

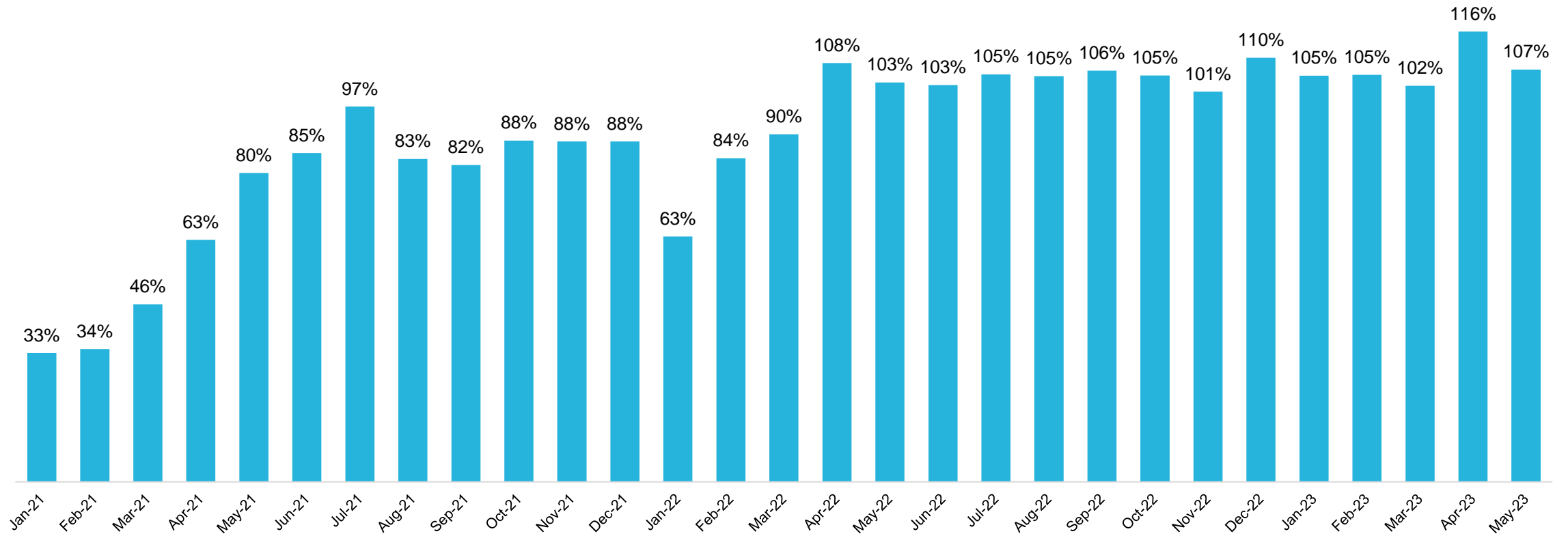


MAY 2023

Monthly Report

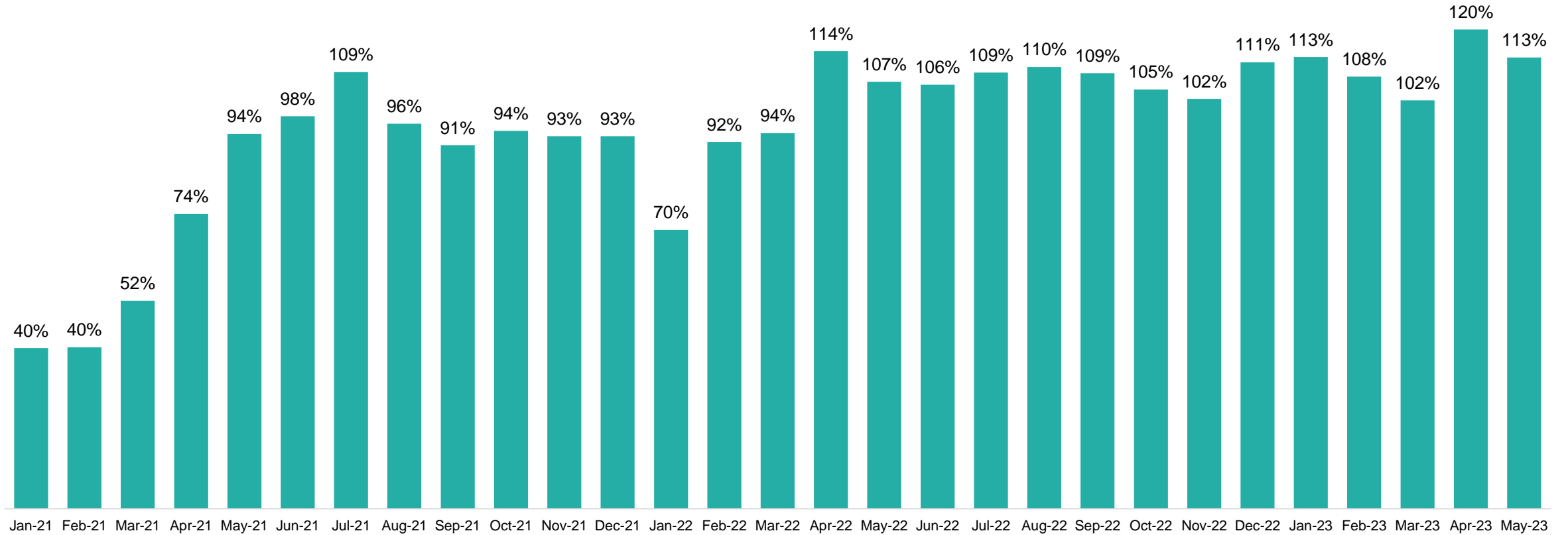
★ STAY-OVER VISITOR ARRIVALS RECOVERY VS 2019

% MONTHLY RECOVERY TOTAL



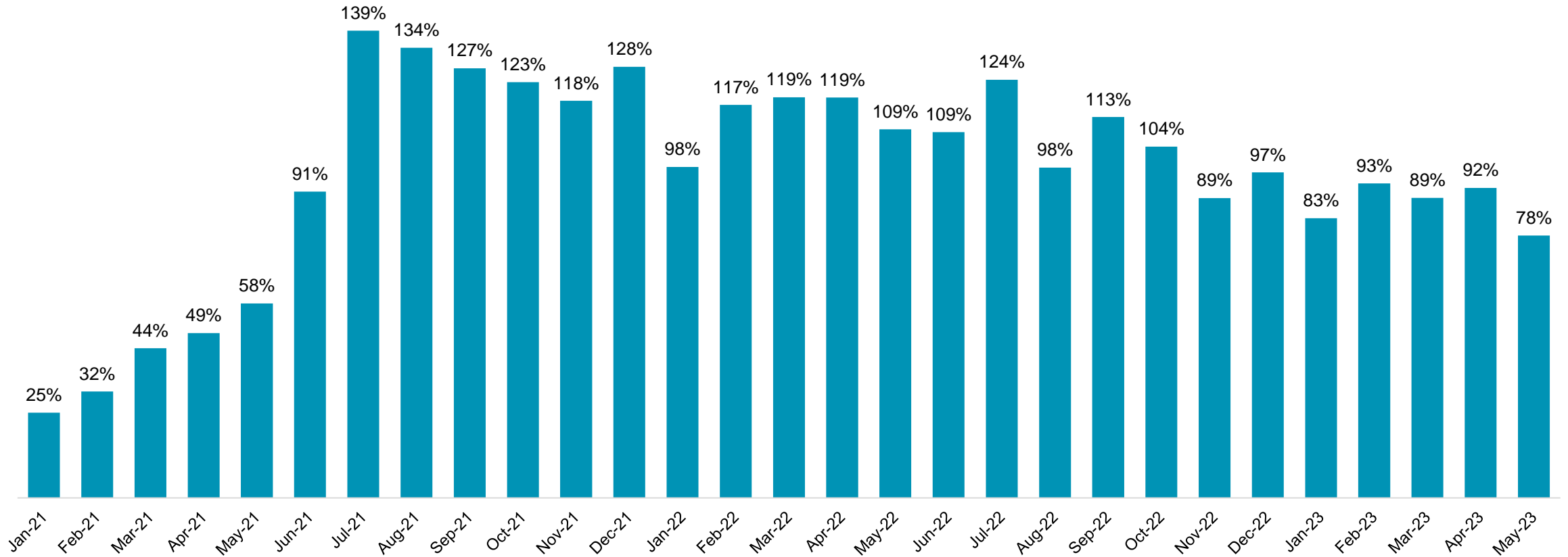
★ STAY-OVER VISITOR ARRIVALS RECOVERY VS 2019

% MONTHLY RECOVERY USA



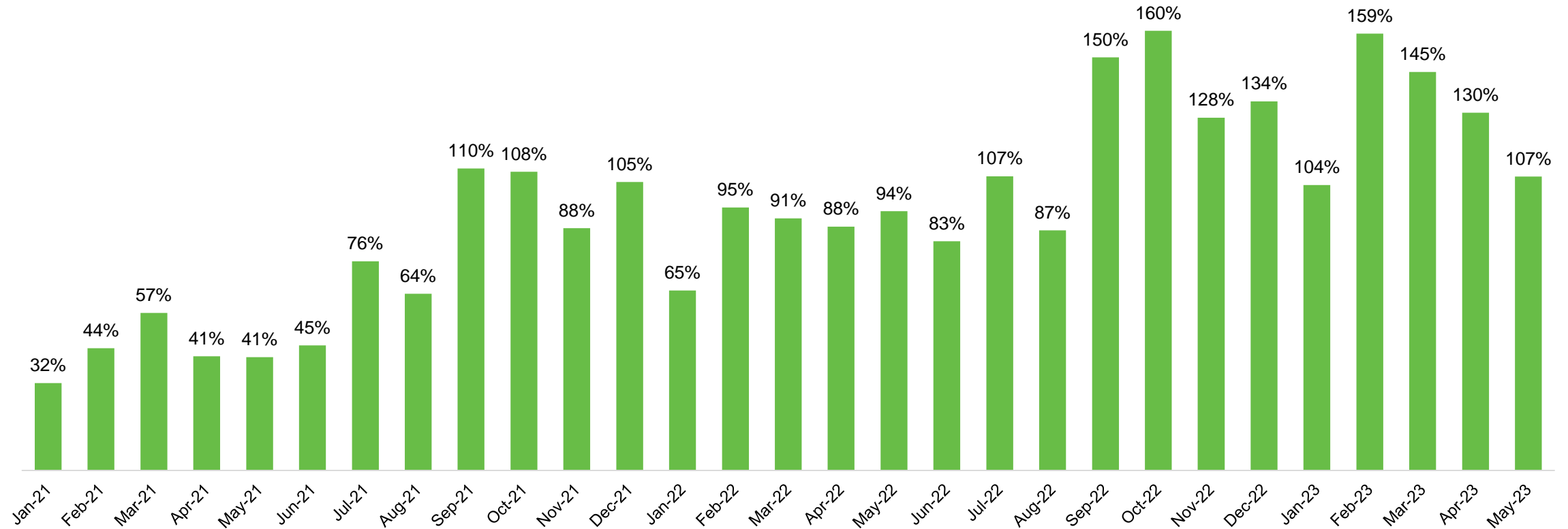
★ STAY-OVER VISITOR ARRIVALS RECOVERY VS 2019

% MONTHLY RECOVERY HOLLAND



★ STAY-OVER VISITOR ARRIVALS RECOVERY VS 2019

% MONTHLY RECOVERY COLOMBIA





COMPARISON 2023 VERSUS 2022

SNAPSHOT YTD MAY 2023/2022



HOW MANY ARRIVALS?

510,033

19.5%



HOW MANY CRUISE TOURISM?

469,978

17.0%

Compared to 2019



HOW LONG DID THEY STAY?

3,678,970

17.2%



WHAT DID THEY SPEND? **
Central Bank Aruba (2022)

Avg. 4,410.6 min

38%

2021: 3,187.1

**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



801,770

NIGHTS

22.3%

ALL INCLUSIVE



563,372

NIGHTS

18.7%

TIMESHARE



1,130,755

NIGHTS

7.2%

OTHERS



1,183,073

NIGHTS

24.1%



ARRIVALS YTD MAY 2023/2022

510,033
ARRIVALS

19.5%
GROWTH

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
USA	341,720	54,387	396,107	15.9%	80.1%	77.7%
Canada	14,663	15,846	30,509	108.1%	3.4%	6.0%
NA	356,383	70,233	426,616	19.7%	83.5%	83.6%
Venezuela	601	90	691	15.0%	0.1%	0.1%
Colombia	10,658	4,892	15,550	45.9%	2.5%	3.0%
Brazil	2,943	1,510	4,453	51.3%	0.7%	0.9%
Argentina	3,981	3,115	7,096	78.2%	0.9%	1.4%
Chile	2,193	915	3,108	41.7%	0.5%	0.6%
Ecuador	1,064	1,040	2,104	97.7%	0.2%	0.4%
Peru	1,349	679	2,028	50.3%	0.3%	0.4%
Paraguay	708	-275	433	-38.8%	0.2%	0.1%
Uruguay	578	4	582	0.7%	0.1%	0.1%
Mexico	582	570	1,152	97.9%	0.1%	0.2%
Others	3,329	1,205	4,534	36.2%	0.8%	0.9%
SA	27,986	13,745	41,731	49.1%	6.6%	8.2%
Netherlands	21,036	-4,697	16,339	-22.3%	4.9%	3.2%
UK	2,656	-633	2,023	-23.8%	0.6%	0.4%
Germany	1,995	572	2,567	28.7%	0.5%	0.5%
Italy	1,270	20	1,290	1.6%	0.3%	0.3%
Sweden	418	1,138	1,556	272.2%	0.1%	0.3%
Belgium	1,066	-224	842	-21.0%	0.2%	0.2%
Austria	244	43	287	17.6%	0.1%	0.1%
Switzerland	683	116	799	17.0%	0.2%	0.2%
Others	3,591	443	4,034	12.3%	0.8%	0.8%
Europe	32,959	-3,222	29,737	-9.8%	7.7%	5.8%
ROW	9,471	2,478	11,949	26.2%	2.2%	2.3%
Total	426,799	83,234	510,033	19.5%		
W/O Ven.	426,198	83,144	509,342	19.5%		



ARRIVALS USA

YTD MAY 2023/2022

396,107
ARRIVALS

15.9%
GROWTH

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
New York	74,435	169	74,604	0.2%	21.8%	18.8%
Massachusetts	49,430	9,994	59,424	20.2%	14.5%	15.0%
New Jersey	41,884	-478	41,406	-1.1%	12.3%	10.5%
Pennsylvania	18,678	3,947	22,625	21.1%	5.5%	5.7%
Illinois	8,369	2,511	10,880	30.0%	2.4%	2.7%
Connecticut	13,444	1,797	15,241	13.4%	3.9%	3.8%
Florida	16,671	2,625	19,296	15.7%	4.9%	4.9%
Ohio	8,392	3,171	11,563	37.8%	2.5%	2.9%
Maryland	10,903	614	11,517	5.6%	3.2%	2.9%
Michigan	8,106	1,606	9,712	19.8%	2.4%	2.5%
Virginia	7,618	3,074	10,692	40.4%	2.2%	2.7%
Georgia	8,014	537	8,551	6.7%	2.3%	2.2%
North Carolina	7,938	2,981	10,919	37.6%	2.3%	2.8%
Texas	7,347	2,275	9,622	31.0%	2.2%	2.4%
California	5,799	652	6,451	11.2%	1.7%	1.6%
Other	54,692	18,912	73,604	34.6%	16.0%	18.6%
Total	341,720	54,387	396,107	15.9%		



NIGHTS YTD MAY 2023/2022

3,678,970
ARRIVALS

17.2%
GROWTH

	2022	Growth	2023	% Growth	ALOS 2022	ALOS 2023
USA	2,345,536	362,801	2,708,337	15.5%	6.9	6.8
Canada	157,642	141,329	298,971	89.7%	10.8	9.8
NA	2,503,178	504,130	3,007,308	20.1%	7.0	7.0
Venezuela	7,808	-998	6,810	-12.8%	13.0	9.9
Colombia	76,151	24,437	100,588	32.1%	7.1	6.5
Brazil	18,309	8,825	27,134	48.2%	6.2	6.1
Argentina	37,661	25,837	63,498	68.6%	9.5	8.9
Chile	17,772	6,119	23,891	34.4%	8.1	7.7
Ecuador	6,407	4,719	11,126	73.7%	6.0	5.3
Peru	9,505	4,243	13,748	44.6%	7.0	6.8
Paraguay	5,047	-2,023	3,024	-40.1%	7.1	7.0
Uruguay	4,529	-36	4,493	-0.8%	7.8	7.7
Mexico	4,135	2,442	6,577	59.1%	7.1	5.7
Others	22,865	5,830	28,695	25.5%	6.9	6.3
SA	210,189	79,395	289,584	37.8%	7.5	6.9
Netherlands	244,118	-50,978	193,140	-20.9%	11.6	11.8
UK	27,361	-9,536	17,825	-34.9%	10.3	8.8
Germany	22,836	-2,054	20,782	-9.0%	11.4	8.1
Italy	12,288	-638	11,650	-5.2%	9.7	9.0
Sweden	4,816	13,878	18,694	288.2%	11.5	12.0
Belgium	11,827	-2,195	9,632	-18.6%	11.1	11.4
Austria	2,577	242	2,819	9.4%	10.6	9.8
Switzerland	7,204	358	7,562	5.0%	10.5	9.5
Others	38,686	488	39,174	1.3%	10.8	9.7
Europe	371,713	-50,435	321,278	-13.6%	11.3	10.8
ROW	53,032	7,768	60,800	14.6%	5.6	5.1
Total	3,138,112	540,858	3,678,970	17.2%	7.4	7.2



ACCOMMODATIONS YTD MAY 2023/2022

510,033
ARRIVALS

19.5%
GROWTH

ARRIVALS BY ACCOMMODATION

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
EP	114,034	26,847	140,881	23.5%	26.7%	27.6%
All Inclusive	76,645	14,310	90,955	18.7%	18.0%	17.8%
Timeshare	125,969	8,908	134,877	7.1%	29.5%	26.4%
Others	110,151	33,169	143,320	30.1%	25.8%	28.1%
Total	426,799	83,234	510,033	19.5%		

