



NOVEMBER 2024

Monthly Report

SNAPSHOT YTD NOV 2024/2023



HOW MANY ARRIVALS?

1,293,446

14.4%



HOW MANY CRUISE TOURISM?

772,612

10.7%

Compared to 2023



HOW LONG DID THEY STAY?

10,078,462

10.7%



WHAT DID THEY SPEND?*

Central Bank Aruba (2023)

Avg. 4,671.0 min

13.5%

2022: 4,114.60 min

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

WHERE DID THEY STAY?

EP



2,039,305

NIGHTS

20.2%

ALL INCLUSIVE



1,370,242

NIGHTS

13.6%

TIMESHARE



3,118,084

NIGHTS

30.9%

OTHERS



3,550,831

NIGHTS

35.2%



ARRIVALS YTD NOV 2024/2023

1,293,446
ARRIVALS

14.4%
GROWTH

	2023		Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
USA	861,485		109,398	970,883	12.7%	76.2%	75.1%
Canada	52,382		8,496	60,878	16.2%	4.6%	4.7%
NA	913,867		117,894	1,031,761	12.9%	80.8%	79.8%
Venezuela	2,524		725	3,249	28.7%	0.2%	0.3%
Colombia	45,444		13,409	58,853	29.5%	4.0%	4.6%
Brazil	12,365		2,501	14,866	20.2%	1.1%	1.1%
Argentina	17,506		7,518	25,024	42.9%	1.5%	1.9%
Chile	7,570		5,611	13,181	74.1%	0.7%	1.0%
Ecuador	7,007		3,628	10,635	51.8%	0.6%	0.8%
Peru	5,747		12,020	17,767	209.2%	0.5%	1.4%
Paraguay	1,085		48	1,133	4.4%	0.1%	0.1%
Uruguay	1,852		1,773	3,625	95.7%	0.2%	0.3%
Mexico	2,973		475	3,448	16.0%	0.3%	0.3%
Others	11,893		800	12,693	6.7%	1.1%	1.0%
SA	115,966		48,508	164,474	41.8%	10.3%	12.7%
Netherlands	35,567	-2,733		32,834	-7.7%	3.1%	2.5%
UK	6,526		495	7,021	7.6%	0.6%	0.5%
Germany	5,099	-941		4,158	-18.5%	0.5%	0.3%
Italy	6,164	-148		6,016	-2.4%	0.5%	0.5%
Sweden	1,982	-1,196		786	-60.3%	0.2%	0.1%
Belgium	1,791	-328		1,463	-18.3%	0.2%	0.1%
Austria	633	-83		550	-13.1%	0.1%	0.0%
Switzerland	1,667		204	1,871	12.2%	0.1%	0.1%
Others	8,512		411	8,923	4.8%	0.8%	0.7%
Europe	67,941	-4,319		63,622	-6.4%	6.0%	4.9%
ROW	33,325		264	33,589	0.8%	2.9%	2.6%
Total	1,131,099		162,347	1,293,446	14.4%		
W/O Ven.	1,128,575		161,....	1,290,197	14.3%		



ARRIVALS USA

YTD NOV 2024/2023

970,883
ARRIVALS

12.7%
GROWTH

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
New York	169,683	24,113	193,796	14.2%	19.7%	20.0%
Massachusetts	108,332	6,234	114,566	5.8%	12.6%	11.8%
New Jersey	104,842	19,492	124,334	18.6%	12.2%	12.8%
Pennsylvania	50,877	6,236	57,113	12.3%	5.9%	5.9%
Illinois	22,064	507	22,571	2.3%	2.6%	2.3%
Connecticut	32,169	4,739	36,908	14.7%	3.7%	3.8%
Florida	47,008	4,820	51,828	10.3%	5.5%	5.3%
Ohio	24,184	3,332	27,516	13.8%	2.8%	2.8%
Maryland	26,914	4,377	31,291	16.3%	3.1%	3.2%
Michigan	16,228	-223	16,005	-1.4%	1.9%	1.6%
Virginia	23,653	3,734	27,387	15.8%	2.7%	2.8%
Georgia	21,050	474	21,524	2.3%	2.4%	2.2%
North Carolina	24,773	3,167	27,940	12.8%	2.9%	2.9%
Texas	26,499	2,485	28,984	9.4%	3.1%	3.0%
California	16,314	1,769	18,083	10.8%	1.9%	1.9%
Other	146,895	24,142	171,037	16.4%	17.1%	17.6%
Total	861,485	109,398	970,883	12.7%		



NIGHTS YTD NOV 2024/2023

10,078,462

ARRIVALS

10.7%

GROWTH

	2023		Growth	2024	% Growth	ALOS 2023	ALOS 2024
USA	6,551,067		685,806	7,236,873	10.5%	7.6	7.5
Canada	550,557		44,373	594,930	8.1%	10.5	9.8
NA	7,101,624		730,179	7,831,803	10.3%	7.8	7.6
Venezuela	28,653		8,859	37,512	30.9%	11.4	11.5
Colombia	315,480		62,107	377,587	19.7%	6.9	6.4
Brazil	77,098		20,297	97,395	26.3%	6.2	6.6
Argentina	161,474		58,564	220,038	36.3%	9.2	8.8
Chile	60,062		39,790	99,852	66.2%	7.9	7.6
Ecuador	34,197		15,120	49,317	44.2%	4.9	4.6
Peru	39,478		60,569	100,047	153.4%	6.9	5.6
Paraguay	7,397		257	7,654	3.5%	6.8	6.8
Uruguay	14,325		14,419	28,744	100.7%	7.7	7.9
Mexico	17,667		12,334	30,001	69.8%	5.9	8.7
Others	85,531		9,767	95,298	11.4%	7.2	7.5
SA	841,362		302,083	1,143,445	35.9%	7.3	7.0
Netherlands	612,943	-51,570		561,373	-8.4%	17.2	17.1
UK	64,592		4,278	68,870	6.6%	9.9	9.8
Germany	48,684	-3,146		45,538	-6.5%	9.5	11.0
Italy	51,438	-4,360		47,078	-8.5%	8.3	7.8
Sweden	24,121	-16,213		7,908	-67.2%	12.2	10.1
Belgium	24,075	-2,577		21,498	-10.7%	13.4	14.7
Austria	6,205	-807		5,398	-13.0%	9.8	9.8
Switzerland	15,159		3,041	18,200	20.1%	9.1	9.7
Others	88,904	-4,316		84,588	-4.9%	10.4	9.5
Europe	936,121	-75,670		860,451	-8.1%	13.8	13.5
ROW	223,818		18,945	242,763	8.5%	6.7	7.2
Total	9,102,925		975,537	10,078,462	10.7%	8.0	7.8



ACCOMMODATIONS YTD NOV 2024/2023

1,293,446
ARRIVALS

14.4%
GROWTH

ARRIVALS BY ACCOMMODATION

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
EP	307,012	29,558	336,570	9.6%	27.1%	26.0%
All Inclusive	200,305	9,447	209,752	4.7%	17.7%	16.2%
Timeshare	306,599	20,376	326,975	6.6%	27.1%	25.3%
Others	317,183	102,966	420,149	32.5%	28.0%	32.5%
Total	1,131,099	162,347	1,293,446	14.4%		

NIGHTS BY ACCOMMODATION

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
EP	1,991,001	48,304	2,039,305	2.4%	21.9%	20.2%
All Inclusive	1,379,754	-9,512	1,370,242	-0.7%	15.2%	13.6%
Timeshare	2,749,203	368,881	3,118,084	13.4%	30.2%	30.9%
Others	2,982,967	567,864	3,550,831	19.0%	32.8%	35.2%
Total	9,102,925	975,537	10,078,462	10.7%		

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 NOV 2024/2023

1,293,446
ARRIVALS

14.4%
GROWTH

	2023	Growth	2024	% Growth
0 - 11	74,165	16,158	90,323	21.8%
12-19	73,614	15,978	89,592	21.7%
20 - 29	133,264	23,848	157,112	17.9%
30 - 39	180,432	27,488	207,920	15.2%
40 - 49	186,566	28,785	215,351	15.4%
50 - 59	218,109	18,704	236,813	8.6%
60 - 69	174,335	19,997	194,332	11.5%
70 +	90,549	11,423	101,972	12.6%
Not Stated	65	-34	31	-52.3%
Total	1,131,099	162,347	1,293,446	14.4%



GENERATIONS

YTD NOV 2024/2023

1,293,446
VISITORS

14.4%
GROWTH

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
Gen A	58,533	12,612	71,145	21.5%	5.2%	5.5%
Gen Z	158,534	33,646	192,180	21.2%	14.0%	14.9%
Millennials	284,337	42,734	327,071	15.0%	25.1%	25.3%
Gen X	301,129	38,138	339,267	12.7%	26.6%	26.2%
Baby Boomers	296,593	30,506	327,099	10.3%	26.2%	25.3%
Silent Generations	31,908	4,745	36,653	14.9%	2.8%	2.8%
Age not specified	65	-34	31	-52.3%	0.0%	0.0%
Total	1,131,099	162,347	1,293,446	14.4%		



GENERATIONS

YTD NOV 2024/2023

1,293,446
VISITORS

14.4%
GROWTH

PURPOSE OF VISIT YTD NOV 2024

	2024	Market share 2024	2023	Market share 2023	% Growth
Sun, Sand, Sea	1,085,578	83.9%	922,128	81.5%	17.7%
Business	22,561	1.7%	21,628	1.9%	4.3%
Conference	6,613	0.5%	7,646	0.7%	-13.5%
Honeymoon	34,610	2.7%	35,896	3.2%	-3.6%
Diving	3,677	0.3%	3,833	0.3%	-4.1%
Incentive	9,637	0.7%	10,449	0.9%	-7.8%
Meeting	7,038	0.5%	7,922	0.7%	-11.2%
Not specified	91,158	7.0%	85,620	7.6%	6.5%
Shopping	7,028	0.5%	7,610	0.7%	-7.6%
Wedding	25,546	2.0%	28,367	2.5%	-9.9%
Total	1,293,446	100.0%	1,131,099	100.0%	14.4%

