------|----------------|--------------|
| Adventure Activities | 31,187 | 4% |
| Direct Flights | 31,811 | 4% |
| Ease/Comfort | 50,811 | 7% |
| Familiarity | 64,358 | 9% |
| Family Friendly Destination | 189,235 | 26% |
| Not Specified | 7,741 | 1% |
| Other | 85,121 | 12% |
| Outside Hurricane Belt | 11,903 | 2% |
| Points redemption | 11,238 | 2% |
| Reliable weather | 108,293 | 15% |
| Word of mouth | 132,572 | 18% |
| Blanks | 13,421 | 2% |
| Total | 737,691 | |



CARRIERS YTD JUNE 2024

737,691
VISITORS

19.0%
GROWTH

| | 2023 | Growth | 2024 | % Growth | Marketshare 2023 | Marketshare 2024 |
|----------------------|----------------|----------------|----------------|--------------|------------------|------------------|
| JETBLUE | 141,186 | 32,059 | 173,245 | 22.7% | 22.8% | 23.5% |
| AMERICAN AIRLINES | 141,060 | 2,682 | 143,742 | 1.9% | 22.8% | 19.5% |
| UNITED AIRLINES | 78,123 | 18,184 | 96,307 | 23.3% | 12.6% | 13.1% |
| DELTA AIRLINE | 79,383 | 15,671 | 95,054 | 19.7% | 12.8% | 12.9% |
| SOUTHWEST AIRLINES | 30,304 | 4,763 | 35,067 | 15.7% | 4.9% | 4.8% |
| COPA AIRLINES | 19,995 | 11,451 | 31,446 | 57.3% | 3.2% | 4.3% |
| AVIANCA | 25,072 | 5,221 | 30,293 | 20.8% | 4.0% | 4.1% |
| SPIRIT AIRLINES | 7,380 | 10,973 | 18,353 | 148.7% | 1.2% | 2.5% |
| WESTJET AIRLINES | 10,189 | 5,846 | 16,035 | 57.4% | 1.6% | 2.2% |
| WINGO | 9,076 | 6,618 | 15,694 | 72.9% | 1.5% | 2.1% |
| KLM ROYAL DUTCH | 17,674 | -3,224 | 14,450 | -18.2% | 2.9% | 2.0% |
| AIR CANADA | 10,281 | -396 | 9,885 | -3.9% | 1.7% | 1.3% |
| LATAM AIRLINES | 0 | 9,485 | 9,485 | - | 0.0% | 1.3% |
| DIVI DIVI AIR | 9,613 | -761 | 8,852 | -7.9% | 1.6% | 1.2% |
| SUNWING AIRLINES | 8,276 | -674 | 7,602 | -8.1% | 1.3% | 1.0% |
| TUI FLY NL | 7,685 | -917 | 6,768 | -11.9% | 1.2% | 0.9% |
| EZ AIR | 5,595 | -228 | 5,367 | -4.1% | 0.9% | 0.7% |
| PRIVATE | 5,553 | -1,161 | 4,392 | -20.9% | 0.9% | 0.6% |
| SUN COUNTRY AIRLINES | 2,256 | 632 | 2,888 | 28.0% | 0.4% | 0.4% |
| SURINAM AIRWAYS | 2,646 | 131 | 2,777 | 5.0% | 0.4% | 0.4% |
| WINAIR | 655 | 2,109 | 2,764 | 322.0% | 0.1% | 0.4% |
| BRITISH AIRWAYS | 1,254 | 1,383 | 2,637 | 110.3% | 0.2% | 0.4% |
| CHARTER | 2,217 | -616 | 1,601 | -27.8% | 0.4% | 0.2% |
| ARAJET | 530 | 404 | 934 | 76.2% | 0.1% | 0.1% |
| JETAIR CARIBBEAN | 1,078 | -171 | 907 | -15.9% | 0.2% | 0.1% |
| SKY HIGH AVIATION | 298 | 259 | 557 | 86.9% | 0.0% | 0.1% |
| Others | 2,340 | -1,751 | 589 | -74.8% | 0.4% | 0.1% |
| Total | 619,719 | 117,972 | 737,691 | 19.0% | | |



CARRIERS YTD JUNE 2024

737,691
VISITORS

19.0%
GROWTH

| City | APO Code | JAN-MAY '24 | Mkt Share | JAN-MAY'23 | Mkt Share | 24 vs 23 |
|-------------------------------|----------|----------------|---------------|----------------|---------------|--------------|
| JFK NY | JFK | 113,552 | 14.9% | 104,328 | 16.2% | 9.2% |
| Boston | BOS | 91,127 | 13.0% | 85,105 | 14.7% | 4.6% |
| Newark | EWR | 81,006 | 11.1% | 51,586 | 7.9% | 65.4% |
| Miami | MIA | 52,693 | 7.1% | 49,106 | 7.8% | 7.7% |
| Charlotte | CLT | 51,133 | 6.7% | 51,099 | 8.1% | -1.3% |
| Atlanta | ATL | 43,958 | 6.3% | 30,714 | 4.9% | 52.0% |
| Bogota | BOG | 34,534 | 5.1% | 30,226 | 5.2% | 16.3% |
| Toronto | YYZ | 33,571 | 4.5% | 28,769 | 4.5% | 16.6% |
| Philadelphia | PHL | 32,268 | 4.4% | 32,717 | 5.3% | -2.8% |
| Panama City | PTY | 31,517 | 4.2% | 20,022 | 3.2% | 56.6% |
| Orlando | MCO | 25,753 | 3.5% | 24,235 | 3.9% | 7.9% |
| G.Bush DC | IAD | 21,480 | 3.0% | 16,344 | 4.2% | -14.8% |
| Amsterdam | AMS | 21,223 | 2.7% | 24,753 | 2.6% | 20.8% |
| Fort Lauderdale | FLL | 18,733 | 2.6% | 7,732 | 1.2% | 154.9% |
| Curacao | CUR | 16,129 | 2.2% | 18,116 | 3.0% | -10.4% |
| Chicago | ORD | 11,548 | 1.6% | 8,668 | 1.4% | 34.4% |
| Lima, Peru | LIM | 9,485 | 1.3% | 0 | 0.0% | — |
| Baltimore | BWI | 9,332 | 1.1% | 6,111 | 1.0% | 30.4% |
| Medellin | MDE | 7,810 | 0.8% | 4,030 | 0.5% | 70.1% |
| Houston International | IAH | 4,212 | 0.4% | 4,320 | 0.0% | 68225.0% |
| Cali, Alfonso Bonilla Aragon | CLO | 3,766 | 0.4% | 4 | 0.6% | -13.7% |
| Dallas Fort Worth Int Airport | DFW | 3164 | 0.4% | 3,478 | 0.4% | 12.8% |
| LaGuardia Airport, NY | LGA | 3,009 | 0.4% | 3,105 | 0.5% | -16.5% |
| Sint Maarten | SXM | 2,768 | 0.4% | 721 | 0.1% | 279.3% |
| Gatwick Airport , UK | LGW | 2,638 | 0.4% | 1,254 | 0.5% | -11.2% |
| | Others | 11,282 | 1.5% | 13,176 | 2.1% | -14.4% |
| Grand Total | | 737,691 | 100.0% | 619,719 | 100.0% | 19.0% |



CRUISE COMPARISON



One happy island ✦ ARUBA.COM



CRUISE YTD JUNE 2024



2023



CRUISE PAX
524,995

CRUISE CALLS
190



2024



CRUISE PAX
543,215

CRUISE CALLS
193

3.5%

1.6%

ABSOLUTE GROWTH PAX YTD JUNE

18,220
3.5%

ABSOLUTE GROWTH CALLS YTD JUNE

3
1.6%

JUNE RESULT 2023

NORTH AMERICA



97,614

79.6%

SOUTH AMERICA



17,821

14.5%

EUROPE



4,320

3.5%

OTHERS



2,818

2.3%

TOTAL ARRIVALS

122,573

100%



ARRIVALS JUNE 2024

122,573
ARRIVALS

20.7%
GROWTH

| | 2023 | | Growth | 2024 | % Growth | Marketshare 2023 | Marketshare 2024 |
|-----------------|----------------|-------------|---------------|----------------|--------------|------------------|------------------|
| USA | 80,892 | | 14,243 | 95,135 | 17.6% | 79.7% | 77.6% |
| Canada | 2,005 | | 474 | 2,479 | 23.6% | 2.0% | 2.0% |
| NA | 82,897 | | 14,717 | 97,614 | 17.8% | 81.7% | 79.6% |
| Venezuela | 173 | | 55 | 228 | 31.8% | 0.2% | 0.2% |
| Colombia | 5,468 | | 2,894 | 8,362 | 52.9% | 5.4% | 6.8% |
| Brazil | 1,153 | | 64 | 1,217 | 5.6% | 1.1% | 1.0% |
| Argentina | 1,308 | | 1,042 | 2,350 | 79.7% | 1.3% | 1.9% |
| Chile | 756 | | 966 | 1,722 | 127.8% | 0.7% | 1.4% |
| Ecuador | 442 | | 266 | 708 | 60.2% | 0.4% | 0.6% |
| Peru | 377 | | 885 | 1,262 | 234.7% | 0.4% | 1.0% |
| Paraguay | 38 | | 33 | 71 | 86.8% | 0.0% | 0.1% |
| Uruguay | 151 | | 217 | 368 | 143.7% | 0.1% | 0.3% |
| Mexico | 196 | | 209 | 405 | 106.6% | 0.2% | 0.3% |
| Others | 1,130 | -2 | | 1,128 | -0.2% | 1.1% | 0.9% |
| SA | 11,192 | | 6,629 | 17,821 | 59.2% | 11.0% | 14.5% |
| Netherlands | 2,405 | -127 | | 2,278 | -5.3% | 2.4% | 1.9% |
| UK | 626 | -81 | | 545 | -12.9% | 0.6% | 0.4% |
| Germany | 334 | -129 | | 205 | -38.6% | 0.3% | 0.2% |
| Italy | 416 | -36 | | 380 | -8.7% | 0.4% | 0.3% |
| Sweden | 51 | -2 | | 49 | -3.9% | 0.1% | 0.0% |
| Belgium | 113 | | 13 | 126 | 11.5% | 0.1% | 0.1% |
| Austria | 22 | -6 | | 16 | -27.3% | 0.0% | 0.0% |
| Switzerland | 86 | -5 | | 81 | -5.8% | 0.1% | 0.1% |
| Others | 627 | | 13 | 640 | 2.1% | 0.6% | 0.5% |
| Europe | 4,680 | -360 | | 4,320 | -7.7% | 4.6% | 3.5% |
| ROW | 2,749 | | 69 | 2,818 | 2.5% | 2.7% | 2.3% |
| Total | 101,518 | | 21,055 | 122,573 | 20.7% | | |
| W/O Ven. | 101,345 | | 21,000 | 122,345 | 20.7% | | |