NIGHTS BY ACCOMMODATION

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
EP	655,567	146,203	801,770	22.3%	20.9%	21.8%
All Inclusive	474,649	88,723	563,372	18.7%	15.1%	15.3%
Timeshare	1,054,891	75,864	1,130,755	7.2%	33.6%	30.7%
Others	953,005	230,068	1,183,073	24.1%	30.4%	32.2%
Total	3,138,112	540,858	3,678,970	17.2%		

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



VISITORS BY AGE YTD MAY 2023/2022

510,033
ARRIVALS

19.5%
GROWTH

	2022	Growth	2023	% Growth
0 - 11	28,777	3,699	32,476	12.9%
12-19	26,819	2,842	29,661	10.6%
20 - 29	56,552	-910	55,642	-1.6%
30 - 39	73,020	4,312	77,332	5.9%
40 - 49	69,326	12,333	81,659	17.8%
50 - 59	82,411	19,977	102,388	24.2%
60 - 69	61,338	25,046	86,384	40.8%
70 +	28,543	15,903	44,446	55.7%
Not Stated	13	32	45	246.2%
Total	426,799	83,234	510,033	19.5%



GENERATIONS

YTD MAY 2023/2022

510,033
VISITORS

19.5%
GROWTH

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
Gen A	22,735	2,979	25,714	13.1%	5.3%	5.0%
Gen Z	62,041	3,413	65,454	5.5%	14.5%	12.8%
Millennials	115,062	6,267	121,329	5.4%	27.0%	23.8%
Gen X	113,051	22,605	135,656	20.0%	26.5%	26.6%
Baby Boomers	104,618	41,812	146,430	40.0%	24.5%	28.7%
Silent Generations	9,279	6,126	15,405	66.0%	2.2%	3.0%
Age not specified	13	32	45	246.2%	0.0%	0.0%
Total	426,799	83,234	510,033	19.5%		



CARRIERS YTD MAY 2023/2022

510,033
VISITORS

19.5%
GROWTH

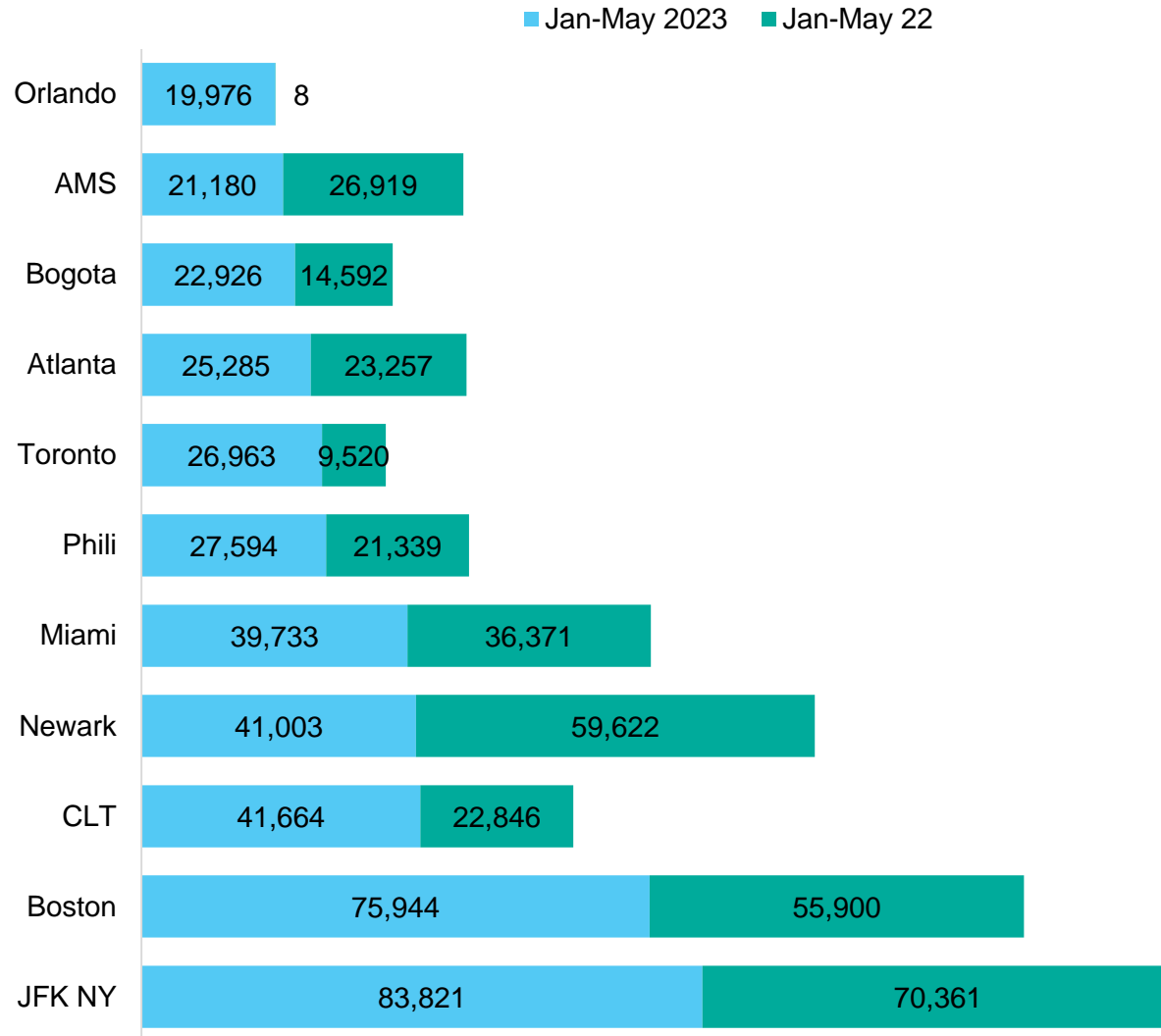
	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
JETBLUE	127,946	-11,417	116,529	-8.9%	30.0%	22.8%
AMERICAN AIRLINES	84,686	31,316	116,002	37.0%	19.8%	22.7%
DELTA AIRLINE	50,527	18,113	68,640	35.8%	11.8%	13.5%
UNITED AIRLINES	60,847	1,610	62,457	2.6%	14.3%	12.2%
SOUTHWEST AIRLINES	19,797	5,108	24,905	25.8%	4.6%	4.9%
AVIANCA	11,488	7,722	19,210	67.2%	2.7%	3.8%
COPA AIRLINE	11,812	4,527	16,339	38.3%	2.8%	3.2%
KLM ROYAL DUTCH	18,648	-3,354	15,294	-18.0%	4.4%	3.0%
AIR CANADA	944	9,256	10,200	980.5%	0.2%	2.0%
WESTJET AIRLINES	4,953	4,268	9,221	86.2%	1.2%	1.8%
SUNWING AIRLINES	3,612	3,909	7,521	108.2%	0.8%	1.5%
DIVI DIVI AIR	5,394	1,465	6,859	27.2%	1.3%	1.3%
TUI NL	8,271	-1,823	6,448	-22.0%	1.9%	1.3%
AERO REPUBLICA/ WINGO	3,090	3,310	6,400	107.1%	0.7%	1.3%
SPIRIT AIRLINES	2,809	3,117	5,926	111.0%	0.7%	1.2%
EZ AIR	2,302	1,816	4,118	78.9%	0.5%	0.8%
PRIVATE	1,349	1,490	2,839	110.5%	0.3%	0.6%
SUN COUNTRY	2,124	131	2,255	6.2%	0.5%	0.4%
SURINAM AIRWAYS	1,835	206	2,041	11.2%	0.4%	0.4%
CHARTER	741	1,016	1,757	137.1%	0.2%	0.3%
SUNCLASS AIRLINES	0	1,158	1,158	-	0.0%	0.2%
JETAIR CARIBBEAN	90	855	945	950.0%	0.0%	0.2%
BRITISH AIRWAYS	0	780	780	-	0.0%	0.2%
WINAIR	834	-367	467	-44.0%	0.2%	0.1%
ARAJET	0	437	437	-	0.0%	0.1%
EASTERN AIRLINES	0	331	331	-	0.0%	0.1%
Others	2,700	-1,746	954	-64.7%	0.6%	0.2%
Total	426,799	83,234	510,033	19.5%		



EMBARKATION POINT YTD MAY 2023/2022

510,033
VISITORS

19.5%
GROWTH



MAY RESULT 2023

NORTH AMERICA



78,611

83.3%

SOUTH AMERICA



8,298

8.8%

EUROPE



4,876

5.2%

OTHERS



2,600

2.8%

TOTAL ARRIVALS

94,385

100%



ARRIVALS MAY 2023/2022

94,385
ARRIVALS

3.2%
GROWTH

	2022	Growth	2023	% Growth
USA	71,659	4,080	75,739	5.7%
Canada	2,675	197	2,872	7.4%
NA	74,334	4,277	78,611	5.8%
Venezuela	117	41	158	35.0%
Colombia	2,555	340	2,895	13.3%
Brazil	776	200	976	25.8%
Argentina	979	370	1,349	37.8%
Chile	676	-212	464	-31.4%
Ecuador	250	195	445	78.0%
Peru	432	121	553	28.0%
Paraguay	145	-77	68	-53.1%
Uruguay	150	-35	115	-23.3%
Mexico	193	117	310	60.6%
Others	803	162	965	20.2%
SA	7,076	1,222	8,298	17.3%
Netherlands	3,973	-1,144	2,829	-28.8%
UK	1,541	-1,028	513	-66.7%
Germany	490	-127	363	-25.9%
Italy	309	-60	249	-19.4%
Sweden	40	-7	33	-17.5%
Belgium	261	-127	134	-48.7%
Austria	44	4	48	9.1%
Switzerland	160	-4	156	-2.5%
Others	760	-209	551	-27.5%
Europe	7,578	-2,702	4,876	-35.7%
ROW	2,449	151	2,600	6.2%
Total	91,437	2,948	94,385	3.2%
W/O Ven.	91,320	2,907	94,227	3.2%

	Marketshare 2022	Marketshare 2023
USA	78.4%	80.2%
Canada	2.9%	3.0%
NA	81.3%	83.3%
Venezuela	0.1%	0.2%
Colombia	2.8%	3.1%
Brazil	0.8%	1.0%
Argentina	1.1%	1.4%
Chile	0.7%	0.5%
Ecuador	0.3%	0.5%
Peru	0.5%	0.6%
Paraguay	0.2%	0.1%
Uruguay	0.2%	0.1%
Mexico	0.2%	0.3%
Others	0.9%	1.0%
SA	7.7%	8.8%
Netherlands	4.3%	3.0%
UK	1.7%	0.5%
Germany	0.5%	0.4%
Italy	0.3%	0.3%
Sweden	0.0%	0.0%
Belgium	0.3%	0.1%
Austria	0.0%	0.1%
Switzerland	0.2%	0.2%
Others	0.8%	0.6%
Europe	8.3%	5.2%
ROW	2.7%	2.8%



ARRIVALS USA

MAY 2023/2022

75,739
ARRIVALS

5.7%
GROWTH

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
New York	13,788	-273	13,515	-2.0%	19.2%	17.8%
Massachusetts	8,046	-259	7,787	-3.2%	11.2%	10.3%
New Jersey	9,571	-842	8,729	-8.8%	13.4%	11.5%
Pennsylvania	4,443	17	4,460	0.4%	6.2%	5.9%
Illinois	1,426	377	1,803	26.4%	2.0%	2.4%
Connecticut	2,437	349	2,786	14.3%	3.4%	3.7%
Florida	4,274	856	5,130	20.0%	6.0%	6.8%
Ohio	1,779	265	2,044	14.9%	2.5%	2.7%
Maryland	3,227	-243	2,984	-7.5%	4.5%	3.9%
Michigan	1,078	321	1,399	29.8%	1.5%	1.8%
Virginia	1,844	441	2,285	23.9%	2.6%	3.0%
Georgia	2,832	-144	2,688	-5.1%	4.0%	3.5%
North Carolina	2,153	583	2,736	27.1%	3.0%	3.6%
Texas	2,120	716	2,836	33.8%	3.0%	3.7%
California	1,922	-9	1,913	-0.5%	2.7%	2.5%
Other	10,719	1,925	12,644	18.0%	15.0%	16.7%
Total	71,659	4,080	75,739	5.7%		



NIGHTS MAY 2023/2022

611,459
NIGHTS

-1.4%
GROWTH

	2022	Growth	2023	% Growth	ALOS 2022	ALOS 2023
USA	453,666	16,086	469,752	3.5%	6.3	6.2
Canada	22,583	327	22,910	1.4%	8.4	8.0
NA	476,249	16,413	492,662	3.4%	6.4	6.3
Venezuela	1,643	291	1,934	17.7%	14.0	12.2
Colombia	17,751	624	18,375	3.5%	6.9	6.3
Brazil	4,837	997	5,834	20.6%	6.2	6.0
Argentina	8,725	3,380	12,105	38.7%	8.9	9.0
Chile	5,218	-1,743	3,475	-33.4%	7.7	7.5
Ecuador	1,598	545	2,143	34.1%	6.4	4.8
Peru	2,719	535	3,254	19.7%	6.3	5.9
Paraguay	899	-461	438	-51.3%	6.2	6.4
Uruguay	1,116	-264	852	-23.7%	7.4	7.4
Mexico	1,328	385	1,713	29.0%	6.9	5.5
Others	5,133	581	5,714	11.3%	6.4	5.9
SA	50,967	4,870	55,837	9.6%	7.2	6.7
Netherlands	43,262	-10,685	32,577	-24.7%	10.9	11.5
UK	16,944	-12,504	4,440	-73.8%	11.0	8.7
Germany	5,244	-1,894	3,350	-36.1%	10.7	9.2
Italy	2,593	-457	2,136	-17.6%	8.4	8.6
Sweden	322	-31	291	-9.6%	8.1	8.8
Belgium	2,781	-1,208	1,573	-43.4%	10.7	11.7
Austria	363	24	387	6.6%	8.3	8.1
Switzerland	1,553	-191	1,362	-12.3%	9.7	8.7
Others	6,838	-1,952	4,886	-28.5%	9.0	8.9
Europe	79,900	-28,898	51,002	-36.2%	10.5	10.5
ROW	13,239	-1,281	11,958	-9.7%	5.4	4.6
Total	620,355	-8,896	611,459	-1.4%	6.8	6.5



ACCOMMODATIONS

MAY 2023/2022

94,385
ARRIVALS

3.2%
GROWTH

ARRIVALS BY ACCOMMODATION

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
EP	25,436	829	26,265	3.3%	27.8%	27.8%
All Inclusive	18,343	336	18,679	1.8%	20.1%	19.8%
Timeshare	26,478	-1,318	25,160	-5.0%	29.0%	26.7%
Others	21,180	3,101	24,281	14.6%	23.2%	25.7%
Total	91,437	2,948	94,385	3.2%		

NIGHTS BY ACCOMMODATION

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
EP	140,023	9	140,032	0.0%	22.6%	22.9%
All Inclusive	114,177	-7,158	107,019	-6.3%	18.4%	17.5%
Timeshare	197,829	-11,077	186,752	-5.6%	31.9%	30.5%
Others	168,326	9,330	177,656	5.5%	27.1%	29.1%
Total	620,355	-8,896	611,459	-1.4%		

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

MAY 2023/2022

94,385
ARRIVALS

3.2%
GROWTH

	2022	Growth	2023	% Growth
0 - 11	3,889	-78	3,811	-2.0%
12-19	3,226	-52	3,174	-1.6%
20 - 29	14,389	-985	13,404	-6.8%
30 - 39	16,797	-570	16,227	-3.4%
40 - 49	14,442	509	14,951	3.5%
50 - 59	18,864	1,395	20,259	7.4%
60 - 69	13,805	1,677	15,482	12.1%
70 +	6,022	1,051	7,073	17.5%
Not Stated	3	1	4	33.3%
Total	91,437	2,948	94,385	3.2%



GENERATIONS

MAY 2023/2022

94,385
ARRIVALS

3.2%
GROWTH

	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
Gen A	3,345	-126	3,219	-3.8%	3.7%	3.4%
Gen Z	11,539	-569	10,970	-4.9%	12.6%	11.6%
Millennials	26,532	-868	25,664	-3.3%	29.0%	27.2%
Gen X	24,610	1,291	25,901	5.2%	26.9%	27.4%
Baby Boomers	23,565	2,697	26,262	11.4%	25.8%	27.8%
Silent Generations	1,843	522	2,365	28.3%	2.0%	2.5%
Age not specified	3	1	4	33.3%	0.0%	0.0%
Total	91,437	2,948	94,385	3.2%		