CONVINCING REASONS FOR VISIT YTD NOV 2024

Reasons for Choice	YD Nov 2024	Market Share
Adventure activities	54,970	4%
Direct flights	49,768	4%
Ease /comfort	86,839	7%
Familiarity	114,525	9%
Family-friendly destination	334,651	26%
Not specified	12,572	1%
Other	154,833	12%
Outside hurricane belt	46,002	4%
Points redemption	19,698	2%
Reliable weather	169,528	13%
Word of mouth	224,244	17%
(blank)	25,816	2%
Total	1,293,446	



CARRIERS YTD NOV 2024/2023

1,293,446
VISITORS

14.4%
GROWTH

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
JETBLUE	269,776	51,679	321,455	19.2%	23.9%	24.9%
AMERICAN AIRLINES	247,737	-2,121	245,616	-0.9%	21.9%	19.0%
UNITED AIRLINES	146,922	24,843	171,765	16.9%	13.0%	13.3%
DELTA AIRLINES	127,767	18,846	146,613	14.8%	11.3%	11.3%
SOUTHWEST AIRLINES	54,024	6,579	60,603	12.2%	4.8%	4.7%
AVIANCA	52,217	6,942	59,159	13.3%	4.6%	4.6%
COPA AIRLINES	42,950	15,024	57,974	35.0%	3.8%	4.5%
WESTJET AIRLINES	18,163	10,429	28,592	57.4%	1.6%	2.2%
WINGO	19,682	8,320	28,002	42.3%	1.7%	2.2%
KLM ROYAL DUTCH	30,817	-3,203	27,614	-10.4%	2.7%	2.1%
SPIRIT AIRLINES	18,311	9,087	27,398	49.6%	1.6%	2.1%
LATAM AIRLINES PERU	0	20,388	20,388	-	0.0%	1.6%
DIVI DIVI AIR	18,171	-855	17,316	-4.7%	1.6%	1.3%
AIR CANADA	12,893	-408	12,485	-3.2%	1.1%	1.0%
TUI FLY NL	14,176	-2,088	12,088	-14.7%	1.3%	0.9%
SUNWING AIRLINES	12,800	-1,278	11,522	-10.0%	1.1%	0.9%
EZ AIR	10,992	-302	10,690	-2.7%	1.0%	0.8%
PRIVATE	9,140	-717	8,423	-7.8%	0.8%	0.7%
SURINAM AIRWAYS	5,835	-403	5,432	-6.9%	0.5%	0.4%
WINAIR	2,266	2,847	5,113	125.6%	0.2%	0.4%
BRITISH AIRWAYS	4,619	169	4,788	3.7%	0.4%	0.4%
SUN COUNTRY AIRLINES	2,256	632	2,888	28.0%	0.2%	0.2%
CHARTER	3,382	-626	2,756	-18.5%	0.3%	0.2%
ARAJET	1,046	774	1,820	74.0%	0.1%	0.1%
SKY HIGH AVIATION	848	131	979	15.4%	0.1%	0.1%
JET AIR CARIBBEAN	1,717	-810	907	-47.2%	0.2%	0.1%
Others	2,592	-1,532	1,060	-59.1%	0.2%	0.1%
Total	1,131,099	162,347	1,293,446	14.4%		



CRUISE COMPARISON



One happy island ✦ ARUBA.COM



CRUISE YTD NOVEMBER 2024/2023



2023



CRUISE PAX

697,877

CRUISE CALLS

264



2024



CRUISE PAX

772,612

10.7%

CRUISE CALLS

288

9.1%

ABSOLUTE GROWTH PAX NOVEMBER

74,735

10.7%

ABSOLUTE GROWTH CALLS NOVEMBER

24

9.1%

NOVEMBER RESULT 2024

NORTH AMERICA



83,852

78.4%

SOUTH AMERICA



14,048

13.1%

EUROPE



5,991

5.6%

OTHERS



3,047

2.8%

TOTAL ARRIVALS

106,938

100%



ARRIVALS NOVEMBER 2024/2023

106,938
ARRIVALS

0.9%
GROWTH

	2023		Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
USA	77,534	-1,188		76,346	-1.5%	73.2%	71.4%
Canada	6,847		659	7,506	9.6%	6.5%	7.0%
NA	84,381	-529		83,852	-0.6%	79.6%	78.4%
Venezuela	190		109	299	57.4%	0.2%	0.3%
Colombia	4,874	-180		4,694	-3.7%	4.6%	4.4%
Brazil	1,205		624	1,829	51.8%	1.1%	1.7%
Argentina	1,477		527	2,004	35.7%	1.4%	1.9%
Chile	597		275	872	46.1%	0.6%	0.8%
Ecuador	997		68	1,065	6.8%	0.9%	1.0%
Peru	719		697	1,416	96.9%	0.7%	1.3%
Paraguay	118	-6		112	-5.1%	0.1%	0.1%
Uruguay	147		97	244	66.0%	0.1%	0.2%
Mexico	275	-27		248	-9.8%	0.3%	0.2%
Others	1,164		101	1,265	8.7%	1.1%	1.2%
SA	11,763		2,285	14,048	19.4%	11.1%	13.1%
Netherlands	3,478	-371		3,107	-10.7%	3.3%	2.9%
UK	572	-53		519	-9.3%	0.5%	0.5%
Germany	520	-71		449	-13.7%	0.5%	0.4%
Italy	423		85	508	20.1%	0.4%	0.5%
Sweden	126	-55		71	-43.7%	0.1%	0.1%
Belgium	144	-7		137	-4.9%	0.1%	0.1%
Austria	74	-37		37	-50.0%	0.1%	0.0%
Switzerland	177		47	224	26.6%	0.2%	0.2%
Others	952	-13		939	-1.4%	0.9%	0.9%
Europe	6,466	-475		5,991	-7.3%	6.1%	5.6%
ROW	3,336	-289		3,047	-8.7%	3.1%	2.8%
Total	105,946		992	106,938	0.9%		
W/O Ven.	105,756		883	106,639	0.8%		



ARRIVALS USA NOVEMBER 2024/2023

76,346
ARRIVALS

-1.5%
GROWTH

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
New York	15,255	-3,064	12,191	-20.1%	19.7%	16.0%
Massachusetts	9,078	-472	8,606	-5.2%	11.7%	11.3%
New Jersey	11,831	-1,407	10,424	-11.9%	15.3%	13.7%
Pennsylvania	4,621	-433	4,188	-9.4%	6.0%	5.5%
Illinois	2,345	-483	1,862	-20.6%	3.0%	2.4%
Connecticut	2,682	-289	2,393	-10.8%	3.5%	3.1%
Florida	4,390	-702	3,688	-16.0%	5.7%	4.8%
Ohio	2,000	-140	1,860	-7.0%	2.6%	2.4%
Maryland	2,337	-77	2,260	-3.3%	3.0%	3.0%
Michigan	1,506	-245	1,261	-16.3%	1.9%	1.7%
Virginia	2,011	-25	1,986	-1.2%	2.6%	2.6%
Georgia	1,647	-258	1,389	-15.7%	2.1%	1.8%
North Carolina	1,921	-178	1,743	-9.3%	2.5%	2.3%
Texas	1,962	145	2,107	7.4%	2.5%	2.8%
California	1,299	-211	1,088	-16.2%	1.7%	1.4%
Other	12,649	6,651	19,300	52.6%	16.3%	25.3%
Total	77,534	-1,188	76,346	-1.5%		



NIGHTS NOVEMBER 2024/2023

1,056,191
NIGHTS

22.4%
GROWTH

	2023		Growth	2024	% Growth	ALOS 2023	ALOS 2024
USA	600,492		215,733	816,225	35.9%	7.7	10.7
Canada	75,683	-9,602		66,081	-12.7%	11.1	8.8
NA	676,175		206,131	882,306	30.5%	8.0	10.5
Venezuela	2,002		1,392	3,394	69.5%	10.5	11.4
Colombia	31,868	-4,583		27,285	-14.4%	6.5	5.8
Brazil	7,241		4,540	11,781	62.7%	6.0	6.4
Argentina	14,283		1,637	15,920	11.5%	9.7	7.9
Chile	5,163		1,294	6,457	25.1%	8.6	7.4
Ecuador	4,728	-292		4,436	-6.2%	4.7	4.2
Peru	3,857		3,537	7,394	91.7%	5.4	5.2
Paraguay	685		29	714	4.2%	5.8	6.4
Uruguay	1,070		685	1,755	64.0%	7.3	7.2
Mexico	1,471		595	2,066	40.4%	5.3	8.3
Others	7,475	-309		7,166	-4.1%	6.4	5.7
SA	79,843		8,525	88,368	10.7%	6.8	6.3
Netherlands	59,184	-16,648		42,536	-28.1%	17.0	13.7
UK	7,491	-3,680		3,811	-49.1%	13.1	7.3
Germany	5,271	-477		4,794	-9.0%	10.1	10.7
Italy	2,845		520	3,365	18.3%	6.7	6.6
Sweden	1,370	-493		877	-36.0%	10.9	12.4
Belgium	2,518	-818		1,700	-32.5%	17.5	12.4
Austria	610	-327		283	-53.6%	8.2	7.6
Switzerland	1,588		238	1,826	15.0%	9.0	8.2
Others	8,575	-619		7,956	-7.2%	9.0	8.5
Europe	89,452	-22,304		67,148	-24.9%	13.8	11.2
ROW	17,499		870	18,369	5.0%	5.2	6.0
Total	862,969		193,222	1,056,191	22.4%	8.1	9.9



