



ARUBA TOURISM AUTHORITY

Corporate Plan

2026



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From the CEO

Tourism has always been the heartbeat of Aruba. It has shaped our economy, strengthened our identity, and connected us to the world. Today, however, we feel its presence more than ever. Growth has brought us prosperity, but also complexity: crowded spaces, rising costs, labor shortages, and a higher demand on our island's resources. These are not just statistics, they are real signals, and they matter deeply to our community.

If we look at the life cycle of destinations, Aruba is a mature tourism economy. For more than 65 years, this sector has brought opportunities and progress. But maturity comes with responsibility. We must acknowledge not only the successes of our tourism economy, but also the marks it leaves behind, both positive and negative.

That is why the Aruba Tourism Authority has embarked on a journey of transformation. With the launch of our Multi-Annual Corporate Strategy 2025–2035 (MACS), we have entered Plateau I of implementation, laying the foundation for a new era: one that shifts our focus from growth in numbers to growth in value, in a manner that is bolder than before.

We are moving from more to better. This means placing balance at the center of our choices, using tools like our Tourism Impact Model to measure not just revenues, but the true costs of growth, from housing to water, energy, waste, and

beyond. It means ensuring that tourism benefits are felt across the island, while protecting our environment and quality of life. This evolution is not a limitation; it is an opportunity.

We are advancing toward a regenerative guest economy, a model that goes beyond sustaining what we have, to restoring and enriching it for generations to come.

Our partnerships are critical on this path. From long-standing partners in tourism and government ministries driving the Turismo 2030 vision - ensuring that Aruba's tourism agenda is a priority across Ministries and underpins the implementation of our MACS - to emerging stakeholders such as Centro pa Desaroyo di Aruba (CEDE Aruba), Colegio EPI, Stichting EPB, Go Cultura Foundation, and the Aruba Conservation Foundation (ACF), we are proving that through a collaborative Guest Economy Governance Model and a mission-driven approach, tourism can be a catalyst for education, culture, environmental stewardship, and social progress.

We are renewing our brand promise, through the Aruba Effect, we are placing a new rallying call at the heart of our story: Protect It. This commitment of protecting our island, our wildlife, our culture, and our community guides how we engage guests (visitors), residents, and partners alike.

The road ahead will not always be simple. Slower growth in arrivals, tighter regulation of vacation rentals, and shifts in how we measure success will test our resolve. Yet Aruba has always been defined not by its size, but by its courage. Just as past generations built an industry with vision and pride, so too will we carry it forward with responsibility and heart.

As such we will advance our Sustainability Ambition as the guiding force behind our decisions and actions, ensuring that every step we take prioritizes the preservation and enhancement of Aruba’s environment, culture, and quality of life. We will translate this ambition into four sustainability commitments that will drive meaningful transformation, balancing environmental, economic, and socio-cultural dimensions in line with the UN SDGs, while also reflecting our corporate responsibility.

This plan marks the next chapter in our shared journey. In the introduction chapter, we highlight top priorities that we presented as a National Agenda under the Turismo 2023 Position Paper, as it is important to have this at the core of our efforts. The tactics identified in 2025 will continue to guide and inspire our work in 2026. A detailed overview of the 20 objectives and over 120 tactics, as set forth in our MACS, is presented in the appendix.

In 2026, we will continue to take bold steps that carry our vision forward and bring us closer to the future we aspire to create:

“Un Aruba Dushi pa Biba ta Un Aruba Dushi pa Bishita.”

On behalf of the A.T.A. team, I invite you to join us in this next chapter, one where Aruba thrives not just as a destination, but as a home, a community, and a promise to a more sustainable future.

Ronella Croes
CEO Aruba Tourism Authority

A.T.A.’s Sustainability Ambition: Our four Commitments

Environmental Commitment

The guest economy restores and nurtures the environment for the intergenerational benefit of Aruba.



Social Commitment

The guest economy enriches our values, culture and heritage and makes people flourish through jobs, knowledge exchange, and well-being.



Economic Commitment

The guest economy thrives and grows incremental value to the Aruban economy and its assets.



Sustainable Destination Management Organization Exemplary in ESG Sustainability.