ARRIVALS USA JUNE 2024

95,135
ARRIVALS

17.6%
GROWTH

| | 2023 | Growth | 2024 | % Growth | Marketshare 2023 | Marketshare 2024 |
|----------------|---------------|---------------|---------------|--------------|------------------|------------------|
| New York | 13,390 | 1,721 | 15,111 | 12.9% | 16.6% | 15.9% |
| Massachusetts | 8,317 | 1,447 | 9,764 | 17.4% | 10.3% | 10.3% |
| New Jersey | 9,889 | 1,940 | 11,829 | 19.6% | 12.2% | 12.4% |
| Pennsylvania | 6,030 | 1,468 | 7,498 | 24.3% | 7.5% | 7.9% |
| Illinois | 2,051 | 277 | 2,328 | 13.5% | 2.5% | 2.4% |
| Connecticut | 3,137 | 704 | 3,841 | 22.4% | 3.9% | 4.0% |
| Florida | 5,096 | 1,070 | 6,166 | 21.0% | 6.3% | 6.5% |
| Ohio | 2,686 | 712 | 3,398 | 26.5% | 3.3% | 3.6% |
| Maryland | 2,840 | 578 | 3,418 | 20.4% | 3.5% | 3.6% |
| Michigan | 869 | 179 | 1,048 | 20.6% | 1.1% | 1.1% |
| Virginia | 2,588 | 744 | 3,332 | 28.7% | 3.2% | 3.5% |
| Georgia | 2,852 | -208 | 2,644 | -7.3% | 3.5% | 2.8% |
| North Carolina | 2,754 | 652 | 3,406 | 23.7% | 3.4% | 3.6% |
| Texas | 3,760 | 263 | 4,023 | 7.0% | 4.6% | 4.2% |
| California | 1,943 | 225 | 2,168 | 11.6% | 2.4% | 2.3% |
| Other | 12,690 | 2,471 | 15,161 | 19.5% | 15.7% | 15.9% |
| Total | 80,892 | 14,243 | 95,135 | 17.6% | | |



NIGHTS JUNE 2024

925,351
NIGHTS

18.3%
GROWTH

| | 2023 | Growth | 2024 | % Growth | ALOS 2023 | ALOS 2024 |
|---------------|----------------|----------------|----------------|--------------|-----------|-----------|
| USA | 581,815 | 98,815 | 680,630 | 17.0% | 7.2 | 7.2 |
| Canada | 18,070 | 2,333 | 20,403 | 12.9% | 9.0 | 8.2 |
| NA | 599,885 | 101,148 | 701,033 | 16.9% | 7.2 | 7.2 |
| Venezuela | 2,135 | 791 | 2,926 | 37.0% | 12.3 | 12.8 |
| Colombia | 39,103 | 16,048 | 55,151 | 41.0% | 7.2 | 6.6 |
| Brazil | 8,236 | -770 | 7,466 | -9.3% | 7.1 | 6.1 |
| Argentina | 12,913 | 7,776 | 20,689 | 60.2% | 9.9 | 8.8 |
| Chile | 6,157 | 7,341 | 13,498 | 119.2% | 8.1 | 7.8 |
| Ecuador | 1,900 | 932 | 2,832 | 49.1% | 4.3 | 4.0 |
| Peru | 2,269 | 4,130 | 6,399 | 182.0% | 6.0 | 5.1 |
| Paraguay | 242 | 214 | 456 | 88.4% | 6.4 | 6.4 |
| Uruguay | 1,199 | 1,903 | 3,102 | 158.7% | 7.9 | 8.4 |
| Mexico | 1,152 | 2,347 | 3,499 | 203.7% | 5.9 | 8.6 |
| Others | 7,038 | 505 | 7,543 | 7.2% | 6.2 | 6.7 |
| SA | 82,344 | 41,217 | 123,561 | 50.1% | 7.4 | 6.9 |
| Netherlands | 51,646 | 4,598 | 56,244 | 8.9% | 21.5 | 24.7 |
| UK | 5,544 | -342 | 5,202 | -6.2% | 8.9 | 9.5 |
| Germany | 3,545 | -1,444 | 2,101 | -40.7% | 10.6 | 10.2 |
| Italy | 3,598 | -261 | 3,337 | -7.3% | 8.6 | 8.8 |
| Sweden | 437 | 31 | 468 | 7.1% | 8.6 | 9.6 |
| Belgium | 1,332 | 453 | 1,785 | 34.0% | 11.8 | 14.2 |
| Austria | 170 | 13 | 183 | 7.6% | 7.7 | 11.4 |
| Switzerland | 768 | -92 | 676 | -12.0% | 8.9 | 8.3 |
| Others | 6,380 | 13 | 6,393 | 0.2% | 10.2 | 10.0 |
| Europe | 73,420 | 2,969 | 76,389 | 4.0% | 15.7 | 17.7 |
| ROW | 26,231 | -1,863 | 24,368 | -7.1% | 9.5 | 8.6 |
| Total | 781,880 | 143,471 | 925,351 | 18.3% | 7.7 | 7.5 |



ACCOMMODATIONS

JUNE 2024

122,573
ARRIVALS

20.7%
GROWTH

ARRIVALS BY ACCOMMODATION

| | 2023 | Growth | 2024 | % Growth | Marketshare 2023 | Marketshare 2024 |
|---------------|----------------|---------------|----------------|--------------|------------------|------------------|
| EP | 27,434 | 3,645 | 31,079 | 13.3% | 27.0% | 25.4% |
| All Inclusive | 18,467 | 1,488 | 19,955 | 8.1% | 18.2% | 16.3% |
| Timeshare | 29,072 | 4,200 | 33,272 | 14.4% | 28.6% | 27.1% |
| Others | 26,545 | 11,722 | 38,267 | 44.2% | 26.1% | 31.2% |
| Total | 101,518 | 21,055 | 122,573 | 20.7% | | |

NIGHTS BY ACCOMMODATION

| | 2023 | Growth | 2024 | % Growth | Marketshare 2023 | Marketshare 2024 |
|---------------|----------------|----------------|----------------|--------------|------------------|------------------|
| EP | 172,238 | 16,964 | 189,202 | 9.8% | 22.0% | 20.4% |
| All Inclusive | 117,727 | 13,732 | 131,459 | 11.7% | 15.1% | 14.2% |
| Timeshare | 234,605 | 43,946 | 278,551 | 18.7% | 30.0% | 30.1% |
| Others | 257,310 | 68,829 | 326,139 | 26.7% | 32.9% | 35.2% |
| Total | 781,880 | 143,471 | 925,351 | 18.3% | | |

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



ACCOMMODATIONS JUNE 2024

122,573
ARRIVALS

20.7%
GROWTH

| | EP | | | All Inclusive | | | Timeshare | | | Others | | |
|---------------------|---------------|---------------|--------------|---------------|---------------|-------------|---------------|---------------|--------------|---------------|---------------|--------------|
| | 2024 | 2023 | % growth | 2024 | 2023 | % growth | 2024 | 2023 | % growth | 2024 | 2023 | % growth |
| USA | 31,435 | 24,243 | 29.7% | 12,021 | 15,054 | -20.1% | 29,605 | 26,560 | 11.5% | 22,074 | 15,035 | 46.8% |
| Venezuela | 33 | 44 | -25.0% | 1 | 0 | 0 | 29 | 21 | 38.1% | 165 | 108 | 52.8% |
| Netherlands | 263 | 303 | -13.2% | 107 | 171 | -37.4% | 143 | 101 | 41.6% | 1,765 | 1,830 | -3.6% |
| Canada | 734 | 226 | 224.8% | 324 | 744 | -56.5% | 291 | 187 | 55.6% | 1,130 | 848 | 33.3% |
| Brazil | 386 | 356 | 8.4% | 62 | 138 | -55.1% | 127 | 143 | -11.2% | 642 | 516 | 24.4% |
| Colombia | 1,028 | 457 | 124.9% | 204 | 494 | -58.7% | 1,593 | 1,113 | 43.1% | 5,537 | 3,404 | 62.7% |
| Argentina | 835 | 130 | 542.3% | 232 | 679 | -65.8% | 381 | 179 | 112.8% | 902 | 320 | 181.9% |
| Chile | 464 | 80 | 480.0% | 123 | 343 | -64.1% | 347 | 124 | 179.8% | 788 | 209 | 277.0% |
| Peru | 384 | 57 | 573.7% | 155 | 108 | 43.5% | 144 | 60 | 140.0% | 579 | 152 | 280.9% |
| UK | 179 | 186 | -3.8% | 75 | 102 | -26.5% | 45 | 70 | -35.7% | 246 | 268 | -8.2% |
| Italy | 173 | 129 | 34.1% | 50 | 161 | -68.9% | 28 | 8 | 250.0% | 129 | 118 | 9.3% |
| Total main mkt | 35,914 | 26,211 | 37.0% | 13,354 | 17,994 | -25.8% | 32,733 | 28,566 | 14.6% | 33,957 | 22,808 | 48.9% |
| All visitors | 31,079 | 27,434 | 13.3% | 19,955 | 18,467 | 8.1% | 33,272 | 29,072 | 14.4% | 38,267 | 26,545 | 44.2% |