ACCOMMODATIONS NOVEMBER 2024/2023

106,938
ARRIVALS

0.9%
GROWTH

ARRIVALS BY ACCOMMODATION

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
EP	29,112	-2,997	26,115	-10.3%	27.5%	24.4%
All Inclusive	17,806	-450	17,356	-2.5%	16.8%	16.2%
Timeshare	28,335	-72	28,263	-0.3%	26.7%	26.4%
Others	30,693	4,511	35,204	14.7%	29.0%	32.9%
Total	105,946	992	106,938	0.9%		

NIGHTS BY ACCOMMODATION

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
EP	194,715	-55,907	138,808	-28.7%	22.6%	13.1%
All Inclusive	129,848	-25,161	104,687	-19.4%	15.0%	9.9%
Timeshare	252,290	295,205	547,495	117.0%	29.2%	51.8%
Others	286,116	-20,915	265,201	-7.3%	33.2%	25.1%
Total	862,969	193,222	1,056,191	22.4%		

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 NOVEMBER 2024/2023

106,938
ARRIVALS

0.9%
GROWTH

	2023		Growth	2024	% Growth
0 - 11	7,114		50	7,164	0.7%
12-19	4,923		62	4,985	1.3%
20 - 29	11,012	-461		10,551	-4.2%
30 - 39	18,159	-547		17,612	-3.0%
40 - 49	17,700		543	18,243	3.1%
50 - 59	19,925	-159		19,766	-0.8%
60 - 69	17,640		741	18,381	4.2%
70 +	9,469		764	10,233	8.1%
Not Stated	4	-1		3	-25.0%
Total	105,946		992	106,938	0.9%



GENERATIONS

NOVEMBER 2024/2023

106,938
ARRIVALS

0.9%
GROWTH

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
Gen A	5,764	-33	5,731	-0.6%	5.4%	5.4%
Gen Z	11,355	-54	11,301	-0.5%	10.7%	10.6%
Millennials	28,074	-846	27,228	-3.0%	26.5%	25.5%
Gen X	27,532	629	28,161	2.3%	26.0%	26.3%
Baby Boomers	29,908	790	30,698	2.6%	28.2%	28.7%
Silent Generations	3,309	507	3,816	15.3%	3.1%	3.6%
Age not specified	4	-1	3	-25.0%	0.0%	0.0%
Total	105,946	992	106,938	0.9%		



GENERATIONS NOVEMBER 2024/2023

106,938
ARRIVALS

0.9%
GROWTH

PURPOSE OF VISIT NOV 2024

	2024	Market share 2024	2023	Market share 2023	% Growth
Sun, Sand, Sea	96,074	89.8%	87,263	82.4%	10.1%
Business	2,539	2.4%	2,280	2.2%	11.4%
Conference	22	0.0%	892	0.8%	-97.5%
Honeymoon	1,477	1.4%	3,413	3.2%	-56.7%
Diving	11	0.0%	376	0.4%	-97.1%
Incentive	189	0.2%	610	0.6%	-69.0%
Meeting	18	0.0%	896	0.8%	-98.0%
Not specified	4,704	4.4%	6,597	6.2%	-28.7%
Shopping	21	0.0%	692	0.7%	-97.0%
Wedding	1,883	1.8%	2,927	2.8%	-35.7%
Total	106,938	100.0%	105,946	100.0%	0.9%

CONVINCING REASONS FOR VISIT NOV 2024

Reasons for Choice	Oct 2024	Market Share
Adventure activities	5,786	5%
Direct flights	4,445	4%
Ease/comfort	8,535	8%
Familiarity	9,763	9%
Family friendly destination	26,426	25%
Not specified	172	0%
Other	16,304	15%
Outside hurricane belt	4,094	4%
Points redemption	2,544	2%
Reliable weather	13,053	12%
Word of mouth	14,204	13%
(blank)	1,612	2%
Total	106,938	



CARRIERS NOVEMBER 2024/2023

106,938
ARRIVALS

0.9%
GROWTH

	2023	Growth	2024	% Growth	Marketshare 2023	Marketshare 2024
JETBLUE	26,369	-1,282	25,087	-4.9%	24.9%	23.5%
AMERICAN AIRLINES	20,823	-1,175	19,648	-5.6%	19.7%	18.4%
UNITED AIRLINES	13,570	1,878	15,448	13.8%	12.8%	14.4%
DELTA AIRLINES	10,006	-333	9,673	-3.3%	9.4%	9.0%
COPA AIRLINES	4,861	331	5,192	6.8%	4.6%	4.9%
WESTJET AIRLINES	2,326	1,951	4,277	83.9%	2.2%	4.0%
SOUTHWEST AIRLINES	4,219	21	4,240	0.5%	4.0%	4.0%
AVIANCA	5,336	-1,317	4,019	-24.7%	5.0%	3.8%
KLM ROYAL DUTCH	3,100	199	3,299	6.4%	2.9%	3.1%
LATAM AIRLINES PERU	0	2,710	2,710	-	0.0%	2.5%
WINGO	1,609	539	2,148	33.5%	1.5%	2.0%
AIR CANADA	2,253	-156	2,097	-6.9%	2.1%	2.0%
SPIRIT AIRLINES	3,290	-1,394	1,896	-42.4%	3.1%	1.8%
DIVI DIVI AIR	1,807	-123	1,684	-6.8%	1.7%	1.6%
PRIVATE	862	188	1,050	21.8%	0.8%	1.0%
EZ AIR	1,092	-91	1,001	-8.3%	1.0%	0.9%
TUI FLY NL	1,324	-473	851	-35.7%	1.2%	0.8%
SUNWING AIRLINES	1,309	-576	733	-44.0%	1.2%	0.7%
SURINAM AIRWAYS	476	74	550	15.5%	0.4%	0.5%
WINAIR	397	28	425	7.1%	0.4%	0.4%
CHARTER	278	53	331	19.1%	0.3%	0.3%
BRITISH AIRWAYS	360	-75	285	-20.8%	0.3%	0.3%
ARAJET	146	38	184	26.0%	0.1%	0.2%
SKY HIGH AVIATION	70	16	86	22.9%	0.1%	0.1%
AIR CENTURY	61	-38	23	-62.3%	0.1%	0.0%
ARUBA AIRLINES	0	1	1	-	0.0%	0.0%
OTHERS	2	-2	0	-100.0%	0.0%	0.0%
Total	105,946	992	106,938	0.9%		



CARRIERS NOVEMBER 2024/2023

106,938
ARRIVALS

0.9%
GROWTH

City	APO Code	NOV '24	Mkt Share	NOV'23	Mkt Share	24 vs 23
JFK NY	JFK	17,709	16.6%	17,582	16.6%	0.7%
Boston	BOS	11,777	11.0%	9,644	9.1%	22.1%
Newark	EWR	10,317	9.6%	13,815	13.0%	-25.3%
Miami	MIA	8,285	7.7%	7,996	7.5%	3.6%
Toronto	YYZ	7,107	6.6%	5,898	5.6%	20.5%
Charlotte	CLT	6,009	5.6%	8,627	8.1%	-30.3%
Panama City	PTY	5,196	4.9%	4,871	4.6%	6.7%
Bogota	BOG	4,850	4.5%	6,227	5.9%	-22.1%
Atlanta	ATL	4,724	4.4%	4,977	4.7%	-5.1%
Philadelphia	PHL	4,471	4.2%	3,239	3.1%	38.0%
G.Bush DC	IAD	4,338	4.1%	2,399	2.3%	80.8%
Amsterdam	AMS	4,150	3.9%	4,410	4.2%	-5.9%
Orlando	MCO	3,565	3.3%	3,690	3.5%	-3.4%
Curacao	CUR	3,521	3.3%	3,803	3.6%	-7.4%
Lima, Peru	LIM	2,710	2.5%	0	0.0%	—
Fort Lauderdale	FLL	1,938	1.8%	3,371	3.2%	-42.5%
Chicago	ORD	1,493	1.4%	1,546	1.5%	-3.4%
Medellin	MDE	1,326	1.2%	797	0.8%	66.4%
Baltimore	BWI	675	0.6%	530	0.5%	27.4%
Houston International	IAH	609	0.6%	494	0.5%	23.3%
Johan A. Pengel Int Airport, Suriname	PBM	495	0.5%	0	0.0%	—
Sint Maarten	SXM	425	0.4%	398	0.4%	6.8%
Dallas Fort Worth Int Airport	DFW	339	0.3%	289	0.3%	17.3%
Gatwick Airport , UK	LGW	285	0.3%	360	0.3%	-20.8%
Las Americas Int. Airport, Sto Dgo	SDQ	254	0.2%	231	0.2%	10.0%
	Others	370	0.3%	752	0.7%	-50.8%
Total		106,938	100.0%	105,946	100.0%	0.9%