Reading Guide

A.T.A.'s Multi-Annual Corporate Strategy (MACS 2025-2035)

Introduction

- Tourism at a Critical Crossroads
- Reshaping Tourism as we know it
- National Agenda: Top Priorities

Global Trends & Critical Forces

- Shaping the Future of Destination Organizations

A.T.A. MACS 2025-2035

- Our Aspiration and Corporate Strategy at a glance
- Key Shifts Guiding Our Transition
- Our Implementation Strategy
- Key Tourism Indicators

A.T.A.'s Corporate Plan 2026

Strategic Areas of Focus

Key Initiatives by Strategic Pillar

Budget

Appendix

Definitions

Strategic Pillars

Core priority areas that focus and organize our Strategic Objectives, Key Tactics and Key Tourism Indicators in support of our long-term aspiration through Integrated Destination Management.

Strategic Objectives

Define 'the WHAT' we aim to achieve under each Strategic Pillar.

Tactics

Each strategic objectives is followed by a set of assigned key tactics, that describe 'the HOW' we will deliver on a Strategic Objective.

Key Initiatives

The major projects or activities needed to complete the respective Tactics. They focus on 2026 and reflect major efforts, not granular actions.

Note: Only a selection of Key Initiatives is included here, with the full set outlined in our unit plans



1

CHAPTER 1

Introduction

- Tourism at a Critical Crossroads
- Reshaping Tourism as we know it
- National Agenda: Top Priorities

Tourism at a Critical Crossroads

Aruba's guest economy has long been a source of pride, a key pillar driving our economy and global reputation. With consistent, positive performance, Aruba continues to be one of the top performers in the Caribbean, boasting strong demand, premium price positioning and high guest satisfaction.

Yet, Aruba stands at a critical crossroads, mirroring the growing global shift in sentiment towards tourism. While our tourism continues to thrive, so does the growing pressure it brings. Signs of overtourism and overdevelopment are emerging, as rapid expansion of infrastructure and buildings strains the environment, natural habitats, and local culture. While the number of guests continues to grow, real per capita GDP no longer increases at the same rate, suggesting diminishing returns, potentially due to infrastructure saturation and increased costs of sustaining tourism at current levels.

A 2024 local sentiment survey conducted by the A.T.A. reveals that while many Arubans—68% of all respondents and 75% of hospitality employees—remain positive about tourism, concerns about its impact on the island's quality of life are increasing. Similarly, first-time and repeat visitors, in a series of focus group discussions conducted in Q1 2024, identified critical challenges, including overcrowding at

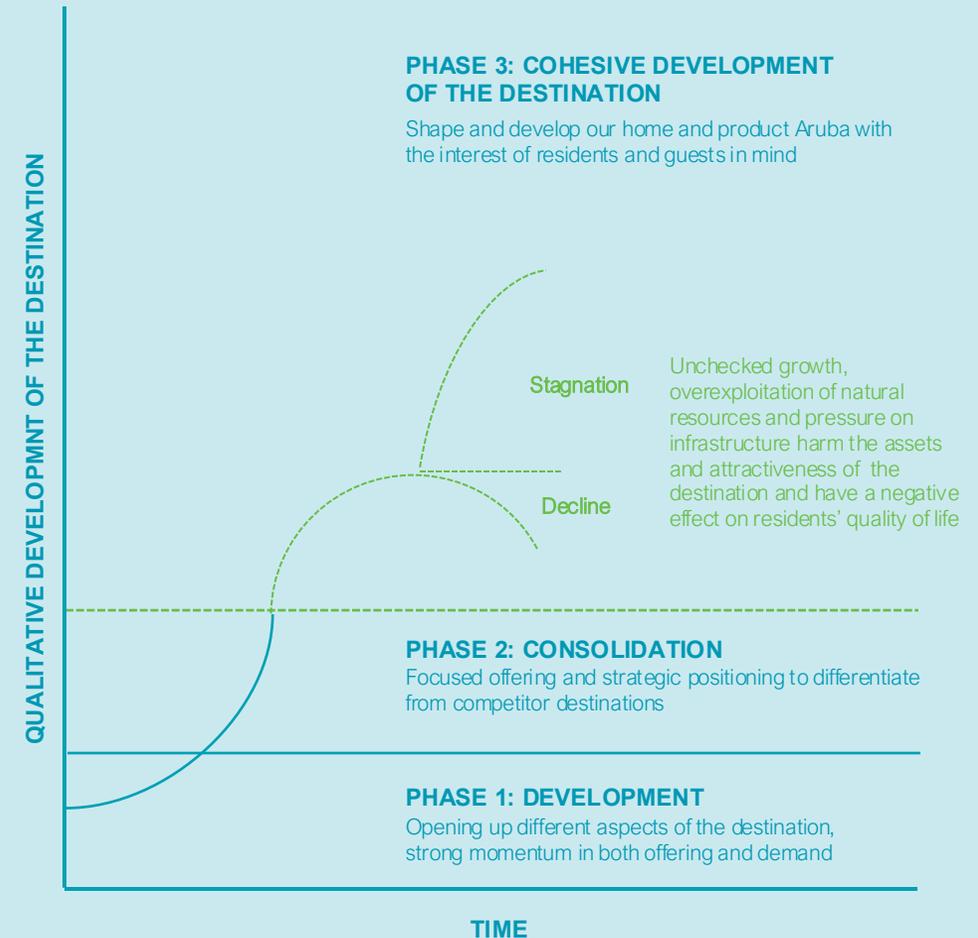
popular attractions and infrastructure congestion, raising key questions about balancing economic growth with sustainability

