

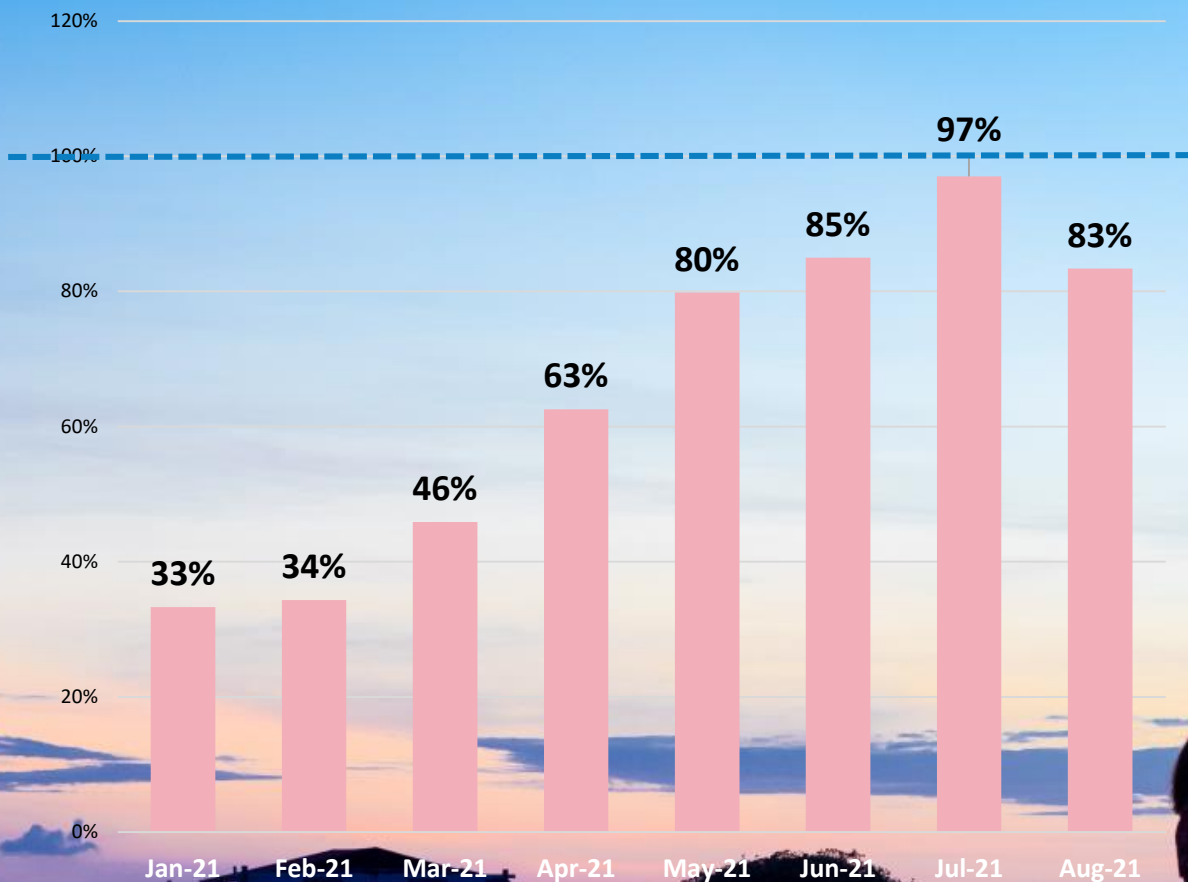


AUGUST 2021

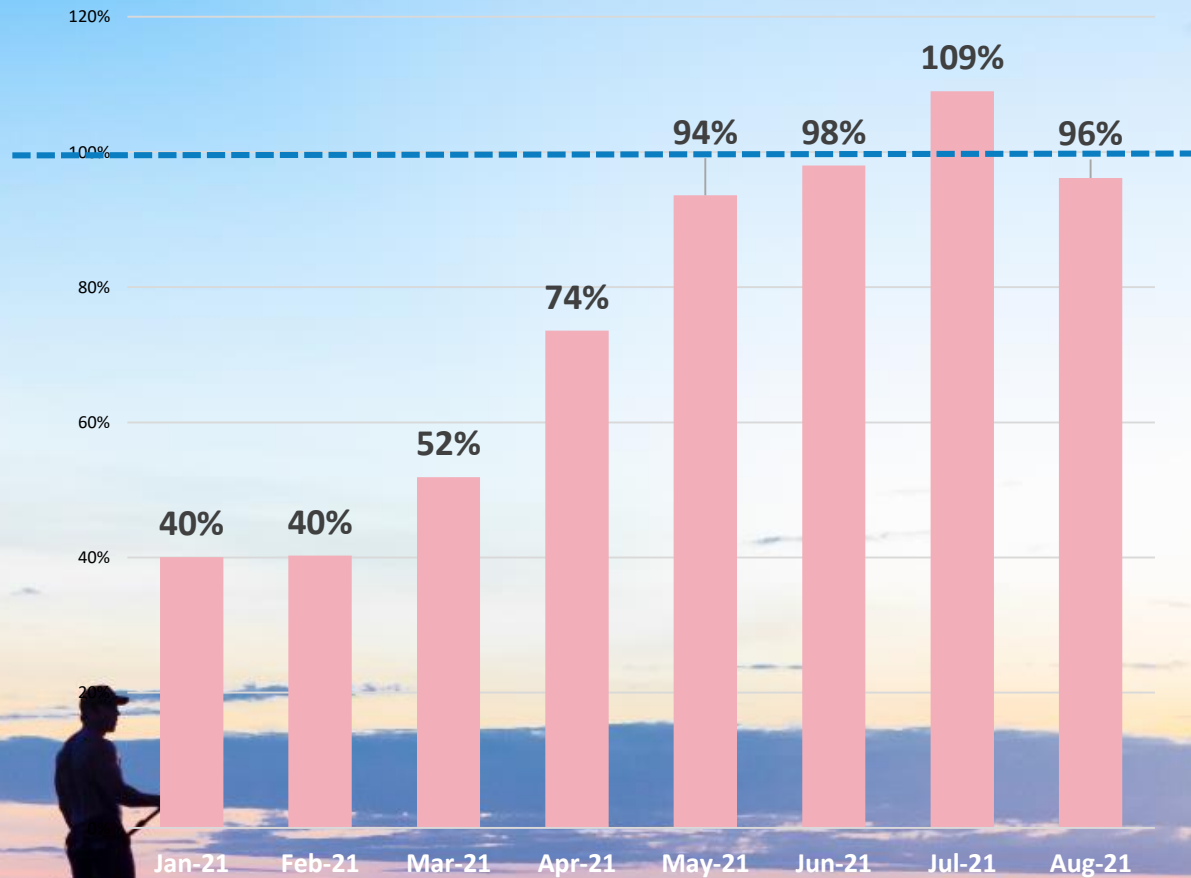


Aruba Tourism
Authority

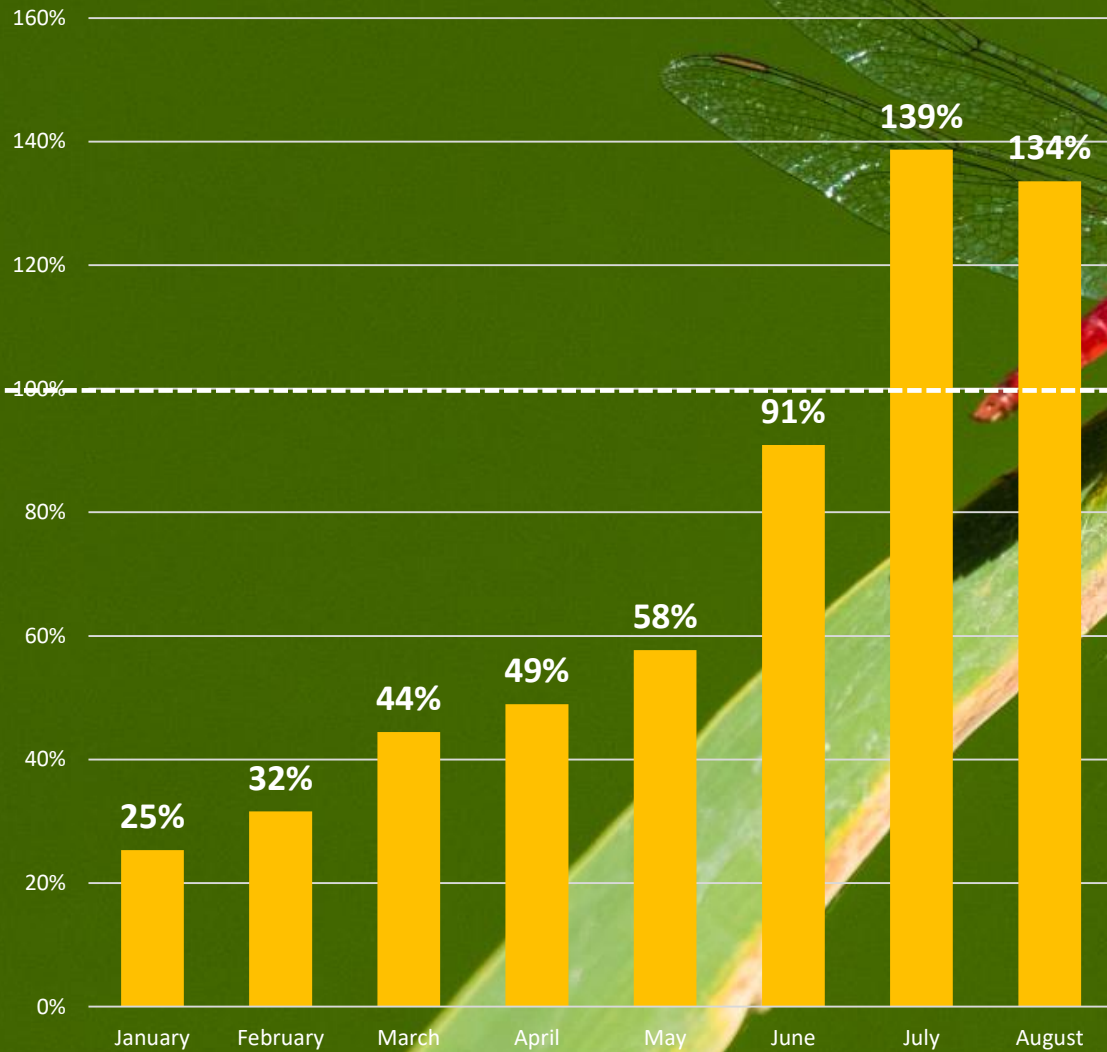
% RECOVERY TOTAL



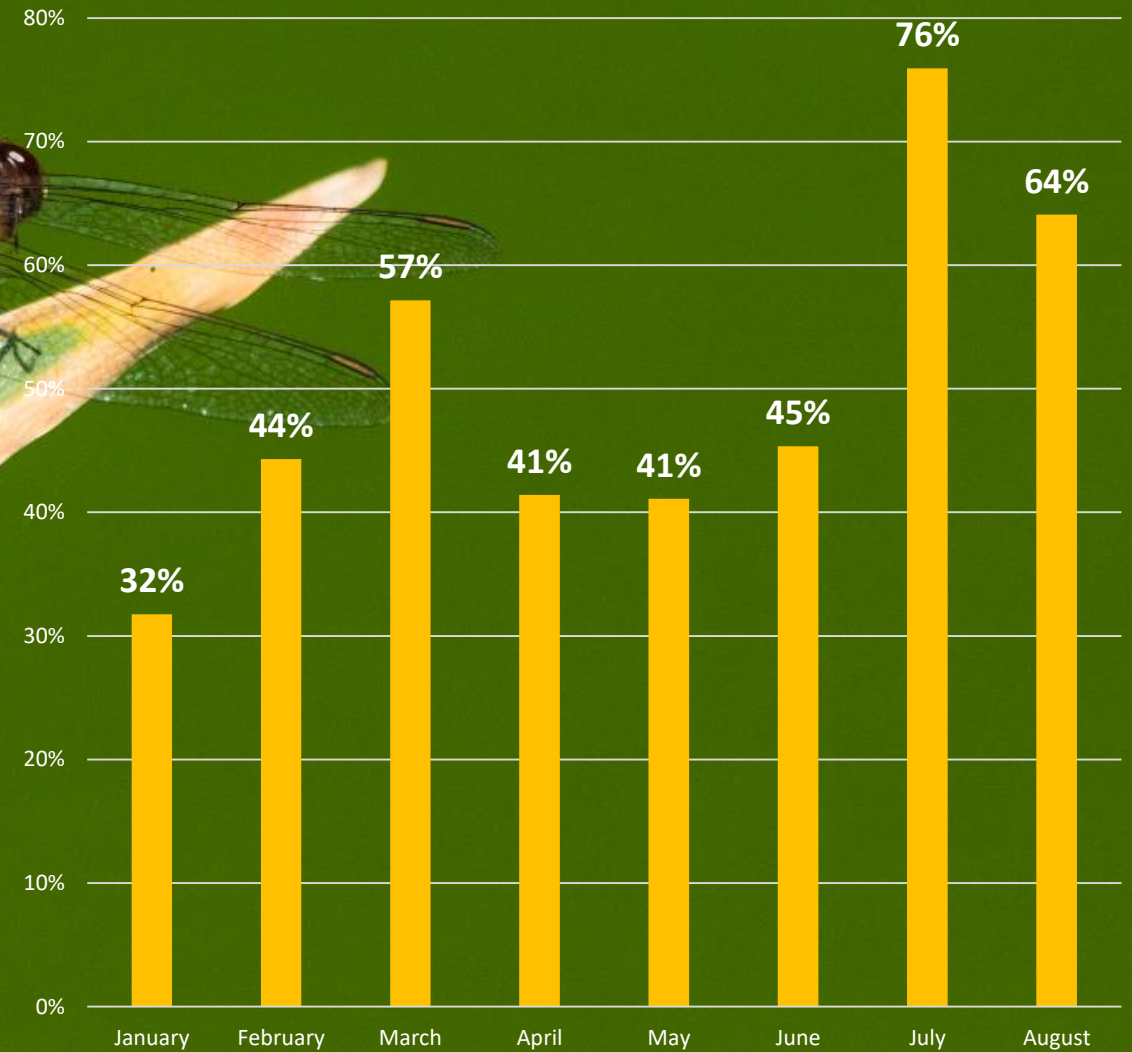
% RECOVERY USA



% RECOVERY HOLLAND



% RECOVERY COLOMBIA



Note: Re-opening borders with LATAM market December 1, 2020

COMPARISON 2021 VERSUS 2020



SNAPSHOT YTD AUGUST 2021



HOW MANY
ARRIVALS?

506,795

95.6%



HOW MANY
CRUISE TOURISM?

20,861

-96%



HOW LONG
DID THEY STAY?