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



ACCOMMODATIONS JUNE 2024

122,573
ARRIVALS

20.7%
GROWTH

| | EP | | | All Inclusive | | | Timeshare | | | Others | | |
|---------------------|---------------|---------------|-------------|---------------|---------------|-------------|---------------|---------------|-------------|---------------|---------------|-------------|
| | 2024 | 2023 | % growth | 2024 | 2023 | % growth | 2024 | 2023 | % growth | 2024 | 2023 | % growth |
| USA | 101.1% | 88.4% | 14.5% | 60.2% | 81.5% | -26.1% | 89.0% | 91.4% | -2.6% | 57.7% | 56.6% | 1.8% |
| Venezuela | 0.1% | 0.2% | -33.8% | 0.0% | 0.0% | #DIV/0! | 0.1% | 0.1% | 20.7% | 0.4% | 0.4% | 6.0% |
| Netherlands | 0.8% | 1.1% | -23.4% | 0.5% | 0.9% | -42.1% | 0.4% | 0.3% | 23.7% | 4.6% | 6.9% | -33.1% |
| Canada | 2.4% | 0.8% | 186.7% | 1.6% | 4.0% | -59.7% | 0.9% | 0.6% | 36.0% | 3.0% | 3.2% | -7.6% |
| Brazil | 1.2% | 1.3% | -4.3% | 0.3% | 0.7% | -58.4% | 0.4% | 0.5% | -22.4% | 1.7% | 1.9% | -13.7% |
| Colombia | 3.3% | 1.7% | 98.6% | 1.0% | 2.7% | -61.8% | 4.8% | 3.8% | 25.1% | 14.5% | 12.8% | 12.8% |
| Argentina | 2.7% | 0.5% | 467.0% | 1.2% | 3.7% | -68.4% | 1.1% | 0.6% | 86.0% | 2.4% | 1.2% | 95.5% |
| Chile | 1.5% | 0.3% | 412.0% | 0.6% | 1.9% | -66.8% | 1.0% | 0.4% | 144.5% | 2.1% | 0.8% | 161.5% |
| Peru | 1.2% | 0.2% | 494.7% | 0.8% | 0.6% | 32.8% | 0.4% | 0.2% | 109.7% | 1.5% | 0.6% | 164.2% |
| UK | 0.6% | 0.7% | -15.1% | 0.4% | 0.6% | -32.0% | 0.1% | 0.2% | -43.8% | 0.6% | 1.0% | -36.3% |
| Italy | 0.6% | 0.5% | 18.4% | 0.3% | 0.9% | -71.3% | 0.1% | 0.0% | 205.8% | 0.3% | 0.4% | -24.2% |
| Total main mkt | 115.6% | 95.5% | 20.9% | 66.9% | 97.4% | -31.3% | 98.4% | 98.3% | 0.1% | 88.7% | 85.9% | 3.3% |
| All visitors | 100.0% | 100.0% | 0.0% | 100.0% | 100.0% | 0.0% | 100.0% | 100.0% | 0.0% | 100.0% | 100.0% | 0.0% |











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



VISITORS BY AGE JUNE 2024

122,573
ARRIVALS

20.7%
GROWTH

| | 2023 | Growth | 2024 | % Growth |
|--------------|----------------|-------------------------------------------------------------------------------------------|----------------|--------------|
| 0 - 11 | 6,968 |  2,354 | 9,322 | 33.8% |
| 12-19 | 9,977 |  2,920 | 12,897 | 29.3% |
| 20 - 29 | 14,808 |  2,669 | 17,477 | 18.0% |
| 30 - 39 | 16,035 |  3,214 | 19,249 | 20.0% |
| 40 - 49 | 17,258 |  4,069 | 21,327 | 23.6% |
| 50 - 59 | 18,471 |  2,725 | 21,196 | 14.8% |
| 60 - 69 | 11,921 |  1,900 | 13,821 | 15.9% |
| 70 + | 6,079 |  1,203 | 7,282 | 19.8% |
| Not Stated | 1 |  1 | 2 | 100.0% |
| Total | 101,518 |  21,055 | 122,573 | 20.7% |

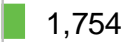
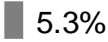
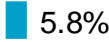









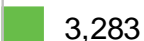



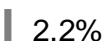
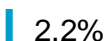






GENERATIONS

JUNE 2024

122,573
ARRIVALS

20.7%
GROWTH

| | 2023 | Growth | 2024 | % Growth | Marketshare 2023 | Marketshare 2024 |
|--------------------|----------------|------------------------------------------------------------------------------------------|----------------|--------------|-------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------|
| Gen A | 5,401 |  1,754 | 7,155 | 32.5% |  5.3% |  5.8% |
| Gen Z | 20,075 |  5,302 | 25,377 | 26.4% |  19.8% |  20.7% |
| Millennials | 25,852 |  5,007 | 30,859 | 19.4% |  25.5% |  25.2% |
| Gen X | 27,403 |  5,252 | 32,655 | 19.2% |  27.0% |  26.6% |
| Baby Boomers | 20,585 |  3,283 | 23,868 | 15.9% |  20.3% |  19.5% |
| Silent Generations | 2,201 |  456 | 2,657 | 20.7% |  2.2% |  2.2% |
| Age not specified | 1 |  1 | 2 | 100.0% |  0.0% |  0.0% |
| Total | 101,518 |  21,055 | 122,573 | 20.7% | | |



PURPOSE OF VISIT JUNE 2024

122,573
ARRIVALS

20.7%
GROWTH

| | 2024 | Market share 2024 | 2023 | Market share 2023 | % Growth |
|----------------|----------------|----------------------|----------------|----------------------|--------------|
| Sun, Sand, Sea | 96,701 | 78.9% | 84,163 | 82.9% | 14.9% |
| Business | 1,825 | 1.5% | 1,585 | 1.6% | 15.1% |
| Conference | 318 | 0.3% | 253 | 0.2% | 25.7% |
| Honeymoon | 3,097 | 2.5% | 3,841 | 3.8% | -19.4% |
| Diving | 324 | 0.3% | 379 | 0.4% | -14.5% |
| Incentive | 918 | 0.7% | 827 | 0.8% | 11.0% |
| Meeting | 614 | 0.5% | 737 | 0.7% | -16.7% |
| Not specified | 15,171 | 12.4% | 5,772 | 5.7% | 162.8% |
| Shopping | 674 | 0.5% | 709 | 0.7% | -4.9% |
| Wedding | 2,931 | 2.4% | 3,252 | 3.2% | -9.9% |
| Total | 122,573 | 100.0% | 101,518 | 100.0% | 20.7% |



CARRIERS JUNE 2024

122,573
ARRIVALS

20.7%
GROWTH

| | 2023 | Growth | 2024 | % Growth | Marketshare 2023 | Marketshare 2024 |
|------------------------|----------------|---------------|----------------|--------------|------------------|------------------|
| JETBLUE | 24,314 | 6,503 | 30,817 | 26.7% | 24.0% | 25.1% |
| AMERICAN AIRLINES | 24,082 | 1,704 | 25,786 | 7.1% | 23.7% | 21.0% |
| UNITED AIRLINES | 15,421 | 2,737 | 18,158 | 17.7% | 15.2% | 14.8% |
| DELTA AIRLINE | 10,390 | 248 | 10,638 | 2.4% | 10.2% | 8.7% |
| AVIANCA | 5,334 | 1,746 | 7,080 | 32.7% | 5.3% | 5.8% |
| SOUTHWEST AIRLINES | 5,276 | 1,636 | 6,912 | 31.0% | 5.2% | 5.6% |
| COPA AIRLINES | 3,358 | 2,082 | 5,440 | 62.0% | 3.3% | 4.4% |
| AERO REPUBLICA/ WINGO | 2,607 | 1,558 | 4,165 | 59.8% | 2.6% | 3.4% |
| SPIRIT AIRLINES | 1,412 | 1,246 | 2,658 | 88.2% | 1.4% | 2.2% |
| KLM ROYAL DUTCH | 2,093 | -211 | 1,882 | -10.1% | 2.1% | 1.5% |
| LATAM AIRLINES | 0 | 1,629 | 1,629 | - | 0.0% | 1.3% |
| DIVI DIVI AIR | 1,609 | -229 | 1,380 | -14.2% | 1.6% | 1.1% |
| WESTJET AIRLINES | 884 | 417 | 1,301 | 47.2% | 0.9% | 1.1% |
| TUI FLY NL | 1,082 | -116 | 966 | -10.7% | 1.1% | 0.8% |
| EZ AIR | 896 | -76 | 820 | -8.5% | 0.9% | 0.7% |
| SUNWING AIRLINES | 740 | -43 | 697 | -5.8% | 0.7% | 0.6% |
| WINAIR | 113 | 342 | 455 | 302.7% | 0.1% | 0.4% |
| BRITISH AIRWAYS | 467 | -36 | 431 | -7.7% | 0.5% | 0.4% |
| SURINAM AIRWAYS | 461 | -65 | 396 | -14.1% | 0.5% | 0.3% |
| PRIVATE | 479 | -153 | 326 | -31.9% | 0.5% | 0.3% |
| CHARTER | 183 | 41 | 224 | 22.4% | 0.2% | 0.2% |
| ARAJET | 87 | 51 | 138 | 58.6% | 0.1% | 0.1% |
| JETAIR CARIBBEAN | 93 | 34 | 127 | 36.6% | 0.1% | 0.1% |
| SKY HIGH AVIATION | 77 | 16 | 93 | 20.8% | 0.1% | 0.1% |
| AIR CENTURY | 59 | -5 | 54 | -8.5% | 0.1% | 0.0% |
| VENSECAR INTERNACIONAL | 1 | -1 | 0 | -100.0% | 0.0% | 0.0% |
| OTHERS | 0 | | 0 | - | 0.0% | 0.0% |
| Total | 101,518 | 21,055 | 122,573 | 20.7% | | |