CRUISE COMPARISON



One happy island ✦ ARUBA.COM



CRUISE NOVEMBER 2024/2023



2023



CRUISE PAX
87,628

CRUISE CALLS
36



2024



CRUISE PAX
75,383

-14.0%

CRUISE CALLS
36

0.0%

ABSOLUTE GROWTH PAX NOVEMBER

-12,245
-14.0%

ABSOLUTE GROWTH CALLS NOVEMBER

0
0.0%



GUEST SATISFACTION

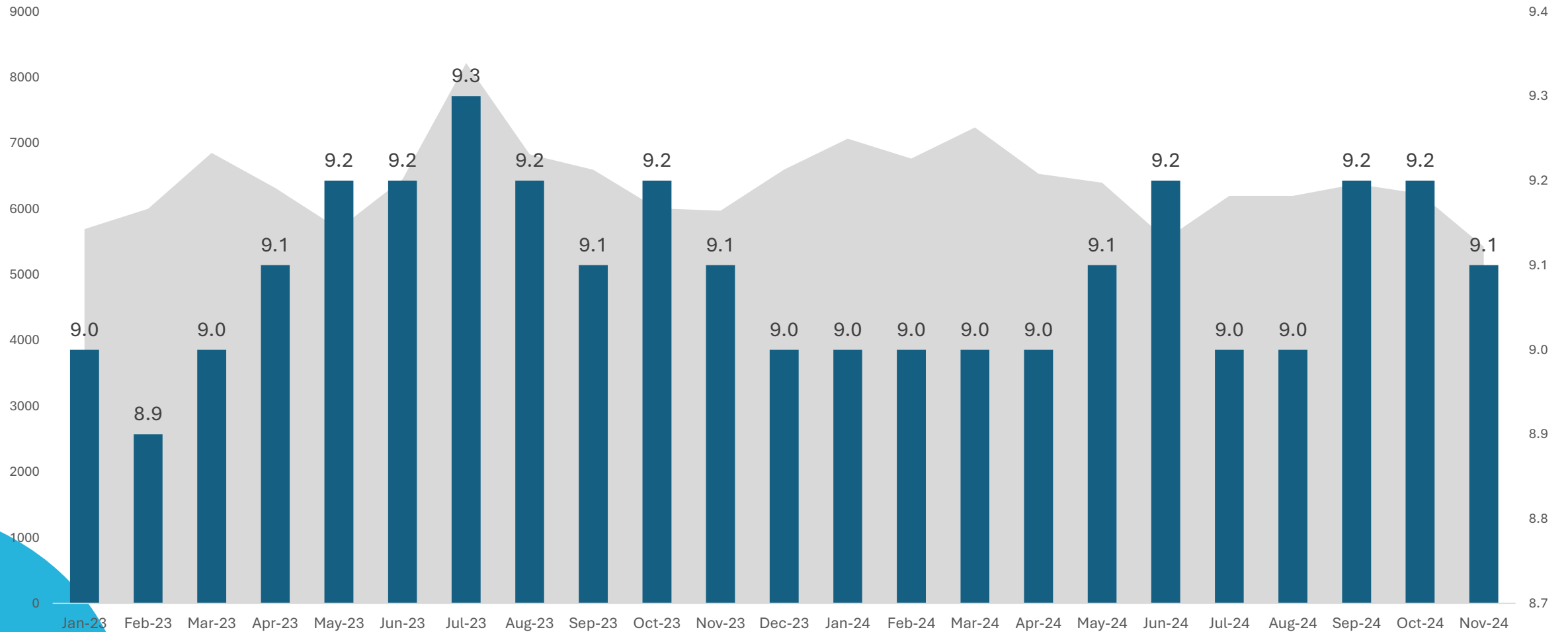




GUEST EXPERIENCE INDEX (GEI)