CARRIERS MAY 2023/2022

94,385
ARRIVALS

3.2%
GROWTH

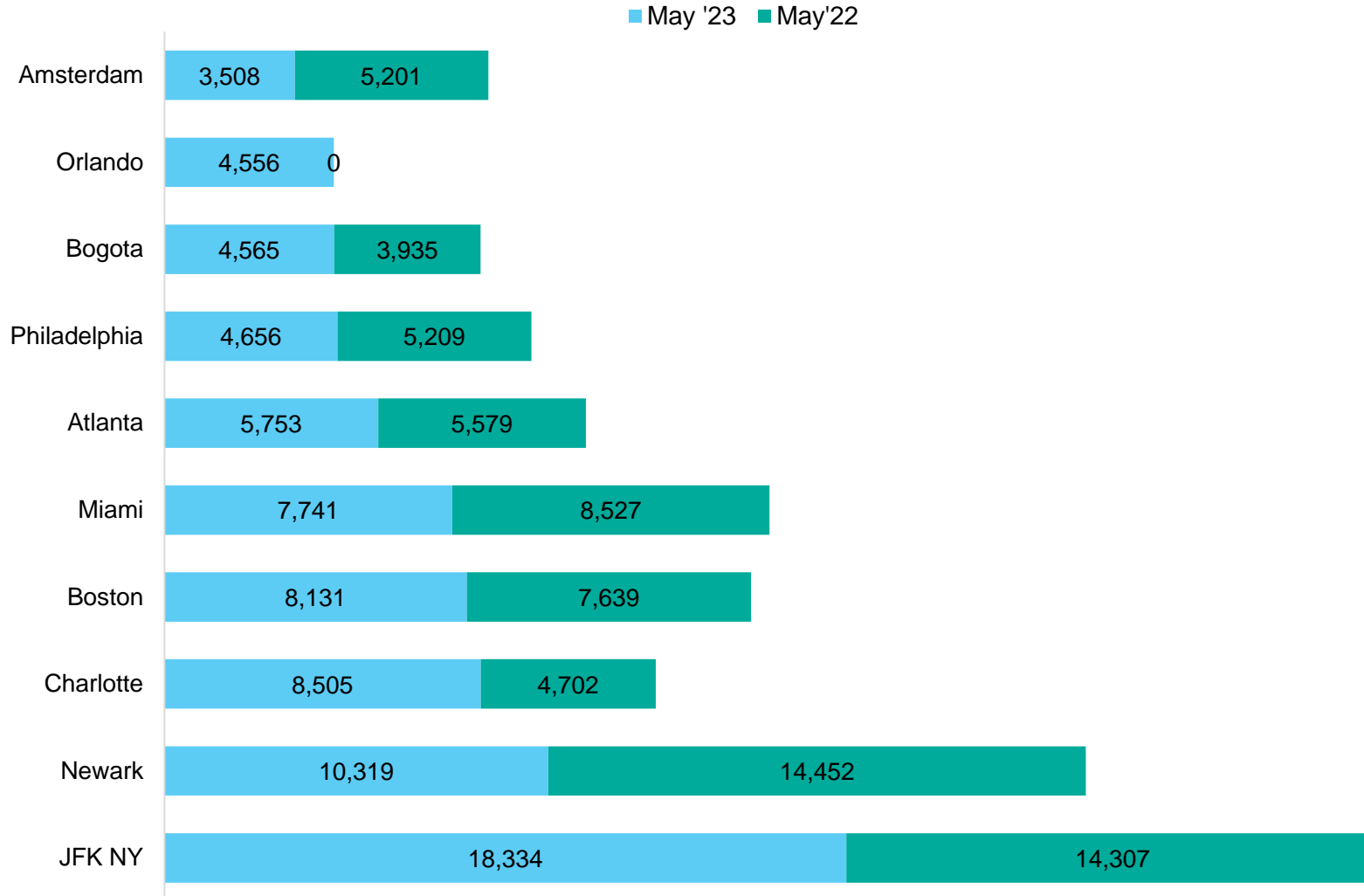
	2022	Growth	2023	% Growth	Marketshare 2022	Marketshare 2023
AMERICAN AIRLINES	18,432		22,007	19.4%	20.2%	23.3%
JETBLUE	24,557	-3,772	20,785	-15.4%	26.9%	22.0%
UNITED AIRLINES	13,543	746	14,289	5.5%	14.8%	15.1%
DELTA AIRLINE	10,564	759	11,323	7.2%	11.6%	12.0%
SOUTHWEST AIRLINES	5,239	377	5,616	7.2%	5.7%	6.0%
AVIANCA	3,064	761	3,825	24.8%	3.4%	4.1%
COPA AIRLINE	3,129	368	3,497	11.8%	3.4%	3.7%
KLM ROYAL DUTCH	3,699	-1,383	2,316	-37.4%	4.0%	2.5%
SPIRIT AIRLINES	718	821	1,539	114.3%	0.8%	1.6%
DIVI DIVI AIR	1,285	129	1,414	10.0%	1.4%	1.5%
AERO REPUBLICA/ WINGO	871	359	1,230	41.2%	1.0%	1.3%
TUI NL	1,502	-310	1,192	-20.6%	1.6%	1.3%
AIR CANADA	0	1,070	1,070	-	0.0%	1.1%
SUNWING AIRLINES	912	-15	897	-1.6%	1.0%	1.0%
EZ AIR	725	89	814	12.3%	0.8%	0.9%
WESTJET AIRLINES	668	-167	501	-25.0%	0.7%	0.5%
PRIVATE	122	331	453	271.3%	0.1%	0.5%
SURINAM AIRWAYS	577	-163	414	-28.2%	0.6%	0.4%
BRITISH AIRWAYS	0	369	369	-	0.0%	0.4%
CHARTER	76	226	302	297.4%	0.1%	0.3%
JETAIR CARIBBEAN	90	66	156	73.3%	0.1%	0.2%
WINAIR	151	-33	118	-21.9%	0.2%	0.1%
AVELO AIRLINES	0	99	99	-	0.0%	0.1%
ARAJET	0	90	90	-	0.0%	0.1%
AIR CENTURY	66	-25	41	-37.9%	0.1%	0.0%
SKY HIGH AVIATION	41	-23	18	-56.1%	0.0%	0.0%
OTHERS	1,406	-1,396	10	-99.3%	1.5%	0.0%
Total	91,437	2,948	94,385	3.2%		



EMBARKATION POINT MAY 2023/2022

94,385
ARRIVALS

3.2%
GROWTH



A woman with a braid, wearing a grey cap, an orange sports top, and dark shorts, is running on a sandy beach. The ocean is in the background under a warm, sunset sky. The text 'COMPARISON 2023 VERSUS 2019' is overlaid in white.

COMPARISON

2023 VERSUS 2019

SNAPSHOT YTD MAY 2023/2019



HOW MANY
ARRIVALS?

510,033

7.0%



HOW MANY
CRUISE TOURISM?

469,978

17.0%

Compared to 2019



HOW LONG
DID THEY STAY?

3,678,970

4.7%



WHAT DID THEY SPEND? **
Central Bank Aruba (2022)

Avg. 4,410.6 min

118%

2019: 3,741.5

**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



801,770

NIGHTS

-15.9%

ALL INCLUSIVE



563,372

NIGHTS

7.4%

TIMESHARE



1,130,755

NIGHTS

10.2%

OTHERS



1,183,073

NIGHTS

17.2%



ARRIVALS YTD MAY 2023/2019

510,033
ARRIVALS

7.0%
GROWTH

	2019		Growth	2023	% Growth
USA	357,850		38,257	396,107	10.7%
Canada	26,276		4,233	30,509	16.1%
NA	384,126		42,490	426,616	11.1%
Venezuela	7,803	-7,112		691	-91.1%
Colombia	12,556		2,994	15,550	23.8%
Brazil	4,348		105	4,453	2.4%
Argentina	6,548		548	7,096	8.4%
Chile	4,663	-1,555		3,108	-33.3%
Ecuador	718		1,386	2,104	193.0%
Peru	2,260	-232		2,028	-10.3%
Paraguay	1,302	-869		433	-66.7%
Uruguay	909	-327		582	-36.0%
Mexico	699		453	1,152	64.8%
Others	3,862		672	4,534	17.4%
SA	45,668	-3,937		41,731	-8.6%
Netherlands	18,780	-2,441		16,339	-13.0%
UK	2,853	-830		2,023	-29.1%
Germany	2,714	-147		2,567	-5.4%
Italy	2,051	-761		1,290	-37.1%
Sweden	2,390	-834		1,556	-34.9%
Belgium	1,006	-164		842	-16.3%
Austria	353	-66		287	-18.7%
Switzerland	884	-85		799	-9.6%
Others	4,686	-652		4,034	-13.9%
Europe	35,717	-5,980		29,737	-16.7%
ROW	11,168		781	11,949	7.0%
Total	476,679		33,354	510,033	7.0%
W/O Ven.	468,876		40,466	509,342	8.6%

	Marketshare 2019	Marketshare 2023
USA	75.1%	77.7%
Canada	5.5%	6.0%
NA	80.6%	83.6%
Venezuela	1.6%	0.1%
Colombia	2.6%	3.0%
Brazil	0.9%	0.9%
Argentina	1.4%	1.4%
Chile	1.0%	0.6%
Ecuador	0.2%	0.4%
Peru	0.5%	0.4%
Paraguay	0.3%	0.1%
Uruguay	0.2%	0.1%
Mexico	0.1%	0.2%
Others	0.8%	0.9%
SA	9.6%	8.2%
Netherlands	3.9%	3.2%
UK	0.6%	0.4%
Germany	0.6%	0.5%
Italy	0.4%	0.3%
Sweden	0.5%	0.3%
Belgium	0.2%	0.2%
Austria	0.1%	0.1%
Switzerland	0.2%	0.2%
Others	1.0%	0.8%
Europe	7.5%	5.8%
ROW	2.3%	2.3%



ARRIVALS USA

YTD MAY 2023/2019

396,107
ARRIVALS

10.7%
GROWTH

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
New York	70,517	4,087	74,604	5.8%	19.7%	18.8%
Massachusetts	48,502	10,922	59,424	22.5%	13.6%	15.0%
New Jersey	37,306	4,100	41,406	11.0%	10.4%	10.5%
Pennsylvania	19,430	3,195	22,625	16.4%	5.4%	5.7%
Illinois	10,216	664	10,880	6.5%	2.9%	2.7%
Connecticut	12,945	2,296	15,241	17.7%	3.6%	3.8%
Florida	18,473	823	19,296	4.5%	5.2%	4.9%
Ohio	10,577	986	11,563	9.3%	3.0%	2.9%
Maryland	9,806	1,711	11,517	17.4%	2.7%	2.9%
Michigan	9,126	586	9,712	6.4%	2.6%	2.5%
Virginia	7,889	2,803	10,692	35.5%	2.2%	2.7%
Georgia	7,651	900	8,551	11.8%	2.1%	2.2%
North Carolina	7,396	3,523	10,919	47.6%	2.1%	2.8%
Texas	8,105	1,517	9,622	18.7%	2.3%	2.4%
California	6,353	98	6,451	1.5%	1.8%	1.6%
Other	73,558	46	73,604	0.1%	20.6%	18.6%
Total	357,850	38,257	396,107	10.7%		



NIGHTS YTD MAY 2023/2019

3,678,970
ARRIVALS

4.7%
GROWTH

	2019		Growth	2023	% Growth	ALOS 2019	ALOS 2023
USA	2,434,405		273,932	2,708,337	11.3%	6.8	6.8
Canada	234,532		64,439	298,971	27.5%	8.9	9.8
NA	2,668,937		338,371	3,007,308	12.7%	6.9	7.0
Venezuela	89,839	-83,029		6,810	-92.4%	11.5	9.9
Colombia	102,095	-1,507		100,588	-1.5%	8.1	6.5
Brazil	27,205	-71		27,134	-0.3%	6.3	6.1
Argentina	59,706		3,792	63,498	6.4%	9.1	8.9
Chile	34,809	-10,918		23,891	-31.4%	7.5	7.7
Ecuador	4,944		6,182	11,126	125.0%	6.9	5.3
Peru	15,208	-1,460		13,748	-9.6%	6.7	6.8
Paraguay	8,504	-5,480		3,024	-64.4%	6.5	7.0
Uruguay	6,982	-2,489		4,493	-35.6%	7.7	7.7
Mexico	4,972		1,605	6,577	32.3%	7.1	5.7
Others	25,434		3,261	28,695	12.8%	6.6	6.3
SA	379,698	-90,114		289,584	-23.7%	8.3	6.9
Netherlands	236,037	-42,897		193,140	-18.2%	12.6	11.8
UK	28,034	-10,209		17,825	-36.4%	9.8	8.8
Germany	24,284	-3,502		20,782	-14.4%	8.9	8.1
Italy	17,653	-6,003		11,650	-34.0%	8.6	9.0
Sweden	28,668	-9,974		18,694	-34.8%	12.0	12.0
Belgium	10,329	-697		9,632	-6.7%	10.3	11.4
Austria	3,053	-234		2,819	-7.7%	8.6	9.8
Switzerland	7,493		69	7,562	0.9%	8.5	9.5
Others	40,939	-1,765		39,174	-4.3%	8.7	9.7
Europe	396,490	-75,212		321,278	-19.0%	11.1	10.8
ROW	68,768	-7,968		60,800	-11.6%	6.2	5.1
Total	3,513,893		165,077	3,678,970	4.7%	7.4	7.2



ACCOMMODATIONS YTD MAY 2023/2019

510,033
ARRIVALS

7.0%
GROWTH

ARRIVALS BY ACCOMMODATION

	2019		Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
EP	162,031	-21,150		140,881	-13.1%	34.0%	27.6%
All Inclusive	81,069		9,886	90,955	12.2%	17.0%	17.8%
Timeshare	122,776		12,101	134,877	9.9%	25.8%	26.4%
Others	110,803		32,517	143,320	29.3%	23.2%	28.1%
Total	476,679		33,354	510,033	7.0%		

NIGHTS BY ACCOMMODATION

	2019		Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
EP	953,596	-151,826		801,770	-15.9%	27.1%	21.8%
All Inclusive	524,608		38,764	563,372	7.4%	14.9%	15.3%
Timeshare	1,026,025		104,730	1,130,755	10.2%	29.2%	30.7%
Others	1,009,664		173,409	1,183,073	17.2%	28.7%	32.2%
Total	3,513,893		165,077	3,678,970	4.7%		



VISITORS BY AGE YTD MAY 2023/2019

510,033
ARRIVALS

7.0%
GROWTH

	2019	Growth	2023	% Growth
0 - 11	31,494	982	32,476	3.1%
12-19	28,121	1,540	29,661	5.5%
20 - 29	53,991	1,651	55,642	3.1%
30 - 39	70,951	6,381	77,332	9.0%
40 - 49	79,571	2,088	81,659	2.6%
50 - 59	99,895	2,493	102,388	2.5%
60 - 69	75,758	10,626	86,384	14.0%
70 +	36,814	7,632	44,446	20.7%
Not Stated	84	-39	45	-46.4%
Total	476,679	33,354	510,033	7.0%



GENERATIONS

YTD MAY 2023/2019

510,033
VISITORS

7.0%
GROWTH

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
Gen A			25,714	#DIV/0!	0.0%	5.0%
Gen Z	67,212	-1,758	65,454	-2.6%	14.1%	12.8%
Millennials	103,337		121,329	17.4%	21.7%	23.8%
Gen X	123,133		135,656	10.2%	25.8%	26.6%
Baby Boomers	157,177		146,430	-6.8%	33.0%	28.7%
Silent Generations	25,736		15,405	-40.1%	5.4%	3.0%
Age not specified	84	-39	45	-46.4%	0.0%	0.0%
Total	476,679		510,033	7.0%		



CARRIERS YTD MAY 2023/2019

510,033
VISITORS

7.0%
GROWTH

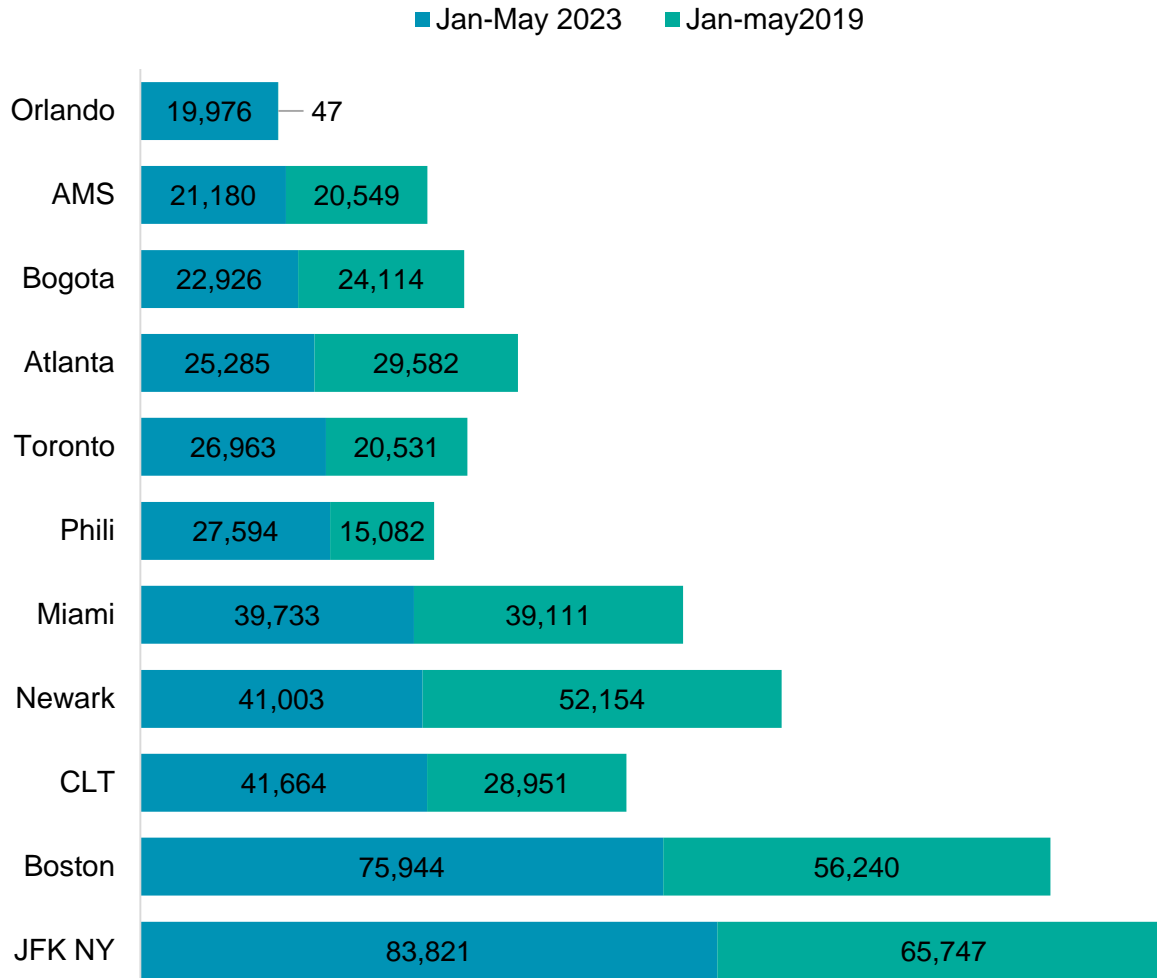
	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
JETBLUE	111,721	4,808	116,529	4.3%	23.4%	22.8%
AMERICAN AIRLINES	85,848	30,154	116,002	35.1%	18.0%	22.7%
DELTA AIRLINE	57,617	11,023	68,640	19.1%	12.1%	13.5%
UNITED AIRLINES	67,475	-5,018	62,457	-7.4%	14.2%	12.2%
SOUTHWEST AIRLINES	32,412	-7,507	24,905	-23.2%	6.8%	4.9%
AVIANCA	20,661	-1,451	19,210	-7.0%	4.3%	3.8%
COPA AIRLINE	14,549	1,790	16,339	12.3%	3.1%	3.2%
KLM ROYAL DUTCH	13,898	1,396	15,294	10.0%	2.9%	3.0%
AIR CANADA	8,151	2,049	10,200	25.1%	1.7%	2.0%
WESTJET AIRLINES	5,049	4,172	9,221	82.6%	1.1%	1.8%
SUNWING AIRLINES	8,215	-694	7,521	-8.4%	1.7%	1.5%
DIVI DIVI AIR	3,630	3,229	6,859	89.0%	0.8%	1.3%
TUI NL / ARKEFLIGHT	6,819	-371	6,448	-5.4%	1.4%	1.3%
AERO REPUBLICA/ WINGO	401	5,999	6,400	1496.0%	0.1%	1.3%
SPIRIT AIRLINES	3,124	2,802	5,926	89.7%	0.7%	1.2%
EZ AIR	1,086	3,032	4,118	279.2%	0.2%	0.8%
PRIVATE	2,034	805	2,839	39.6%	0.4%	0.6%
SUN COUNTRY	2,399	-144	2,255	-6.0%	0.5%	0.4%
SURINAM AIRWAYS	2,083	-42	2,041	-2.0%	0.4%	0.4%
CHARTER	9,089	-7,332	1,757	-80.7%	1.9%	0.3%
SUNCLASS AIRLINES	0	1,158	1,158	-	0.0%	0.2%
JETAIR CARIBBEAN	0	945	945	-	0.0%	0.2%
BRITISH AIRWAYS	0	780	780	-	0.0%	0.2%
WINAIR	2,250	-1,783	467	-79.2%	0.5%	0.1%
ARAJET	0	437	437	-	0.0%	0.1%
EASTERN AIRLINES	0	331	331	-	0.0%	0.1%
Others	18,168	-17,214	954	-94.7%	3.8%	0.2%
Total	476,679	33,354	510,033	7.0%		