CARRIERS JUNE 2024

122,573
ARRIVALS

20.7%
GROWTH

| City | APO Code | April '24 | Market share 2024 | April'23 | Market share 2023 | 2024 vs 2023 |
|-------------------------------|----------|----------------|-------------------|----------------|-------------------|--------------|
| JFK NY | JFK | 21,718 | 16.7% | 20,238 | 19.3% | 0.8% |
| Newark | EWR | 12,945 | 10.0% | 10,445 | 10.9% | 7.4% |
| Boston | BOS | 11,451 | 9.5% | 8,919 | 8.5% | 29.9% |
| Charlotte | CLT | 9,650 | 8.3% | 9,072 | 8.2% | 18.3% |
| Miami | MIA | 9,305 | 8.1% | 8,825 | 8.9% | 6.3% |
| Bogota | BOG | 7,128 | 5.9% | 6,721 | 6.1% | 13.1% |
| Panama City | PTY | 5,440 | 5.2% | 3,370 | 4.9% | 22.4% |
| Philadelphia | PHL | 5,344 | 5.1% | 5,018 | 3.7% | 60.4% |
| Atlanta | ATL | 5,262 | 4.8% | 5,254 | 4.9% | 14.6% |
| G.Bush DC | IAD | 4,976 | 4.3% | 2,678 | 2.8% | 79.2% |
| Orlando | MCO | 4,060 | 4.2% | 4,138 | 4.8% | 2.4% |
| Medellin | MDE | 3,084 | 3.1% | 1,252 | 3.7% | 63.3% |
| Baltimore | BWI | 2,852 | 2.5% | 1,141 | 3.2% | -7.1% |
| Amsterdam | AMS | 2,848 | 2.3% | 3,175 | 1.7% | -4.7% |
| Fort Lauderdale | FLL | 2,677 | 1.9% | 1,434 | 2.6% | -13.6% |
| Curacao | CUR | 2,423 | 1.2% | 2,814 | 0.0% | — |
| Toronto | YYZ | 2,012 | 0.9% | 1,626 | 1.1% | -1.7% |
| Chicago | ORD | 1,663 | 0.9% | 1,311 | 0.5% | 93.5% |
| Lima, Peru | LIM | 1,629 | 0.8% | 0 | 0.7% | 29.9% |
| Houston International | IAH | 1,625 | 0.7% | 1,323 | 0.7% | 12.4% |
| Cali, Alfonso Bonilla Aragon | CLO | 1,033 | 0.6% | 0 | 0.0% | — |
| Dallas Fort Worth Int Airport | DFW | 832 | 0.6% | 684 | 0.7% | 5.1% |
| LaGuardia Airport, NY | LGA | 724 | 0.5% | 532 | 0.5% | 10.3% |
| Sint Maarten | SXM | 462 | 0.5% | 113 | 0.5% | 14.9% |
| Gatwick Airport , UK | LGW | 431 | 0.4% | 467 | 0.2% | 188.7% |
| | Others | 999 | 0.8% | 968 | 1.0% | 3.2% |
| Grand Total | | 122,573 | 100.0% | 101,518 | 100.0% | 20.7% |



CRUISE COMPARISON



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



CRUISE JUNE 2024



2023



CRUISE PAX
29,464

CRUISE CALLS
9



2024



CRUISE PAX
43,031

46.1%

CRUISE CALLS
11

22.2%

ABSOLUTE GROWTH PAX JUNE

13,567
46.1%

ABSOLUTE GROWTH CALLS JUNE

2
22.2%



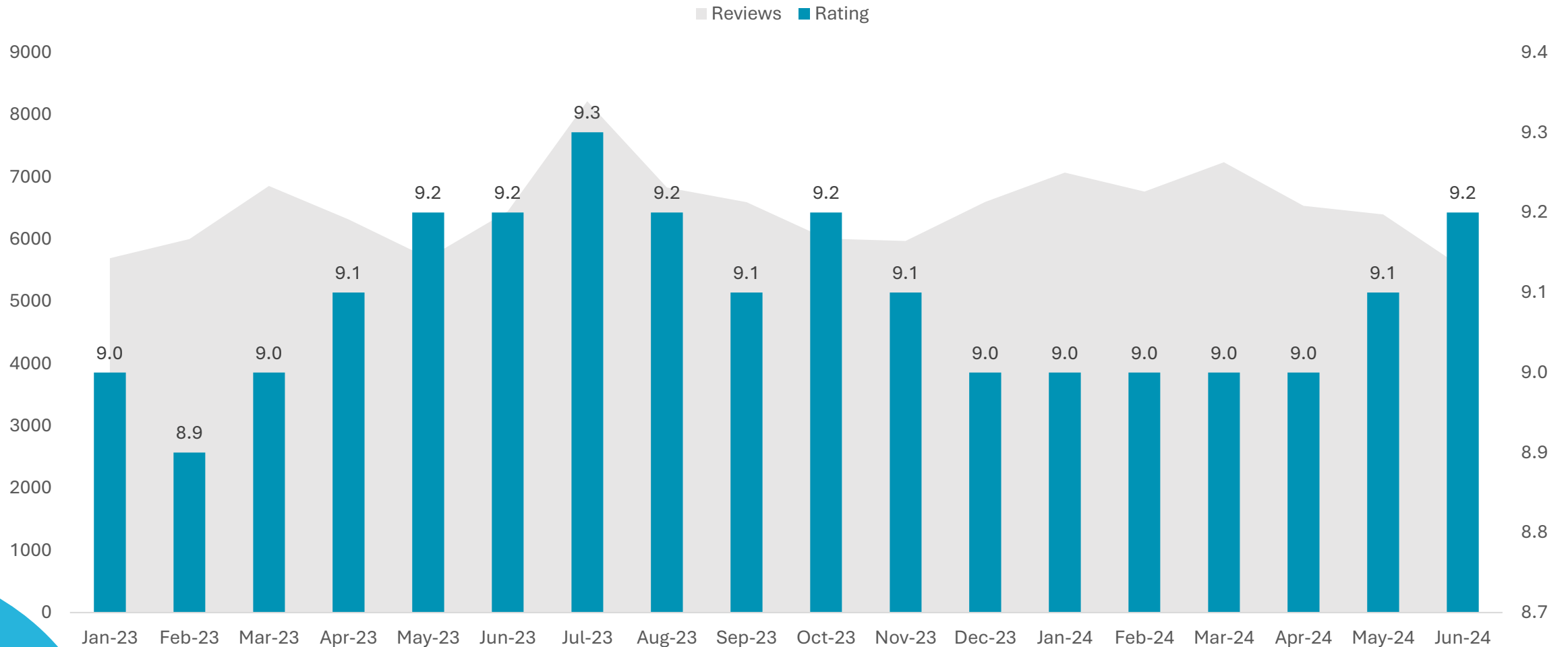
GUEST SATISFACTION





GUEST EXPERIENCE INDEX (GEI)