Reviews and Ratings

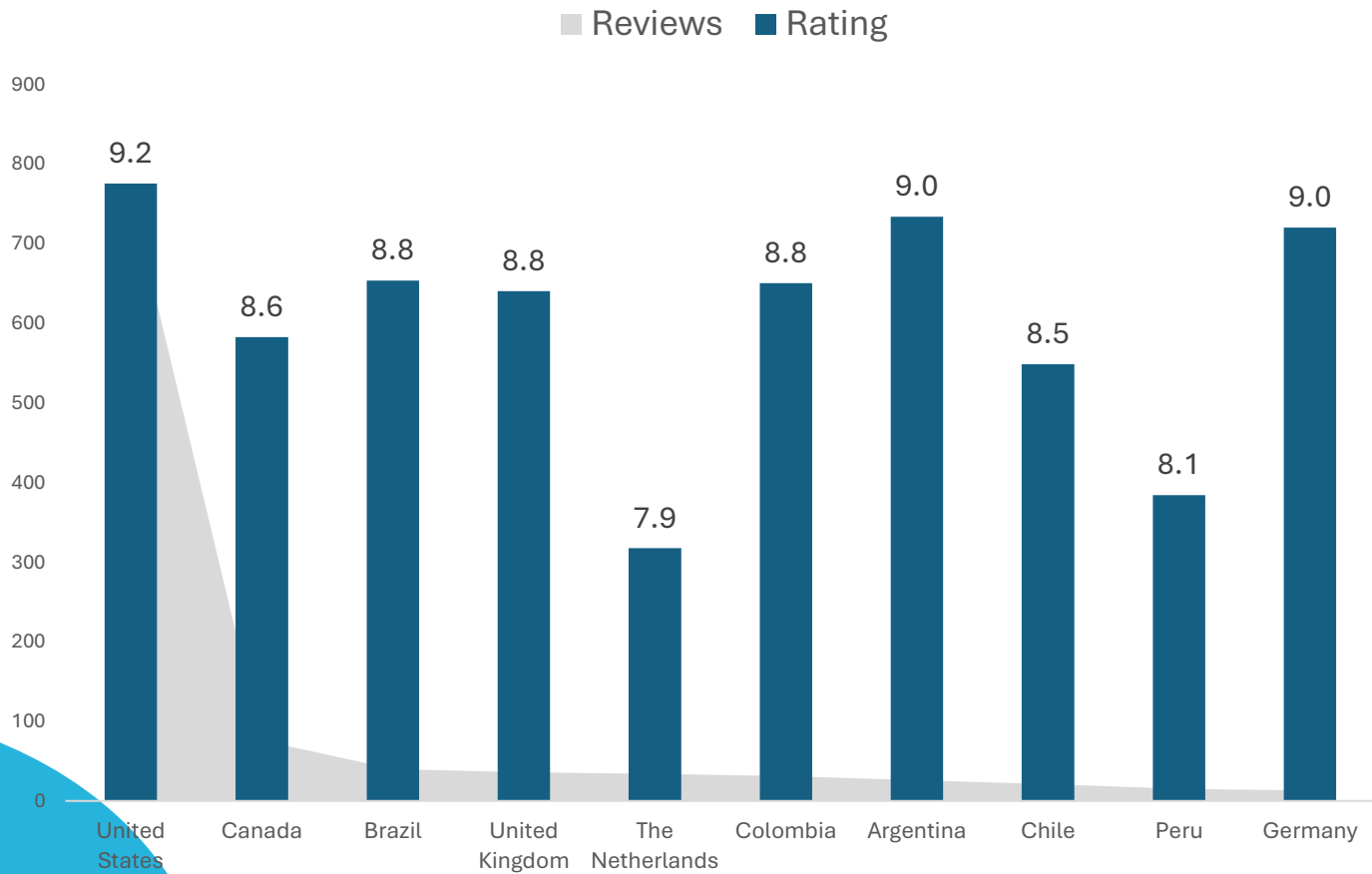
■ Reviews ■ Rating





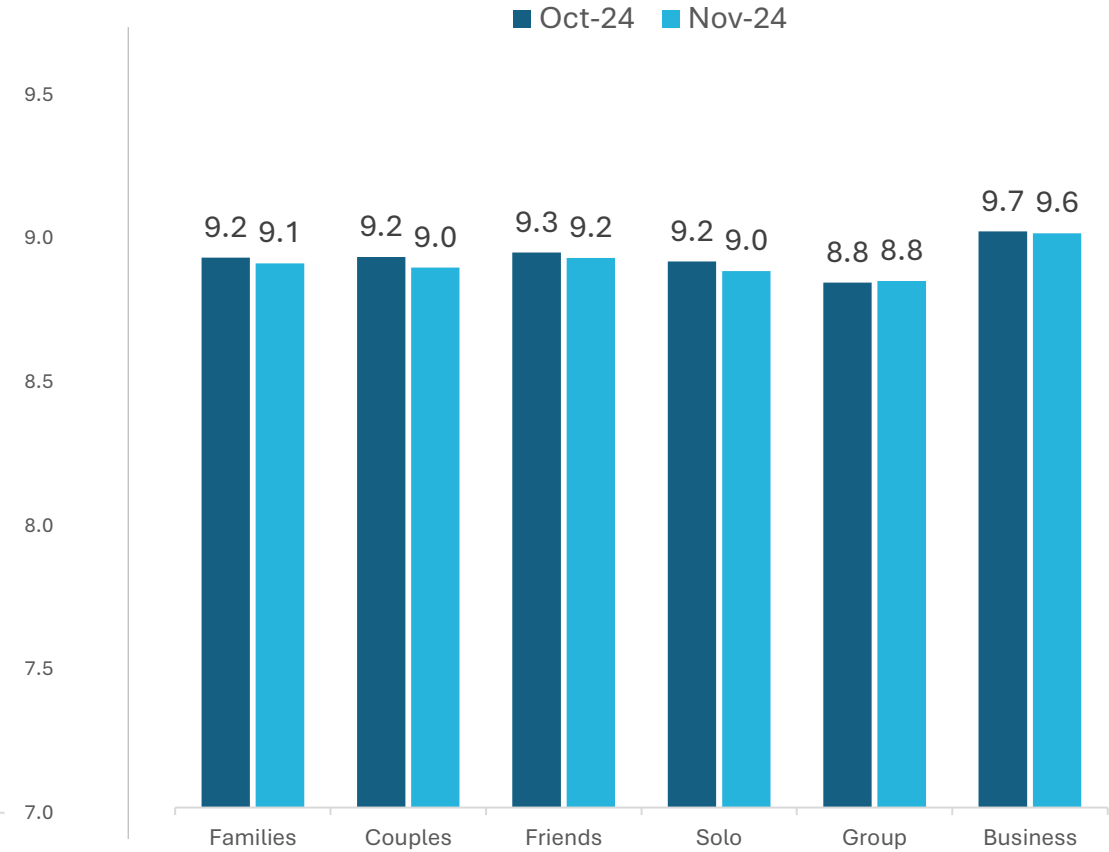
GEI NOVEMBER 2024

MARKETS



TRAVEL PARTY

Compared to Previous Month



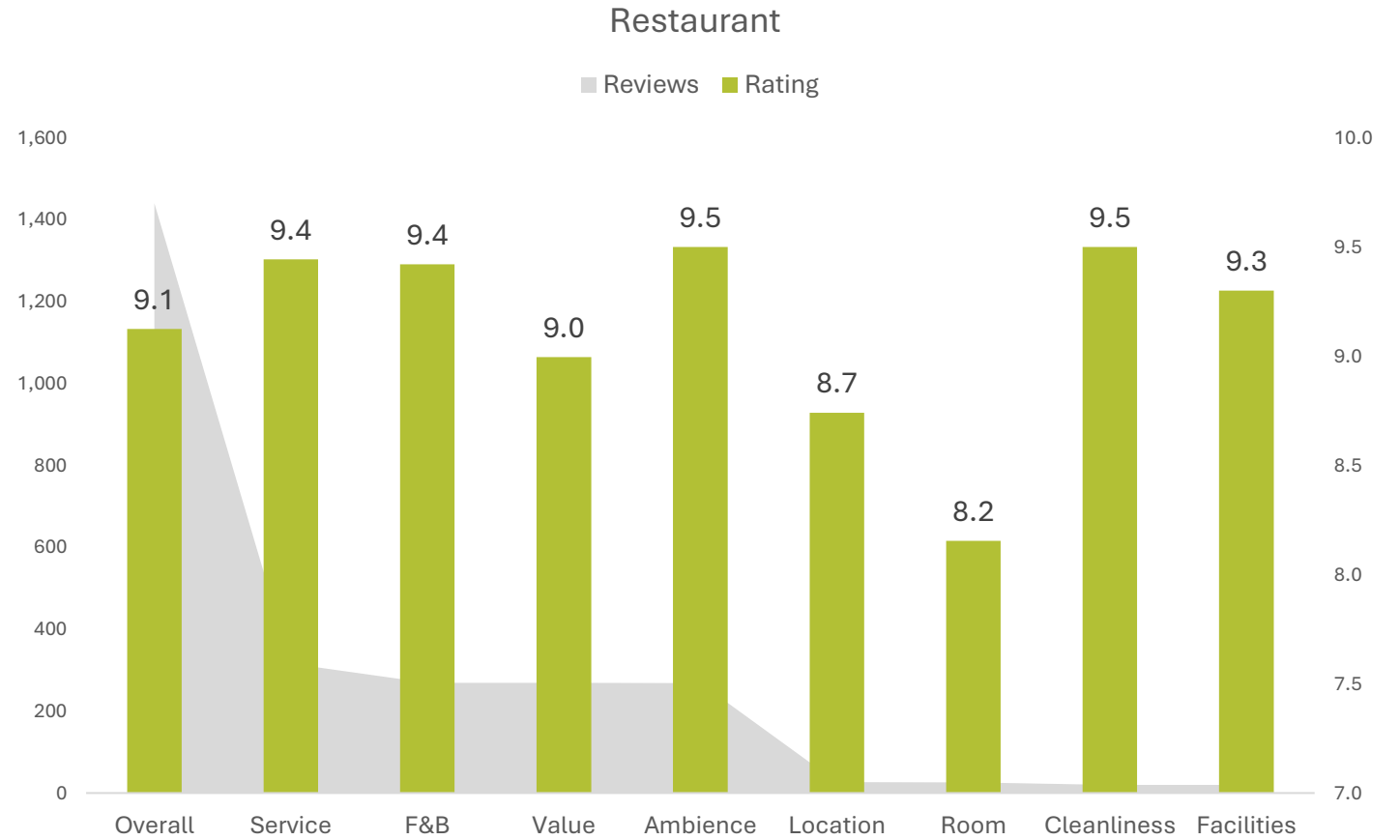


GEI NOVEMBER 2024





RESTAURANT GEI NOVEMBER 2024





VACATIONS RENTALS

 **Transparent**
an OTA INSIGHT company

INTRODUCTION

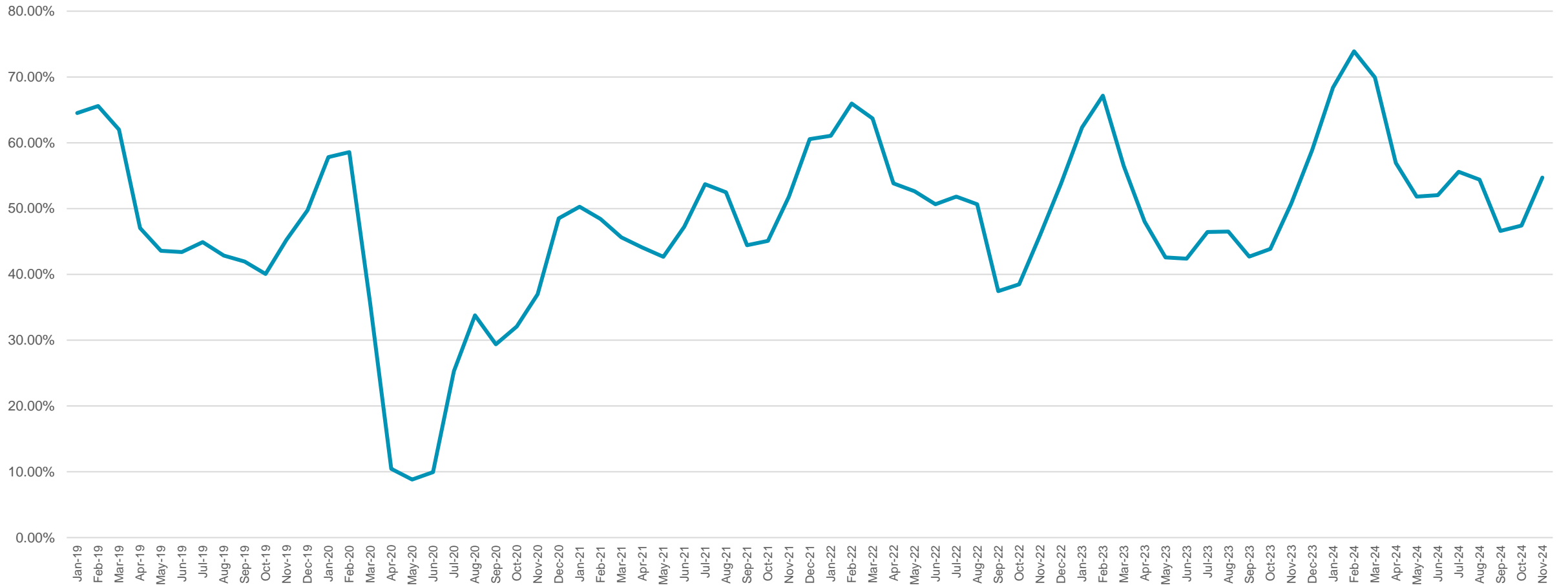
- ▶ In 2023, A.T.A. started working with Lighthouse, formerly Transparent Insights. Lighthouse tracks short-term rentals at the property level through their dashboard.
- ▶ With Lighthouse, A.T.A. is able to do the following:
 - Measure the economic impact of short-term rental, track (ADR) and occupancy and analyse the booking window.
 - The above data points are also forward-looking making it possible to make demand and revenue predictions based on the current status of property calendars and advertised rates.
 - Track visitors' origin and accommodation size.
 - The dashboard also provides the ability to make a direct comparison with similar, contrasting, or competing markets to compare data on occupancy rates, ADR, and booking window.