In short, our destination is approaching a point of stagnation. While the development of our niches has sparked a new upward curve, unchecked volume growth and the increasing pressures it brings could threaten the appeal of our destination for both locals and guests. If this trajectory continues, it could even lead to a decline with further diminishing returns, negatively affecting both the happiness and wellbeing of our population, and the overall guest experience on the island.

Main concerns of local respondents

- High cost of living
- Unpayable housing for locals
- Pressure on our infrastructure
- Lack of benefit that locals derive from tourism generated revenue
- Damage to nature and the environment.

Cycle of Destination Development





Reshaping Tourism as We Know It

Aruba has reached the limits of traditional tourism. We have a crucial opportunity to counteract potential decline by developing our destination with the interest of residents and guests in mind. To protect our home, we must fundamentally change the way we approach tourism.

The A.T.A.'s MACS 2025–2035 and the Corporate Plan for 2026 build on these priorities, providing guidance and concrete initiatives to drive progress.

Aruba is more than a destination; it is our home. Travelers who visit are not mere tourists; they are guests, and we expect them to respect and honor our island as we do. We must shift our perspective from 'What can Aruba do for its visitors?' to 'What can Aruba do for its guests AND what can our guests do for Aruba'. We must all consider our footprint on the island and protect it as we would our home.



**Responsible
Tourism**

The concept of creating better places to live in, and better places for people to visit.

Aruba is transitioning from a traditional tourism industry to Responsible and Sustainable Tourism and ultimately evolving to a Regenerative Guest Economy. This vision goes beyond the high-value, low-impact tourism model, aiming to create a system where tourism not only minimizes its environmental, social and economic footprint, but actively revitalizes and enriches our island.



**Sustainable
Tourism**

Tourism is developed and maintained in a way that remains viable over an infinite period of time, without degrading the environment or the culture it operates within.

In line with this broader perspective, the A.T.A. submitted a Position Paper to the government in February 2025, outlining top priorities that we presented as a national agenda under the title Turismo 2023 – Un Aruba Dushi Pa Biba y Bishita. Within this framework, we identified three thematic clusters with key priorities to accelerate the transition from a traditional model toward a responsible, sustainable, and regenerative guest economy.