3,723,138

87.3%



WHAT DID
THEY SPEND?**
Central Bank Aruba
(Q1 2021)

Avg. 554.5 min

-46%

**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?

HIGH RISE



1,105,552

NIGHTS

72.1%

LOW RISE



287,566

NIGHTS

97.1%

TIMESHARE



1,341,924

NIGHTS

117.9%

OTHERS



988,096

NIGHTS

69.2%



ARRIVALS YTD AUGUST

506,795
ARRIVALS

95.6%
GROWTH

	2020	Growth		2021	% Growth
USA	200,450		244,085	444,535	121.8%
Canada	18,173	-16,209		1,964	-89.2%
NA	218,623		227,876	446,499	104.2%
Venezuela	1,178	-638		540	-54.2%
Colombia	3,802	7,382		11,184	194.2%
Brazil	1,631	-842		789	-51.6%
Argentina	3,530	-2,642		888	-74.8%
Chile	1,195	-722		473	-60.4%
Ecuador	114	442		556	387.7%
Peru	762	-205		557	-26.9%
Paraguay	331	20		351	6.0%
Uruguay	281	-50		231	-17.8%
Mexico	201	416		617	207.0%
Others	1,677	373		2,050	22.2%
SA	14,702	3,534		18,236	24.0%
Netherlands	11,298	8,600		19,898	76.1%
UK	803	224		1,027	27.9%
Germany	1,359	235		1,594	17.3%
Italy	1,263	-573		690	-45.4%
Sweden	1,524	-1,348		176	-88.5%
Belgium	484	172		656	35.5%
Ireland	47	3		50	6.4%
Others	3,355	1,120		4,475	33.4%
Europe	20,133	8,433		28,566	41.9%
ROW	5,635	7,859		13,494	139.5%
Total	259,093		247,702	506,795	95.6%
W/O Ven.	257,915		248,300	506,255	96.3%

Marketshare 2020	Marketshare 2021
77.4%	87.7%
7.0%	0.4%
84.4%	88.1%
0.5%	0.1%
1.5%	2.2%
0.6%	0.2%
1.4%	0.2%
0.5%	0.1%
0.0%	0.1%
0.3%	0.1%
0.1%	0.1%
0.1%	0.0%
0.1%	0.1%
0.6%	0.4%
5.7%	3.6%
4.4%	3.9%
0.3%	0.2%
0.5%	0.3%
0.5%	0.1%
0.6%	0.0%
0.2%	0.1%
0.0%	0.0%
1.3%	0.9%
7.8%	5.6%
2.2%	2.7%



ARRIVALS USA YTD AUGUST

444,535
ARRIVALS

121.8%
GROWTH

	2020	Growth	2021	% Growth
New York	45,457	56,321	101,778	123.9%
Massachusetts	25,358	27,637	52,995	109.0%
New Jersey	21,264	40,921	62,185	192.4%
Pennsylvania	11,803	12,568	24,371	106.5%
Illinois	6,546	3,506	10,052	53.6%
Connecticut	6,644	9,641	16,285	145.1%
Florida	8,066	13,813	21,879	171.2%
Ohio	5,449	4,873	10,322	89.4%
Maryland	5,428	9,599	15,027	176.8%
Michigan	5,016	2,206	7,222	44.0%
Virginia	4,331	6,288	10,619	145.2%
Georgia	3,349	9,814	13,163	293.0%
North Carolina	4,094	7,224	11,318	176.5%
Texas	4,312	9,764	14,076	226.4%
California	2,909	6,302	9,211	216.6%
Other	40,424	23,608	64,032	58.4%
Total	200,450	244,085	444,535	121.8%

Marketshare 2020	Marketshare 2021
22.7%	22.9%
12.7%	11.9%
10.6%	14.0%
5.9%	5.5%
3.3%	2.3%
3.3%	3.7%
4.0%	4.9%
2.7%	2.3%
2.7%	3.4%
2.5%	1.6%
2.2%	2.4%
1.7%	3.0%
2.0%	2.5%
2.2%	3.2%
1.5%	2.1%
20.2%	14.4%



NIGHTS YTD AUGUST

3,723,138

ARRIVALS

87.3%

GROWTH

	2020	Growth		2021	% Growth
USA	1,434,535		1,632,636	3,067,171	113.8%
Canada	165,063	-133,983		31,080	-81.2%
NA	1,599,598		1,498,653	3,098,251	93.7%
Venezuela	12,455	-5,485		6,970	-44.0%
Colombia	27,550		66,668	94,218	242.0%
Brazil	10,293	-2,975		7,318	-28.9%
Argentina	34,703	-24,072		10,631	-69.4%
Chile	9,191	-4,344		4,847	-47.3%
Ecuador	941		5,064	6,005	538.2%
Peru	5,264		219	5,483	4.2%
Paraguay	2,455		66	2,521	2.7%
Uruguay	2,198		29	2,227	1.3%
Mexico	1,304		4,111	5,415	315.3%
Others	10,144		7,012	17,156	69.1%
SA	116,498		46,293	162,791	39.7%
Netherlands	148,581		106,160	254,741	71.4%
UK	8,226		5,568	13,794	67.7%
Germany	13,993		6,732	20,725	48.1%
Italy	11,709	-549		11,160	-4.7%
Sweden	18,714	-16,284		2,430	-87.0%
Belgium	5,675		2,566	8,241	45.2%
Ireland	640		154	794	24.1%
Others	31,920		29,347	61,267	91.9%
Europe	239,458		133,694	373,152	55.8%
ROW	32,545		56,399	88,944	173.3%
Total	1,988,099		1,735,039	3,723,138	87.3%

	ALOS 2020	ALOS 2021
USA	7.2	6.9
Canada	9.1	15.8
NA	7.3	6.9
Venezuela	10.6	12.9
Colombia	7.2	8.4
Brazil	6.3	9.3
Argentina	9.8	12.0
Chile	7.7	10.2
Ecuador	8.3	10.8
Peru	6.9	9.8
Paraguay	7.4	7.2
Uruguay	7.8	9.6
Mexico	6.5	8.8
Others	6.0	8.4
SA	7.9	8.9
Netherlands	13.2	12.8
UK	10.2	13.4
Germany	10.3	13.0
Italy	9.3	16.2
Sweden	12.3	13.8
Belgium	11.7	12.6
Ireland	13.6	15.9
Others	9.5	13.7
Europe	11.9	13.1
ROW	5.8	6.6
Total	7.7	7.3



ACCOMMODATIONS YTD AUGUST

506,795
ARRIVALS

95.6%
GROWTH

ARRIVALS BY ACCOMMODATION

	2020	Growth	2021	% Growth
High Rise	105,435	84,154	189,589	79.8%
Low Rise	20,602	24,284	44,886	117.9%
Timeshare	68,808	96,204	165,012	139.8%
Others	64,248	43,060	107,308	67.0%
Total	259,093	247,702	506,795	95.6%

Marketshare 2020	Marketshare 2021
40.7%	37.4%
8.0%	8.9%
26.6%	32.6%
24.8%	21.2%

NIGHTS BY ACCOMMODATION

	2020	Growth	2021	% Growth
High Rise	642,537	463,015	1,105,552	72.1%
Low Rise	145,888	141,678	287,566	97.1%
Timeshare	615,834	726,090	1,341,924	117.9%
Others	583,840	404,256	988,096	69.2%
Total	1,988,099	1,735,039	3,723,138	87.3%

Marketshare 2020	Marketshare 2021
35.3%	29.7%
7.3%	7.7%
31.0%	36.0%
29.4%	26.5%



VISITORS BY AGE YTD AUGUST

506,795
ARRIVALS

95.6%
GROWTH

LARGEST ABSOLUTE INCREASE: **0-11** years old

	2020	Growth		2021	% Growth
0 - 11	16,461		63,769	80,230	387.4%
12-19	15,720		30,348	46,068	193.1%
20 - 29	30,071		51,245	81,316	170.4%
30 - 39	37,326		53,948	91,274	144.5%
40 - 49	40,128		47,395	87,523	118.1%
50 - 59	53,737		34,868	88,605	64.9%
60 - 69	43,280		9,162	52,442	21.2%
70 +	22,332		1,979	24,311	8.9%
Not Stated	38	-31		7	-81.6%
Total	259,093		247,702	506,795	95.6%



GENERATIONS YTD AUGUST

506,795
VISITORS

95.6%
GROWTH

	2021	% Share	2020	% Share	% Growth
Gen Z	94,540	18.7%	37,242	14.4%	153.9%
Millennials	142,937	28.2%	55,012	21.2%	159.8%
Gen X	134,944	26.6%	62,976	24.3%	114.3%
Baby Boomers	116,959	23.1%	87,614	33.8%	33.5%
Silent Generations	17,408	3.4%	16,211	6.3%	7.4%
Age not specified	7	0.0%	38	0.0%	-81.6%
Total	506,795	100.0%	259,093	100.0%	95.6%



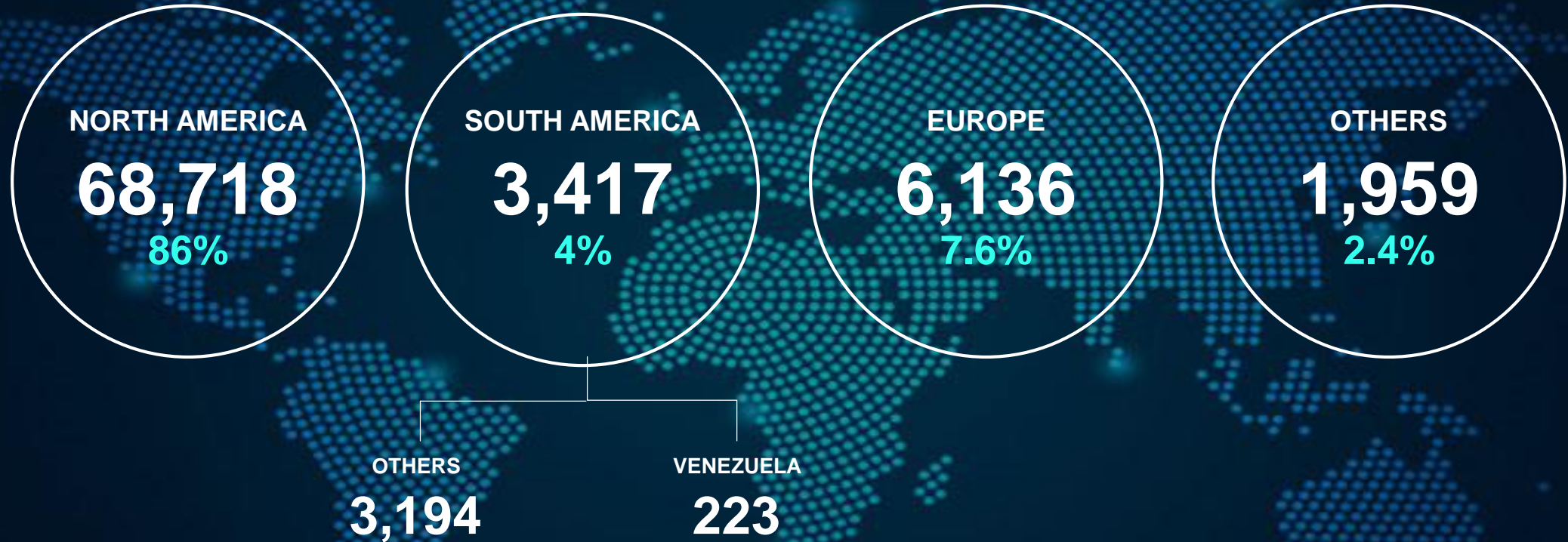
CARRIERS YTD AUGUST

506,795
VISITORS

95.6%
GROWTH

	2020	Growth		2021	% Growth	Marketshare 2020	Marketshare 2021
JETBLUE	53,904		94,580	148,484	175.5%	20.8%	29.3%
AMERICAN AIRLINES	52,824		74,122	126,946	140.3%	20.4%	25.0%
UNITED AIRLINES	40,467		43,984	84,451	108.7%	15.6%	16.7%
DELTA AIRLINE	34,679		24,430	59,109	70.4%	13.4%	11.7%
SOUTH WEST	18,645		7,411	26,056	39.7%	7.2%	5.1%
KLM	9,612		11,520	21,132	119.9%	3.7%	4.2%
AVIANCA	6,987	-129		6,858	-1.8%	2.7%	1.4%
AIR CANADA	6,144	-5,731		413	-93.3%	2.4%	0.1%
COPA AIRLINE	5,539	-149		5,390	-2.7%	2.1%	1.1%
SUNWING AIRLINES	4,680	-4,680		0	-100.0%	1.8%	0.0%
WESTJET AIRLINES	4,635	-4,506		129	-97.2%	1.8%	0.0%
ARUBA AIRLINES	2,900	-2,900		0	-100.0%	1.1%	0.0%
ARKEFLIGHT	2,791		2,899	5,690	103.9%	1.1%	1.1%
SPIRIT AIRLINES	2,342		2,018	4,360	86.2%	0.9%	0.9%
DIVI DIVI AIR	2,116		3,862	5,978	182.5%	0.8%	1.2%
WINAIR	1,664	-1,022		642	-61.4%	0.6%	0.1%
CHARTER	1,647	-1,234		413	-74.9%	0.6%	0.1%
SUN COUNTRY	1,389	-481		908	-34.6%	0.5%	0.2%
TUI	1,291	-506		785	-39.2%	0.5%	0.2%
THOMAS COOK	1,218	-1,218		0	-100.0%	0.5%	0.0%
EZ AIRLINE	968		311	1,279	32.1%	0.4%	0.3%
SURINAM AIRWAYS	900	-286		614	-31.8%	0.3%	0.1%
PRIVATE	831		201	1,032	24.2%	0.3%	0.2%
AERO REPUBLICA/ WINGO	666		4,331	4,997	650.3%	0.3%	1.0%
AIR CENTURY	141		117	258	83.0%	0.1%	0.1%
SKY HIGH AVIATION	100		140	240	140.0%	0.0%	0.0%
Others	13		618	631	4753.8%	0.0%	0.1%
Total	259,093		247,702	506,795	95.6%		

AUGUST RESULT 2021



TOTAL ARRIVALS
80,230

TOTAL ARRIVALS WITHOUT VENEZUELA
80,007



ARRIVALS AUGUST

80,230
ARRIVALS

360.6%
GROWTH

	2020	Growth	2021	% Growth
USA	15,342	52,903	68,245	344.8%
Canada	164	309	473	188.4%
NA	15,506	53,212	68,718	343.2%
Venezuela	8	215	223	2687.5%
Colombia	9	1,745	1,754	19388.9%
Brazil	1	346	347	34600.0%
Argentina	0	69	69	#DIV/0!
Chile	0	121	121	#DIV/0!
Ecuador	2	128	130	6400.0%
Peru	1	112	113	11200.0%
Paraguay	0	48	48	#DIV/0!
Uruguay	1	78	79	7800.0%
Mexico	1	83	84	8300.0%
Others	2	447	449	22350.0%
SA	25	3,392	3,417	13568.0%
Netherlands	725	3,686	4,411	508.4%
UK	100	111	211	111.0%
Germany	120	296	416	246.7%
Italy	73	85	158	116.4%
Sweden	12	9	21	75.0%
Belgium	27	96	123	355.6%
Ireland	10	7	17	70.0%
Others	316	463	779	146.5%
Europe	1,383	4,753	6,136	343.7%
ROW	506	1,453	1,959	287.2%
Total	17,420	62,810	80,230	360.6%
W/O Ven.	17,412	62,595	80,007	359.5%

Marketshare 2020	Marketshare 2021
88.1%	85.1%
0.9%	0.6%
89.0%	85.7%
0.0%	0.3%
0.1%	2.2%
0.0%	0.4%
0.0%	0.1%
0.0%	0.2%
0.0%	0.2%
0.0%	0.1%
0.0%	0.1%
0.0%	0.1%
0.0%	0.1%
0.0%	0.6%
0.1%	4.3%
4.2%	5.5%
0.6%	0.3%
0.7%	0.5%
0.4%	0.2%
0.1%	0.0%
0.2%	0.2%
0.1%	0.0%
1.8%	1.0%
7.9%	7.6%
2.9%	2.4%



ARRIVALS USA AUGUST

68,245
ARRIVALS

344.8%
GROWTH

	2020	Growth	2021	% Growth
New York	5,405	14,013	19,418	259.3%
Massachusetts	1,044	6,042	7,086	578.7%
New Jersey	2,804	8,942	11,746	318.9%
Pennsylvania	711	2,883	3,594	405.5%
Illinois	310	982	1,292	316.8%
Connecticut	511	1,758	2,269	344.0%
Florida	705	2,643	3,348	374.9%
Ohio	196	942	1,138	480.6%
Maryland	283	2,485	2,768	878.1%
Michigan	222	620	842	279.3%
Virginia	354	1,382	1,736	390.4%
Georgia	198	1,200	1,398	606.1%
North Carolina	263	1,313	1,576	499.2%
Texas	399	1,397	1,796	350.1%
California	388	1,157	1,545	298.2%
Other	1,549	5,144	6,693	332.1%
Total	15,342	52,903	68,245	344.8%

Marketshare 2020	Marketshare 2021
35.2%	28.5%
6.8%	10.4%
18.3%	17.2%
4.6%	5.3%
2.0%	1.9%
3.3%	3.3%
4.6%	4.9%
1.3%	1.7%
1.8%	4.1%
1.4%	1.2%
2.3%	2.5%
1.3%	2.0%
1.7%	2.3%
2.6%	2.6%
2.5%	2.3%
10.1%	9.8%