CARRIERS YTD MAY 2023/2019

510,033
VISITORS

7.0%
GROWTH





ARRIVALS MAY 2023/2019

94,385
ARRIVALS

6.6%
GROWTH

	2019	Growth	2023	% Growth
USA	67,227	8,512	75,739	12.7%
Canada	2,599	273	2,872	10.5%
NA	69,826	8,785	78,611	12.6%
Venezuela	651	-493	158	-75.7%
Colombia	2,715	180	2,895	6.6%
Brazil	943	33	976	3.5%
Argentina	1,158	191	1,349	16.5%
Chile	1,070	-606	464	-56.6%
Ecuador	145	300	445	206.9%
Peru	675	-122	553	-18.1%
Paraguay	196	-128	68	-65.3%
Uruguay	168	-53	115	-31.5%
Mexico	181	129	310	71.3%
Others	838	127	965	15.2%
SA	8,740	-442	8,298	-5.1%
Netherlands	3,633	-804	2,829	-22.1%
UK	1,610	-1,097	513	-68.1%
Germany	545	-182	363	-33.4%
Italy	343	-94	249	-27.4%
Sweden	44	-11	33	-25.0%
Belgium	184	-50	134	-27.2%
Austria	57	-9	48	-15.8%
Switzerland	179	-23	156	-12.8%
Others	706	-155	551	-22.0%
Europe	7,301	-2,425	4,876	-33.2%
ROW	2,676	-76	2,600	-2.8%
Total	88,543	5,842	94,385	6.6%
W/O Ven.	87,892	6,335	94,227	7.2%

	Marketshare 2019	Marketshare 2023
USA	75.9%	80.2%
Canada	2.9%	3.0%
NA	78.9%	83.3%
Venezuela	0.7%	0.2%
Colombia	3.1%	3.1%
Brazil	1.1%	1.0%
Argentina	1.3%	1.4%
Chile	1.2%	0.5%
Ecuador	0.2%	0.5%
Peru	0.8%	0.6%
Paraguay	0.2%	0.1%
Uruguay	0.2%	0.1%
Mexico	0.2%	0.3%
Others	0.9%	1.0%
SA	9.9%	8.8%
Netherlands	4.1%	3.0%
UK	1.8%	0.5%
Germany	0.6%	0.4%
Italy	0.4%	0.3%
Sweden	0.0%	0.0%
Belgium	0.2%	0.1%
Austria	0.1%	0.1%
Switzerland	0.2%	0.2%
Others	0.8%	0.6%
Europe	8.2%	5.2%
ROW	3.0%	2.8%



ARRIVALS USA MAY 2023/2019

75,739
ARRIVALS

12.7%
GROWTH

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
New York	11,504	2,011	13,515	17.5%	17.1%	17.8%
Massachusetts	7,151	636	7,787	8.9%	10.6%	10.3%
New Jersey	7,304	1,425	8,729	19.5%	10.9%	11.5%
Pennsylvania	3,765	695	4,460	18.5%	5.6%	5.9%
Illinois	1,603	200	1,803	12.5%	2.4%	2.4%
Connecticut	2,101	685	2,786	32.6%	3.1%	3.7%
Florida	4,722	408	5,130	8.6%	7.0%	6.8%
Ohio	1,654	390	2,044	23.6%	2.5%	2.7%
Maryland	2,555	429	2,984	16.8%	3.8%	3.9%
Michigan	1,254	145	1,399	11.6%	1.9%	1.8%
Virginia	1,696	589	2,285	34.7%	2.5%	3.0%
Georgia	2,639	49	2,688	1.9%	3.9%	3.5%
North Carolina	1,864	872	2,736	46.8%	2.8%	3.6%
Texas	2,503	333	2,836	13.3%	3.7%	3.7%
California	1,898	15	1,913	0.8%	2.8%	2.5%
Other	13,014	-370	12,644	-2.8%	19.4%	16.7%
Total	67,227	8,512	75,739	12.7%		



NIGHTS MAY 2023/2019

611,459
NIGHTS

0.1%
GROWTH

	2019		Growth	2023	% Growth	ALOS 2019	ALOS 2023
USA	421,315		48,437	469,752	11.5%	6.3	6.2
Canada	20,598		2,312	22,910	11.2%	7.9	8.0
NA	441,913		50,749	492,662	11.5%	6.3	6.3
Venezuela	12,202	-10,268		1,934	-84.2%	18.7	12.2
Colombia	21,442	-3,067		18,375	-14.3%	7.9	6.3
Brazil	5,708		126	5,834	2.2%	6.1	6.0
Argentina	10,562		1,543	12,105	14.6%	9.1	9.0
Chile	7,671	-4,196		3,475	-54.7%	7.2	7.5
Ecuador	910		1,233	2,143	135.5%	6.3	4.8
Peru	4,106	-852		3,254	-20.8%	6.1	5.9
Paraguay	1,215	-777		438	-64.0%	6.2	6.4
Uruguay	1,305	-453		852	-34.7%	7.8	7.4
Mexico	1,038		675	1,713	65.0%	5.7	5.5
Others	5,863	-149		5,714	-2.5%	7.0	5.9
SA	72,022	-16,185		55,837	-22.5%	8.2	6.7
Netherlands	45,994	-13,417		32,577	-29.2%	12.7	11.5
UK	17,472	-13,032		4,440	-74.6%	10.9	8.7
Germany	4,981	-1,631		3,350	-32.7%	9.1	9.2
Italy	2,674	-538		2,136	-20.1%	7.8	8.6
Sweden	404	-113		291	-28.0%	9.2	8.8
Belgium	2,036	-463		1,573	-22.7%	11.1	11.7
Austria	521	-134		387	-25.7%	9.1	8.1
Switzerland	1,538	-176		1,362	-11.4%	8.6	8.7
Others	6,004	-1,118		4,886	-18.6%	8.5	8.9
Europe	81,624	-30,622		51,002	-37.5%	11.2	10.5
ROW	15,116	-3,158		11,958	-20.9%	5.6	4.6
Total	610,675		784	611,459	0.1%	6.9	6.5



ACCOMMODATIONS MAY 2023/2019

94,385
ARRIVALS

6.6%
GROWTH

ARRIVALS BY ACCOMMODATION

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
EP	30,268	-4,003	26,265	-13.2%	34.2%	27.8%
All Inclusive	16,580	2,099	18,679	12.7%	18.7%	19.8%
Timeshare	24,618	542	25,160	2.2%	27.8%	26.7%
Others	17,077	7,204	24,281	42.2%	19.3%	25.7%
Total	88,543	5,842	94,385	6.6%		

NIGHTS BY ACCOMMODATION

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
EP	167,250	-27,218	140,032	-16.3%	27.4%	22.9%
All Inclusive	103,298	3,721	107,019	3.6%	16.9%	17.5%
Timeshare	182,276	4,476	186,752	2.5%	29.8%	30.5%
Others	157,851	19,805	177,656	12.5%	25.8%	29.1%
Total	610,675	784	611,459	0.1%		

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

MAY 2023/2019

94,385
ARRIVALS

6.6%
GROWTH

	2019	Growth	2023	% Growth
0 - 11	3,687	124	3,811	3.4%
12-19	2,928	246	3,174	8.4%
20 - 29	12,563	841	13,404	6.7%
30 - 39	15,599	628	16,227	4.0%
40 - 49	14,839	112	14,951	0.8%
50 - 59	19,288	971	20,259	5.0%
60 - 69	13,763	1,719	15,482	12.5%
70 +	5,859	1,214	7,073	20.7%
Not Stated	17	-13	4	-76.5%
Total	88,543	5,842	94,385	6.6%



















GENERATIONS

MAY 2023/2019

94,385
ARRIVALS

6.6%
GROWTH

	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
Gen A		 3,219	3,219	#DIV/0!	0.0%	 3.4%
Gen Z	8,368	 2,602	10,970	31.1%	 9.5%	 11.6%
Millennials	23,531	 2,133	25,664	9.1%	 26.6%	 27.2%
Gen X	23,490	 2,411	25,901	10.3%	 26.5%	 27.4%
Baby Boomers	29,077		26,262	-9.7%	 32.8%	 27.8%
Silent Generations	4,060		2,365	-41.7%	 4.6%	 2.5%
Age not specified	17	-13	4	-76.5%	0.0%	0.0%
Total	88,543	 5,842	94,385	6.6%		



CARRIERS MAY 2023/2019

94,385
ARRIVALS

6.6%
GROWTH

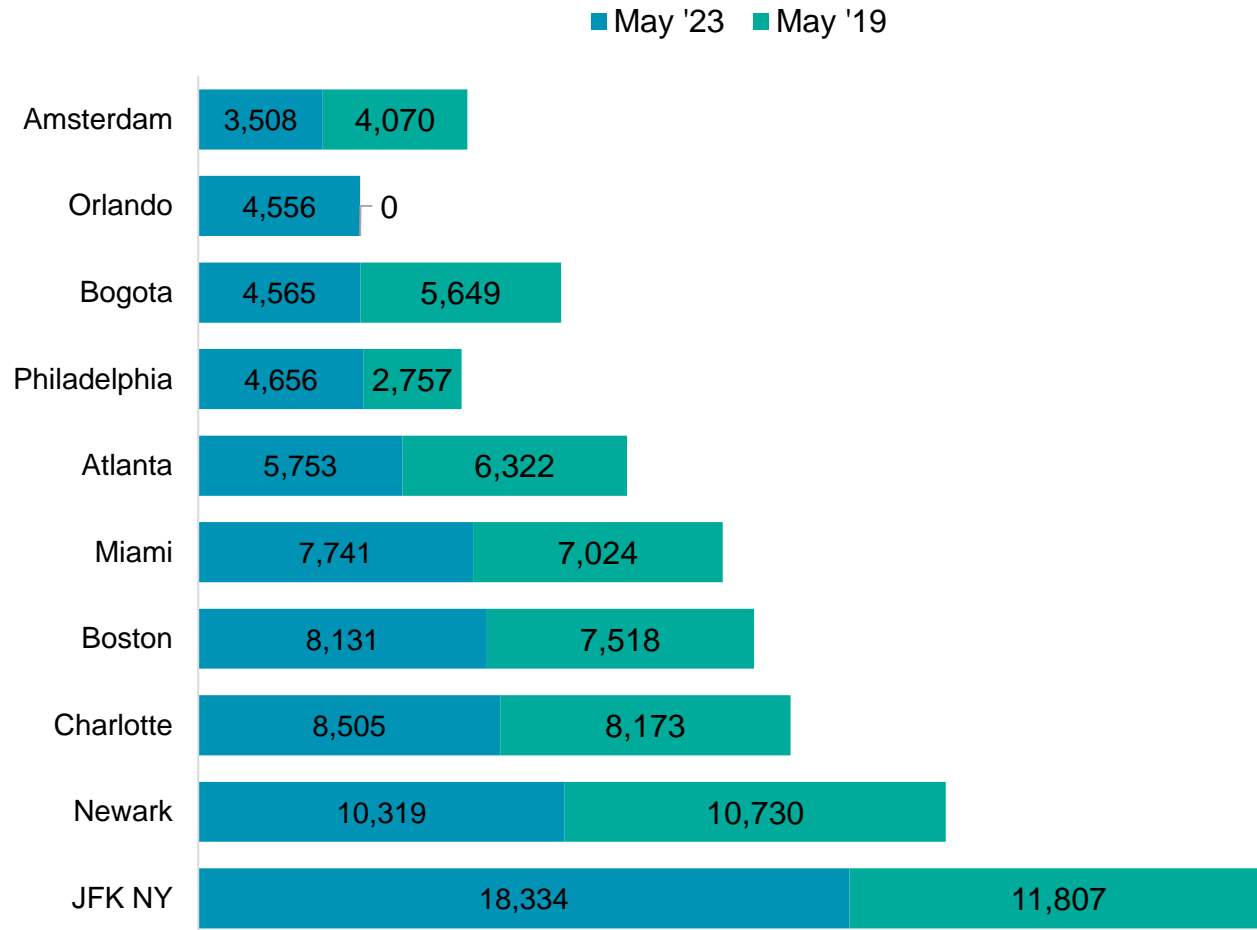
	2019	Growth	2023	% Growth	Marketshare 2019	Marketshare 2023
AMERICAN AIRLINES	18,189	3,818	22,007	21.0%	20.5%	23.3%
JETBLUE	16,920	3,865	20,785	22.8%	19.1%	22.0%
UNITED AIRLINES	12,539	1,750	14,289	14.0%	14.2%	15.1%
DELTA AIRLINE	12,161	-838	11,323	-6.9%	13.7%	12.0%
SOUTHWEST AIRLINES	6,126	-510	5,616	-8.3%	6.9%	6.0%
AVIANCA	4,945	-1,120	3,825	-22.6%	5.6%	4.1%
COPA AIRLINE	3,031	466	3,497	15.4%	3.4%	3.7%
KLM ROYAL DUTCH	2,954	-638	2,316	-21.6%	3.3%	2.5%
SPIRIT AIRLINES	1,393	146	1,539	10.5%	1.6%	1.6%
DIVI DIVI AIR	802	612	1,414	76.3%	0.9%	1.5%
AERO REPUBLICA/ WINGO	98	1,132	1,230	1155.1%	0.1%	1.3%
TUI NL / ARKEFLIGHT	1,197	-5	1,192	-0.4%	1.4%	1.3%
AIR CANADA	852	218	1,070	25.6%	1.0%	1.1%
SUNWING AIRLINES	767	130	897	16.9%	0.9%	1.0%
EZ AIR	409	405	814	99.0%	0.5%	0.9%
WESTJET AIRLINES	495	6	501	1.2%	0.6%	0.5%
PRIVATE	140	313	453	223.6%	0.2%	0.5%
SURINAM AIRWAYS	532	-118	414	-22.2%	0.6%	0.4%
BRITISH AIRWAYS	0	369	369	-	0.0%	0.4%
CHARTER	1,171	-869	302	-74.2%	1.3%	0.3%
JETAIR CARIBBEAN	0	156	156	-	0.0%	0.2%
WINAIR	558	-440	118	-78.9%	0.6%	0.1%
AVELO AIRLINES	0	99	99	-	0.0%	0.1%
ARAJET	0	90	90	-	0.0%	0.1%
AIR CENTURY	60	-19	41	-31.7%	0.1%	0.0%
SKY HIGH AVIATION	45	-27	18	-60.0%	0.1%	0.0%
OTHERS	3,159	-3,149	10	-99.7%	3.6%	0.0%
Total	88,543	5,842	94,385	6.6%		