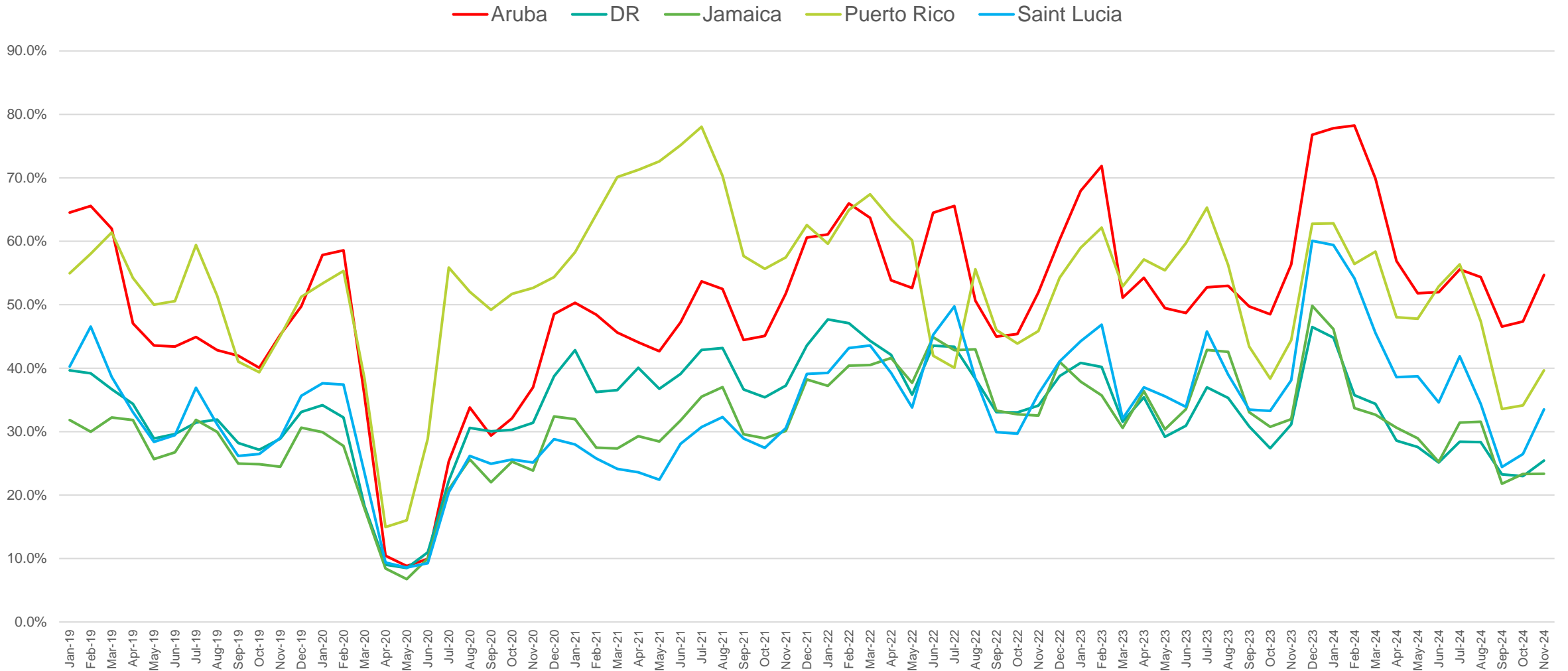
OCCUPANCY

NOV 2023 Occupancy: 50.8% | NOV 2024 Occupancy: 54.7%

Occupancy



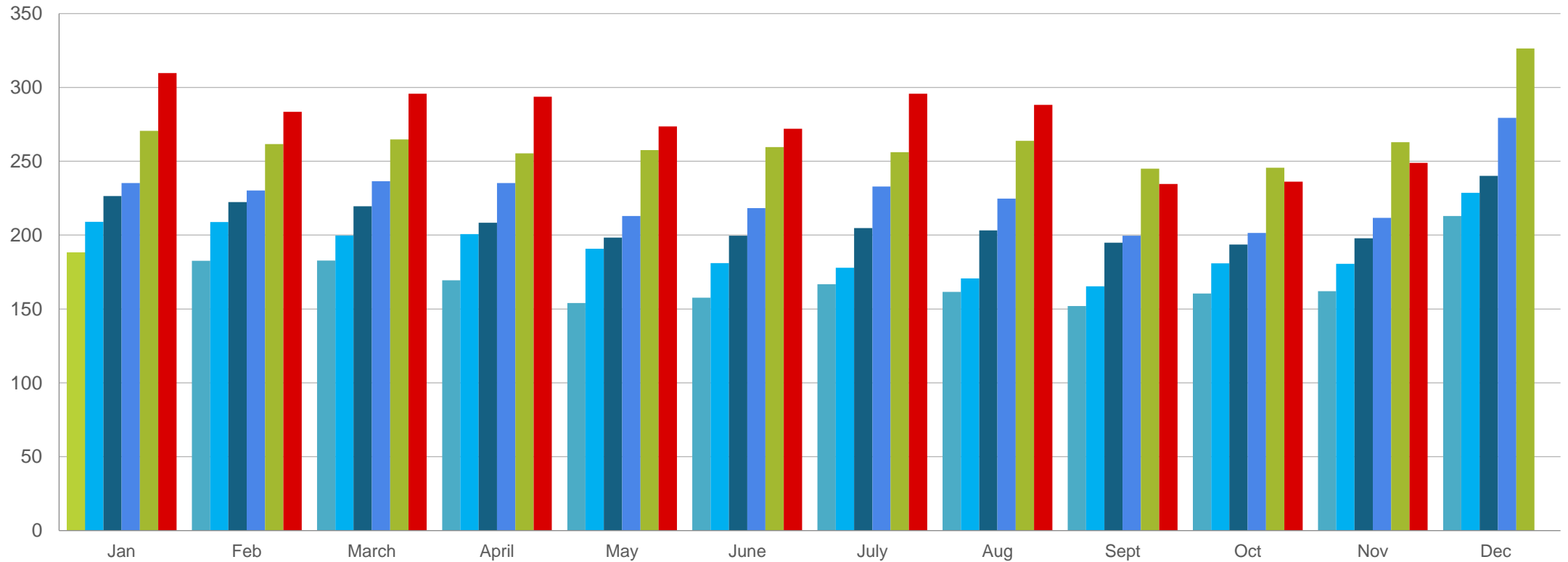
OCCUPANCY BENCHMARK



ADR

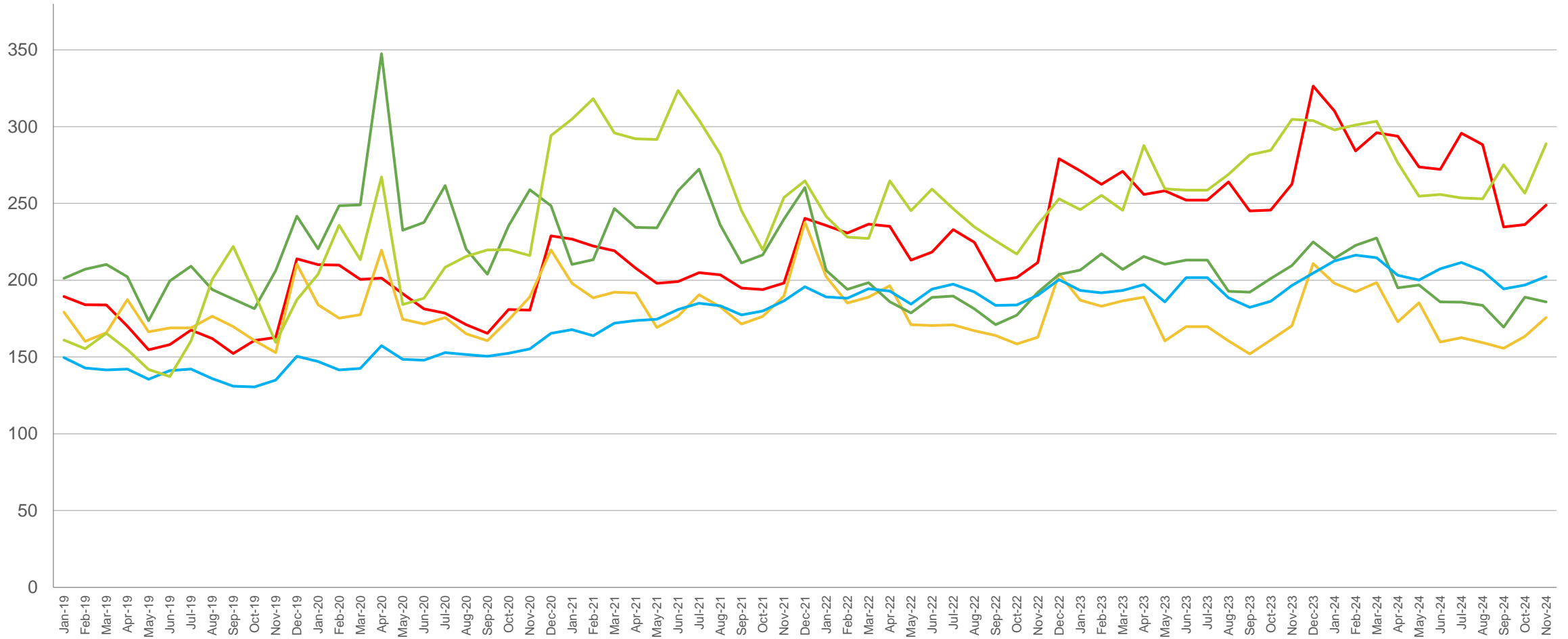
NOV 2023 ADR: \$263 | NOV 2024 ADR: \$249