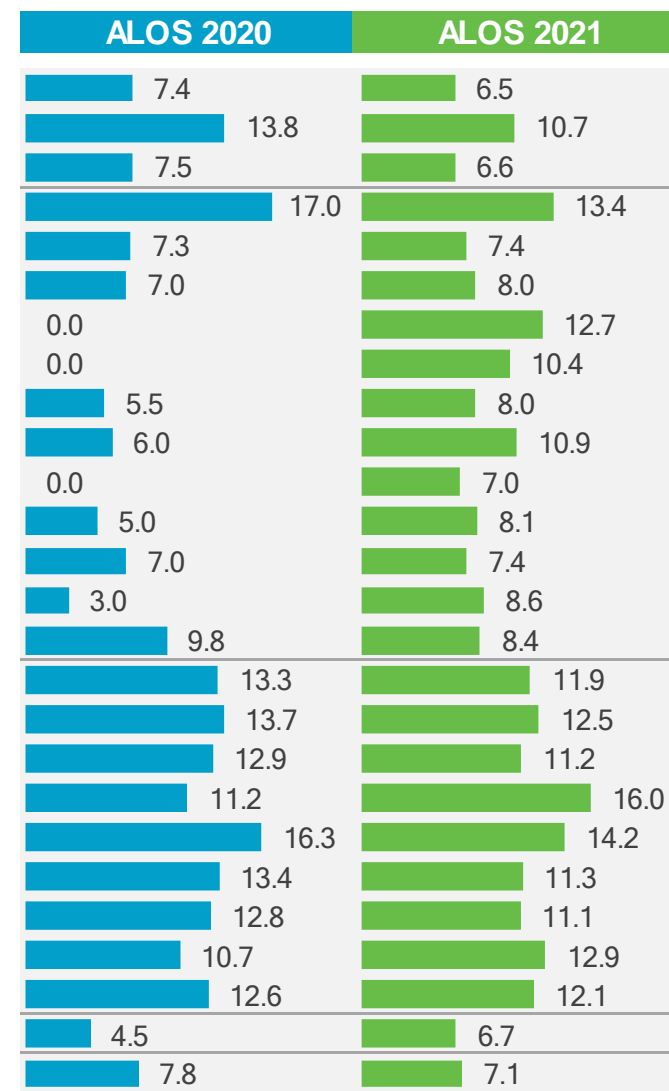


NIGHTS AUGUST

567,256
NIGHTS

317.1%
GROWTH

	2020	Growth	2021	% Growth
USA	113,749	332,758	446,507	292.5%
Canada	2,261	2,809	5,070	124.2%
NA	116,010	335,567	451,577	289.3%
Venezuela	136	2,853	2,989	2097.8%
Colombia	66	12,874	12,940	19506.1%
Brazil	7	2,780	2,787	39714.3%
Argentina	0	873	873	#DIV/0!
Chile	0	1,254	1,254	#DIV/0!
Ecuador	11	1,035	1,046	9409.1%
Peru	6	1,223	1,229	20383.3%
Paraguay	0	334	334	#DIV/0!
Uruguay	5	637	642	12740.0%
Mexico	7	616	623	8800.0%
Others	6	3,855	3,861	64250.0%
SA	244	28,334	28,578	11612.3%
Netherlands	9,663	42,650	52,313	441.4%
UK	1,369	1,258	2,627	91.9%
Germany	1,553	3,108	4,661	200.1%
Italy	821	1,712	2,533	208.5%
Sweden	196	103	299	52.6%
Belgium	361	1,027	1,388	284.5%
Ireland	128	61	189	47.7%
Others	3,374	6,679	10,053	198.0%
Europe	17,465	56,598	74,063	324.1%
ROW	2,271	10,767	13,038	474.1%
Total	135,990	431,266	567,256	317.1%





ACCOMMODATIONS AUGUST

80,230
ARRIVALS

360.6%
GROWTH

ARRIVALS BY ACCOMMODATION

	2020	Growth	2021	% Growth
High Rise	6,432	25,310	31,742	393.5%
Low Rise	956	6,996	7,952	731.8%
Timeshare	6,104	17,972	24,076	294.4%
Others	3,928	12,532	16,460	319.0%
Total	17,420	62,810	80,230	360.6%

Marketshare 2020	Marketshare 2021
36.9%	39.6%
5.5%	9.9%
35.0%	30.0%
22.5%	20.5%

NIGHTS BY ACCOMMODATION

	2020	Variance	2021	% Growth
High Rise	40,708	147,152	187,860	361.5%
Low Rise	6,410	43,863	50,273	684.3%
Timeshare	49,737	133,357	183,094	268.1%
Others	39,135	106,894	146,029	273.1%
Total	135,990	431,266	567,256	317.1%

Marketshare 2020	Marketshare 2021
29.9%	33.1%
4.7%	8.9%
36.6%	32.3%
28.8%	25.7%



VISITORS BY AGE AUGUST

80,230
ARRIVALS

360.6%
GROWTH

	2020	Growth	2021	% Growth
0 - 11	1,403	5,413	6,816	385.8%
12-19	1,680	6,264	7,944	372.9%
20 - 29	3,334	9,409	12,743	282.2%
30 - 39	3,571	10,847	14,418	303.8%
40 - 49	3,203	11,306	14,509	353.0%
50 - 59	2,681	10,429	13,110	389.0%
60 - 69	1,150	6,221	7,371	541.0%
70 +	398	2,920	3,318	733.7%
Not Stated	0	1	1	#DIV/0!
Total	17,420	62,810	80,230	360.6%



GENERATIONS AUGUST

80,230
ARRIVALS

360.6%
GROWTH

	2021	% Share	2020	% Share	% Growth
Gen Z	16,815	21.0%	3,541	20.3%	374.9%
Millennials	22,423	27.9%	5,804	33.3%	286.3%
Gen X	22,021	27.4%	4,820	27.7%	356.9%
Baby Boomers	16,591	20.7%	2,981	17.1%	456.6%
Silent Generations	2,379	3.0%	274	1.6%	768.2%
Age not specified	1	0.0%	0	0.0%	
Total	80,230	100.0%	42,842	100.0%	360.6%



CARRIERS AUGUST

80,230
ARRIVALS

360.6%
GROWTH

	2020	Growth		2021	% Growth	Marketshare 2020	Marketshare 2021
AMERICAN AIRLINES	4,192		12,939	17,131	308.7%	24.1%	21.4%
JETBLUE	4,072		20,180	24,252	495.6%	23.4%	30.2%
DELTA AIRLINE	3,226		6,102	9,328	189.2%	18.5%	11.6%
UNITED AIRLINES	3,501		11,025	14,526	314.9%	20.1%	18.1%
KLM	1,291		2,463	3,754	190.8%	7.4%	4.7%
SPIRIT AIRLINES	604	-119		485	-19.7%	3.5%	0.6%
DIVI DIVI AIR	131		989	1,120	755.0%	0.8%	1.4%
PRIVATE	55		94	149	170.9%	0.3%	0.2%
CHARTER	40	-18		22	-45.0%	0.2%	0.0%
AERO REPUBLICA	0		822	822	-	0.0%	1.0%
AIR CENTURY	0		33	33	-	0.0%	0.0%
LASER	0				-	0.0%	0.0%
AMERIFLIGHT	0		2	2	-	0.0%	0.0%
AEROCARIBE	0			0	-	0.0%	0.0%
AIR CANADA	159	-159		0	-100.0%	0.9%	0.0%
AIRES	0			0	-	0.0%	0.0%
ALBATROS AIRLINE	0			0	-	0.0%	0.0%
AMERIJET INTERNATIONAL	0			0	-	0.0%	0.0%
ANTONOV	0			0	-	0.0%	0.0%
ARKEFLIGHT	0		1,722	1,722	-	0.0%	2.1%
ARUBA AIRLINES	3	-3		0	-100.0%	0.0%	0.0%
AVIANCA	0		1,242	1,242	-	0.0%	1.5%
BRITANNIA	0			0	-	0.0%	0.0%
CONTINENTAL	0			0	-	0.0%	0.0%
CONVIASA	0			0	-	0.0%	0.0%
COPA AIRLINE	0		1,164	1,164	-	0.0%	1.5%
OTHERS	146		4,332	4,478	2967.1%	0.8%	5.6%
Total	17,420		62,810	80,230	360.6%		

COMPARISON 2021 VERSUS 2019





ARRIVALS YTD AUGUST 2021

506,795
ARRIVALS

-34.6%
GROWTH

	2019	Growth	2021	% Growth
USA	586,058	-141,523	444,535	-24.1%
Canada	34,090	-32,126	1,964	-94.2%
NA	620,148	-173,649	446,499	-28.0%
Venezuela	10,881	-10,341	540	-95.0%
Colombia	22,646	-11,462	11,184	-50.6%
Brazil	7,140	-6,351	789	-88.9%
Argentina	11,041	-10,153	888	-92.0%
Chile	7,209	-6,736	473	-93.4%
Ecuador	1,139	-583	556	-51.2%
Peru	4,013	-3,456	557	-86.1%
Paraguay	1,797	-1,446	351	-80.5%
Uruguay	1,466	-1,235	231	-84.2%
Mexico	1,159	-542	617	-46.8%
Others	6,548	-4,498	2,050	-68.7%
SA	75,039	-56,803	18,236	-75.7%
Netherlands	28,704	-8,806	19,898	-30.7%
UK	7,803	-6,776	1,027	-86.8%
Germany	4,412	-2,818	1,594	-63.9%
Italy	7,458	-6,768	690	-90.7%
Sweden	2,662	-2,486	176	-93.4%
Belgium	1,598	-942	656	-58.9%
Ireland	210	-160	50	-76.2%
Others	9,055	-4,580	4,475	-50.6%
Europe	61,902	-33,336	28,566	-53.9%
ROW	18,124	-4,630	13,494	-25.5%
Total	775,213	-268,418	506,795	-34.6%
W/O Ven.	764,332	-258,077	506,255	-33.8%

Marketshare 2019	Marketshare 2021
75.6%	87.7%
4.4%	0.4%
80.0%	88.1%
1.4%	0.1%
2.9%	2.2%
0.9%	0.2%
1.4%	0.2%
0.9%	0.1%
0.1%	0.1%
0.5%	0.1%
0.2%	0.1%
0.2%	0.0%
0.1%	0.1%
0.8%	0.4%
9.7%	3.6%
3.7%	3.9%
1.0%	0.2%
0.6%	0.3%
1.0%	0.1%
0.3%	0.0%
0.2%	0.1%
0.0%	0.0%
1.2%	0.9%
8.0%	5.6%
2.3%	2.7%



ARRIVALS USA YTD AUGUST

444,535
ARRIVALS

-24.1%
GROWTH

	2019	Growth	2021	% Growth
New York	117,477	-15,699	101,778	-13.4%
Massachusetts	67,239	-14,244	52,995	-21.2%
New Jersey	68,476	-6,291	62,185	-9.2%
Pennsylvania	33,921	-9,550	24,371	-28.2%
Illinois	15,413	-5,361	10,052	-34.8%
Connecticut	19,854	-3,569	16,285	-18.0%
Florida	33,730	-11,851	21,879	-35.1%
Ohio	16,769	-6,447	10,322	-38.4%
Maryland	18,915	-3,888	15,027	-20.6%
Michigan	11,461	-4,239	7,222	-37.0%
Virginia	13,991	-3,372	10,619	-24.1%
Georgia	14,323	-1,160	13,163	-8.1%
North Carolina	13,427	-2,109	11,318	-15.7%
Texas	17,836	-3,760	14,076	-21.1%
California	12,724	-3,513	9,211	-27.6%
Other	110,502	-46,470	64,032	-42.1%
Total	586,058	-141,523	444,535	-24.1%

Marketshare 2019	Marketshare 2021
20.0%	22.9%
11.5%	11.9%
11.7%	14.0%
5.8%	5.5%
2.6%	2.3%
3.4%	3.7%
5.8%	4.9%
2.9%	2.3%
3.2%	3.4%
2.0%	1.6%
2.4%	2.4%
2.4%	3.0%
2.3%	2.5%
3.0%	3.2%
2.2%	2.1%
18.9%	14.4%



NIGHTS YTD AUGUST

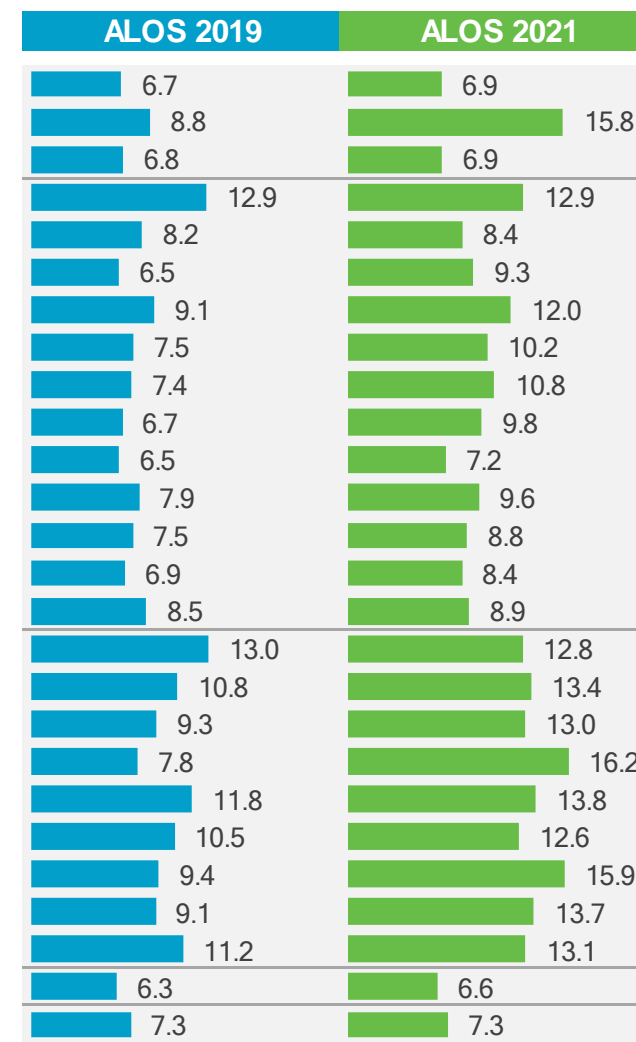
3,723,138

ARRIVALS

-34.2%

GROWTH

	2019	Growth	2021	% Growth
USA	3,918,074	-850,903	3,067,171	-21.7%
Canada	298,828	-267,748	31,080	-89.6%
NA	4,216,902	-1,118,651	3,098,251	-26.5%
Venezuela	139,991	-133,021	6,970	-95.0%
Colombia	185,608	-91,390	94,218	-49.2%
Brazil	46,344	-39,026	7,318	-84.2%
Argentina	100,185	-89,554	10,631	-89.4%
Chile	54,267	-49,420	4,847	-91.1%
Ecuador	8,440	-2,435	6,005	-28.9%
Peru	26,874	-21,391	5,483	-79.6%
Paraguay	11,711	-9,190	2,521	-78.5%
Uruguay	11,605	-9,378	2,227	-80.8%
Mexico	8,645	-3,230	5,415	-37.4%
Others	45,283	-28,127	17,156	-62.1%
SA	638,953	-476,162	162,791	-74.5%
Netherlands	374,207	-119,466	254,741	-31.9%
UK	84,151	-70,357	13,794	-83.6%
Germany	40,832	-20,107	20,725	-49.2%
Italy	58,525	-47,365	11,160	-80.9%
Sweden	31,464	-29,034	2,430	-92.3%
Belgium	16,815	-8,574	8,241	-51.0%
Ireland	1,978	-1,184	794	-59.9%
Others	82,660	-21,393	61,267	-25.9%
Europe	690,632	-317,480	373,152	-46.0%
ROW	114,564	-25,620	88,944	-22.4%
Total	5,661,051	-1,937,913	3,723,138	-34.2%





ACCOMMODATIONS YTD AUGUST

506,795
ARRIVALS

-34.6%
GROWTH

ARRIVALS BY ACCOMMODATION

	2019	Growth	2021	% Growth
High Rise	333,872	-144,283	189,589	-43.2%
Low Rise	68,567	-23,681	44,886	-34.5%
Timeshare	207,619	-42,607	165,012	-20.5%
Others	165,155	-57,847	107,308	-35.0%
Total	775,213	-268,418	506,795	-34.6%

Marketshare 2019	Marketshare 2021
43.1%	37.4%
8.8%	8.9%
26.8%	32.6%
21.3%	21.2%

NIGHTS BY ACCOMMODATION

	2019	Growth	2021	% Growth
High Rise	1,996,865	-891,313	1,105,552	-44.6%
Low Rise	458,933	-171,367	287,566	-37.3%
Timeshare	1,670,992	-329,068	1,341,924	-19.7%
Others	1,534,261	-546,165	988,096	-35.6%
Total	5,661,051	-1,937,913	3,723,138	-34.2%

