

# Online Destination Image & Competitiveness: Aruba and Curaçao — U.S. Market (2023)



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## Context

Despite shared geography and similar tourism offerings, Aruba and Curaçao demonstrate significantly different performance in the U.S. market.

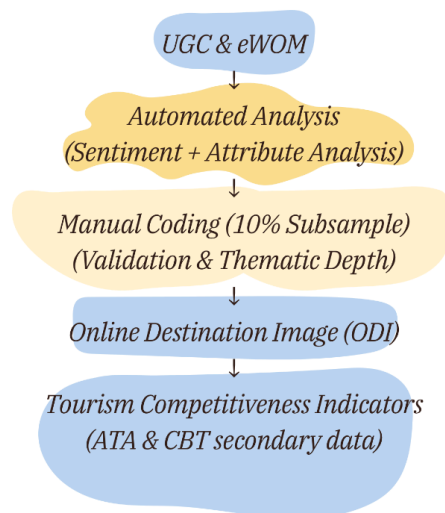
Aruba operates as a mature, well-positioned destination with a strong and cohesive digital presence. In contrast, Curaçao remains an emerging competitor with lower visibility and inconsistent online perception.

In a tourism landscape increasingly shaped by user-generated content and digital sentiment, these differences directly impact competitiveness.

## Situation Audit

The current landscape and level of online perception & exposure

## Approach



Based on analysis of 7,900+ user-generated data points across digital platforms (2023).

# Key Insight: Perception Drives Performance

ARUBA	CURAÇAO
<ul style="list-style-type: none"><li>• Strong, consistent sentiment</li><li>• Clear and cohesive brand positioning</li><li>• Alignment between perception and demand</li><li>• Mature, stable tourism performance</li></ul>	<ul style="list-style-type: none"><li>• Authentic and culturally distinct</li><li>• Mixed and inconsistent sentiment</li><li>• Weak alignment between perception and demand</li><li>• Emerging, fragmented positioning</li></ul>

## Key Gaps & Constraints

### ARUBA

Issue or Gap	Current Impact	Value if Resolved
<i>High dependence on U.S. source market</i>	Medium	High
<i>Mature and stable positioning with potential need for innovation to sustain competitiveness</i>	Medium	High

### CURAÇAO

Issue or Gap	Current Impact	Value if Resolved
<i>Fragmented positioning in the U.S. market</i>	High	High
<i>Weak alignment between perception and demand</i>	High	High

## Strategic Direction

Steps to take to achieve better performance through online destination image enhancement

*Destinations that align digital perception with brand identity achieve stronger competitiveness, higher demand, and more stable market positioning.*

The findings highlight that managing official branding alone is insufficient. Online Destination Image is co-created through user-generated content and digital narratives, requiring continuous monitoring and active engagement.

For Aruba, a mature destination with strong affective and conative alignment, the focus should shift toward sustaining emotional consistency and reducing vulnerability to external shocks to perception. This includes proactive reputation management and diversification beyond a single source market.

For Curaçao, the opportunity lies in strengthening the translation of positive perception into behavioral outcomes. While the destination demonstrates strong authenticity and cultural differentiation, inconsistencies in messaging and perceived accessibility limit loyalty formation.

Strengthening conative signals through clearer positioning, consistent communication, and improved visibility across digital platforms will enhance competitiveness.

More broadly, the findings suggest that tourism performance is not only shaped by marketing but also by structural factors such as accessibility, infrastructure, and institutional reliability, which directly influence how destinations are perceived in digital environments.



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Full report and tailored destination analysis available upon request.

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