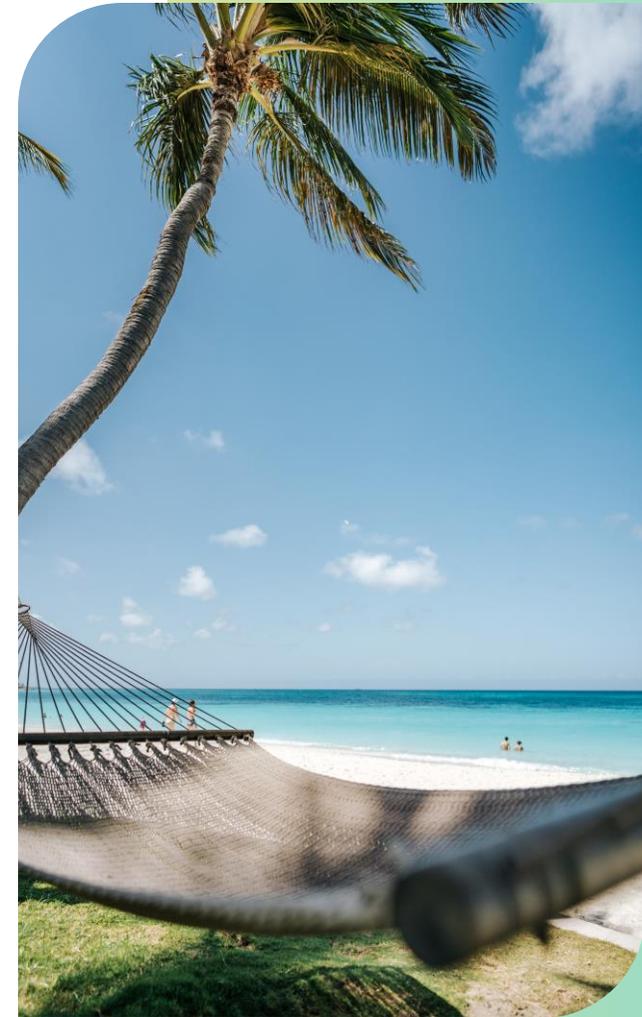
**Regenerative
Tourism**

A focus beyond responsible and sustainable tourism, where we seek to actively improve and rejuvenate our destination.

National Agenda Top Priorities

Enhanced Tourism Governance

1. **Responsible and Collaborative Management of Aruba's Guest Industry:** Responsible management of Aruba's guest industry requires firm commitment and collaboration among multiple authorities and ministries. The Government of Aruba is urged to take a leading role in adopting best practices, such as the establishment of an 'infra committee,' comprising key stakeholders like the A.T.A., DOW, DIP, DNM, and TPEF. It is imperative for the Government to remain informed about necessary maintenance work and allocate appropriate budgets to support vital infrastructural enhancements.
2. **Extending and Strengthening the Moratorium:** The moratorium on hotel and condominium projects, in place since December 1, 2018, should be extended beyond the current ROPV's duration. Strengthening this moratorium includes potentially halting projects still in the pipeline while revisiting the 'Criteria Toeristische Accommodatie' and reinstating the ROPV - Commissie Toerisme (or establishing a similar committee). Refer to the Room Inventory overview in the appendix.
3. **Elevating Aruba's Tourism Product:** Enhancing Aruba's offerings is pivotal to the "High Value – Low Impact" strategy. This includes attracting high-income guests, improving residents' quality of life, and addressing diminishing returns linked to lower value-for-money perceptions. The A.T.A. will lead these efforts through strategic investments, research, and advocacy. The government is called upon to prioritize the Protect and Maintain principle, preserving Aruba's culture, heritage, and natural assets while investing in key product development projects and maintaining existing ones.
4. **Strengthening Spatial Planning and Infrastructure:** Sustainable growth requires a focus on guest flow management, integration of the beach policy, and enforcement of regulations for water sports and motorized vehicles. Spatial planning must be updated based on insights gained from five years of ROPV implementation and the integration of beach policies, ensuring quality upgrades and assurance programs remain priorities.
5. **Preparing for Climate Change Risks:** To safeguard Aruba's future, the Government should implement programs to combat and adapt to climate change risks. These measures will ensure the island's resilience and long-term sustainability.



National Agenda Top Priorities

Elevating Aruba's Accommodations Product

6. **Upgrading the Hotel Product:** As part of the high-value, low-impact strategy, A.T.A. seeks to elevate existing hotels, making them more high-end, boutique, and lifestyle-oriented, with a focus on sustainability and exclusivity.
7. **Stimulating Green and Eco-Friendly Investments:** Reinstating the former IPC is crucial to encourage hotel upgrades and support investments in eco-friendly and sustainable aspects of accommodations.
8. **Upgrading the Vacation Ownership Sector:** Given the significant presence of vacation ownership (timeshare) on the island, Aruba should consider separate policies to promote product upgrades and innovations in this sector.
9. **Regulating Short-term Vacation Rentals (STVRs):** Curtailing STVRs (2,437 units as per the Room Inventory overview in the appendix) is vital to fostering a transparent, equitable, and sustainable market that benefits residents, guests, and the local economy. Enhanced regulations should address taxation collection, safety and health standards enforcement, neighborhood disruption mitigation, and property rights protection.
10. **Establishing the Aruba Quality and Hospitality Authority (AQHA):** To ensure quality and compliance of STVRs, A.T.A. supports the establishment of the AQHA. This includes updating Aruba's spatial planning framework and continuing efforts to manage the STVR inventory sustainably.