Marketshare 2019	Marketshare 2021
35.3%	29.7%
8.1%	7.7%
29.5%	36.0%
27.1%	26.5%



VISITORS BY AGE YTD AUGUST

506,795
ARRIVALS

-34.6%
GROWTH

	2019	Growth		2021	% Growth
0 - 11	57,036		23,194	80,230	40.7%
12-19	60,582	-14,514		46,068	-24.0%
20 - 29	96,560	-15,244		81,316	-15.8%
30 - 39	118,382	-27,108		91,274	-22.9%
40 - 49	133,693	-46,170		87,523	-34.5%
50 - 59	152,078	-63,473		88,605	-41.7%
60 - 69	105,713	-53,271		52,442	-50.4%
70 +	51,034	-26,723		24,311	-52.4%
Not Stated	135	-128		7	-94.8%
Total	775,213	-268,418		506,795	-34.6%



GENERATIONS YTD AUGUST

506,795
VISITORS

-34.6%
GROWTH

	2021	% Share	2019	% Share	% Growth
Gen Z	94,540	18.7%	132,726	17.1%	-28.8%
Millennials	142,937	28.2%	176,522	22.8%	-19.0%
Gen X	134,944	26.6%	204,622	26.4%	-34.1%
Baby Boomers	116,959	23.1%	225,426	29.1%	-48.1%
Silent Generations	17,408	3.4%	35,782	4.6%	-51.3%
Age not specified	7	0.0%	135	0.0%	-94.8%
Total	506,795	100.0%	775,213	100.0%	-34.6%



CARRIERS YTD AUGUST

506,795
VISITORS

-34.6%
GROWTH

	2019	Growth	2021	% Growth
JETBLUE	177,056	-28,572	148,484	-16.1%
AMERICAN AIRLINES	149,584	-22,638	126,946	-15.1%
UNITED AIRLINES	108,176	-23,725	84,451	-21.9%
DELTA AIRLINE	95,520	-36,411	59,109	-38.1%
SOUTH WEST	51,100	-25,044	26,056	-49.0%
KLM	21,573	-441	21,132	-2.0%
AVIANCA	35,160	-28,302	6,858	-80.5%
AIR CANADA	11,278	-10,865	413	-96.3%
COPA AIRLINE	24,967	-19,577	5,390	-78.4%
SUNWING AIRLINES	10,605	-10,605	0	-100.0%
WESTJET AIRLINES	6,693	-6,564	129	-98.1%
ARUBA AIRLINES	11,869	-11,869	0	-100.0%
ARKEFLIGHT	10,772	-5,082	5,690	-47.2%
SPIRIT AIRLINES	8,215	-3,855	4,360	-46.9%
DIVI DIVI AIR	6,108	-130	5,978	-2.1%
WINAIR	4,150	-3,508	642	-84.5%
CHARTER	10,905	-10,492	413	-96.2%
SUN COUNTRY	2,399	-1,491	908	-62.2%
TUI	0	785	785	-
THOMAS COOK	1,481	-1,481	0	-100.0%
EZ AIRLINE	2,061	-782	1,279	-37.9%
SURINAM AIRWAYS	3,611	-2,997	614	-83.0%
PRIVATE	2,750	-1,718	1,032	-62.5%
AERO REPUBLICA/ WINGO	2,418	2,579	4,997	106.7%
AIR CENTURY	448	-190	258	-42.4%
SKY HIGH AVIATION	338	-98	240	-29.0%
Others	15,976	-15,345	631	-96.1%
Total	775,213	-268,418	506,795	-34.6%

Marketshare 2019	Marketshare 2021
22.8%	29.3%
19.3%	25.0%
14.0%	16.7%
12.3%	11.7%
6.6%	5.1%
2.8%	4.2%
4.5%	1.4%
1.5%	0.1%
3.2%	1.1%
1.4%	0.0%
0.9%	0.0%
1.5%	0.0%
1.4%	1.1%
1.1%	0.9%
0.8%	1.2%
0.5%	0.1%
1.4%	0.1%
0.3%	0.2%
0.0%	0.2%
0.2%	0.0%
0.3%	0.3%
0.5%	0.1%
0.4%	0.2%
0.3%	1.0%
0.1%	0.1%
0.0%	0.0%
2.1%	0.1%



ARRIVALS AUGUST

80,230
ARRIVALS

-16.5%
GROWTH

	2019	Growth	2021	% Growth
USA	70,990	-2,745	68,245	-3.9%
Canada	2,879	-2,406	473	-83.6%
NA	73,869	-5,151	68,718	-7.0%
Venezuela	1,524	-1,301	223	-85.4%
Colombia	2,737	-983	1,754	-35.9%
Brazil	870	-523	347	-60.1%
Argentina	1,518	-1,449	69	-95.5%
Chile	638	-517	121	-81.0%
Ecuador	171	-41	130	-24.0%
Peru	506	-393	113	-77.7%
Paraguay	96	-48	48	-50.0%
Uruguay	191	-112	79	-58.6%
Mexico	128	-44	84	-34.4%
Others	1,056	-607	449	-57.5%
SA	9,435	-6,018	3,417	-63.8%
Netherlands	3,302	1,109	4,411	33.6%
UK	1,792	-1,581	211	-88.2%
Germany	549	-133	416	-24.2%
Italy	3,513	-3,355	158	-95.5%
Sweden	54	-33	21	-61.1%
Belgium	158	-35	123	-22.2%
Ireland	30	-13	17	-43.3%
Others	1,172	-393	779	-33.5%
Europe	10,570	-4,434	6,136	-41.9%
ROW	2,226	-267	1,959	-12.0%
Total	96,100	-15,870	80,230	-16.5%
W/O Ven.	94,576	-14,569	80,007	-15.4%

Marketshare 2019	Marketshare 2021
73.9%	85.1%
3.0%	0.6%
76.9%	85.7%
1.6%	0.3%
2.8%	2.2%
0.9%	0.4%
1.6%	0.1%
0.7%	0.2%
0.2%	0.2%
0.5%	0.1%
0.1%	0.1%
0.2%	0.1%
0.1%	0.1%
1.1%	0.6%
9.8%	4.3%
3.4%	5.5%
1.9%	0.3%
0.6%	0.5%
3.7%	0.2%
0.1%	0.0%
0.2%	0.2%
0.0%	0.0%
1.2%	1.0%
11.0%	7.6%
2.3%	2.4%



ARRIVALS USA AUGUST

68,245
ARRIVALS

-3.9%
GROWTH

	2019	Growth		2021	% Growth
New York	18,107		1,311	19,418	7.2%
Massachusetts	6,159		927	7,086	15.1%
New Jersey	11,482		264	11,746	2.3%
Pennsylvania	3,912	-318		3,594	-8.1%
Illinois	1,547	-255		1,292	-16.5%
Connecticut	2,297	-28		2,269	-1.2%
Florida	4,389	-1,041		3,348	-23.7%
Ohio	1,360	-222		1,138	-16.3%
Maryland	2,537		231	2,768	9.1%
Michigan	753		89	842	11.8%
Virginia	1,735		1	1,736	0.1%
Georgia	1,524	-126		1,398	-8.3%
North Carolina	1,628	-52		1,576	-3.2%
Texas	2,245	-449		1,796	-20.0%
California	1,921	-376		1,545	-19.6%
Other	9,394	-2,701		6,693	-28.8%
Total	70,990	-2,745		68,245	-3.9%

Marketshare 2019		Marketshare 2021	
	25.5%		28.5%
	8.7%		10.4%
	16.2%		17.2%
	5.5%		5.3%
	2.2%		1.9%
	3.2%		3.3%
	6.2%		4.9%
	1.9%		1.7%
	3.6%		4.1%
	1.1%		1.2%
	2.4%		2.5%
	2.1%		2.0%
	2.3%		2.3%
	3.2%		2.6%
	2.7%		2.3%
	13.2%		9.8%

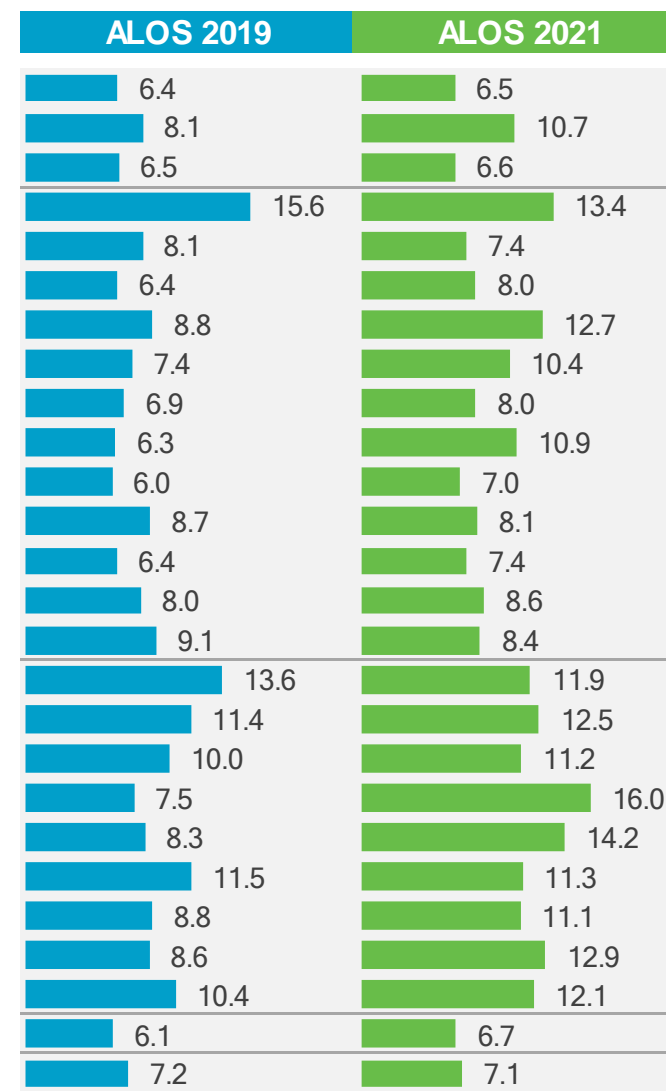


NIGHTS AUGUST

567,256
NIGHTS

-17.5%
GROWTH

	2019	Growth	2021	% Growth
USA	455,065	-8,558	446,507	-1.9%
Canada	23,390	-18,320	5,070	-78.3%
NA	478,455	-26,878	451,577	-5.6%
Venezuela	23,733	-20,744	2,989	-87.4%
Colombia	22,185	-9,245	12,940	-41.7%
Brazil	5,561	-2,774	2,787	-49.9%
Argentina	13,378	-12,505	873	-93.5%
Chile	4,725	-3,471	1,254	-73.5%
Ecuador	1,175	-129	1,046	-11.0%
Peru	3,175	-1,946	1,229	-61.3%
Paraguay	576	-242	334	-42.0%
Uruguay	1,654	-1,012	642	-61.2%
Mexico	813	-190	623	-23.4%
Others	8,434	-4,573	3,861	-54.2%
SA	85,409	-56,831	28,578	-66.5%
Netherlands	44,930	7,383	52,313	16.4%
UK	20,463	-17,836	2,627	-87.2%
Germany	5,474	-813	4,661	-14.9%
Italy	26,427	-23,894	2,533	-90.4%
Sweden	447	-148	299	-33.1%
Belgium	1,811	-423	1,388	-23.4%
Ireland	264	-75	189	-28.4%
Others	10,057	-4	10,053	0.0%
Europe	109,873	-35,810	74,063	-32.6%
ROW	13,549	-511	13,038	-3.8%
Total	687,286	-120,030	567,256	-17.5%





CARRIERS AUGUST

80,230
ARRIVALS

-16.5%
GROWTH

	2019	Growth	2021	% Growth	Marketshare 2019	Marketshare 2021
AMERICAN AIRLINES	19,203	-2,072	17,131	-10.8%	20.0%	21.4%
JETBLUE	22,918	1,334	24,252	5.8%	23.8%	30.2%
DELTA AIRLINE	12,443	-3,115	9,328	-25.0%	12.9%	11.6%
UNITED AIRLINES	13,626	900	14,526	6.6%	14.2%	18.1%
KLM	2,278	1,476	3,754	64.8%	2.4%	4.7%
SPIRIT AIRLINES	1,592	-1,107	485	-69.5%	1.7%	0.6%
DIVI DIVI AIR	797	323	1,120	40.5%	0.8%	1.4%
PRIVATE	303	-154	149	-50.8%	0.3%	0.2%
CHARTER	623	-601	22	-96.5%	0.6%	0.0%
AERO REPUBLICA	628	194	822	30.9%	0.7%	1.0%
AIR CENTURY	78	-45	33	-57.7%	0.1%	0.0%
LASER	0		-		0.0%	0.0%
AMERIFLIGHT	0	2	2	-	0.0%	0.0%
AEROCARIBE	0		0	-	0.0%	0.0%
AIR CANADA	1,144	-1,144	0	-100.0%	1.2%	0.0%
AIRES	0		0	-	0.0%	0.0%
ALBATROS AIRLINE	3	-3	0	-100.0%	0.0%	0.0%
AMERIJET INTERNATIONAL	1	-1	0	-100.0%	0.0%	0.0%
ANTONOV	0		0	-	0.0%	0.0%
ARKEFLIGHT	1,302	420	1,722	32.3%	1.4%	2.1%
ARUBA AIRLINES	1,159	-1,159	0	-100.0%	1.2%	0.0%
AVIANCA	4,450	-3,208	1,242	-72.1%	4.6%	1.5%
BRITANNIA	1,397	-1,397	0	-100.0%	1.5%	0.0%
CONTINENTAL	0		0	-	0.0%	0.0%
CONVIASA	0		0	-	0.0%	0.0%
COPA AIRLINE	3,833	-2,669	1,164	-69.6%	4.0%	1.5%
OTHERS	8,322	-3,844	4,478	-46.2%	8.7%	5.6%
Total	96,100	-15,870	80,230	-16.5%		



CRUISE AUGUST



2019



CRUISE PAX

38,953

CRUISE CALLS

15



2021



CRUISE PAX

12,342

-100.0%

CRUISE CALLS

9

-40.0%

ABSOLUTE GROWTH PAX August

-26,611

-71.7%

ABSOLUTE GROWTH CALLS August

-6

-40%



GUEST SATISFACTION

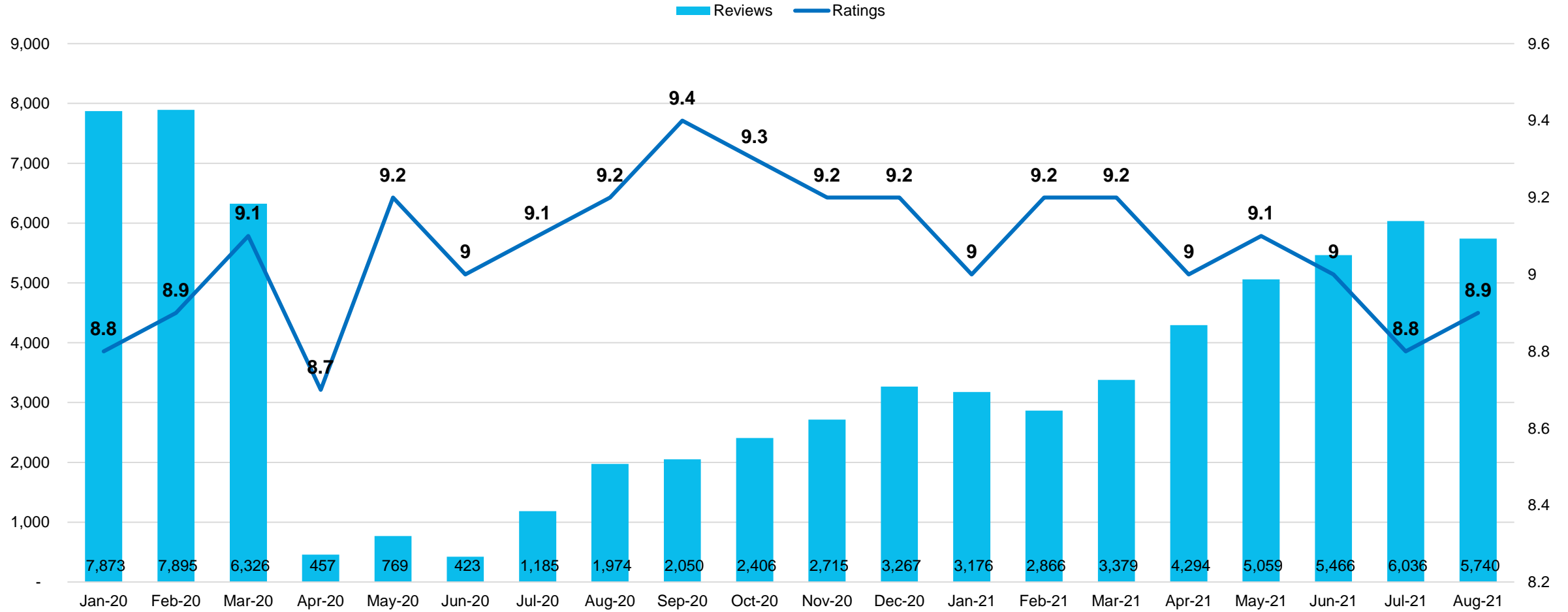


Aruba Tourism
Authority



GUEST EXPERIENCE INDEX (GEI)

In total ATA is tracking 318 establishments.