CARRIERS MAY 2023/2019

94,385
ARRIVALS

6.6%
GROWTH





CRUISE COMPARISON



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



CRUISE YTD MAY 2023



2019



CRUISE PAX

401,534

CRUISE CALLS

158



2023



CRUISE PAX

469,978

17.0%

CRUISE CALLS

181

14.6%

ABSOLUTE GROWTH PAX YTD MAY

68,444

17.0%

ABSOLUTE GROWTH CALLS YTD APRIL

23

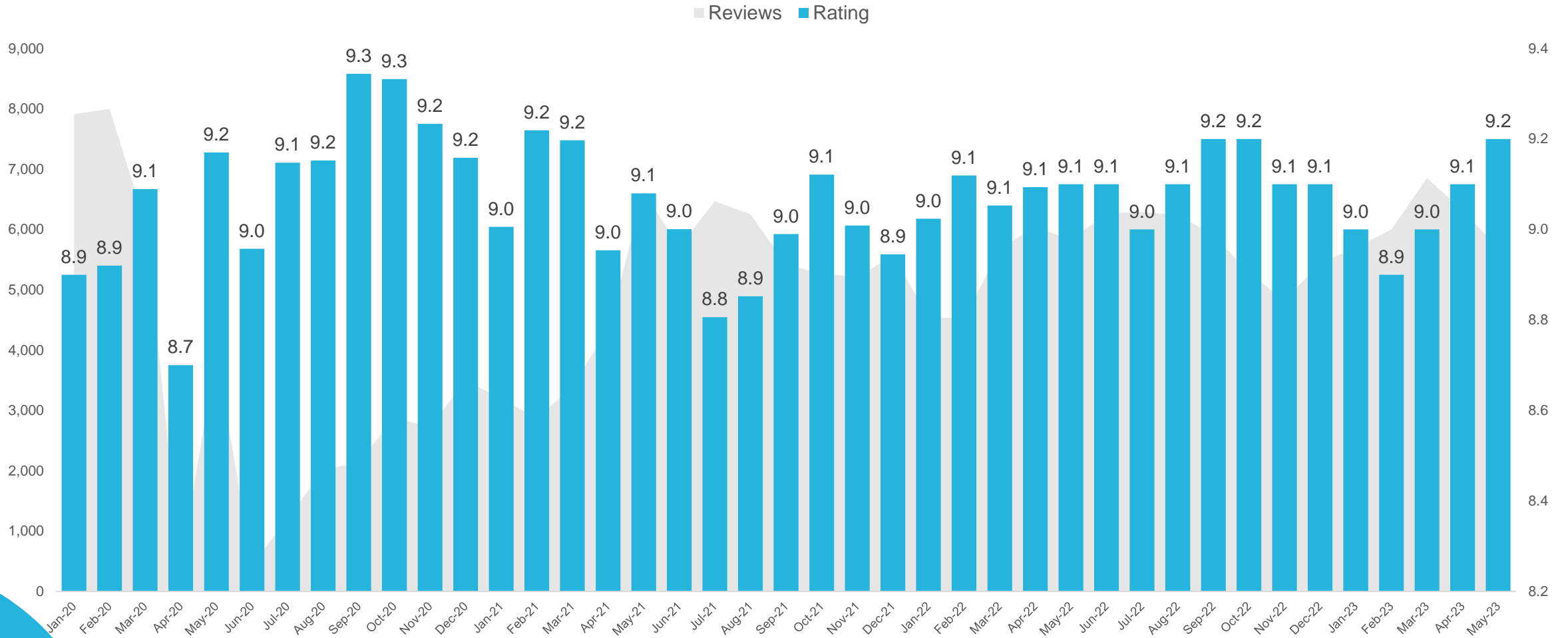
14.6%





GUEST EXPERIENCE INDEX (GEI)