11. **Advisory Committee on Accommodation Projects:** Aruba's accommodations portfolio (both existing and in the pipeline), should embrace innovative, eco-conscious practices that align with Aruba's commitment to a responsible, regenerative tourism model. The A.T.A. recommends the Government establish an advisory committee to provide expert guidance on accommodation projects, with A.T.A. actively participating as a member.



National Agenda Top Priorities

Authority 2.0: Integrated Destination Marketing and Management

12. Securing the organization's financial stability: The A.T.A. continues to actively pursue amendments to its legislation, which are crucial for securing the organization's financial stability. A key element of these amendments is the ability for the A.T.A. to retain any positive financial results. This is essential to ensure that the A.T.A. can meet its operational obligations, even in times of crisis. Currently, the emergency fund can only be used for marketing activities and cannot be used for direct operational expenses. The proposed amendments include the establishment of an OPEX reserve fund, allowing the A.T.A. to build up a reserve of up to 50% of its operational costs. In anticipation of the legislative change, the A.T.A. included a reserve of Afl. 6.8 million in its Corporate Plan 2024 and Afl. 2.6 million for 2025. The emergency fund for marketing activities (EFMP) will remain at 25% of the budgeted revenue. Given the recent changes in the allocation of the Tourism Levy to the A.T.A., this legislative amendment is essential for maintaining sustainable tourism management.

13. Landsverordening Top Inkomens (LNT): On July 4, 2022 (AB 2022 no. 91) the national ordinance on standardization top incomes (Landsverordening Top Inkomens: LNT) was introduced via national decree. This ordinance contains regulation governing the standards of remuneration, salaries, and related allowances of top officials in both the public and semi-public sectors. Recognizing the importance of the tourism industry to the

local economy and wellbeing of the community, as well as the unique responsibilities of the A.T.A., call for the entity to be eligible for an exemption from the norm which the legislation allows to occur at the discretion of the Minister of Finance and Culture. The A.T.A. expressed its thoughts to the Government on various occasions, including in a letter sent on June 7th, 2022, and a second letter on February 29th, 2024. The request seeks the removal of the A.T.A. from the list, as reported in the AB 2022 NO 91, or a decision allowing the A.T.A. to exceed the maximum set norm in Article 9.

Not proceeding herewith will make the A.T.A., with its overseas offices, less competitive and attractive as an employer. It shall also require an adjustment to the organization's salary structure, to avoid situations where employees might be earning more than those who qualify as 'top executives' ("top functionarissen") in accordance to the law. The A.T.A. being unique in its kind, in that it also has overseas offices, is put in a very delicate position whereby it loses a critical part of its autonomy in regard to its HR management. One of the critical objectives behind its independization in 2011.



2

CHAPTER 2

Global Trends and Critical Forces

Shaping the Future of Destination Organizations

As destination organizations worldwide navigate a rapidly changing environment, forces such as global political shifts, accelerating technological advancements, and evolving traveler expectations are redefining the future of tourism. These dynamics reinforce the critical role destination organizations play—not only in driving economic impact but also in supporting community well-being, sustainability, and innovation.

Guided by amongst other insights from the 2025 DestinationNEXT Futures Study, A.T.A. continues to build on its long-standing commitment to proactive transformation. Our strategic direction aligns with global best practices and emphasizes data, collaboration, and long-term resilience as we work to future-proof Aruba's guest economy and ensure tourism continues to enrich the lives of all who live on, and visit, our island.

Global Trends

Out of 25 global trends identified in the DestinationNEXT Futures Study, the following were selected as most relevant to A.T.A.'s direction and priorities.

1

Industry leaders need multi-dimensional KPIs that go beyond traditional economic metrics to effectively measure and communicate the industry's full economic, social, and environmental value.

2

Resident sentiment and community engagement are critical to maintaining destination alignment.

3

Preserving authenticity and distinctiveness is becoming critical as similar or standardized tourism offerings threaten destination brand value and visitor attachment.