Since July 2020, the number of reviews has been growing gradually while the destination is carefully reopening. On a very positive note, the score of guest satisfaction since the destination has reopened reaches 9 including June 2021. In July 2021 with a total of 100,178 arrivals we scored 8.8 in rating, reaching back **pre- covid19 averages** (8.9). A similar trend is observed in August 2021 in we scored 8.9 rating.



KEY SANITARY INDICATORS - AUG

In total ATA is tracking 318 establishments.

 Aruba	Sanitary Safety Score	Health Precautions Score
	4.9	4.0
July 2021:	4.5	3.4

Sanitary Safety Score : The Sanitary Safety Score gives you a key insight into what your customers' sentiment regarding the cleanliness and safety of your establishment. In total ATA is tracking 318 establishments.

Health Precaution Scores : The Health Precaution Score gives you an insight into the perception your customers have concerning the precautions you have taken within your establishment. Based on selected keywords and analyzed for sentiment, you can understand the sentiment your customers have about how you are protecting your guests during the pandemic.

Both scores, expressed on a 10-point scale (10 being the best rating), are based on an expansive selection of key words along with analyzing the negative and positive sentiment, covering 6 Languages - English, French, Spanish, German, Dutch and Italian.



TIDBITS

Visa Spending

Q1 and Q2- 2021 REPORT

Methodology

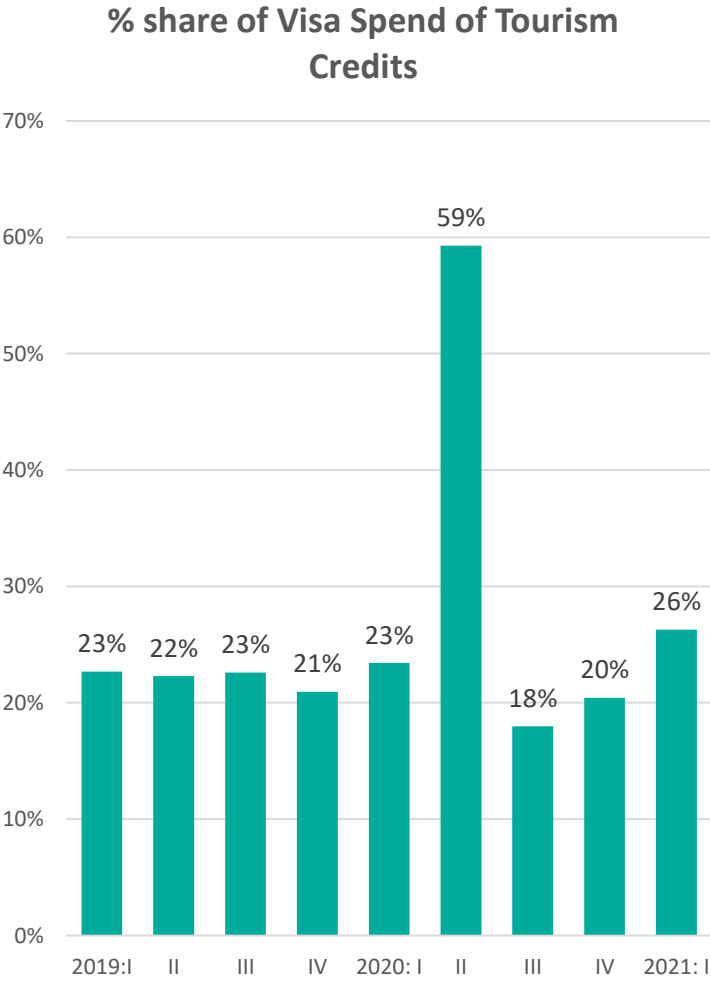
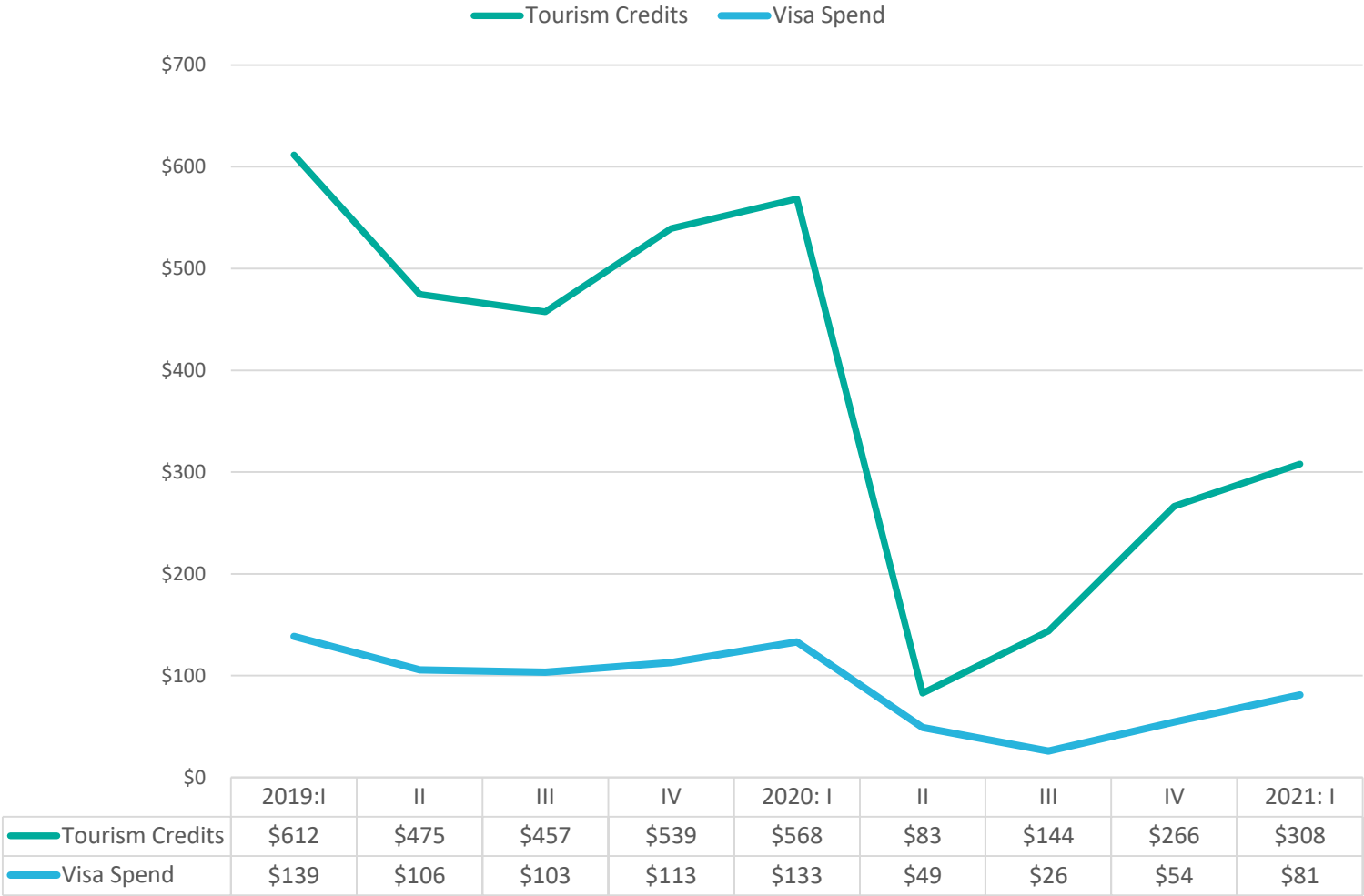
Metrics Definition & Scope

Data scope definition

- The Visa Destination Insight 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 Insight 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 Q2 2021.**
 - ✓ 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.*
- In addition, **any cardholder whose purchase history indicates that they are a long-term resident**, rather than a tourist, will have all their transactions excluded.
- No individual cardholder or merchant data is ever displayed or analyzed

There has been a change in the calculation method, particularly in relation to transaction dates and remote VS on-site expenditure, in order to have a better match between the date of expenditure and the visit. This may produce breaks in the history of previous reports, but the data is well reprocessed to ensure a comparable Y/Y calculation.

Comparison to Tourism Credits



Tourism Credits and Total amount on Visa Spend display a similar trend

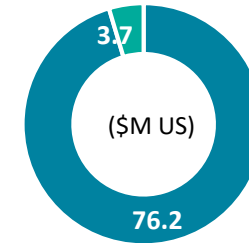


Overall Spending & Y/Y Evolutions

<i>Sales transactions (excl withdrawal)</i>	# of Issuer Countries	Total Spend Amount	Y/Y Growth	Average Ticket / transaction	Spend / Cardholder
Q2 2021	104	\$81 058 208	6357% ▲	\$110	\$655

Spend by Card Type

- Consumer (94%)
- Commercial (6%)



Cash withdrawal



Q2 2021 – Card transactions

Y/Y Growth

Comparison with Q2 2019 (growth)

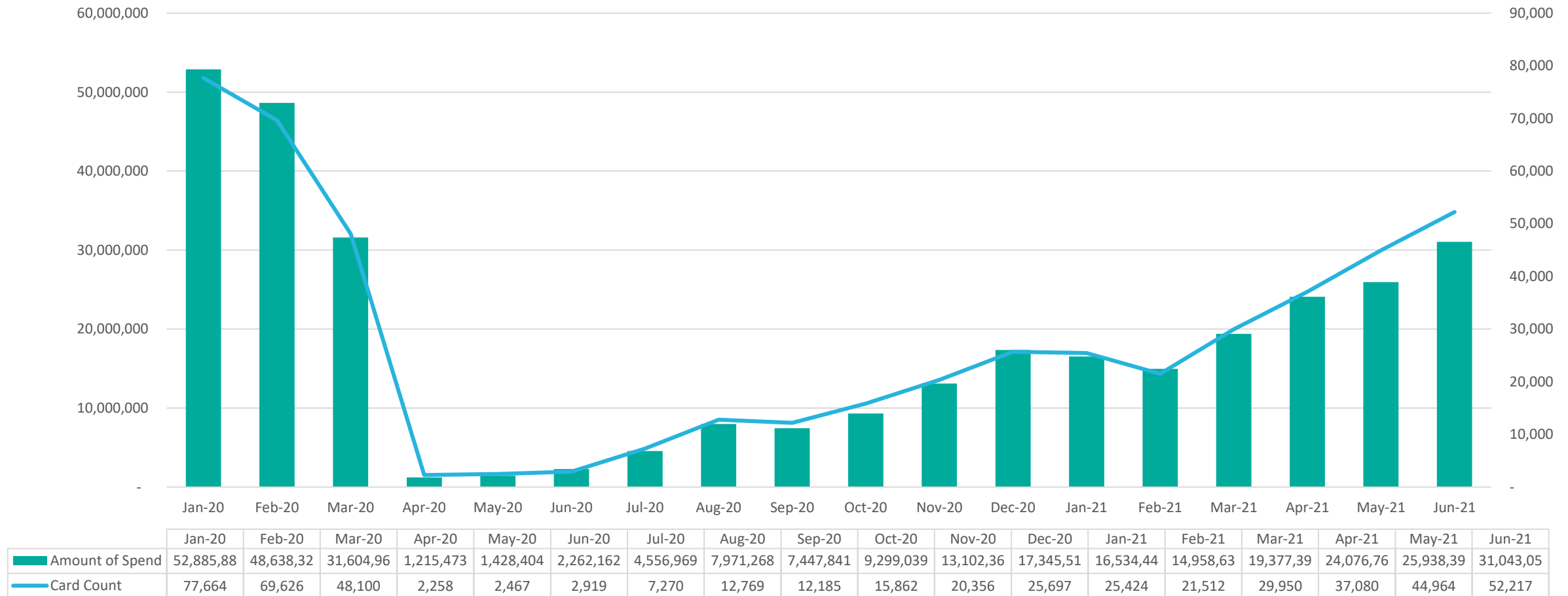
	Cardholder Count (Net)	Total Spend Amount	Spend per Cardholder	Trans Count	Avg Ticket	Cardholder Count (Net)	Total Spend Amount	Spend per Cardholder	Trans Count	Avg Ticket	Cardholder Count (Net)	Total Spend Amount	Spend per Cardholder	Trans Count	Avg Ticket
Consumer	118 690	\$76 288 895	\$643	709 477	\$108	6663,0%	6611,1%	-0,8%	5487,3%	20,1%	-15,2%	4,0%	22,6%	2,5%	1,5%
Commercial	5 046	\$4 769 314	\$945	25 171	\$189	5384,8%	3925,2%	-26,6%	2980,9%	30,6%	-25,0%	1,4%	35,2%	-15,4%	19,9%
Total	123 736	\$81 058 209	\$655	734 648	\$110	6599,3%	6357,6%	-3,6%	5335,8%	18,8%	-15,7%	3,8%	23,1%	1,7%	2,1%

During Q2 2021, **123 736 VISA cardholders** from 104 issuer countries have spent **US\$ 81 millions in Aruba**. Despite 15,7% less cardholders compared to pre-Covid, the **total Visa spend** on the island has **recovered and even increased vs 2019** thanks to a major rise in spend per cardholder (+23,1%). **\$10 Million cash** was also withdrawn on the island during the quarter (it was 12 Million in 2019 for the same quarter).

Note: Total Visitors Q2: 214,049 (Share of cardholder count of total visitors 58%)

Monthly Trends

Card Count and Amount of Spend



The rise of cardholder count and sales amount is **steady and spectacular** since March 2021, gaining about 5 Million every month!

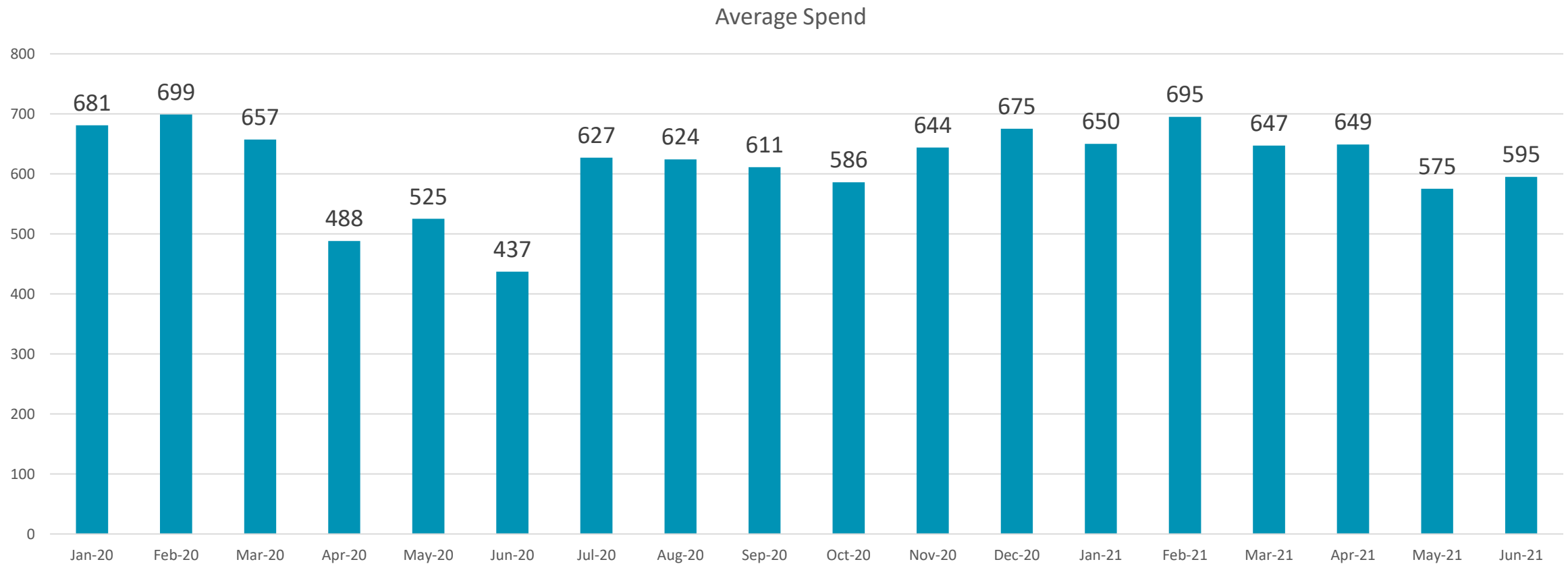
Data include consumers and commercial cards (sales transactions only, withdrawal excluded)

Quarterly Report – Q2-2021

Average Monthly Trends

Spend per Cardholder

The **seasonal drop** in average spend per cardholder is observed in Q2-2021 **like it used to be in pre-Covid time**. During the quarter, the average spend per cardholder was 23% higher than in 2019 on a comparable basis.