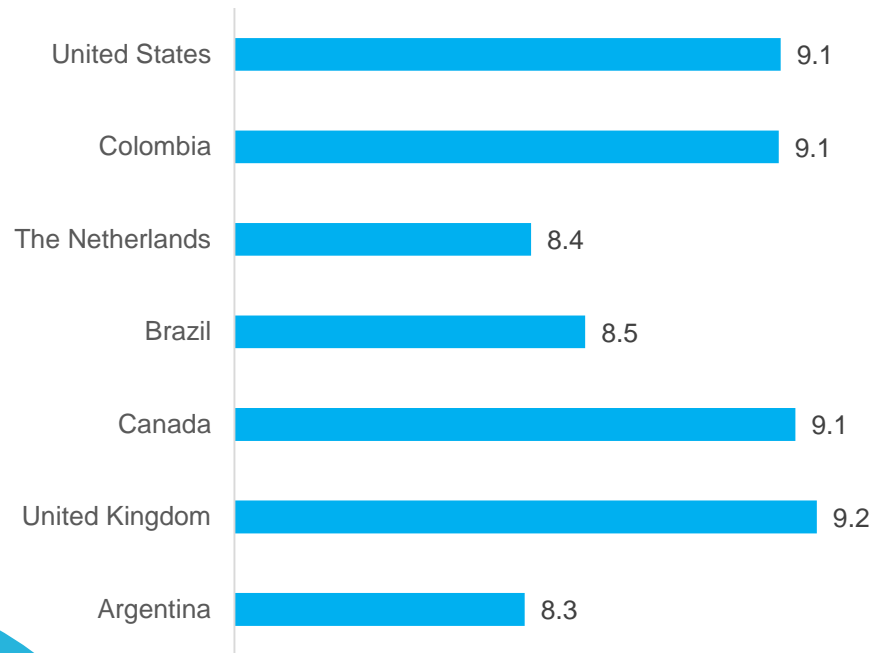
Reviews and Ratings



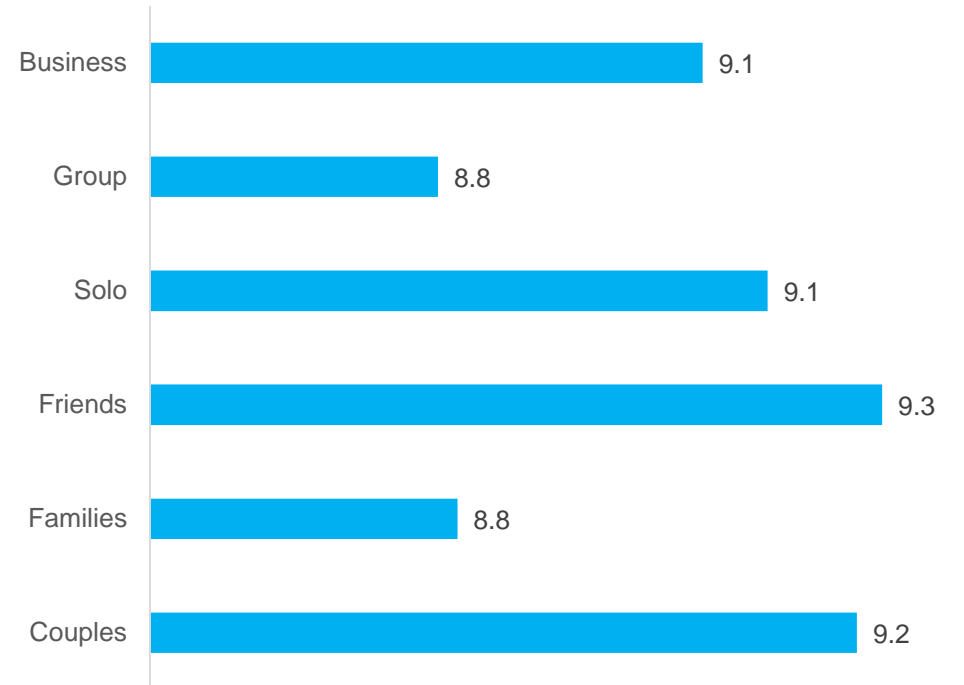


GEI May 2023

Markets



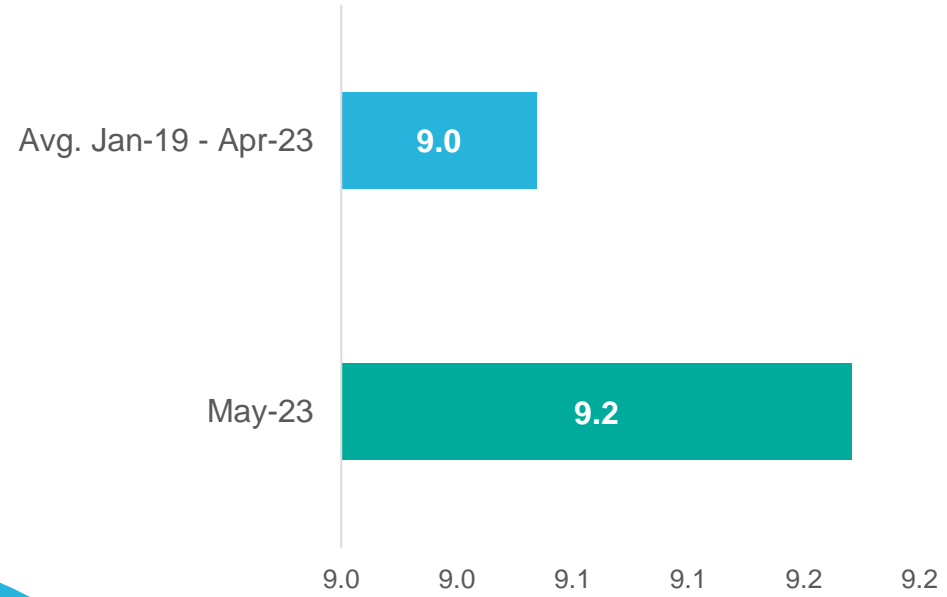
Travel Party



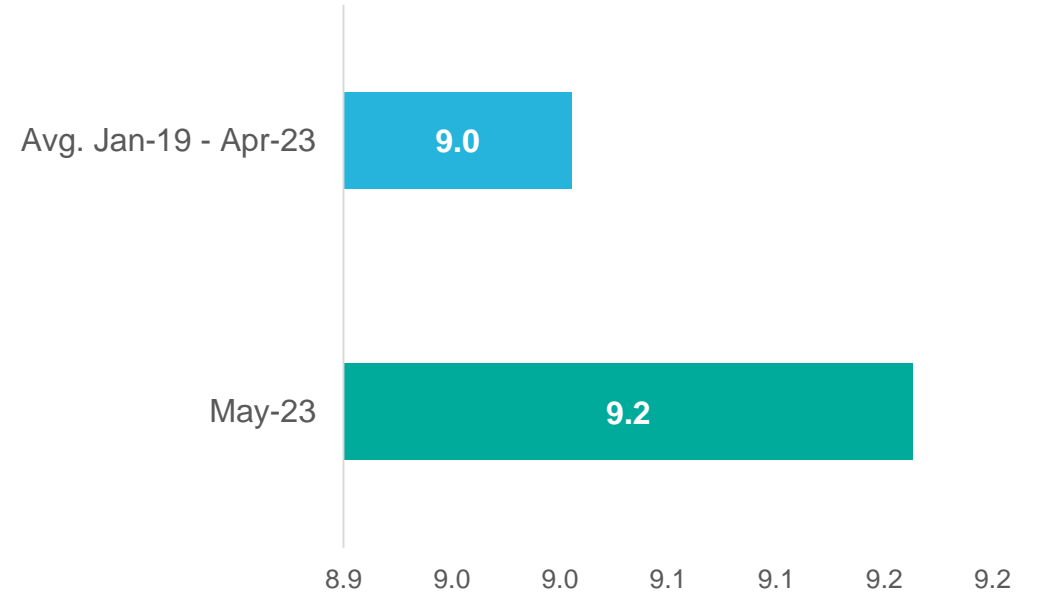


GEI May 2023

Overall



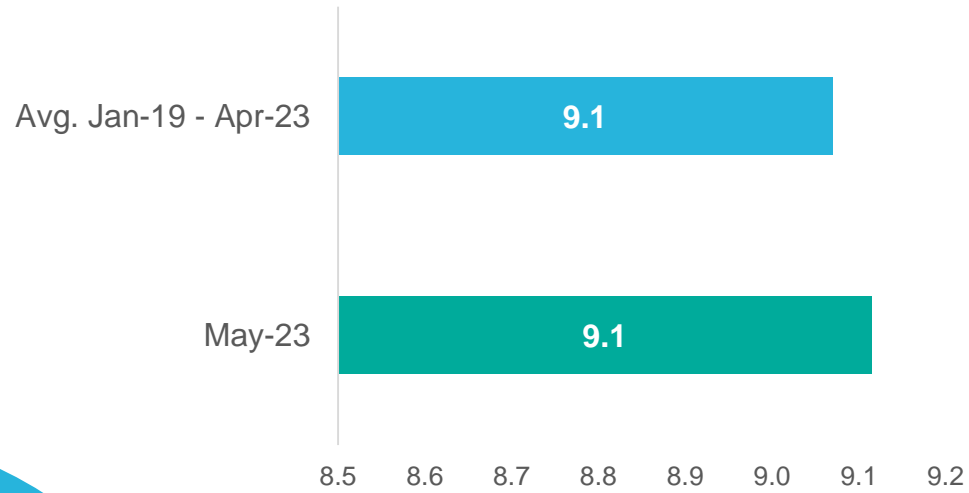
Service



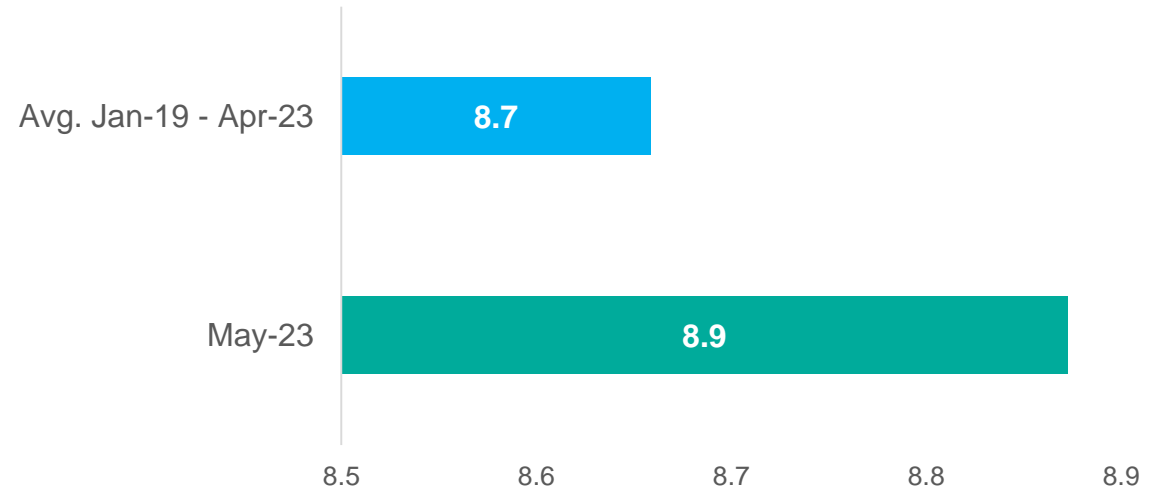


GEI May 2023

Cleanliness



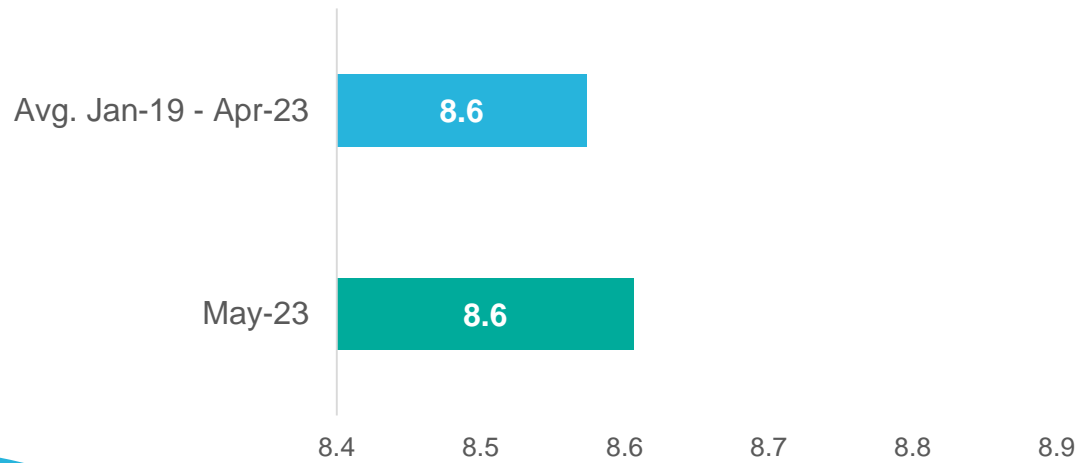
Value



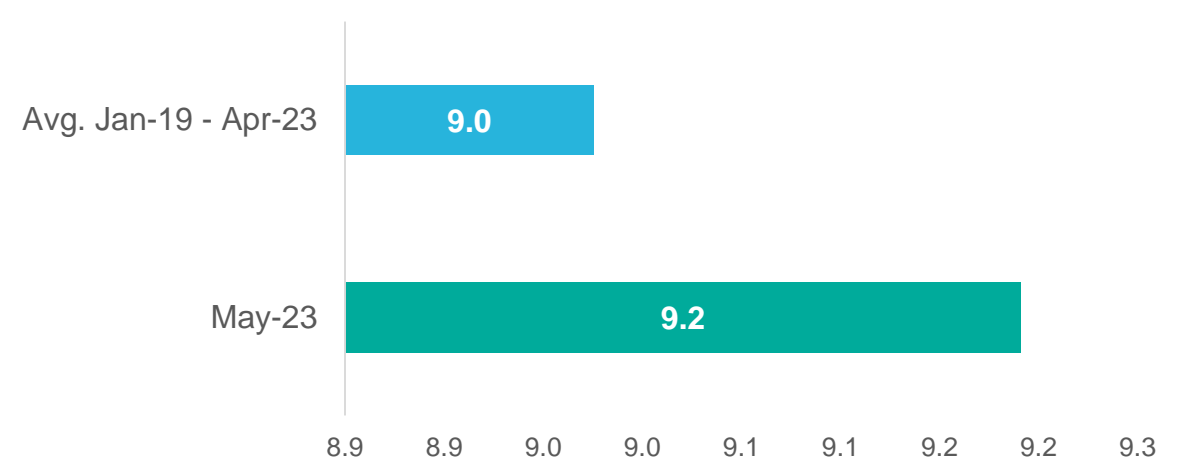


GEI May 2023

Facilities



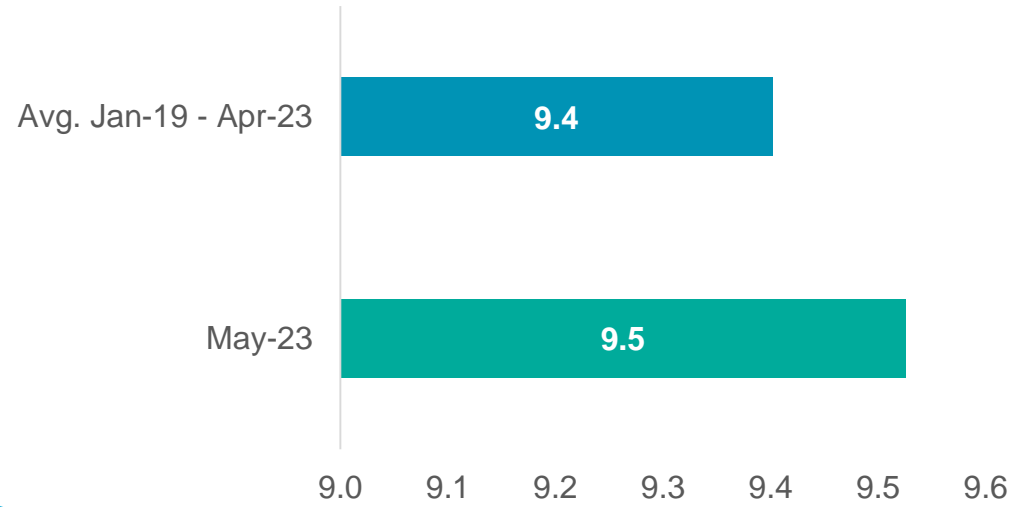
F&B





GEI May 2023

Location





VACATIONS RENTALS

 **Transparent**
an OTA INSIGHT company

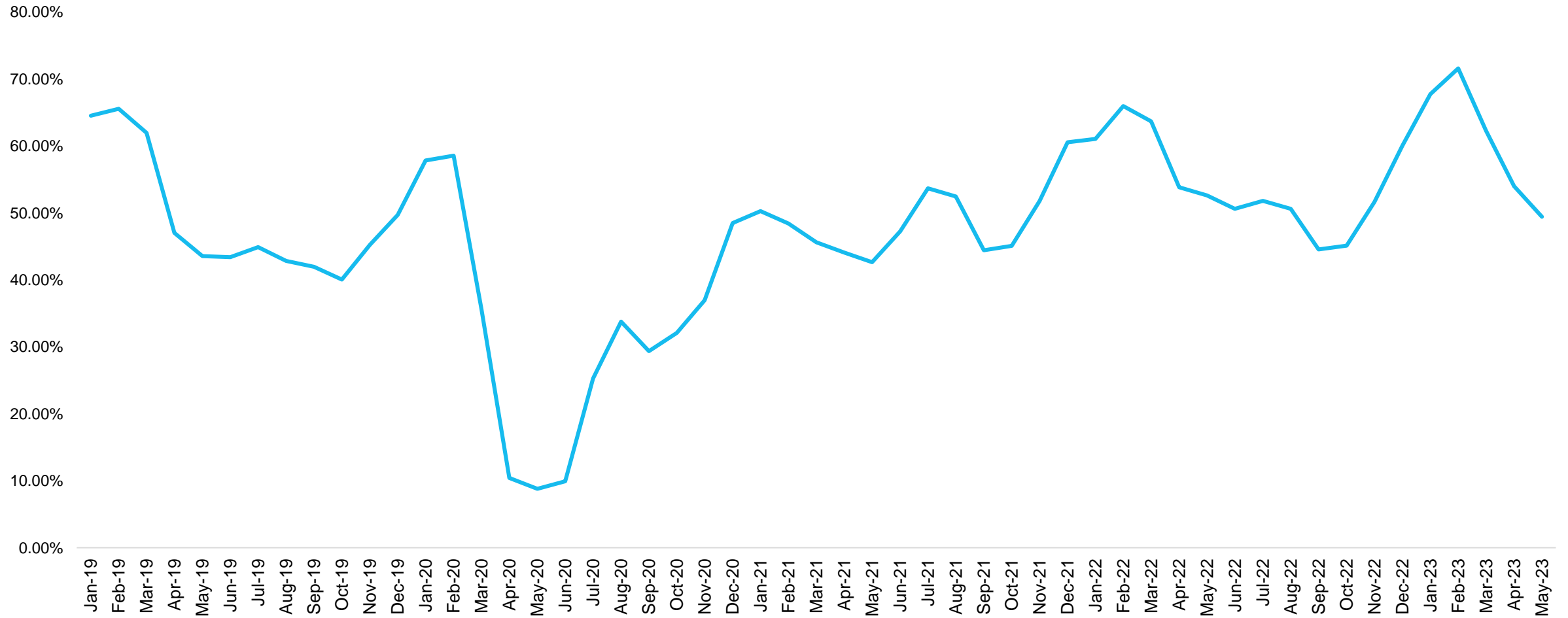
INTRODUCTION

- ▶ 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

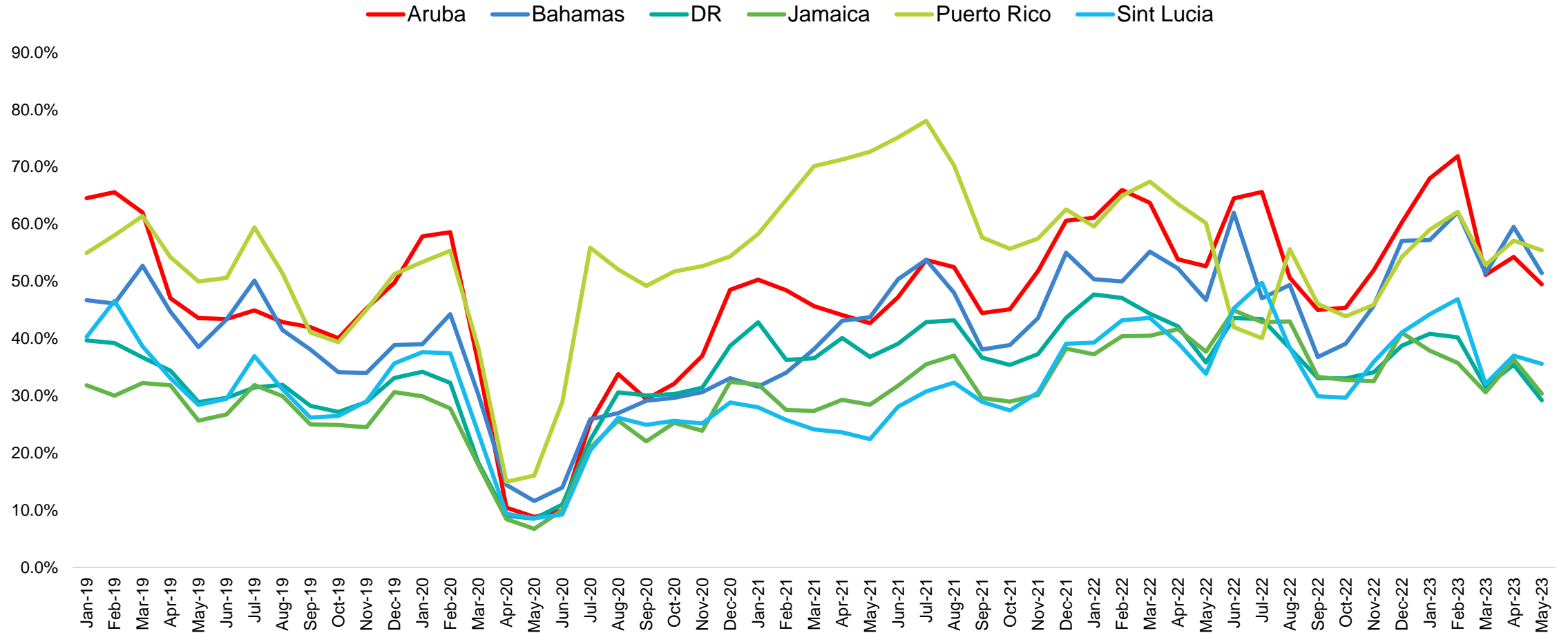
May 2023 Occupancy: 49.5% | May 2022 Occupancy: 52.6%



CARIBBEAN OCCUPANCY

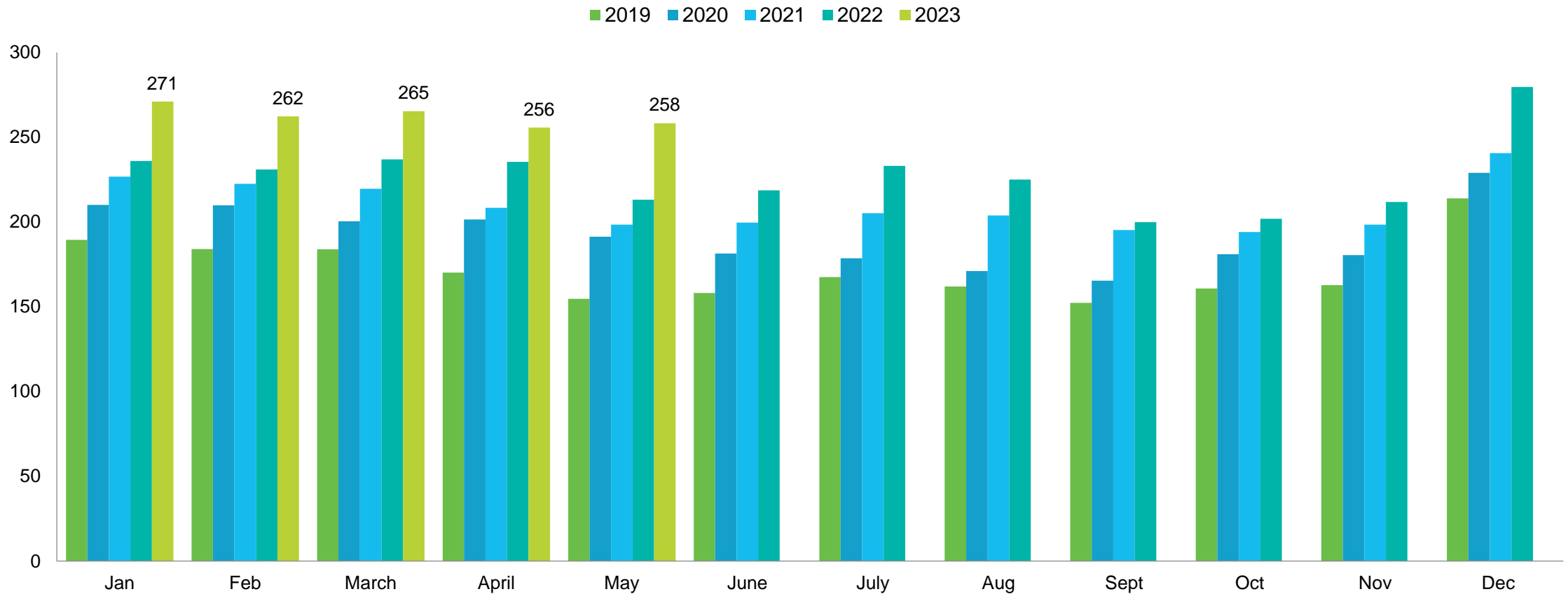
May

AUA: 49.5% | Bahamas: 51.4% | DR: 29.2% | Jamaica: 30.3% | PR: 55.4% | Sint Lucia: 35.6%



AVERAGE DAILY RATE (ADR)

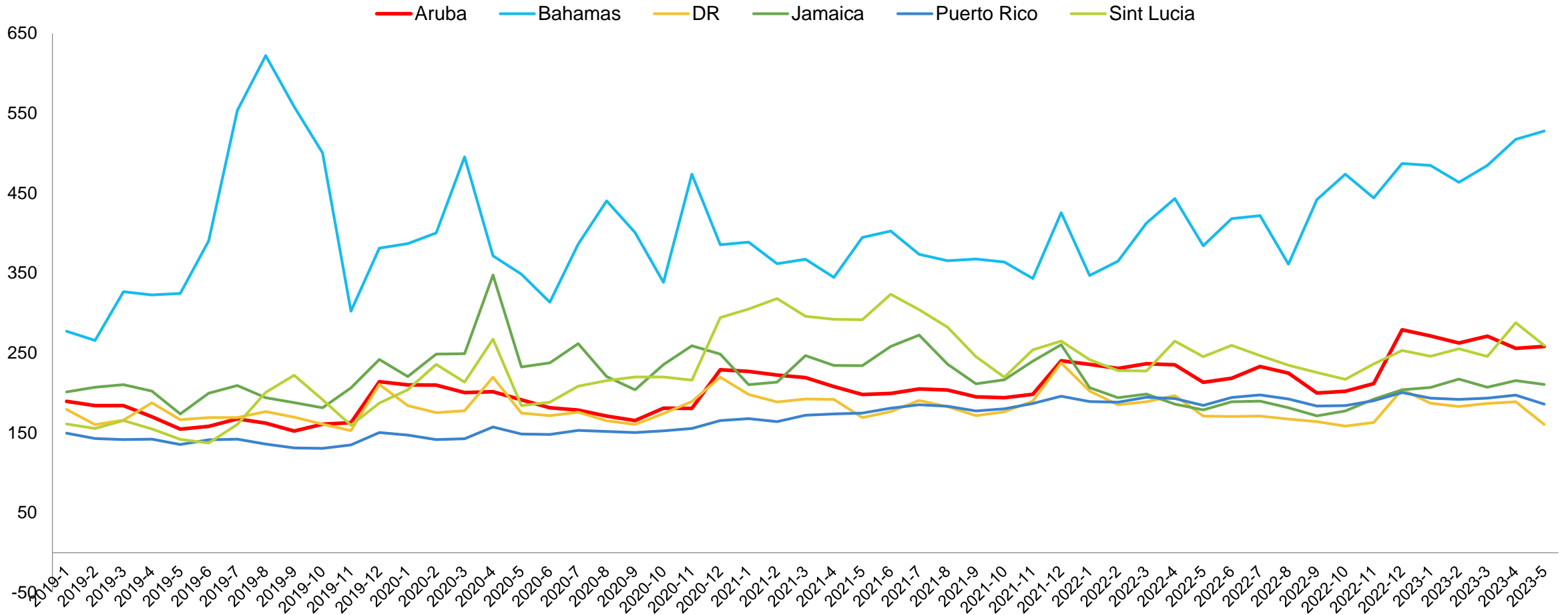
May 2023 ADR: USD\$258 | April 2019 ADR: USD\$213



CARIBBEAN ADR

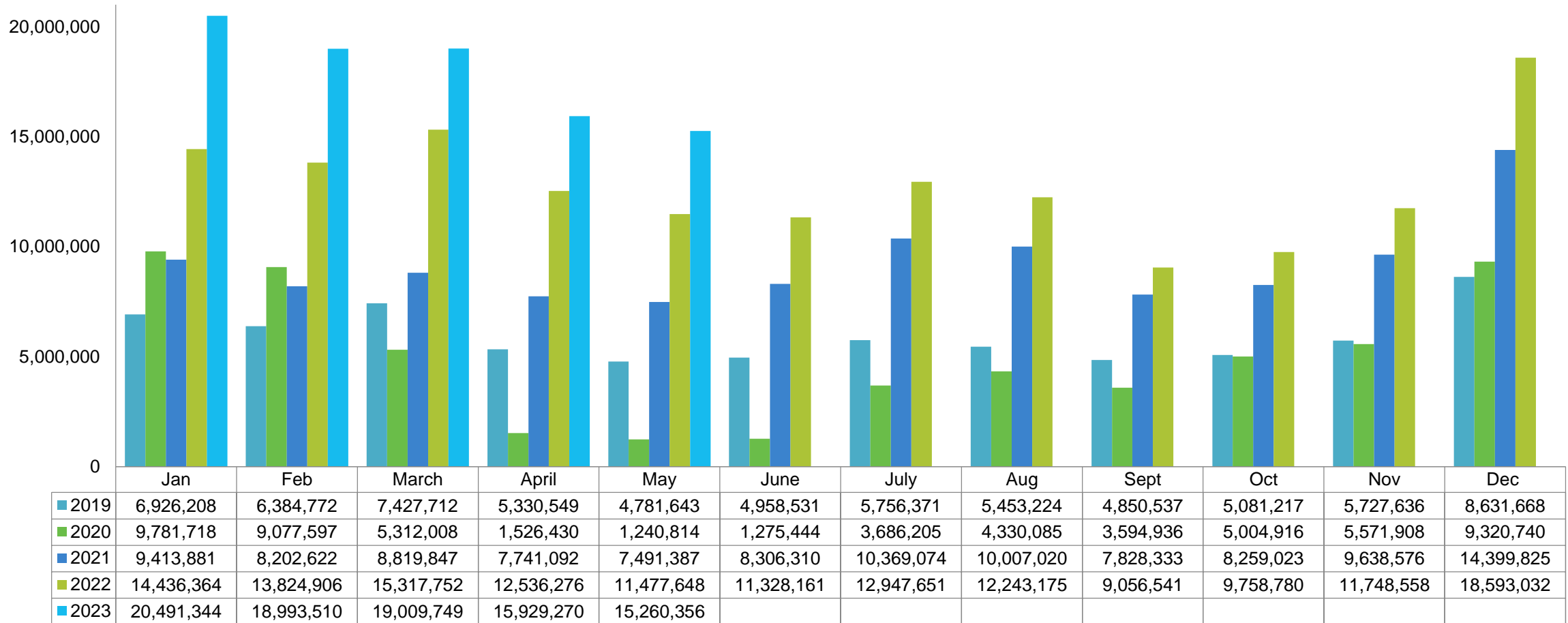
May

AUA: USD\$258 | Bahamas: USD\$528 | DR: USD\$160 | Jamaica: USD\$210 | PR: USD\$186 | Sint Lucia: USD\$259



REVENUE

■ 2019 ■ 2020 ■ 2021 ■ 2022 ■ 2023



T I D B I T S

Visa Cardholders' Spending on Aruba

Q1 - 2023 REPORT

Methodology

Metrics Definition & Scope



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 Q1 2023.**
 - ✓ 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.