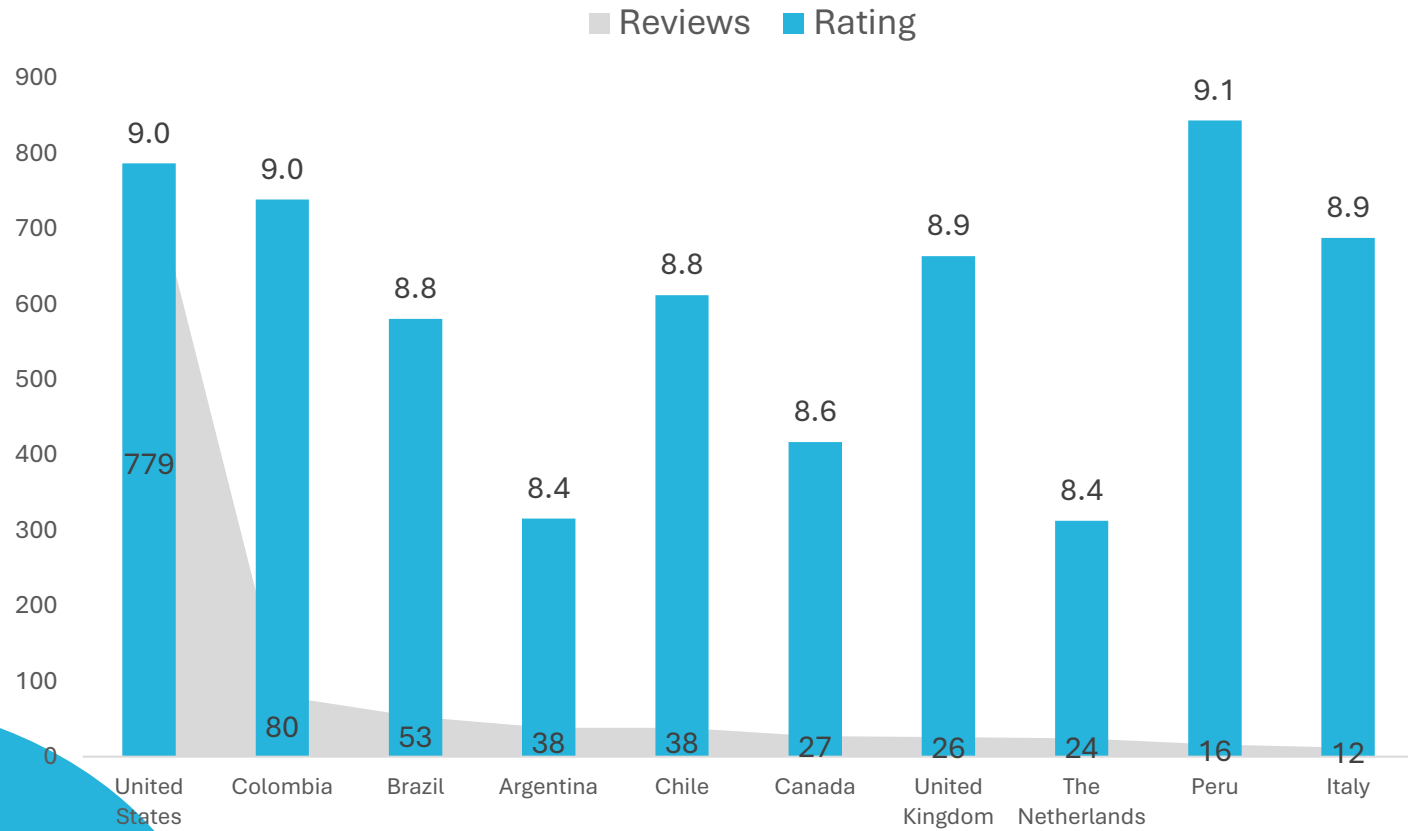
Reviews and Ratings



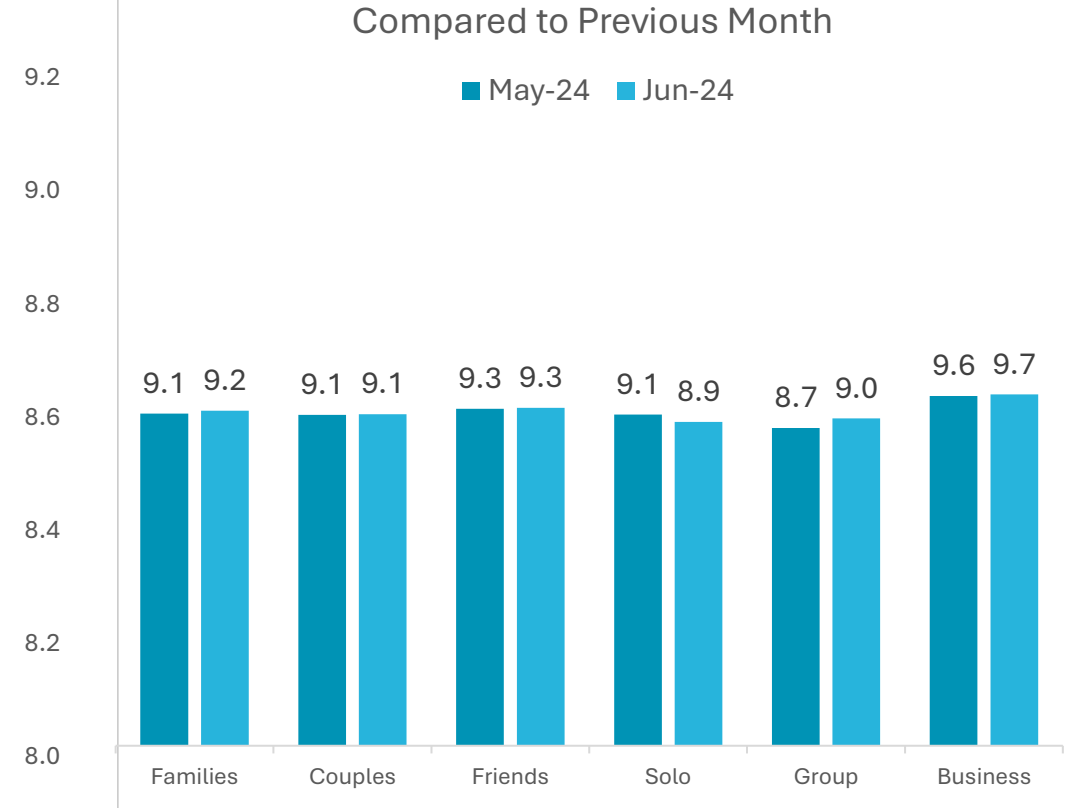


GEI JUNE 2024

MARKETS



TRAVEL PARTY





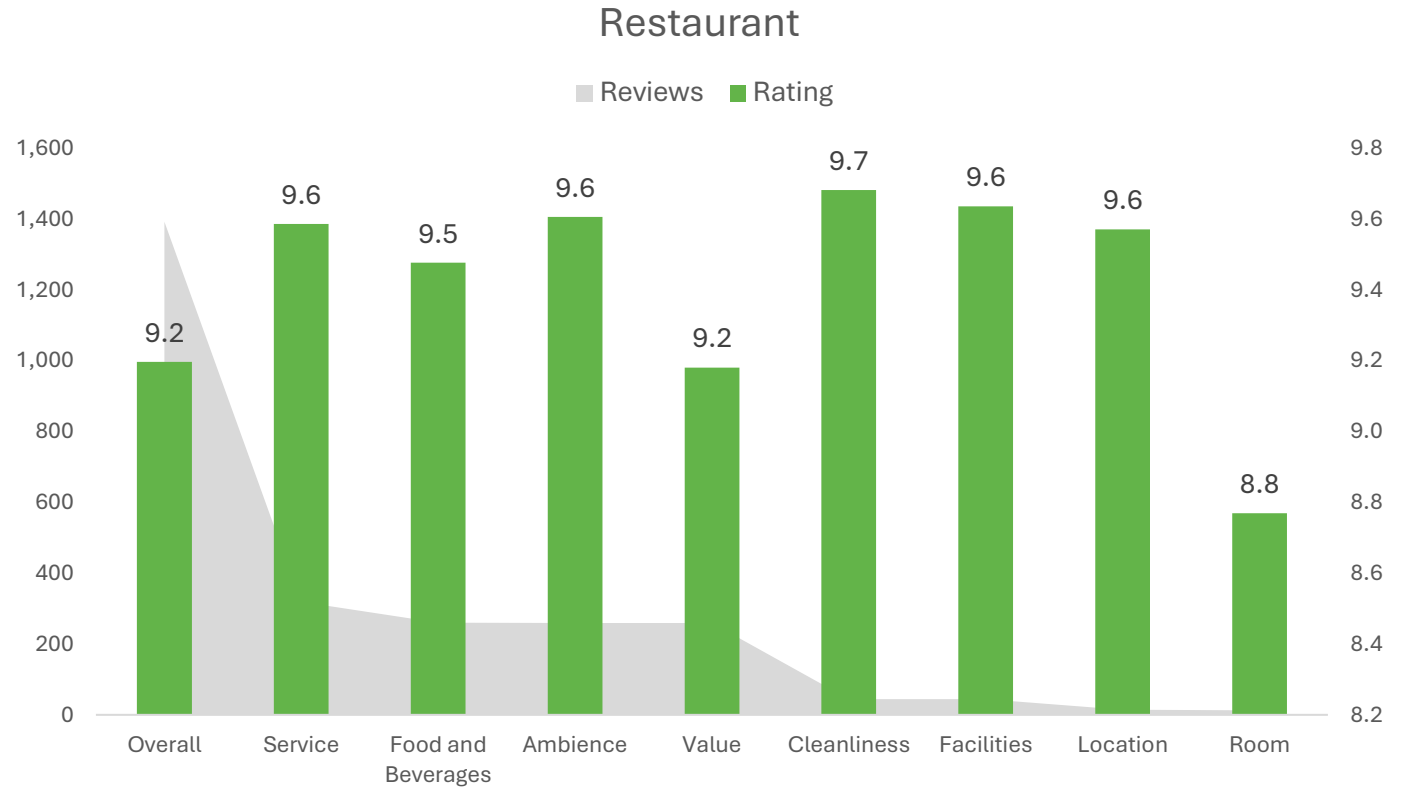
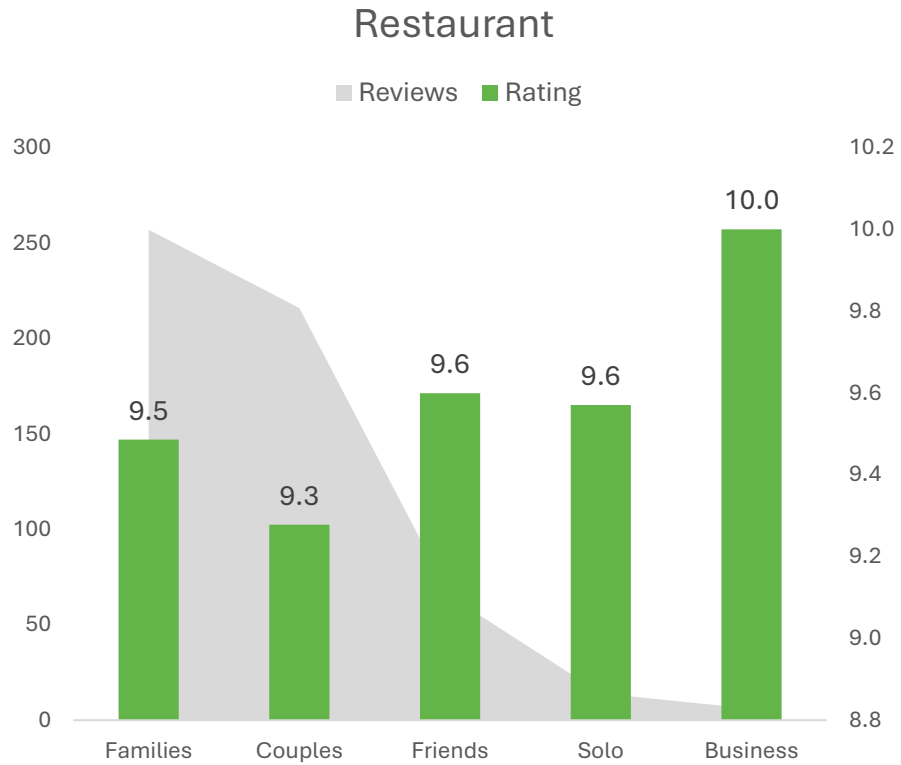
GEI JUNE 2024

■ May-24 ■ Jun-24





RESTAURANT GEI JUNE 2024





VACATIONS RENTALS

 **Transparent**
an OTA INSIGHT company

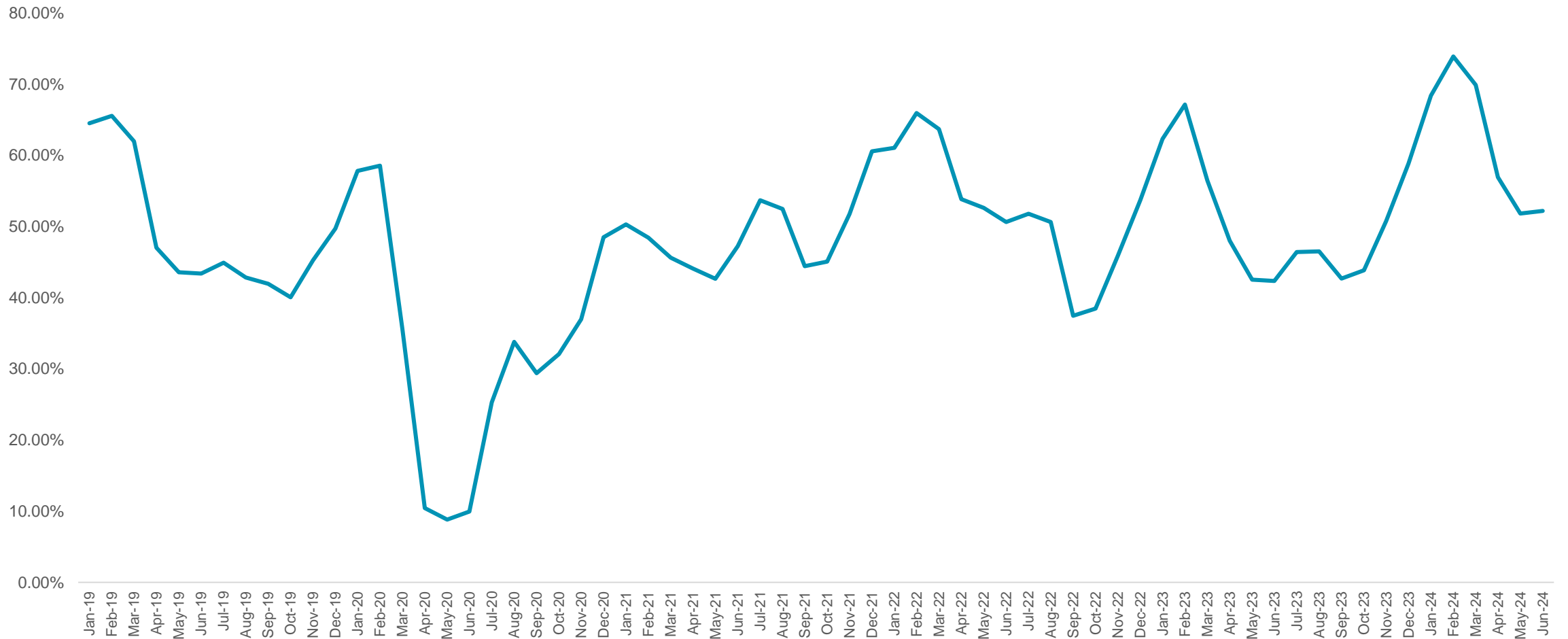
INTRODUCTION

- ▶ 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. 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.