Data include consumers and commercial cards (sales transactions only, withdrawal excluded)

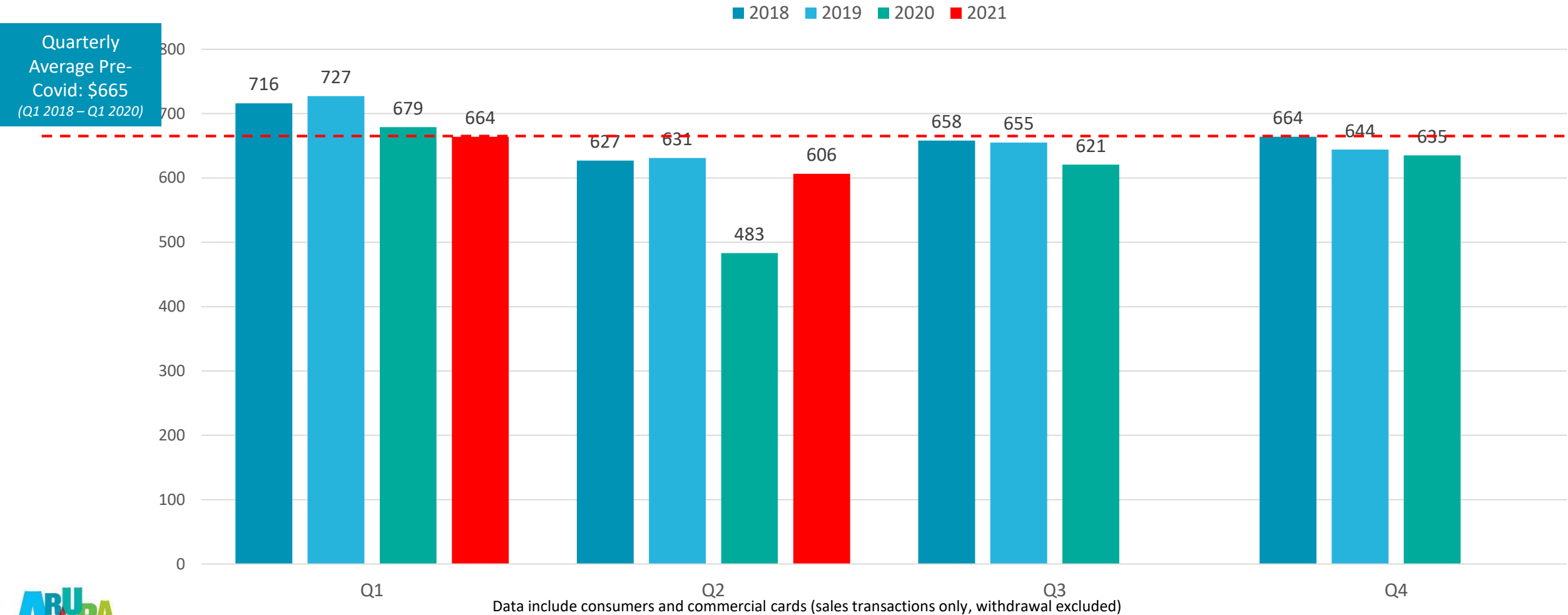
Quarterly Report – Q2-2021



Quarterly Trends

Spend per Cardholder

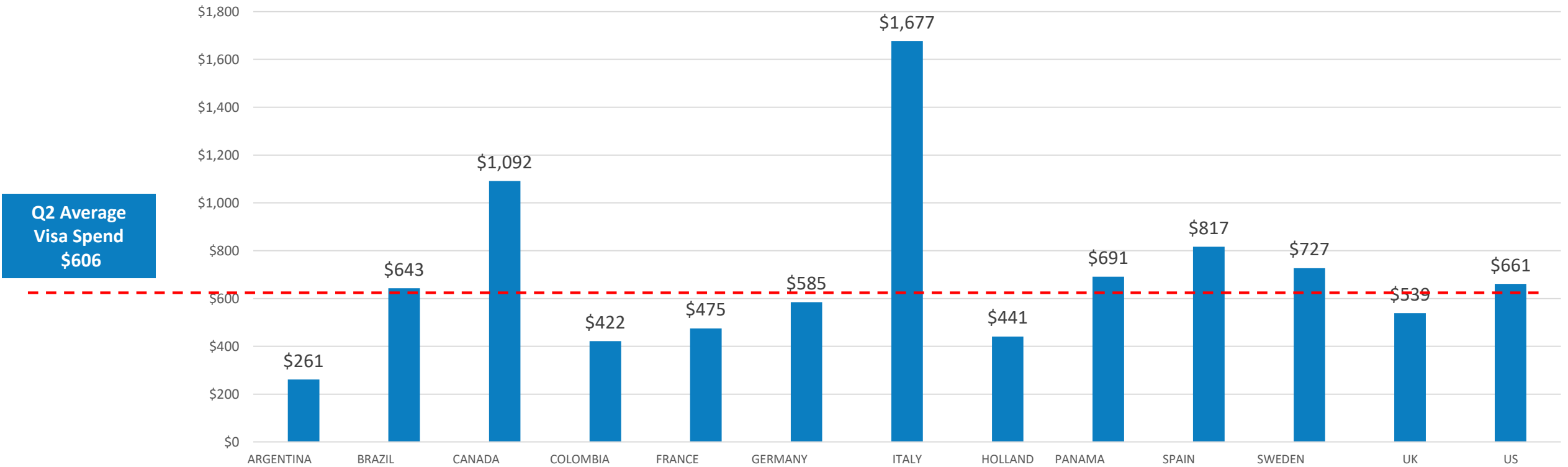
The **seasonal drop** in average spend per cardholder is observed in Q2-2021 **like it used to be in pre-Covid time**. During the quarter, the average spend per cardholder was 23% higher than in 2019 on a comparable basis.



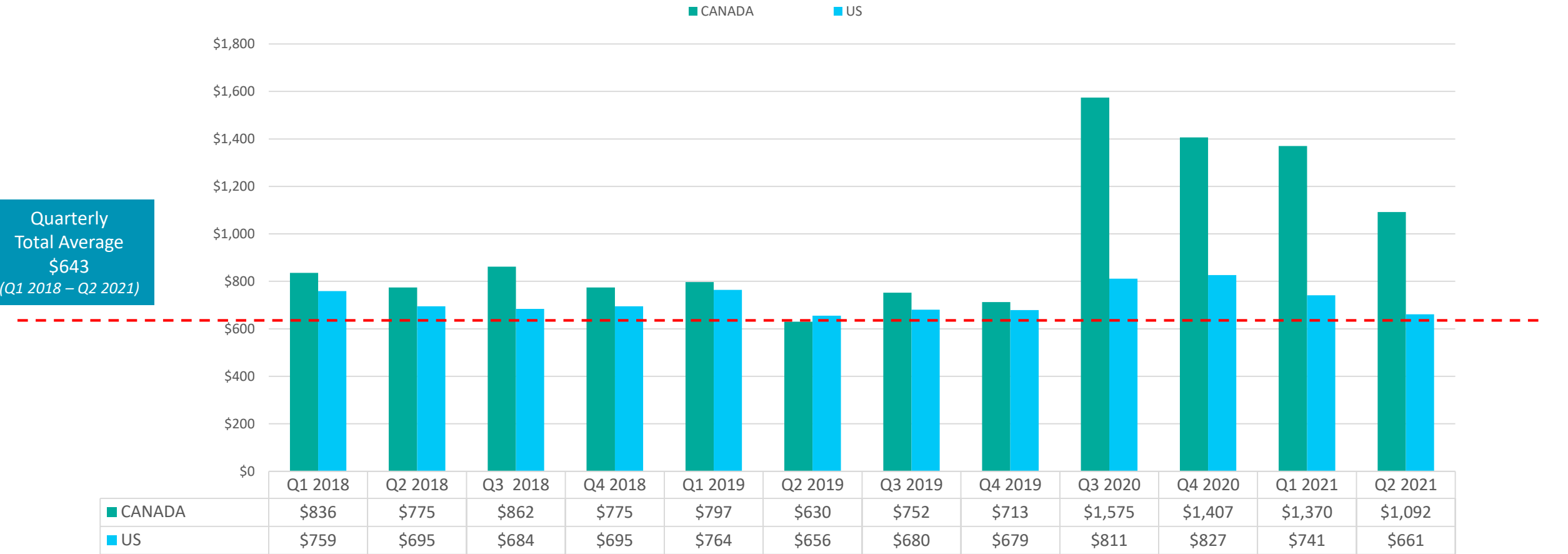
Q2 Average Visa spend

Spend per Cardholder

Q2 2021



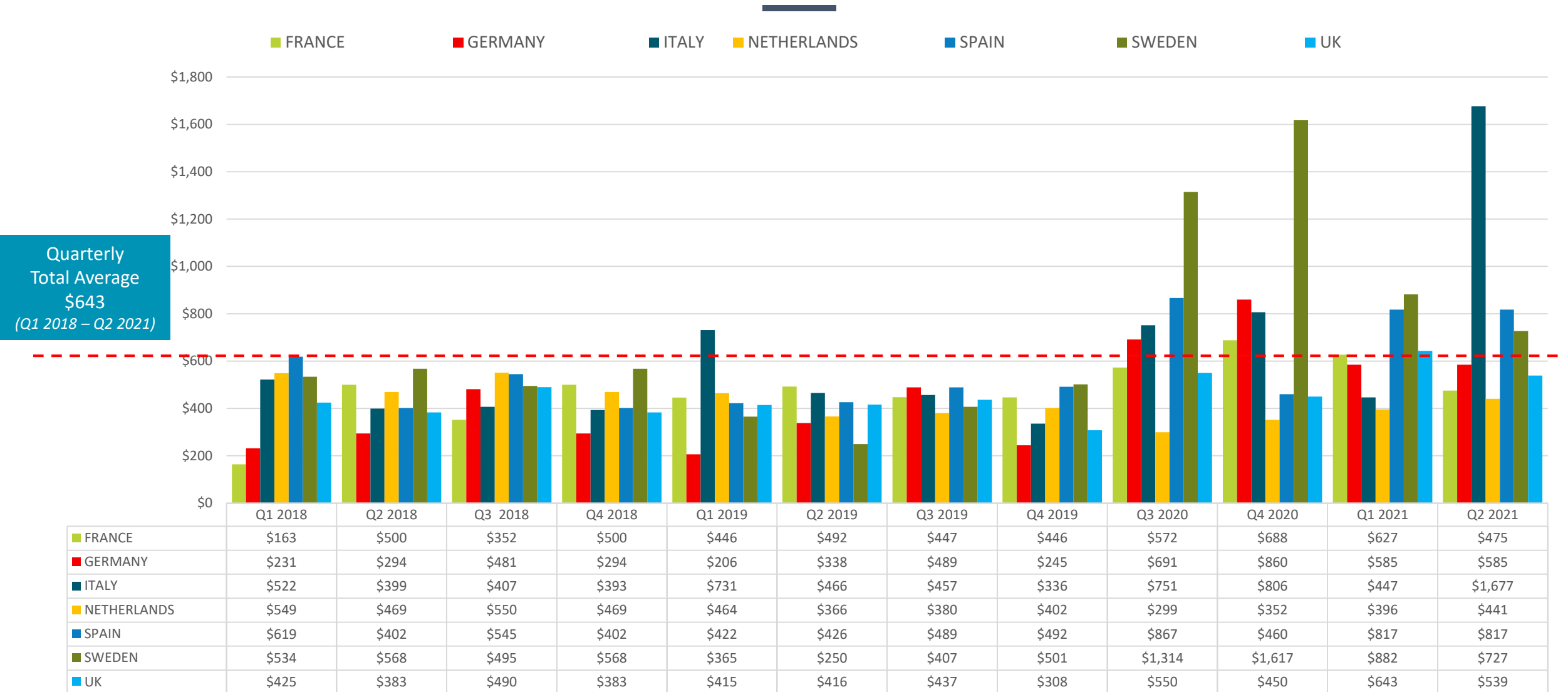
TOP Spenders by Markets (*) By Spend (US \$)



The recovery in spend compared to 2019 is massively driven by the **US, the Netherlands and Spain**.

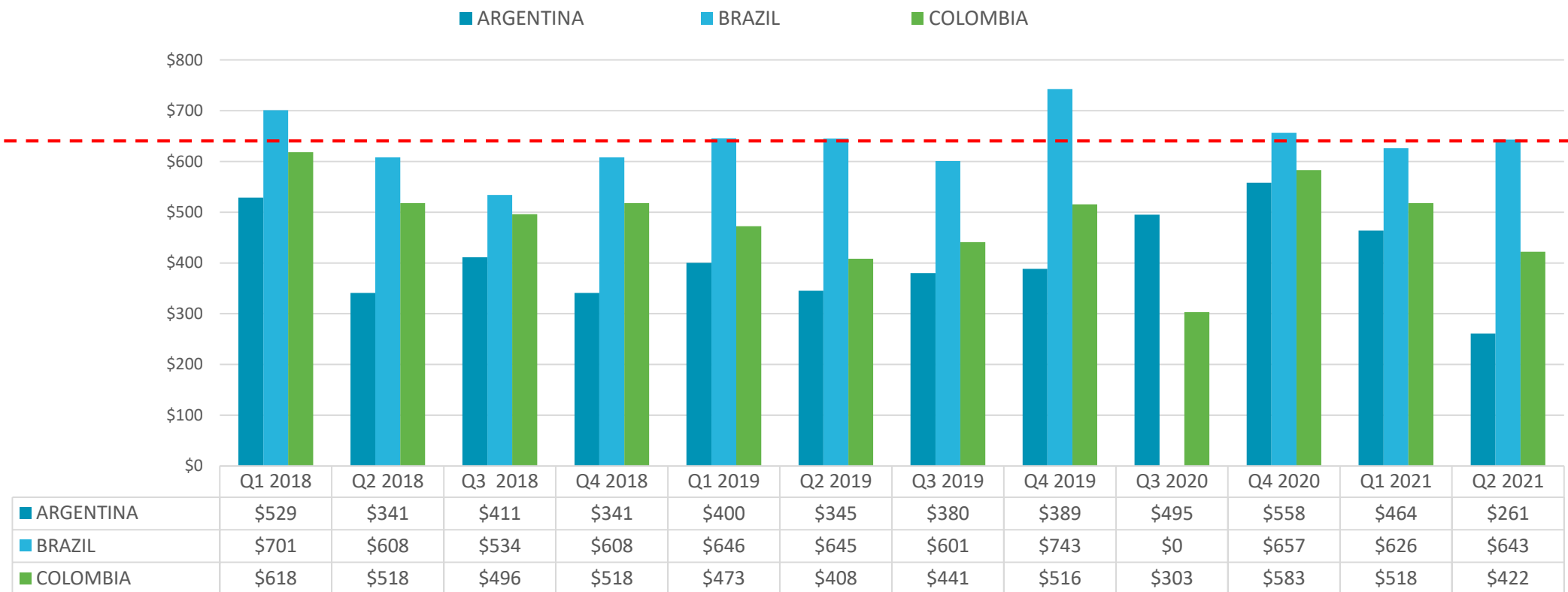
Focus on TOP Markets visiting Aruba (*)

Spend per Cardholder (US\$)



Focus on TOP Markets visiting Aruba (*)

Spend per Cardholder (US\$)



The **sharp post-reopening rise** in average spend per cardholder in Q2-2021 is **confirmed among all markets** to Aruba compared to Q2 2019.