■ 2019 ■ 2020 ■ 2021 ■ 2022 ■ 2023 ■ 2024



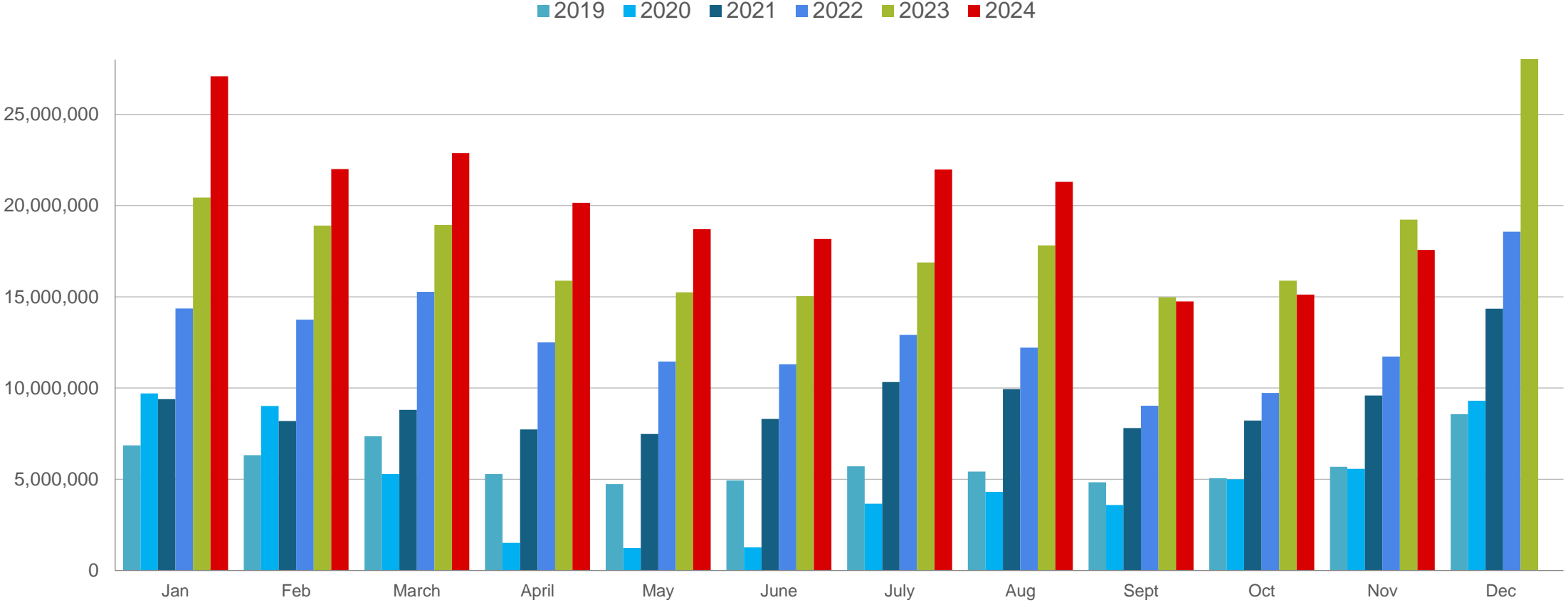
ADR BENCHMARK

— Aruba — DR — Jamaica — Puerto Rico — Saint Lucia



REVENUE

Total Revenue YTD NOV 2023: USD\$ 189,249,383 | Total Revenue YTD NOV 2024: USD\$ 219,713,444
NOV 2023: USD\$ 19,227,741 | NOV 2024 USD\$17,568,927





T I D B I T S

Visa Cardholders' Spending in Aruba

2024 – Q3 REPORT

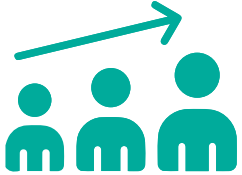


Aruba Tourism
Authority

A Goedgedrag
@ArtMando_multimed

Mastercard

Average Spending Q3 2024:



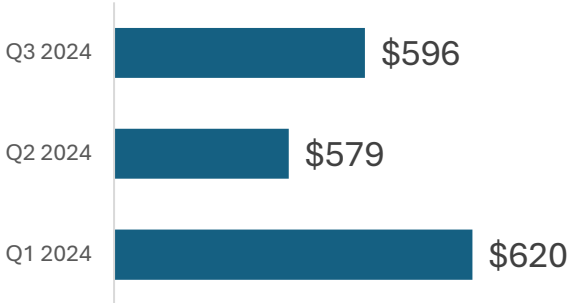
\$596

The average length of days of Card use:

3.7



Quarterly Overview

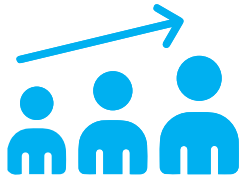


Average Mastercard Spend by Country

	Q1 2024	Q2 2024	Q3 2024
USA	\$685	\$610	\$625
Canada	\$591	\$520	\$601
Colombia	\$307	\$290	\$299
Argentina	\$326	\$361	\$462
Brazil	\$589	\$465	\$658
Chile	\$706	\$653	\$723
Netherlands	\$445	\$463	\$515
Germany	\$228	\$469	\$551
UK	\$275	\$394	\$498
Italy	\$310	\$352	\$384

Visa Credit Card

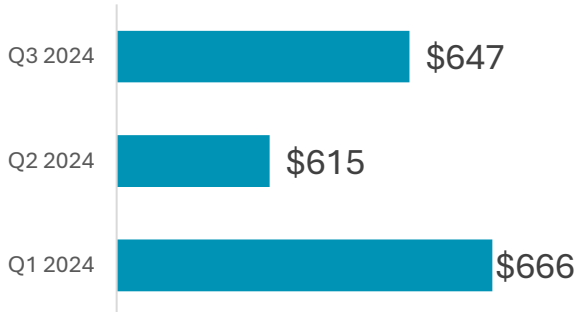
Average Spending Q3 2024:



\$647



Quarterly Overview



Average Visa Credit Card Spend by Country

	Q1 2024	Q2 2024	Q3 2024
USA	\$695	\$630	\$654
Canada	\$782	\$613	\$717
Colombia	\$362	\$322	\$363
Argentina	\$333	\$490	\$473
Brazil	\$580	\$665	\$771
Chile	\$792	\$378	\$765
Netherlands	\$733	\$668	\$725
Germany	\$247	\$378	\$659
UK	\$275	\$428	\$659
Italy	\$403	\$395	\$495

Metrics Definition & Scope

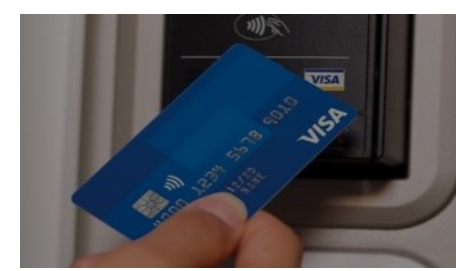
METHODOLOGICAL OVERVIEW

Data scope definition

- The Visa Destination Insights reports **sales volume for international Visa Cardholders visiting Aruba**.
- The data is sourced from VisaNet which contains **all transactions conducted using Visa-branded cards and settled through Visa's network “physically” present in Aruba**. Visa Destination Insights data is empirical, based on verified transaction data from VisaNet. It includes all Visa credit, debit, prepaid, commercial and small business transactions, as well as ATM cash transactions processed through Visa’s PLUS ATM Network on Aruba.
- Data are selected with **the following criteria**:
 - ✓ The Visa card was issued by a **foreign bank**.
 - ✓ The transaction was conducted **in Aruba during Q3 2024**.
 - ✓ The transaction was **conducted face-to-face** not through the Internet or as a telephone transaction. *Online booking* of accommodations, travel packages and attractions are not included in the data.
 - ✓ The transaction **excluded the following merchant categories**: *Direct Marketing. Catalog Marketing. Telemarketing. Airlines. Schools. colleges and universities.*
- Any cardholder whose purchase history indicates that they are a **long-term resident** rather than a tourist will have all their transactions excluded (based on consecutive spending on the last 3 months and/or in specific categories such as electrical, phone, water, self storage or insurance...).
- No individual cardholder or merchant data is ever displayed or analyzed.

Metrics Definition & Scope

METHODOLOGICAL OVERVIEW



Metrics Definition

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

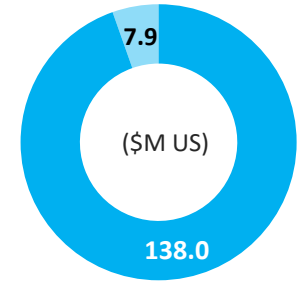
Spending Trends

OVERALL SPENDING & Y/Y EVOLUTIONS

<i>Sales transactions</i>	# of Issuer Countries	Total Spend Amount	Y/Y Growth	Average Ticket / transaction	Spend / Cardholder
Q3 2024	126	\$ 145 927 627	↑ 13.1%	\$ 109	\$ 647

Spend by Card Type

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



Q3 2024 – 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	217 254	\$138 005 930	\$ 635	1 297 344	\$ 106	16.7%	13.0%	-3.2%	18.1%	-4.3%
Business	8 328	\$ 7 921 696	\$ 951	44 572	\$ 178	12.8%	14.3%	1.3%	15.1%	-0.7%
Total	225 582	\$145 927 627	\$ 647	1 341 916	\$ 109	16.6%	13.1%	-3.0%	18.0%	-4.2%

Cash withdrawal

\$ 13 606 324

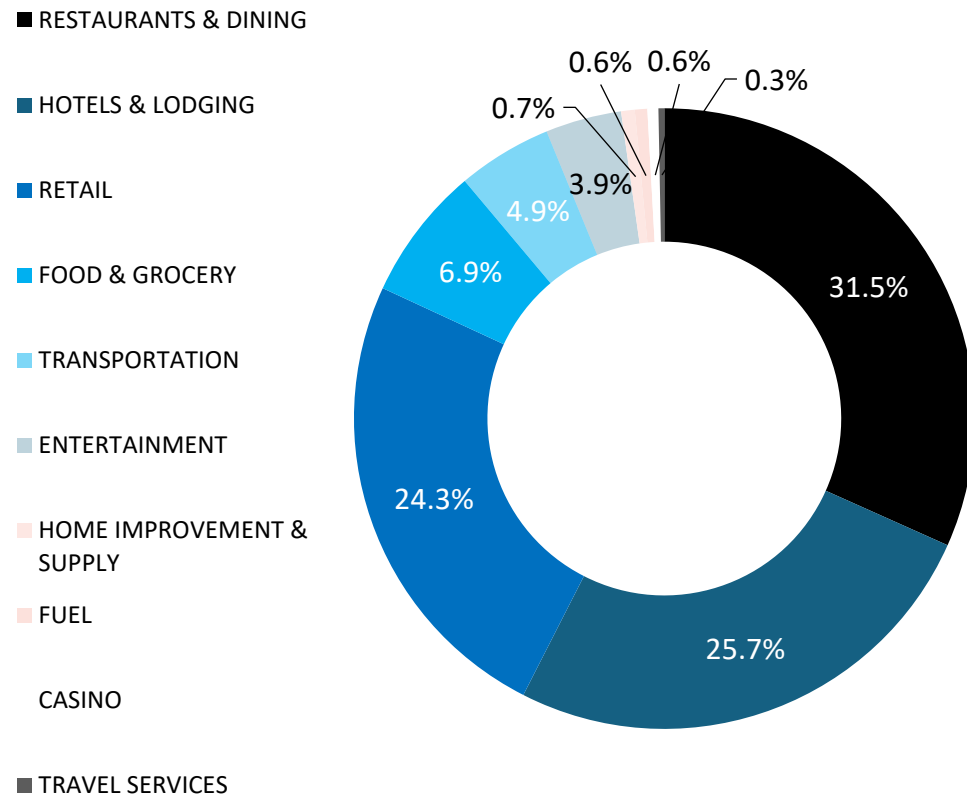


During Q3 2024, **225 582 VISA cardholders** from **126 issuer countries** have spent **US\$ 146 millions** in Aruba, generating a **Y/Y growth of 13.1%** in total sales, supported by an **increase in cardholder count (17%)** and **transactions count (18%)**. **US\$ 13.6 Million cash was withdrawn**. However, the spend per cardholder has decreased in comparison with Q3 2023 (-3.0%).