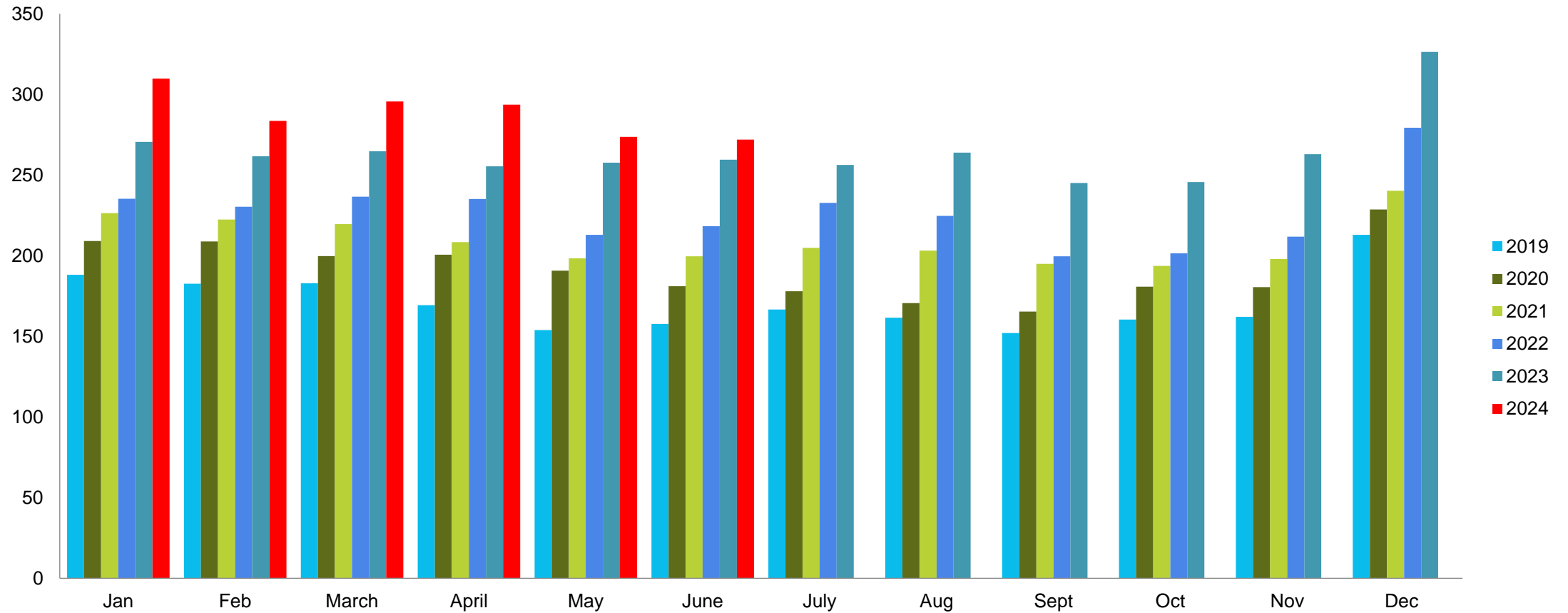
OCCUPANCY

June 2023 Occupancy: 42.4% | June 2024 Occupancy: 52.2%



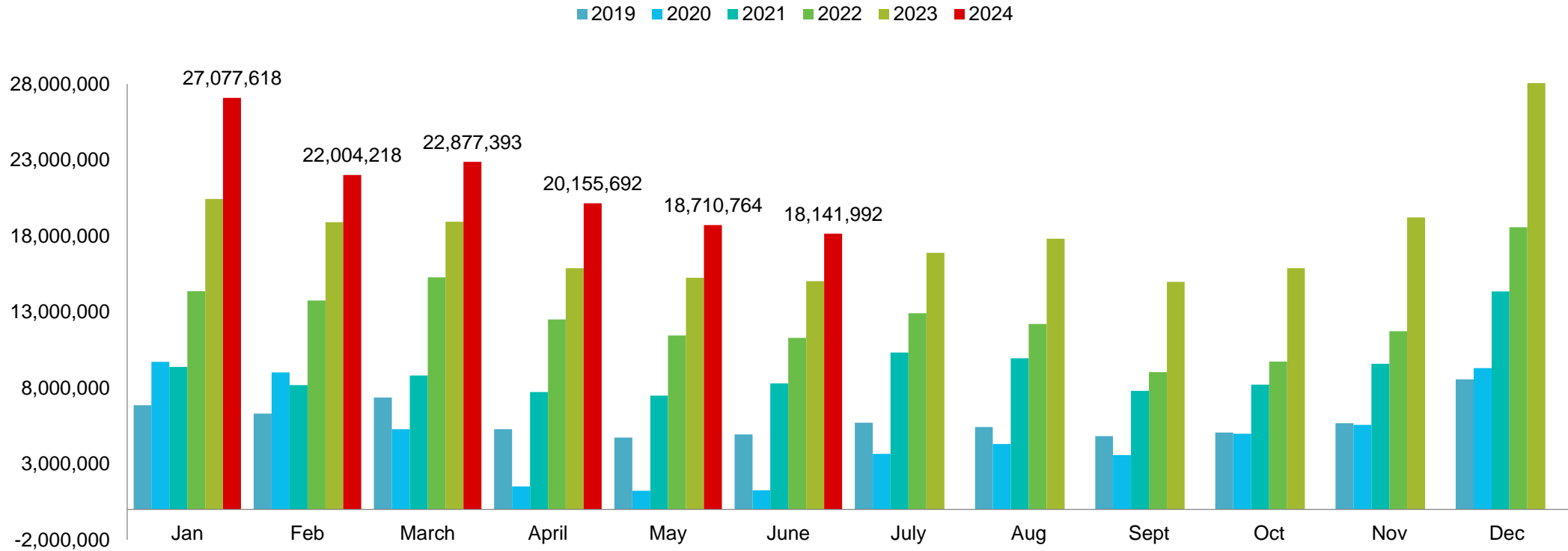
ADR

June 2023 ADR: \$260 | June 2024 ADR: \$272



REVENUE

Total Revenue YTD June 2024: USD\$128,967,677 | Total Revenue YTD June 2023: USD\$104,460,144
June 2024: USD\$18,141,992 | June 2023: USD\$15,030,984





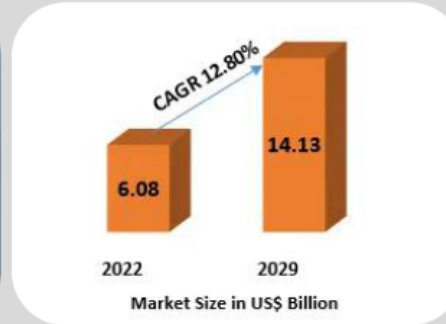
TIDBITS

Luxury Cruise Market Study

This luxury cruise market study was prepared by PKF Hospitality GmbH between December 2023 and March 2024.
Part 1: Market Analysis and Competitive Analysis

The luxury cruise industry is witnessing a significant growth trajectory, fueled by a demand for bespoke experiences.

Market Size



The luxury cruise industry is on a remarkable growth trajectory, with revenue expected to soar from \$6.08 billion in 2022 to an estimated \$14.13 billion by 2029. This impressive expansion, characterized by a compound annual growth rate (CAGR) of 12.8%, underscores a rising demand for personalized, high-end travel experiences, signaling a pivotal shift within the industry towards luxury and exclusivity.

This growth trend aligns with broader economic indicators, such as rising global wealth and the expansion of the affluent consumer base, which have fueled the demand for luxury goods and experiences worldwide. The luxury travel sector, with cruising as a key component, is increasingly catering to these affluent travelers who seek unique, exclusive experiences that transcend traditional vacations.

These travelers are drawn to the promise of exploring remote destinations in unparalleled comfort and style, emphasizing the need for destinations and service providers to offer exceptional quality and unique experiences to attract this lucrative market segment.

Key Players



THE RITZ-CARLTON
YACHT COLLECTION



CRYSTAL
CRUISES

Regent

SEVEN SEAS CRUISES®

Hapag-Lloyd



PONANT



AZAMARA®

OCEANIA
CRUISES



SEABOURN®



SILVERSEA®

The luxury cruise market is evolving with key players setting new standards for opulent experiences. The trend is towards smaller, more luxurious ships, as established cruise companies shift focus to offer intimate, personalized voyages. This reflects the industry's move towards quality, underscoring the growing preference for exclusivity in cruise travel.

Meanwhile, companies like Compagnie du Ponant and Silversea Cruises are pushing the boundaries of luxury with their focus on bespoke expeditions and unparalleled onboard services. These players, along with others like Regent Seven Seas Cruises and Crystal Cruises, are not only expanding their fleets with custom-built luxury ships but are also innovating the very concept of cruising—turning it into a curated journey of discovery and indulgence.