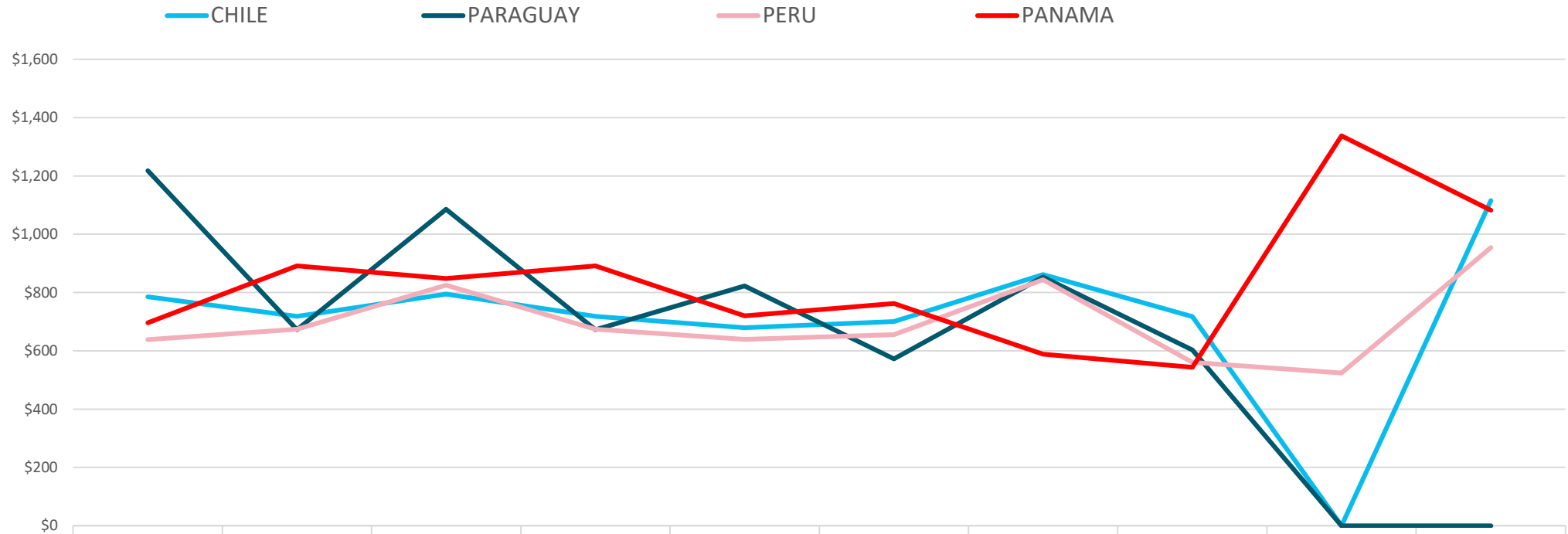
(*) LATAM markets not reported (low count of cardholders due to border closing)

Quarterly Report – Q2-2021

Additional Latam Markets

Spend per Cardholder (US\$) Q1 2018 – Q4 2020

	Average Q1 2018 – Q4 2020
CHILE	\$709
PANAMA	\$833
PARAGUAY	\$650
PERU	\$699



	Q1 2018	Q2 2018	Q3 2018	Q4 2018	Q1 2019	Q2 2019	Q3 2019	Q4 2019	Q3 2020	Q4 2020
CHILE	\$786	\$718	\$795	\$718	\$679	\$701	\$862	\$717	\$0	\$1,116
PARAGUAY	\$1,218	\$672	\$1,086	\$672	\$822	\$572	\$853	\$603	\$0	\$0
PERU	\$638	\$674	\$825	\$674	\$639	\$655	\$844	\$560	\$524	\$954
PANAMA	\$696	\$891	\$848	\$891	\$720	\$762	\$589	\$543	\$1,338	\$1,082

Additional European Markets

Spend per Cardholder (US\$)



	Average <i>Q1 2018 – Q4 2020</i>
AUSTRIA	\$494
BELGIUM	\$568
CHILE	\$709
FINLAND	\$399
LUXEMBOURG	\$952
NORWAY	\$500
POLAND	\$430
PORTUGAL	\$816
IRELAND	\$564
SWITZERLAND	\$1,174

	Q1 2018	Q2 2018	Q3 2018	Q4 2018	Q1 2019	Q2 2019	Q3 2019	Q4 2019	Q3 2020	Q4 2020
AUSTRIA	\$435	\$555	\$583	\$555	\$257	\$560	\$466	\$287	\$590	\$657
BELGIUM	\$480	\$561	\$555	\$561	\$548	\$564	\$607	\$538	\$556	\$708
FINLAND	\$298	\$288	\$445	\$288	\$274	\$233	\$228	\$384	\$809	\$738
LUXEMBOURG	\$1,455	\$817	\$1,303	\$817	\$573	\$598	\$772	\$463	\$979	\$1,744
NORWAY	\$636	\$342	\$590	\$342	\$489	\$358	\$547	\$365	\$907	\$427
POLAND	\$411	\$342	\$672	\$342	\$339	\$632	\$498	\$299	\$158	\$608
PORTUGAL	\$562	\$1,057	\$829	\$1,057	\$379	\$642	\$546	\$309	\$2,273	\$502
REPUBLIC OF IRELAND	\$273	\$422	\$533	\$422	\$433	\$656	\$647	\$554	\$797	\$898
SWITZERLAND	\$1,071	\$1,061	\$1,429	\$1,061	\$1,029	\$1,342	\$1,287	\$848	\$1,040	\$1,576

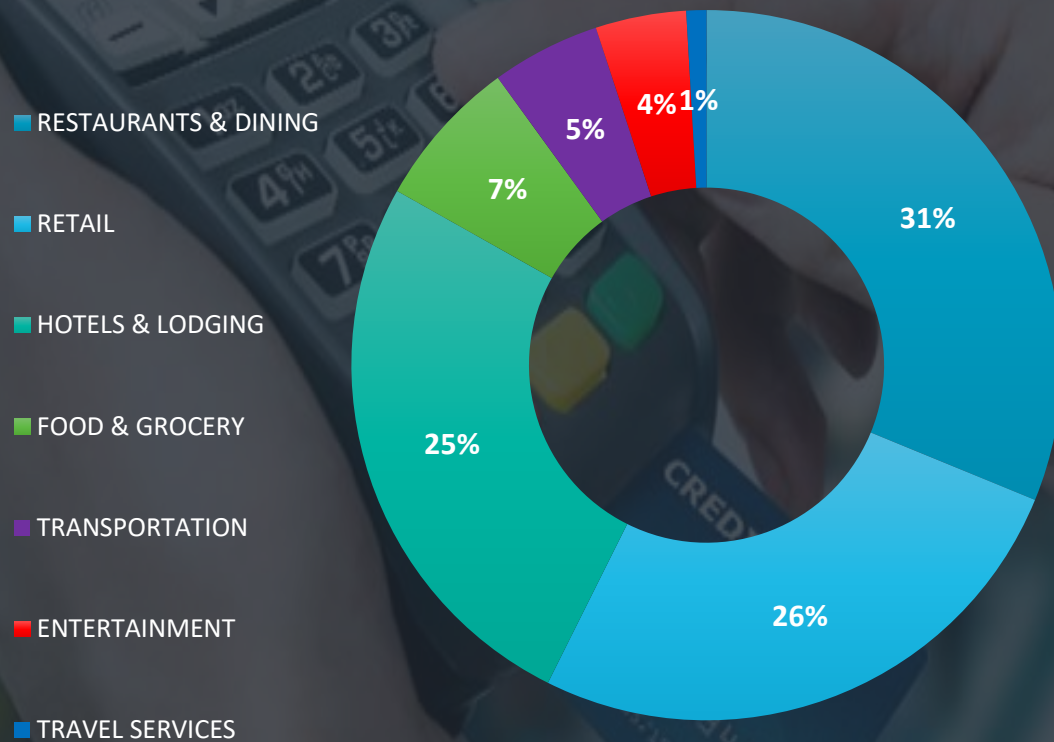
Spending Categories

Where did cardholders spend their money?



Top Spend Categories

(% of Total Spend Amount)



Quarterly Report – Q2-2021



In association with Visa Destination Insight

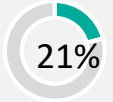

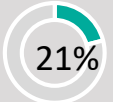

The **hospitality sector** (hotels and restaurants) see their spend **grow very significantly** vs the same quarter in 2019, fueling positive prospects about the magnitude of the recovery. Most of other sectors have **already recovered at least 85% of their 2019 levels**. The increase in food and grocery stores is a positive news for the local economy too, while the dynamic observed in specific shopping categories (p.16) such as gifts, accessories and art, suggest a large presence of more affluent visitors with strong desire to enjoy themselves at destination.

TOP10 Categories	Spend Amount (US \$)	Comparison vs Q2 2019 (\$ Growth)	Cardholder Count	Spend per Cardholder
RESTAURANTS & DINING	\$24 885 970	13,6%	88 323	\$282
RETAIL	\$20 879 057	-9,3%	74 274	\$281
HOTELS & LODGING	\$20 572 617	11,1%	31 119	\$661
FOOD & GROCERY	\$5 460 359	27,3%	44 011	\$124
TRANSPORTATION	\$3 949 275	-14,4%	19 952	\$198
ENTERTAINMENT	\$3 294 452	-15,5%	17 241	\$191
TRAVEL SERVICES	\$729 701	-6,5%	1 319	\$553
HOME IMPROVEMENT & SUPPLY	\$655 105	36,3%	845	\$775
FUEL	\$392 096	13,1%	11 151	\$35

Focus on Accommodation

Quarterly Trends



PERIOD		Spend Amount (US \$)	% of Total Spend	Cardholder Count	Spend per Cardholder
Q3-2020		\$4 274 290	 21%	6 880	\$621
Q4-2020	▲	\$8 697 790	 22%	▲ 14 461	▼ \$601
Q1-2021	▲	\$10 742 712	 21%	▲ 17 610	▲ \$610
Q2-2021	▲	\$20 572 617	 25%	▲ 31 119	▲ \$661

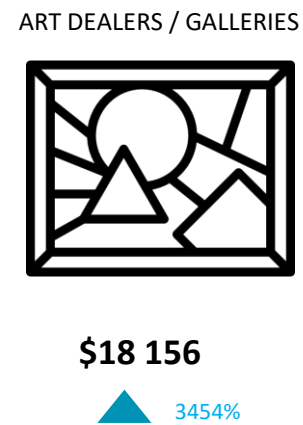
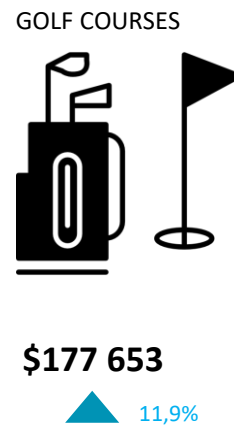
The rise since reopening in Accommodation spend quarter after quarter is spectacular, **doubling in Q2 2021 vs previous quarter.**

(*) Distant transactions (by phone, emails...) are not included anymore, to give favor to in-site spend.

Focus on Sub-Categories

Specific Merchant Categories (selection)

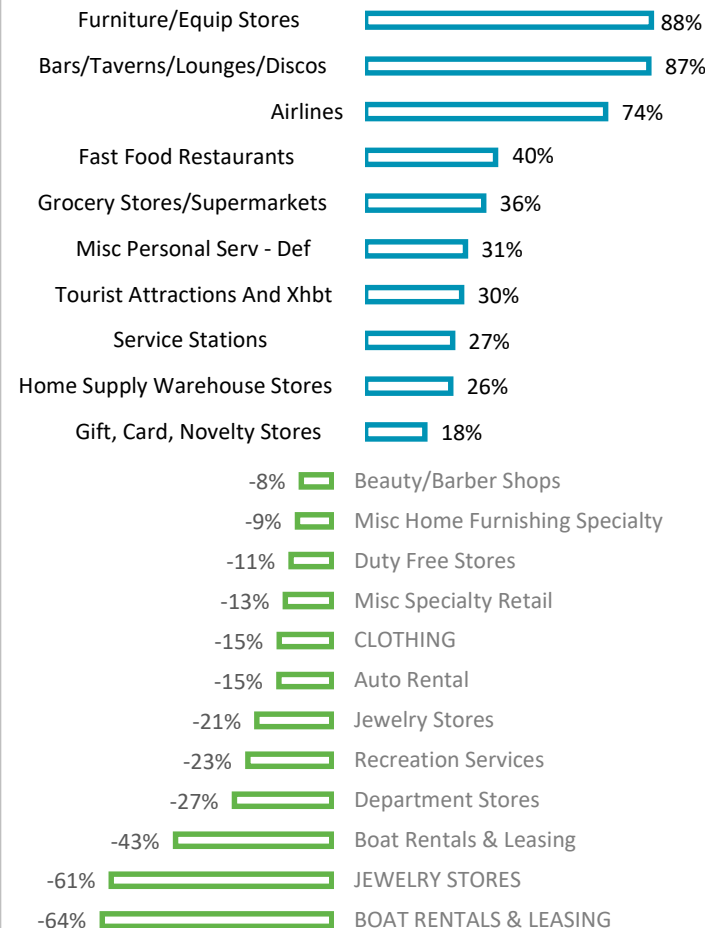
(Comparison with Q2 2019)



Top Sub-Categories \$

Comparison vs Q2 2019

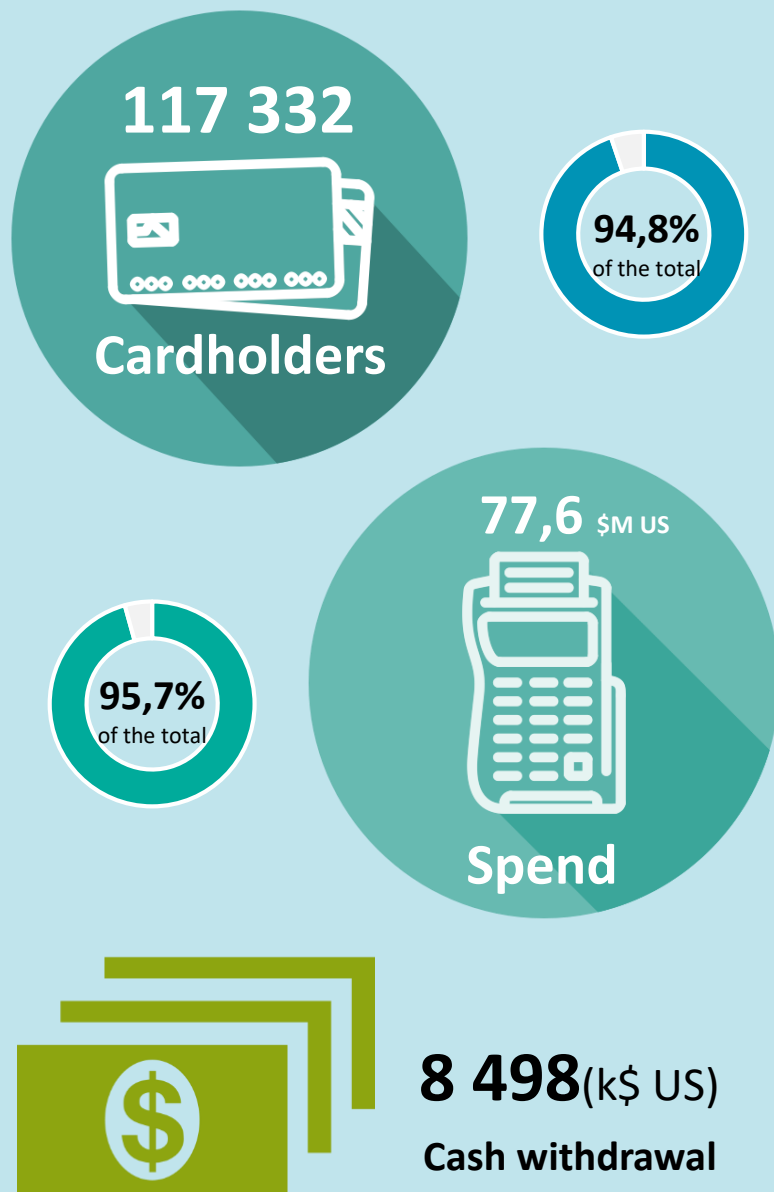
(based on all individual Visa Merchant Codes with min. \$ 100k spend)