Glossary

Metrics Definition & Scope



Metrics Definition

- **Consumer/Commercial:** based on the type of Visa card used in the transaction. All business/purchasing 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 Amt / 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).

Glossary

Metrics Definition & Scope



Merchant and Category Definition

Spend areas are reported at two levels:

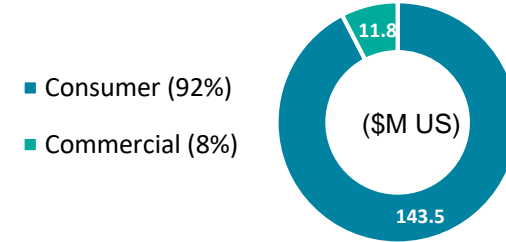
- Spend Categories
- Spend Sub-Categories (MCC. Merchant Category Codes. 100+)

SPEND CATEGORIES	TYPES OF MERCHANTS / SUB-CATEGORIES INCLUDED
AUTOMOTIVE	Auto service/repair shops. Car & Truck dealers. Motorcycle dealers. Carwash...
DRUG STORES & PHARMACIES	Drugstores & Pharmacies. Drugs/Druggists Sundries
ENTERTAINMENT	Amusement parks. Tourist Attractions. Golf. Sporting activities. Theater. Recreation. Casino...
FOOD & GROCERY	Supermarket. Grocery stores. Food stores. Bakeries. Wine/liquors. Meat lockers...
FUEL	Service Stations. fuel dealers
HOME IMPROVEMENT & SUPPLY	Furniture. Appliance. Decoration. Equipment stores...
HOTELS & LODGING	Lodging
PROFESSIONAL SERVICES	Casinos. Legal services. Financial inst.. Consulting. Architectural...
CASH WITHDRAWAL	Financial Inst/Auto Cash
RESTAURANTS & DINING	Restaurants. Fast Food. Taverns. Bars. Disco...
RETAIL	Clothing and Wear stores. Sport apparels. Jewelry stores
TRANSPORTATION	Bus lines. Parking. Airport/Fields/Terminals. Taxi/Limousines
TRAVEL SERVICES	Travel Agencies
WAREHOUSE RETAILS	Club Stores. Discount Goods . Warehouse Retail

Overall Spending & Y/Y Evolutions

<i>Sales transactions</i>	# of Issuer Countries	Total Spend Amount	Y/Y Growth	Average Ticket / transaction	Spend / Cardholder
Q1 2023	132	\$155 260 283	▲ 29.1%	\$123	\$667

Spend by Card Type



Cash withdrawal



Q1 2023 – Card transactions

Y/Y Growth

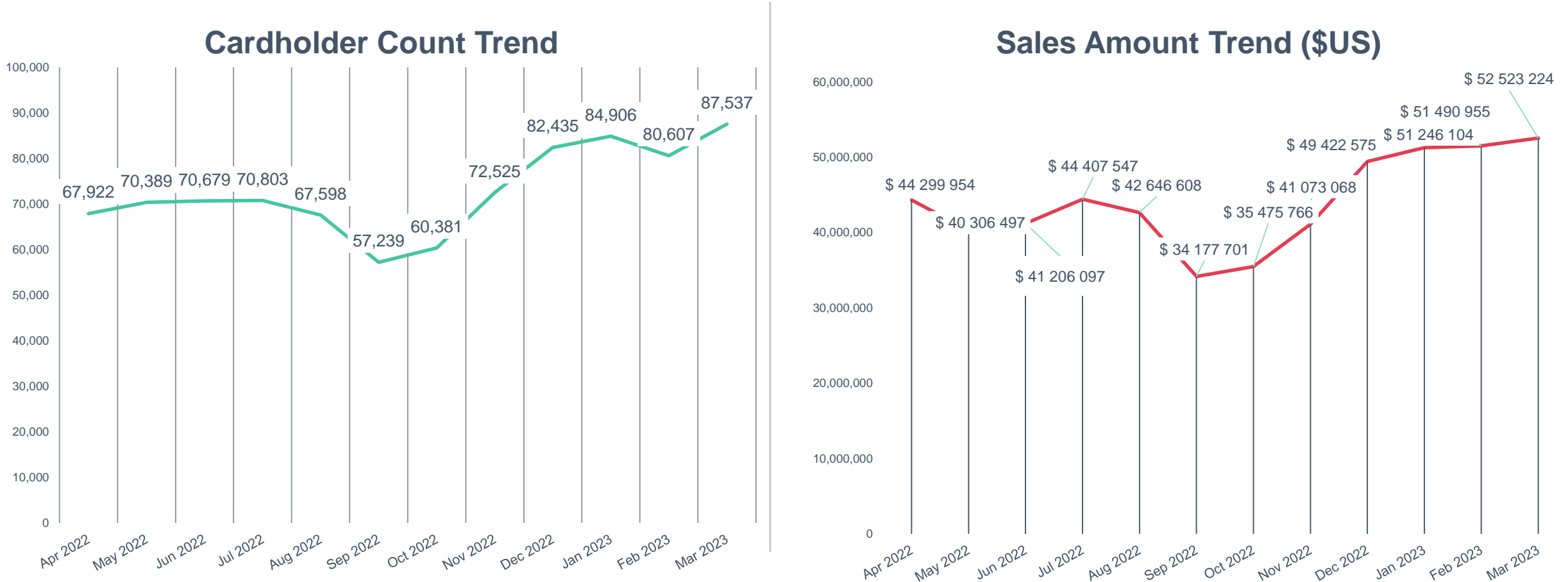
	Cardholder Count (Net)	Total Spend Amount	Spend per Cardholder	Trans Count	Avg Ticket	Cardholder Count (Net)	Total Spend Amount	Spend per Cardholder	Trans Count	Avg Ticket
Consumer	221 672	\$143 471 859	\$647	1 202 655	\$119	42.4%	29.1%	-9.3%	32.8%	-2.8%
Commercial	11 075	\$11 788 424	\$1 064	56 125	\$210	37.2%	28.8%	-6.2%	31.0%	-1.7%
Total	232 747	\$155 260 283	\$667	1 258 780	\$123	42.1%	29.1%	-9.2%	32.7%	-2.7%

During Q1 2023, **232 747 VISA cardholders** from 132 issuer countries have spent **US\$ 155 million in Aruba**, generating a **Y/Y growth of 29.1 % in total sales**, supported by an increase in cardholder count (42.1%) and transactions count (32.7%). \$16 million cash was withdrawn on the island during the quarter. **The average spend per cardholder was 9.2% lower than Q1 2022.**

Data include card spend and withdrawal.

Monthly Trends

Cardholder Count and Sales Amount

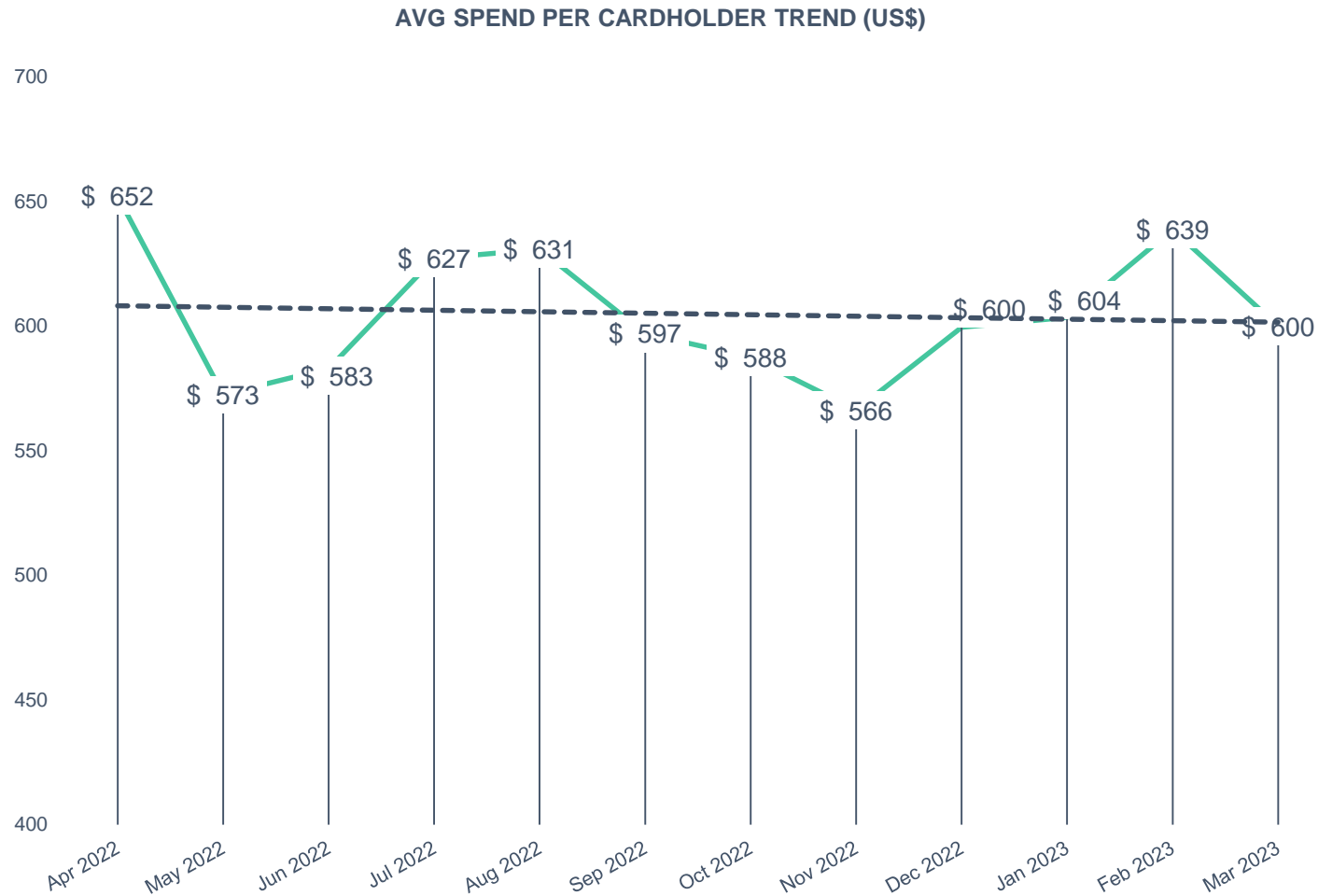


After a decline observed in August and September 2022, **cardholder count started to grow and reach the peak at 87 537 in March 2023**; Sales amount have been **continuously growing from September**, confirming a positive trend.

Data include card spend and withdrawal.

Monthly Trends

Spend per Cardholder

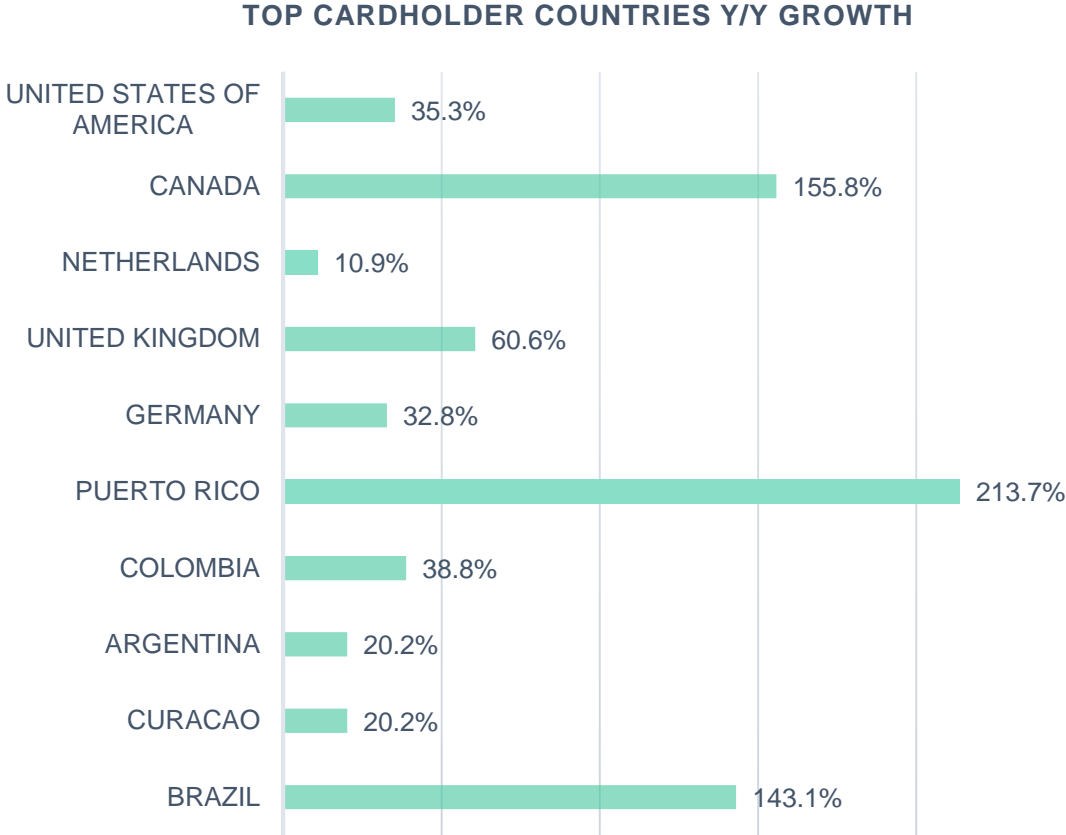
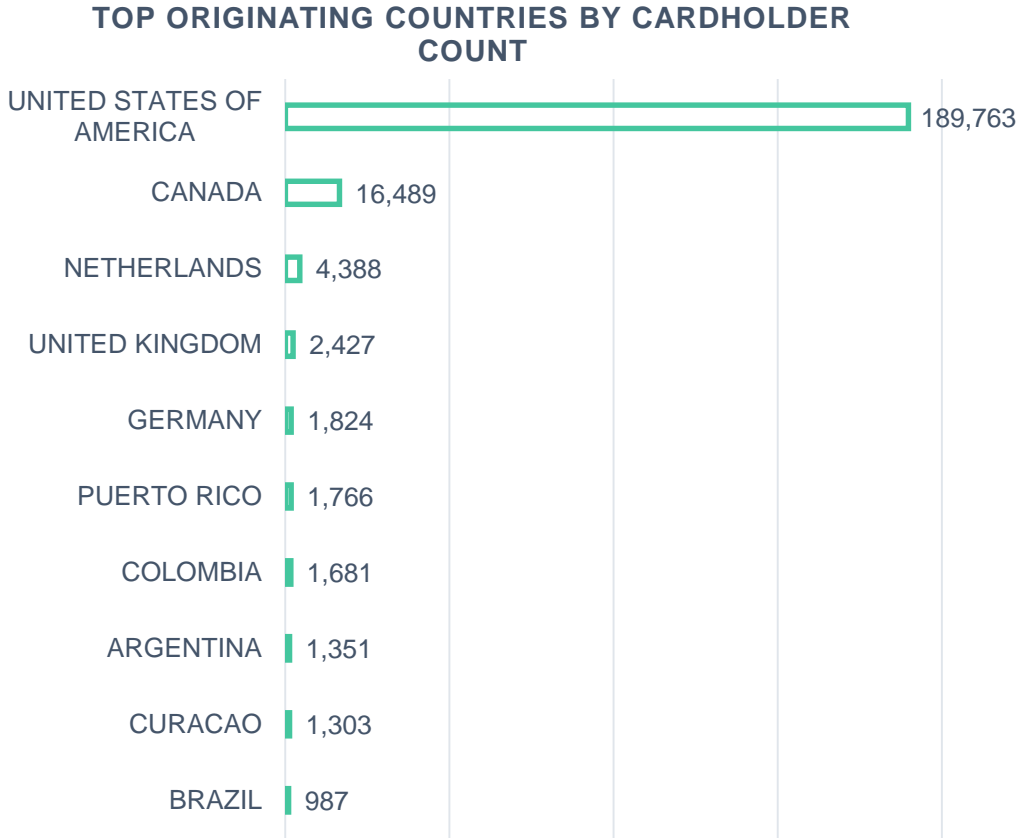


Monthly spend per cardholder fluctuated during the past 12 months but recovered on a visible growth and reached the top at US\$ 639 in Feb 2023. The trend line for the past 12 months indicates a **light downward trend in average spend per cardholder**.

Data include card spend and withdrawal.