The luxury cruise market is dynamically evolving, driven by increased competition and the entry of distinguished brands like The Ritz-Carlton Yacht Collection and the Four Seasons Yachts. This influx of renowned hospitality leaders into the cruising world promises a future of enhanced diversity and luxury, redefining high-end maritime travel to surpass the expectations of modern luxury travelers.

Luxury cruising evolves with a focus on intimacy, personalization, and sustainability.

Growth Trends



The evolution of luxury cruising towards offering more intimate and personalized experiences reflects a broader trend in the luxury market, where exclusivity and customization are paramount.

The industry's pivot to smaller luxury vessels allows for access to less-traveled ports, providing seasoned travelers with the unique, off-the-beaten-path experiences they desire. This trend is further exemplified by the industry's investment in luxury expedition cruising, where ships equipped with advanced navigational technology can venture into remote areas like the Arctic and Antarctic, offering guests the thrill of discovery without sacrificing comfort.

Moreover, the emphasis on unique, culturally rich experiences over standard tourist attractions highlights a shift in luxury consumer values towards more meaningful, transformative travel. Luxury cruise lines are responding by curating itineraries that offer deep dives into the history, culture, and natural beauty of each destination, ensuring that guests return home with stories of unforgettable experiences.

Competitive Landscape



In the luxury cruise market's competitive landscape, differentiation hinges on offering an all-encompassing, seamless luxury experience that addresses every aspect of the guest's journey. Beyond the exquisite accommodations and gourmet dining, luxury cruise lines are distinguishing themselves through comprehensive service offerings that include everything from private transfers and expedited check-ins to exclusive tours and onboard amenities.

This holistic approach to luxury, where every detail is meticulously curated to ensure guest satisfaction, sets the benchmark for luxury cruising. Moreover, the industry's focus on sustainability and eco-friendly practices reflects a growing awareness among affluent travelers of their environmental impact, adding another layer of complexity to the competitive dynamics.

Cruise lines that successfully integrate luxury with sustainability are likely to gain a competitive edge, appealing to the modern luxury traveler's desire for experiences that are not only exclusive and personalized but also responsible and mindful of the planet's future.

Diverse demographics and changing preferences define the luxury cruise market's evolving landscape.

Demographic Profiling of the Luxury Cruise Market



Age

The luxury cruise market spans several age groups, with distinct preferences and expectations. While traditionally skewed towards an older demographic, including baby boomers (aged 57-75) who prioritize comfort, luxury, and cultural experiences, there is a noticeable shift towards attracting younger generations. Gen X (aged 41-56) and older Millennials (aged 25-40) are emerging as significant segments, drawn by the promise of unique, immersive travel experiences. These younger travelers often seek adventure and exploration, alongside luxury and exclusivity.

Income Level

Luxury cruisers typically fall into the higher income brackets, with disposable income that allows for discretionary spending on high-end travel experiences. This segment includes affluent professionals, business owners, and retirees with significant savings. The luxury cruise industry caters to this group by offering an array of premium services and exclusive experiences that justify the higher price point associated with luxury cruising.

Preferences

Preferences among luxury cruise travelers vary, with some seeking relaxation and rejuvenation in a lavish setting, while others look for adventure and cultural immersion. High-luxury consumers demand personalized services, from bespoke excursions to tailored dining experiences. There is a growing trend towards experiences that are not only exclusive but also meaningful and transformative, blending luxury with authenticity and sustainability, for example, high-end adventure experiences like private yacht charters, or guided scuba diving excursions in pristine reefs.

Travel Behavior

Travel behavior in the luxury cruise segment highlights a penchant for longer, more immersive itineraries that offer in-depth exploration of destinations, like private cultural performances or exclusive access to remote natural wonders. Luxury cruisers value exclusivity and privacy, preferring smaller ships that can access unique, less-traveled ports. This group tends to plan and book their trips well in advance, often seeking the assistance of luxury travel advisors to curate their travel experiences. Repeat business is common within this segment, with satisfied cruisers loyal to brands that have successfully met or exceeded their high expectations.

Psychographics

Luxury cruise value experiences over material goods, seeking travel that enriches their lives and broadens their perspectives. They prioritize wellness and well-being, often choosing cruises that offer spa services, fitness activities, and health-conscious dining options. Sustainability and responsible travel are increasingly important to this demographic, influencing their choice of cruise lines that demonstrate environmental stewardship and community engagement.

Market profiles reveal the varied lifestyles and interests of luxury cruisers, each with unique travel behaviors and preferences.

Affluent Retirees



John (68), a retired corporate executive, and Margaret (65), a former school principal, have been looking forward to exploring the world in their retirement years. With a significant nest egg saved up, they prioritize comfort, wellness, and cultural enrichment in their travels.

interests

opera, historical sites, gourmet food and wine.

Lifestyle & Behaviour

They prefer leisurely, extended cruises with luxurious accommodations and attentive service. They value all-inclusive packages for a hassle-free experience and often book their cruises through a trusted luxury travel advisor.

Exploratory Affluent Professional



Sophia (45) is a successful tech startup director who blends her adventurous spirit with her love for travel. Amid her bustling career, she finds solace and adventure in unique, off-the-beaten-path destinations that offer a mix of luxury and discovery.

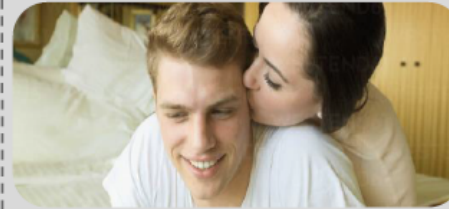
interests

hiking, authentic experiences, the latest travel technology.

Lifestyle & Behaviour

Sophia seeks out luxury cruises that with personalized experiences and access to less-traveled ports. Flexibility and customization are key for her, as she looks for options that can adapt to her dynamic lifestyle. Staying technologically connected is non-negotiable for her.

Luxury-seeking Millennials



Alex (29) and Jordan (32), a millennial couple working in digital marketing and graphic design, respectively, are always on the lookout for travel experiences that strike the perfect balance between luxury, authenticity and shareability.

interests

Eco-conscious travel, immersive cultural experiences, wellness retreats.

Lifestyle & Behaviour

Preferring shorter, immersive cruises to unique destinations, they emphasize sustainability and authentic experiences. They rely on social media and online reviews to guide their travel choices, seeking out experiences that are as luxurious as they are Instagrammable.

High-End Family Travelers



The Harrisons are a family who treasures their vacation time, seeking out enriching experiences that cater to both the kids and adults. David (42) and Michelle (39), and their two kids (14 & 12), look for travel that allows the family to bond, learn, and relax in a luxury.

interests

Family-friendly excursions, activities for the kids, relaxation and spa days for the adults.

Lifestyle & Behaviour

The Harrison family opts for luxury cruises designed to accommodate families, prioritizing safety, diverse dining options, and engaging kids' programs. They choose all-inclusive packages to ensure a seamless, worry-free holiday experience.

Luxury cruisers favor exclusive, culturally rich, and sustainable destinations for unique, authentic experiences.

Sought-after Destinations

Luxury cruise travelers typically seek destinations that offer a blend of natural beauty, exclusivity, and rich cultural experiences. While the allure of iconic cities like Venice, Barcelona, and Santorini remains strong, there is a growing interest in off-the-beaten-path destinations that promise unique and immersive experiences. These include:

- **Polar Regions and Alaska:** The Arctic and Antarctic continue to enthrall luxury cruisers with their otherworldly landscapes, wildlife encounters, and the allure of remote exploration, making them a top choice for adventure-seekers. Alaska offers rugged beauty and encounters with majestic wildlife, both drawing luxury cruisers with their unique appeals.
- **Caribbean :** A perennial favorite, the Caribbean is renowned for its warm hospitality, stunning beaches, and rich and diverse cultures.
- **Southeast Asia:** With vibrant cultures, breathtaking scenery, and rich culinary traditions, destinations like Bali and Ha Long Bay remain alluring to those seeking a blend of relaxation and sensory experiences.
- **South Pacific Islands:** The idyllic settings of Bora Bora, Fiji, and the Cook Islands offer luxury travelers the ultimate escape with their untouched beaches and tranquil, crystal-clear waters.
- **Northern Europe and the Baltics:** Steeped in history and culture, this region promises luxury cruisers a journey through time, with treasures ranging from the architectural wonders of St. Petersburg to the natural beauty of the Norwegian Fjords and Scottish Highlands.
- **South America:** The Amazon River, Galapagos Islands, and the dramatic landscapes of Patagonia attract those looking for biodiversity and immersive adventure experiences.

Factors Influencing Destination Choice

Several key factors influence the destination preferences of luxury cruise travelers, including:

- **Exclusivity and Privacy:** Luxury travelers prefer destinations that offer a sense of exclusivity and privacy, away from the crowds typically associated with popular cruise stops.
- **Natural Beauty and Wildlife:** Destinations that offer stunning natural landscapes and opportunities for safe wildlife encounters are particularly appealing, providing a backdrop for relaxation and adventure.
- **Unique and Authentic Experiences:** There is a strong desire for authentic cultural encounters, whether it is participating in local traditions, exploring hidden gems, or enjoying cuisine prepared by local chefs.
- **Cultural Richness:** Places with a deep cultural heritage and a wealth of historical sites attract those looking to enrich their travel experiences with educational and cultural exploration.
- **Sustainability:** An increasing concern for environmental impact influences the choice of destinations, with a preference for locations and experiences that prioritize sustainability and conservation of nature and culture.

The destination preferences of luxury cruise travelers are shaped by a combination of the quest for exclusivity, the pursuit of unique and authentic experiences, and a deep appreciation for natural beauty and cultural richness. To meet these needs, **a dedicated luxury port** for smaller, upscale ships, especially in combination with shore power, can provide the intimate experience these travelers prefer, underscoring the destination's commitment to personalized service and eco-friendliness. As preferences evolve, destinations with such bespoke facilities are poised to lead in attracting the luxury cruise market.

Barbados offers lush landscapes and rich cultural experiences yet faces challenges with limited air connectivity from certain market.

Barbados

Barbados distinguishes itself in the luxury cruise market with its lush, vibrant landscapes and rich, distinct cultural heritage. The island's acclaimed rum distilleries and historic plantations offer unique tastes of Barbadian heritage, appealing to luxury travelers seeking deep cultural immersion. Furthermore, Barbados boasts some of the Caribbean's most renowned culinary experiences, elevating it as a foodie's paradise with flavors and dishes that reflect its complex history.