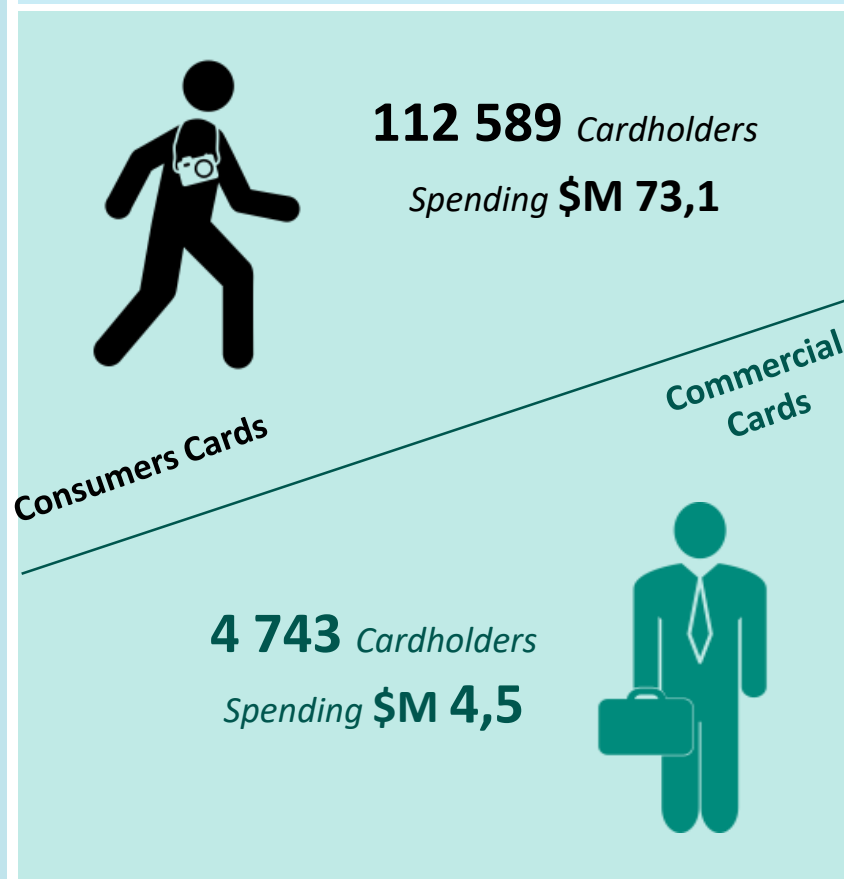


U.S. VISA CARDHOLDERS

Period: Q2-2021



+\$ 6
vs avg markets



THEY HAVE SPENT IN...

TOP10 CATEGORIES	Spend Amount (US \$)	Spend per Cardholder
HOTELS & LODGING	\$19 895 877	\$666
RESTAURANTS & DINING	\$24 141 394	\$286
RETAIL	\$19 849 413	\$280
TRANSPORTATION	\$3 692 003	\$196
FOOD & GROCERY	\$5 077 417	\$122
ENTERTAINMENT	\$3 171 604	\$192
FUEL	\$347 107	\$34
DRUG STORES & PHARMACIES	\$81 405	\$28

... AND ALSO IN (selection of sub-categories)



\$826 194
CLOTHING



\$5 834 408
JEWELRY



\$1 135 968
COSMETICS



\$510 648
BARS, LOUNGE, DISCO



\$1 617 395
GIFT, CARD, NOVELTY STORES

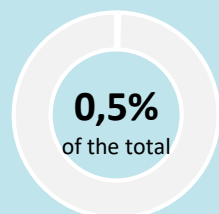
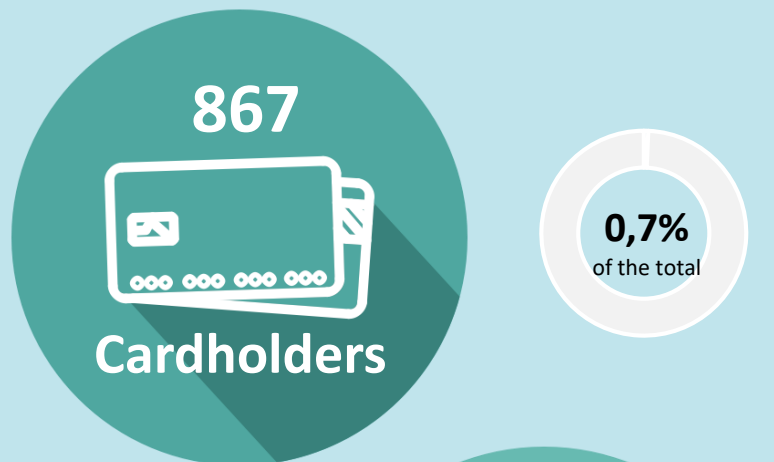


\$288 908
BOAT RENTAL

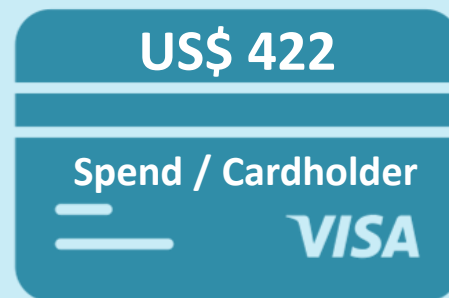


COLOMBIA VISA CARDHOLDERS

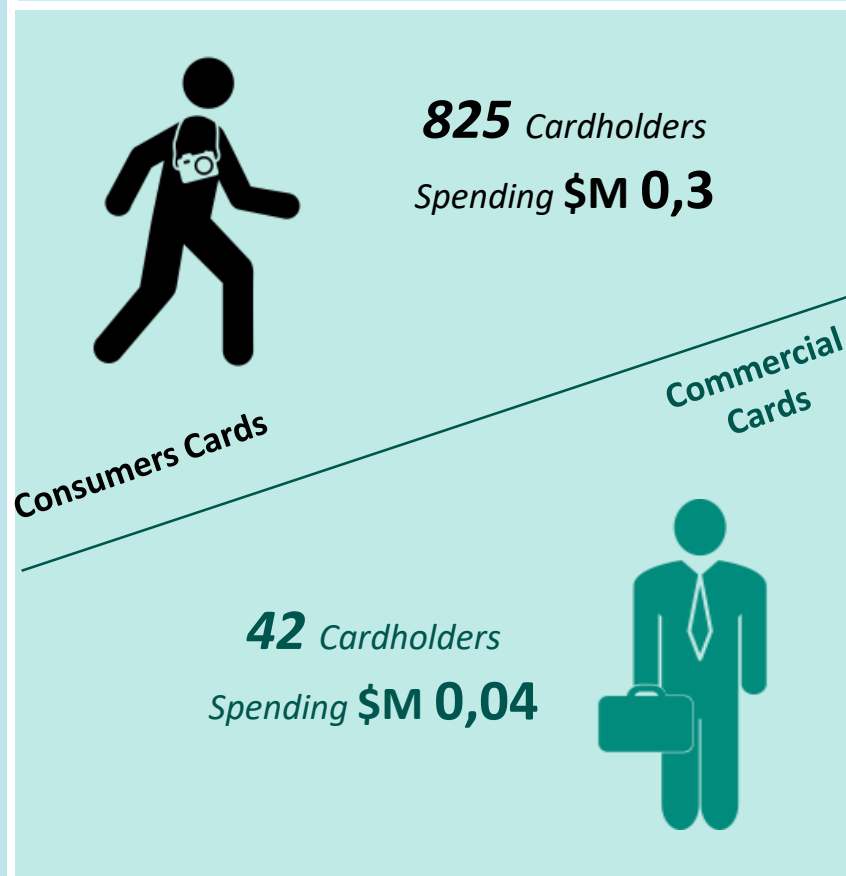
Period: Q2-2021



89 (k\$ US)
Cash withdrawal



-\$ 233
vs avg markets



THEY HAVE SPENT IN...

TOP10 CATEGORIES	Spend Amount (US \$)	Spend per Cardholder
HOTELS & LODGING	\$88 789	\$573
RETAIL	\$130 590	\$294
TRANSPORTATION	\$34 786	\$164
RESTAURANTS & DINING	\$62 249	\$145
FOOD & GROCERY	\$33 440	\$122
ENTERTAINMENT	\$9 082	\$138
FUEL	\$2 829	\$36
DRUG STORES & PHARMACIES	\$911	\$41

... AND ALSO IN (selection of sub-categories)



\$7 823
CLOTHING



\$23 653
JEWELRY



\$15 446
COSMETICS



\$1 858
BARS, LOUNGE, DISCO



\$6 153
GIFT, CARD, NOVELTY STORES

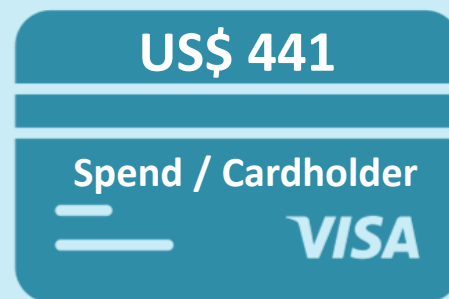
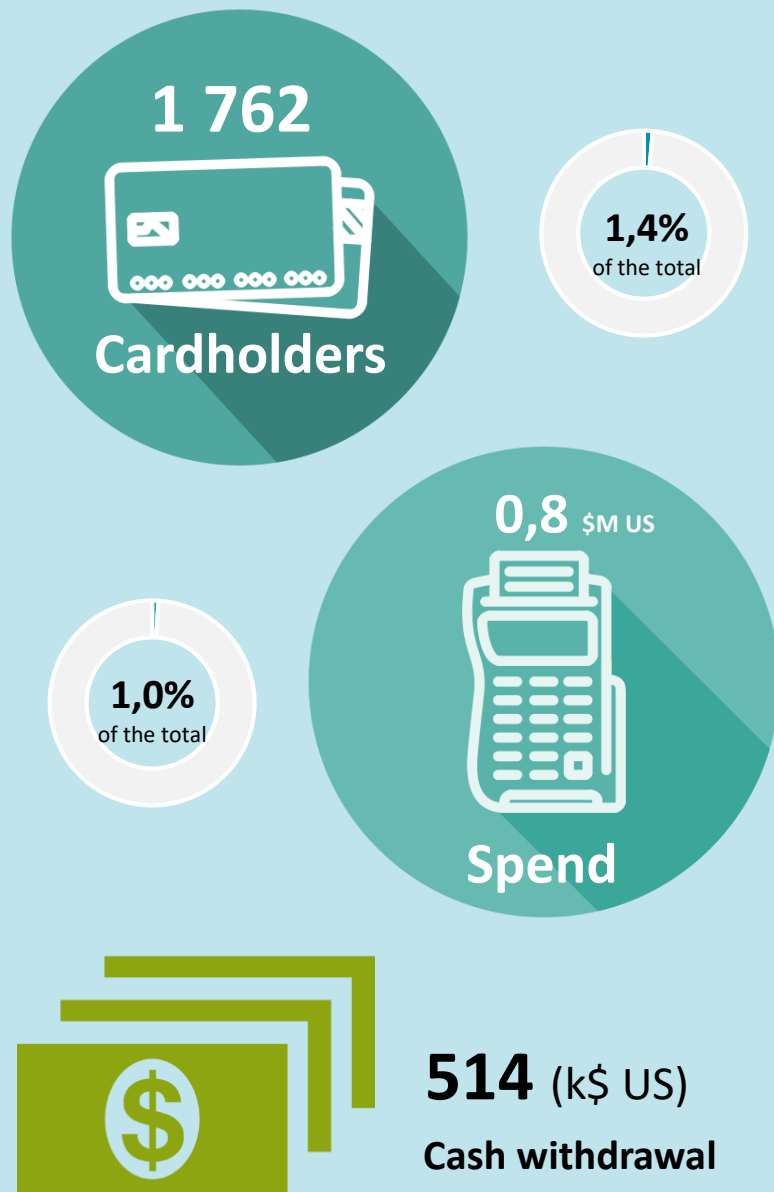


\$1 721
BOAT RENTAL

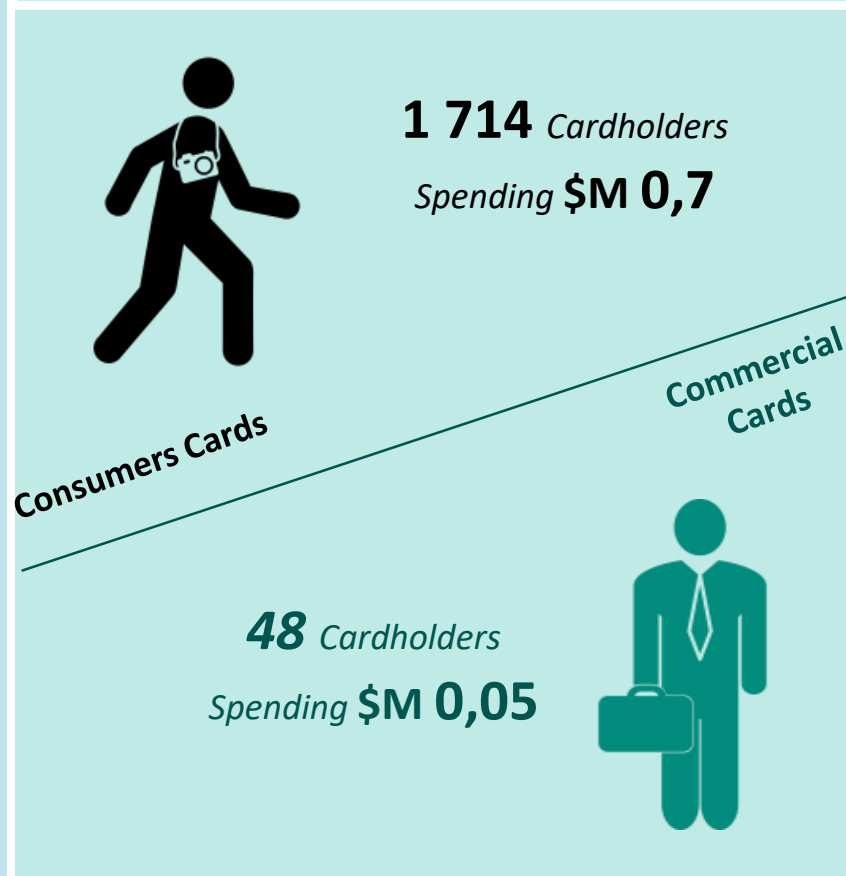


HOLLAND VISA CARDHOLDERS

Period: Q2-2021



-\$ 214
vs avg markets



THEY HAVE SPENT IN...

TOP10 CATEGORIES	Spend Amount (US \$)	Spend per Cardholder
HOTELS & LODGING	\$171 038	\$428
RESTAURANTS & DINING	\$233 757	\$201
RETAIL	\$144 356	\$184
TRANSPORTATION	\$68 957	\$278
FOOD & GROCERY	\$101 610	\$152
ENTERTAINMENT	\$21 792	\$122
FUEL	\$10 638	\$50
DRUG STORES & PHARMACIES	\$3 081	\$30

... AND ALSO IN (selection of sub-categories)



\$5 628
CLOTHING



\$31 621
JEWELRY



\$12 102
COSMETICS



\$8 616
BARS, LOUNGE, DISCO



\$6 675
GIFT, CARD, NOVELTY STORES



\$1 056
BOAT RENTAL

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+)

For detailed information about categories definition, please refer to the ***Visa Merchant Data Standards Manual***.

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
REMAINING MERCHANTS	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

NOTE: spend in Casinos are currently under covered due to Casinos on Aruba sending majority of the transactions through a MCC code that Visa rules prohibit from using for insights.

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)

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.arubainsight.com