Visa Credit Card Top Spend Categories

(% OF TOTAL SPEND AMOUNT)

In Q3 2024, **Restaurants & Dining** remains **the highest spending category** in Aruba, experiencing a 16.3% increase compared to the same period last year. The most significant increases compared to Q3 2023 in spending are observed in **Food & Grocery** (21.6%), **Transportation** (20.1%), and **Fuel** (19.6%). Conversely, expenditures on **Travel services** (-40.6%) and **Casino** (-24.0%) have decreased in Y/Y comparison.



TOP 10 Categories	Spend Amount (US \$)	\$ Y/Y Growth	Cardholder Count	Spend per Cardholder
RESTAURANTS & DINING	\$ 41 735 306	16.3%	151 834	\$ 275
HOTELS & LODGING	\$ 33 994 613	17.7%	36 970	\$ 920
RETAIL	\$ 32 124 270	8.5%	128 547	\$ 250
FOOD & GROCERY	\$ 9 187 376	21.6%	76 626	\$ 20
TRANSPORTATION	\$ 6 491 703	20.1%	27 959	\$ 232
ENTERTAINMENT	\$ 5 219 106	12.3%	28 283	\$ 185
HOME IMPROVEMENT & SUPPLY	\$ 931 153	13.4%	1 650	\$ 564
FUEL	\$ 856 510	19.6%	21 668	\$ 40
CASINO	\$ 748 878	-24.0%	556	\$ 1,347
TRAVEL SERVICES	\$ 400 227	-40.6%	1 663	\$ 241

Focus on Accommodation

QUARTERLY TRENDS

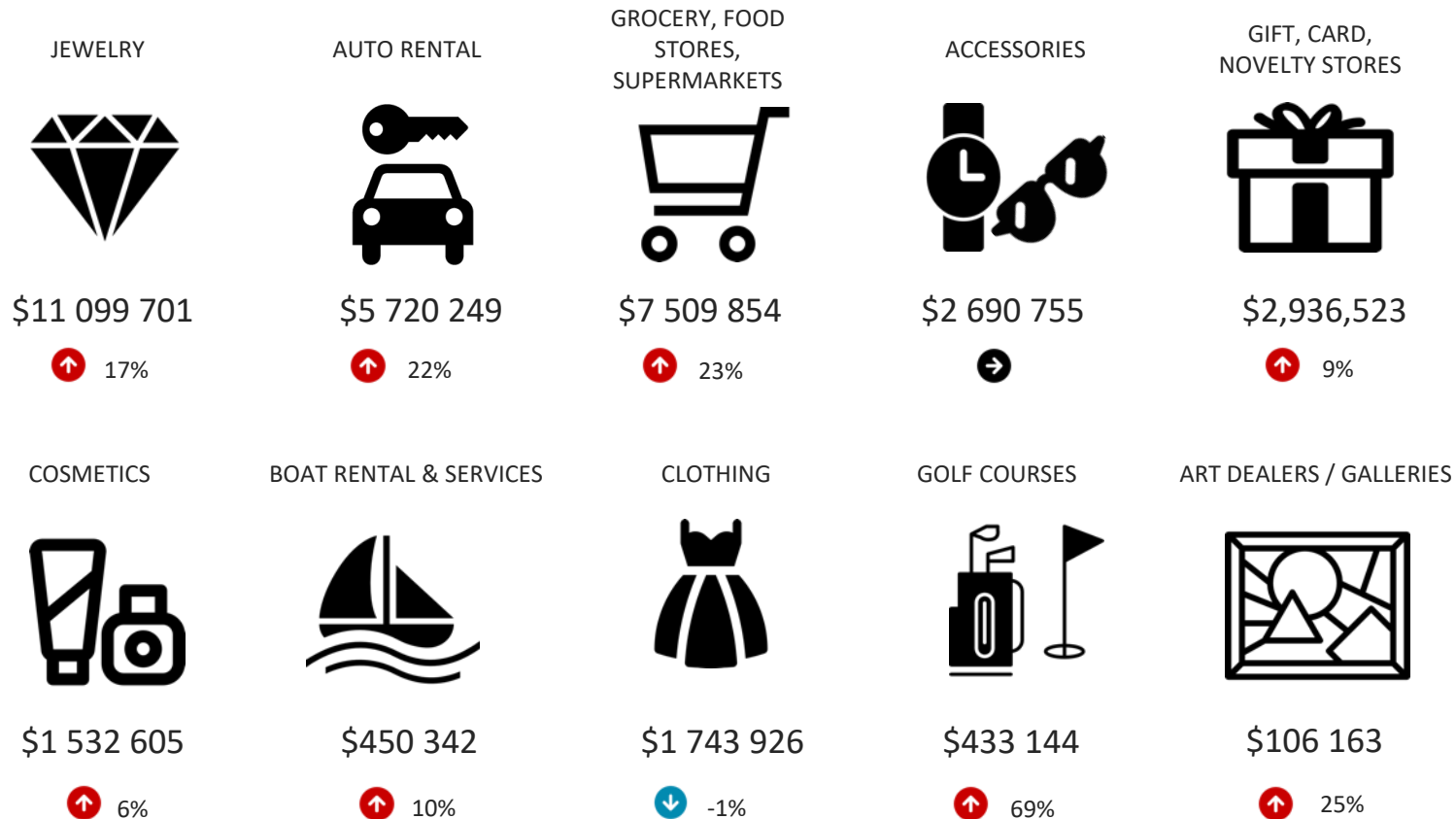
PERIOD	Spend Amount (US \$)	% of Total Spend	Cardholder Count	Spend per Cardholder
Q1-2023	\$30 988 585	23%	33 106	\$936
Q2-2023	\$26 203 363	22%	32 001	\$819
Q3-2023	\$28 894 682	18%	32 244	\$896
Q4-2023	\$35 009 755	23%	37 044	\$945
Q1-2024	\$ 43 973 404	25%	43 764	\$ 1 005
Q2-2024	\$ 35 233 357	26%	39 323	\$896
Q3-2024	\$ 33 994 613	26%	36 970	\$920

In Q3 2024, the Lodging sector experienced a **decrease in spending** and **cardholder count** and compared to the previous quarter. In contrast, there was a rise in spending per cardholder.

In comparison with Q3 2023, the spend amount has increased from 28.9 Million to 34 Million **as well as the cardholder count**, from 32 244 to 36 970.

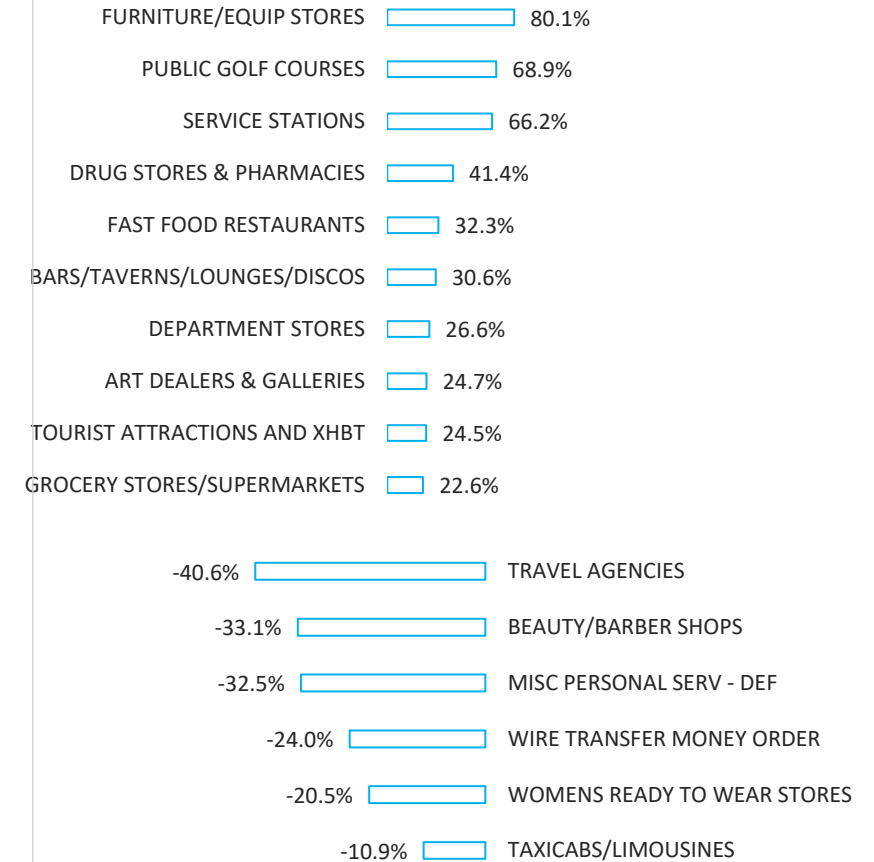
Focus on Sub-Categories

SPECIFIC MERCHANT CATEGORIES - ZOOM AMONG KEY CATEGORIES SELECTED BY ARUBA



Top Sub-Categories \$ Y/Y Growth

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





MASHA DANKI

Thank You

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

Or

Visit our website www.ata.aw