However, Barbados faces challenges such as limited direct air connectivity from certain markets, which could affect its accessibility for turn-around cruises. Additionally, while offering stunning natural beauty, it does not have the advantage of being outside the hurricane belt, which can be a crucial factor for travelers and cruise lines planning in the hurricane season. It also lacks immersive experiences for the affluent traveler to partake in.



Port Facilities and Guest Services

Bridgetown Port, a key entry for luxury cruises, offers modern amenities and efficient services. While capable of accommodating luxury vessels, the port reflects the broader challenge Barbados faces: adapting to the luxury market's changing needs. The current infrastructure and service offerings, though adequate, highlight the necessity for ongoing updates to keep up with the global standards expected by luxury travelers.

Accommodation and Gastronomic Offering:

Barbados boasts a variety of luxury accommodations and a renowned culinary scene, essential in attracting luxury cruise visitors. The accommodations and dining experiences, while noteworthy, suggest room for broader diversity in the island's luxury offerings. The gastronomic landscape, celebrated for its quality, could benefit from an expanded range of distinctive dining experiences to meet the sophisticated tastes of luxury travelers.

Cultural and Leisure Experiences:

The island offers a wealth of cultural sites and leisure activities, yet there is an observable shortfall in exclusive, culturally immersive experiences catered to the luxury segment. This shortfall points to a potential area for development in enriching the cultural and leisure offerings. The current array of activities, though commendable, indicates the need for more personalized and unique cultural engagements that could further enhance the appeal of Barbados as a luxury cruise destination.



St. Maarten impresses with its vibrant culture and modern port facilities but struggles with masses and immersive experiences.

St. Maarten

St. Maarten, known for its dual French and Dutch cultural charm, is a vibrant destination within the luxury cruise market. Its stunning beaches and lively ports offer an engaging experience for travelers. Philipsburg Port, equipped with modern facilities, welcomes luxury travelers, showcasing the island's commitment to high-quality service. St. Maarten's varied culinary landscape and a plethora of activities extend beyond typical beach leisure, making it an attractive option for luxury cruisers seeking diverse experiences.

However, St. Maarten faces certain challenges that impact its appeal in the luxury cruise market. Notably, the island is experiencing issues with overcrowding, affecting the exclusivity and tranquility often sought by luxury travelers. Additionally, while the island offers a range of leisure and cultural activities, there is an observed lack of deeply immersive and unique experiences tailored specifically to the luxury segment.



Port Facilities and Guest Services

Philipsburg Port is a crucial asset for St. Maarten in accommodating luxury cruises, providing essential services that facilitate a comfortable experience for visitors. The port's ability to handle various luxury vessels is a testament to the island's readiness to cater to upscale tourists. Despite these strengths, there is a noted need for further enhancements in port facilities and guest services to align with the evolving standards of the luxury travel market.

Accommodation and Gastronomic Offering:

The island boasts several luxury accommodations and a rich gastronomic scene that appeals to those with refined tastes. Despite this, there is a recognized need for a broader range of high-end dining options and accommodations that consistently meet the high standards expected by luxury cruisers. The current offerings, while commendable, highlight the opportunity for growth in diversifying St. Maarten's luxury hospitality landscape.

Cultural and Leisure Experiences:

St. Maarten's vibrant nightlife and water sports activities provide a glimpse into the island's leisure offerings. However, the luxury travel market looks for unique and culturally rich experiences, which are currently underrepresented. The relative scarcity of bespoke cultural tours and engagements with local heritage points to an area where St. Maarten could expand its offerings to better meet the desires of luxury travelers seeking meaningful experiences.



The Bahamas boasts stunning natural beauty and efficient port facilities but lacks tailored cultural experiences for luxury travelers.

The Bahamas

The Bahamas are renowned for their crystal-clear waters, pristine beaches, and a relaxed vibe, attracting luxury cruise travelers seeking a tropical getaway. The allure of the Bahamas lies in its natural beauty, with islands like Exuma and Harbor Island offering secluded escapes. The country's ports, particularly in Nassau, serve as welcoming gateways to these paradisiacal settings, equipped to handle the influx of visitors with their efficient services and amenities.

However, the Bahamas encounter challenges in fully meeting the luxury cruise market's demands. The islands face the task of preserving their natural beauty while accommodating an increasing number of visitors looking for high-end experiences. There is also an observed lack of depth in the cultural and leisure activities specifically tailored for the luxury segment, indicating a potential area for growth.



Port Facilities and Guest Services

The port facilities in the Bahamas, notably in Nassau, are key entry points for luxury cruisers, offering access to the islands' stunning beaches and luxury experiences. While these ports provide essential services for a comfortable arrival, the need for continuous enhancement in infrastructure and service offerings is apparent to match the evolving expectations of the luxury travel market.

Accommodation and Gastronomic Offering

The Bahamas boast an array of luxury accommodations and a culinary scene celebrated for its freshness and flavor, key attractions for luxury cruisers. However, the diversity in high-end dining experiences and accommodations, while notable, suggests room for expanding the scope of luxury offerings to cater more effectively to the tastes and preferences of affluent travelers.

Cultural and Leisure Experiences:

The cultural and leisure activities available in the Bahamas, including water sports and local market exploration, offer glimpses into the islands' offerings. Nonetheless, the relative scarcity of exclusive, culturally enriching experiences tailored to luxury travelers points to an area where the Bahamas could further develop their appeal, enriching the overall experience for visitors seeking unique and immersive engagements with the destination's heritage and natural landscapes.



St. Barts' luxury allure comes with high costs and peak-season crowding, posing challenges for visitors seeking tranquility.

St. Barts

St. Barts distinguishes itself within the luxury cruise market through its exclusive allure and high-end offerings that make it a magnet for the world's elite, particularly those with an affinity for luxury yachts. Its reputation is further bolstered by events like the St. Barts Bucket and Les Voiles de St. Barts regattas. The blend of natural beauty with the sophistication of its amenities and social scene mirrors the charm of the French Riviera, set against the backdrop of the Caribbean's turquoise waters.

However, St. Barts' focus on high-end brings its own set of challenges. The exclusivity that defines the island also translates into high costs for visitors, and residents, from dining and shopping to basic services like transportation. While the luxurious lifestyle and social events are a draw, they can contribute to a sense of overcrowding during peak seasons, detracting from the island's appeal to those seeking a more secluded or authentic Caribbean experience.



Port Facilities and Guest Services

The port in Gustavia is a central hub for the arrival of luxury yachts and cruise passengers, upscale amenities that reflect St. Barts' persona. Its pedestrian-friendly layout and proximity to high-end boutiques, restaurants, and beaches make it an ideal point of entry for visitors. However, the island's focus on luxury yachting means that facilities are tailored more towards private vessels than commercial cruise liners, which limits accessibility for a broader range of luxury cruise passengers seeking the same level of exclusivity and service.

Accommodation and Gastronomic Offering:

Accommodations in St. Barts cater to the highest standards of luxury, offering an array of exquisite resorts, villas, and private estates. The culinary scene is boasting a selection of restaurants that rank among the Caribbean's best for gourmet dining. Despite these strengths, the concentration of high-end options means that experiences can come at a premium, potentially excluding a segment of luxury travelers looking for value alongside opulence.

Cultural and Leisure Experiences:

St. Barts' cultural offerings and leisure activities are infused with its French heritage. The island provides a unique cultural blend that is both European and Caribbean. Nevertheless, the focus on luxury and exclusivity might overshadow the depth and diversity of local and cultural experiences available to visitors, with opportunities to further explore and integrate St. Barts' rich history and local artistry into the luxury travel itinerary.



Luxury cruise passengers desire exceptional hospitality, valuing personalized experiences and authentic cultural immersion.

Sustainable innovations in the Luxury Cruise Industry

As sustainability shifted from a vague touristic attribute to a global trend, and from marketing to customer demand, the luxury cruise industry is especially challenged. Having a reputation of not only contributing to overtourism but also of causing significant environmental damage rather represents the lowest side on the sustainability scale.

However, the cruise industry has started to shift towards ideas and technologies which are quite remarkable. Focusing on recyclable materials even during construction, efficient waste management and waste to energy technologies, onboard recycling, exhaust and greywater filters all contribute to the new demand and changing regulations.

Like airplanes, the biggest challenge still lies in the carbon fuels being used. While there are simply not enough “greener” fuels available to cover the demand, other technologies may become a solution, especially Hydrogen fuel cell driven engines. In the meantime, available shore power (ideally from renewable sources) can contribute massively to reduce emissions while the ship is docked. Ultra luxury cruise lines are actively searching for cruise ports which offer shore power.

Meeting the High Expectations of Luxury Cruise Passengers

From a passenger’s point of view, luxury knows no limits. Immense suites, personal Butler service, a choice of onboard restaurants, and the ability to realize all and any wishes are the norm on ultra luxury cruise ships. For cruise destinations, this puts up the pressure to offer individual products and outstanding services.

It takes excellent understanding of this clientele’s expectations, a well-organized and reliable network, the right people to handle and manage requests, and to coordinate and triple-check all arrangements. In this respect, Aruba is well set up with highly experienced staff in all relevant areas and departments, from the Port Authority to the Cruise Director within Aruba Tourism Authority, Port Agents and special VIP service providers.

From meetings and discussions with representatives of luxury cruise lines, VIP service providers, tour and port agents, as well as from feedback on the questionnaire sent to more than 150 industry representatives, the following statements reflect the very essence of what (ultra) luxury cruise passengers are and expect:

- They want to see amazing destinations while experiencing wonderful hospitality.
- They want to learn but also be indulged.
- They want to travel with other interested people who have the same desire to know the world better.
- They want to experience the insiders' world of the places they visit and get to know the people of the places they visit
- **They are travelers, not tourists.**

This last statement cannot be repeated often enough. Only if it is understood, can tailor-made individual offers and packages be successful. These travelers are educated, interested, and experienced, and they do not mix with the masses. Their desire to meet “real” local people and to learn from them is a huge opportunity to let genuine Arubans profit who have interesting stories to tell and fascinating things to show or experience.





MASHA DANKI

Thank You

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

Or

Visit our website www.ata.aw