TOP Spenders by Markets

By Cardholder Count



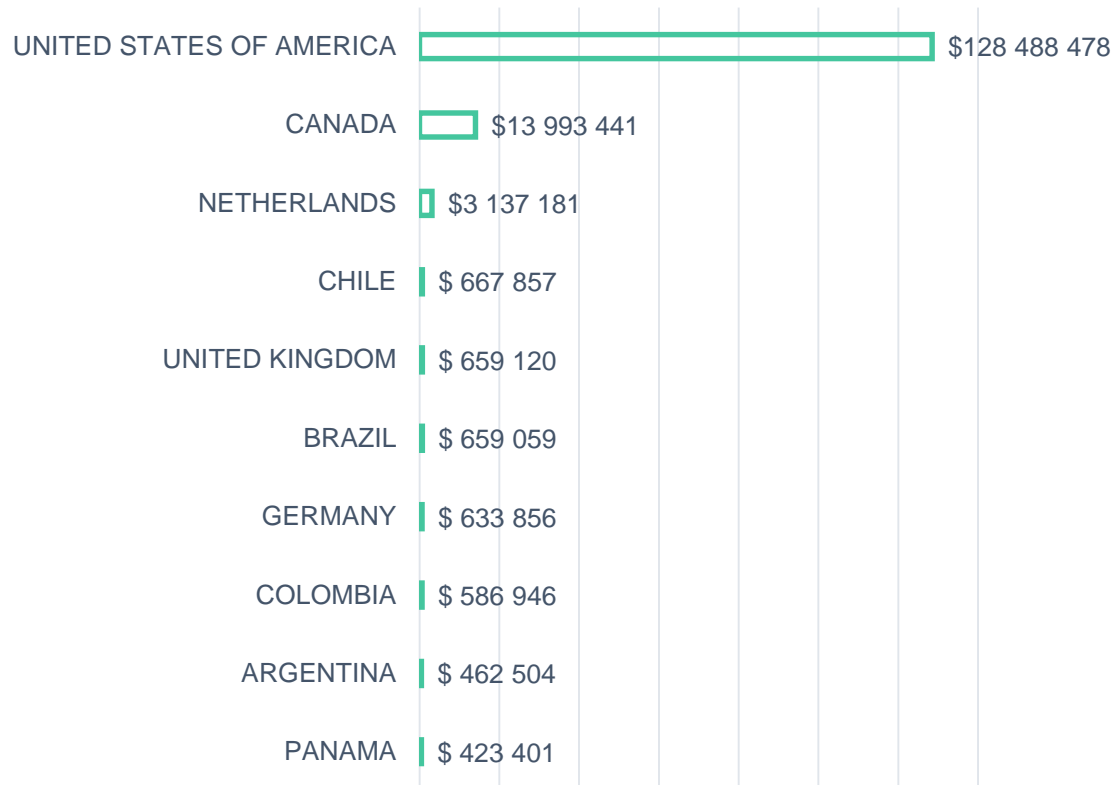
During Q1 2023, **the US remained a very dynamic contributing country** on the island with a **growth of 35.3% in Y/Y comparison**. In other source markets, the number of cardholders **has increased considerably** in yearly comparison, especially for Puerto Rico (213.7%), Canada (155.8%), and Brazil (143.1%). In the meantime, Netherlands, Argentina and Curacao shows the lowest growth of cardholder number among top markets, respectively 10.9%, 20.2% and 20.2%.

Data include card spend and withdrawal.

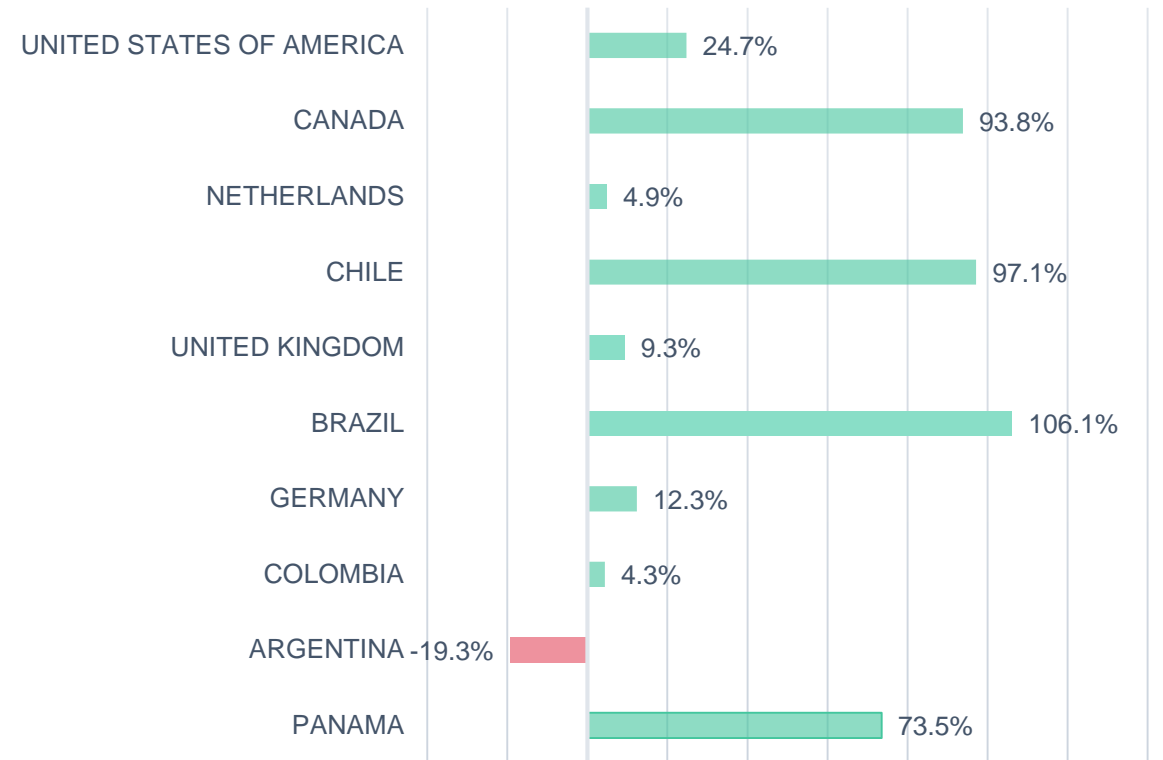
TOP Spenders by Markets

By Spend (US \$)

TOP ORIGINATING COUNTRIES BY SPEND (\$US)



TOP \$ COUNTRIES - Y/Y GROWTH



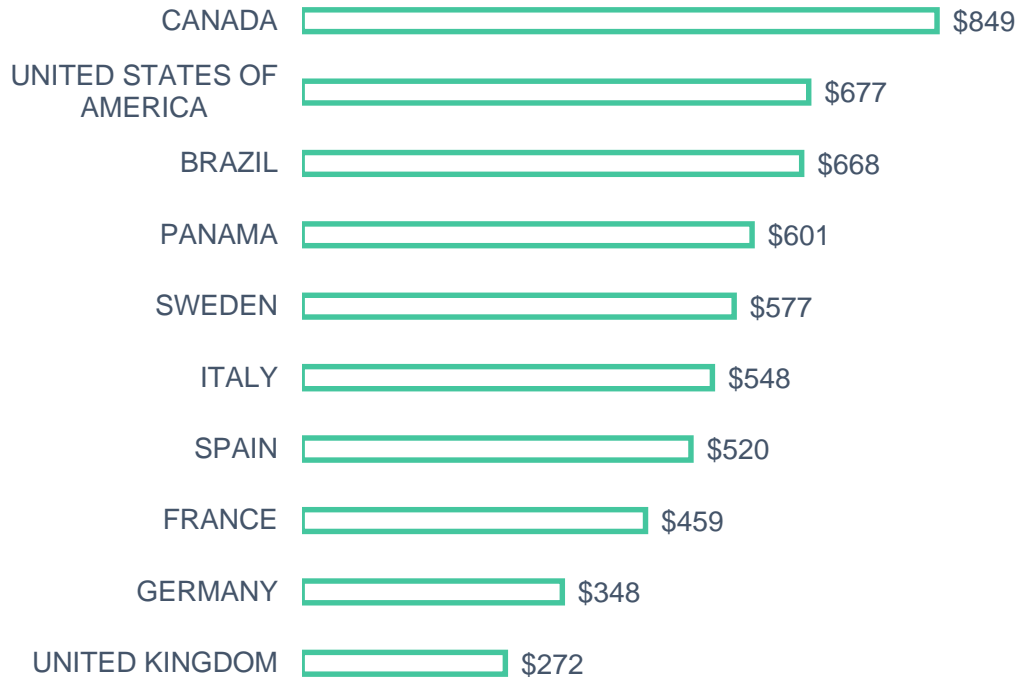
The **TOP spending market** in Q1 2023 was the **USA** with a **Y/Y increase of 24.7%**. Noticeably, **Brazil** reached the highest Y/Y growth at 106.1% compared with Q1 2022 while **Argentina** showed a negative record -19.3%.

Data include card spend and withdrawal.

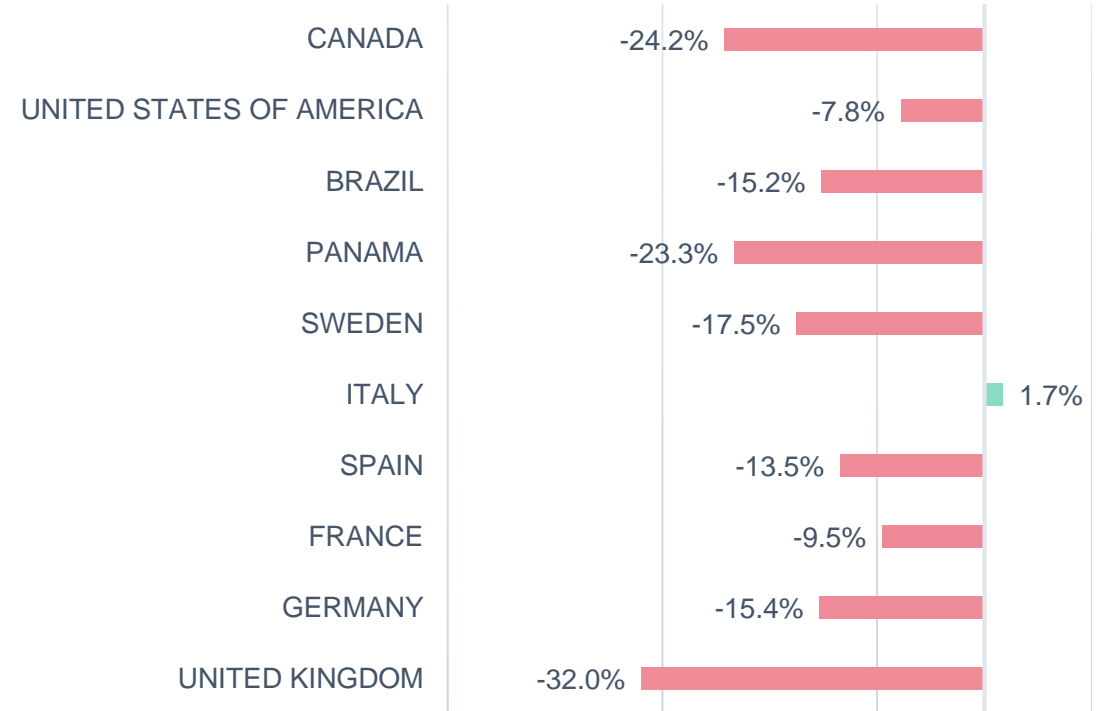
Focus on TOP Markets visiting Aruba

Spend per Cardholder (US\$)

SPEND PER CARDHOLDER BY COUNTRY (US\$)



SPEND PER CARDHOLDER – COUNTRY Y/Y GROWTH

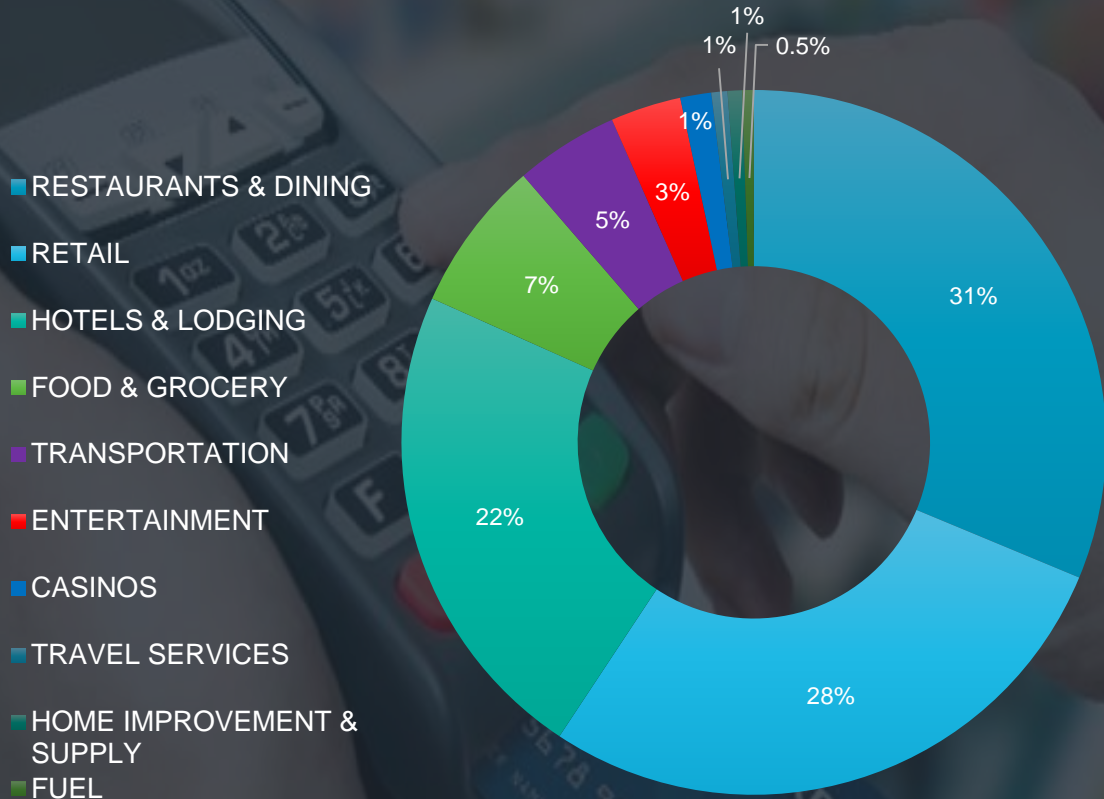


In Q1 2023, apart from **Italy**, the **spend per cardholder has decreased** in all markets in Y/Y comparison (though moderately among US cardholders). Data suggests that United **Kingdom, Canada and Panama** are 3 markets recording the **strongest decline** in spending per cardholder, respectively -32%, 24% and 23%.

Data include card spend and withdrawal.

Top Spend Categories

(% of Total Spend Amount)



In Q1 2023, **Restaurant & Dining** reached at the top of the TOP 10 categories in terms of spend amount in Aruba. In the meantime, **two sectors (Retail, Hotels & Lodging)** came after at the second and third highest positions. The highest yearly increase in spend is also seen in **Restaurant & Dining (37%)**, followed by **Retail and Entertainment (both at 33%)**.

TOP 10 Categories	Spend Amount (US \$)	\$ YY Growth	Cardholder Count	Spend per Cardholder
RESTAURANTS & DINING	\$ 43 279 972	37%	142 073	\$ 305
RETAIL	\$ 38 804 432	33%	135 377	\$ 287
HOTELS & LODGING	\$ 30 988 585	18%	33 106	\$ 936
FOOD & GROCERY	\$ 9 643 015	32%	70 105	\$ 138
TRANSPORTATION	\$ 6 576 570	30%	20 085	\$ 327
ENTERTAINMENT	\$ 4 485 261	33%	23 784	\$ 189
CASINOS	\$ 1 970 454	24%	808	\$ 2 439
TRAVEL SERVICES	\$ 1 018 142	4%	1 035	\$ 984
HOME IMPROVEMENT & SUPPLY	\$ 917 665	-2%	1 891	\$ 485
FUEL	\$ 733 534	28%	17 373	\$ 42

Focus on Accommodation

Quarterly Trends

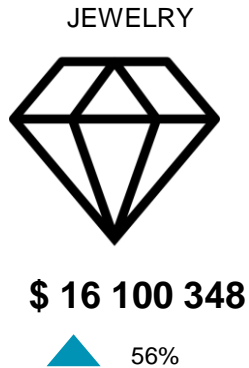
PERIOD	Spend Amount (US \$)	% of Total Spend	Cardholder Count	Spend per Cardholder
Q4-2021	▲ \$26 111 745	26%	▲ 34 576	▲ \$755
Q1-2022	▲ \$26 241 439	24%	▲ 35 829	▲ \$732
Q2-2022	▲ \$28 825 686	23%	▲ 44 425	▼ \$649
Q3-2022	▼ \$26 154 379	22%	▼ 39 079	▲ \$669
Q4-2022	▼ \$22 762 445	18%	▼ 34 640	▼ \$657
Q1-2023	▲ \$30 988 585	20%	▲ 33 106	▲ \$936



The Lodging sector saw an upward trend in Q1 2023, with a considerable climb **in spend and cardholder count**. Moreover, the **spend per cardholder** is recorded at US\$ 936, that is the **highest rate since Q4 2021**.

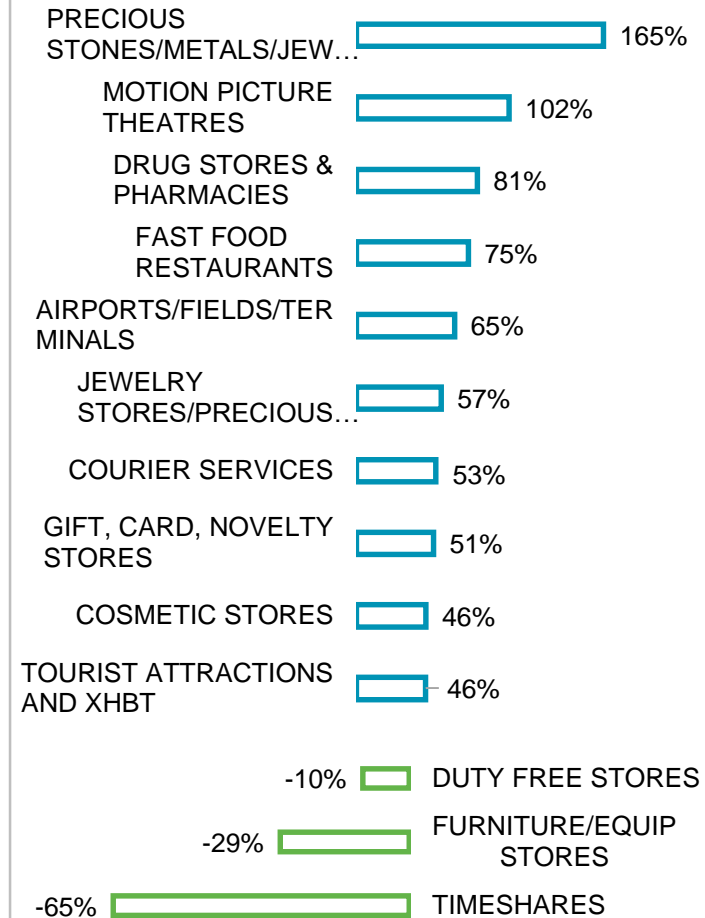
Focus on Sub-Categories

Specific Merchant Categories (selection)



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
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Or

Visit our website www.arubainsight.com