4

Geopolitical tensions and nationalism are rapidly altering global travel flows, as travelers seek destinations perceived as safe and welcoming.

5

Destinations are prioritizing visitors who deliver greater economic, cultural, and environmental value, rather than simply pursuing volume growth.

6

Industry must address skilled labor shortages, labor pipelines, and generational workplace shifts.

7

Communities expect to be more engaged in destination, product and experience development for local and visitors.

8

The rise of generative AI is disrupting traditional destination marketing models

9

The housing crisis is straining workforce availability in the tourism industry

10

The rise of the "anytime, anywhere traveler" is blurring the lines between business and leisure, with remote work enabling more frequent, extended, and blended travel experiences

11

Destinations are looking at sustainability/regeneration more broadly, encompassing economic, social and environmental impact

Critical Forces Shaping The Future of Destination Organizations

Key forces from the DestinationNEXT study were selected to reflect those most relevant to A.T.A.'s evolving role and long-term strategic direction.





3

CHAPTER 3

MACS

2025-2035

- Our Aspiration and Corporate Strategy at a Glance
- Key Shifts Guiding our Transition
- Our Implementation Strategy
- Key Tourism Indicators

Our Aspiration and Corporate Strategy at a glance

Our long-term aspiration towards 2035 and Corporate Strategy for the first five years consisting of five strategic pillars, 20 strategic objectives and over 120 actionable tactics for execution.



Aspiration 2035

Sustainability Ambition

Environmental Commitment

The guest economy restores and nurtures the environment Aruba

Social Commitment

The guest economy enriches our values, culture and heritage and makes people flourish through jobs, knowledge exchange, and well-being

Economic Commitment

The guest economy thrives and grows incremental value to the Aruban economy and its assets

Sustainable Destination Management Organization

Exemplary in ESG Sustainability



Vision

Un Aruba dushi pa biba ta un Aruba dushi pa bishita

Aruba as a wonderful place to live is a wonderful place to visit

Core Values



Core Purpose

Enrich the Quality of Life on Aruba through responsible and integrated destination management

Roles



5 Strategic Pillars



20 Strategic Objectives

I. QUALITY OF LIFE & PLACE	II. QUALITY OF EXPERIENCE	III. QUALITY OF ECONOMIC IMPACT	IV. QUALITY OF NATURAL ENVIRONMENT & CULTURAL HERITAGE	V. QUALITY OF ORGANIZATION
1.1 MANAGE GUEST ECONOMY IMPACT	2.1 DEVELOP NICHES	3.1 EVOLVE BRAND POSITIONING	4.1 PROMOTE ECOLOGICAL AND SOCIAL RESPONSIBLE BEHAVIOR	5.1 STRENGTHEN ORGANIZATIONAL OUTREACH
1.2 INVEST IN DESTINATION SAFETY	2.2 ENABLE AND SUPPORT DELIVERY OF DIVERSE QUALITY EXPERIENCES FOR EVERYONE	3.2 INNOVATE MARKETING COMMUNICATION	4.2 FACILITATE ENVIRONMENTAL CONSERVATION & REGENERATION	5.2 ACHIEVE ORGANIZATIONAL EXCELLENCE IN ESG
1.3 PLACEMAKING	2.3 ENHANCE ON-ISLAND COMMUNICATION	3.3 STRENGTHEN HIGH VALUE PORTFOLIO	4.3 FACILITATE CULTURAL HERITAGE CONSERVATION	5.3 ENHANCE ORGANIZATIONAL CAPABILITIES
1.4 IMPROVE GUEST FLOW MANAGEMENT	2.4 DRIVE EXCEPTIONAL SERVICE QUALITY	3.4 IMPROVE INDUSTRY CAPABILITIES		5.4 NURTURE EMPLOYEE EXPERIENCE
1.5 OVERSEE CURRENT AND FUTURE ACCOMMODATIONS				

Key Shifts Guiding Our Transition

The following shifts illustrate our path toward a more responsible and ultimately regenerative guest economy.



Integrated Destination Management Approach

Through integrated destination management we promote a collaborative approach to managing our guest economy, bringing together government, businesses, and communities to develop and sustain our destination. This approach extends to the A.T.A. , where we will further harmonize our destination marketing and development efforts to drive the transition towards responsible, sustainable and regenerative guest economy.



High-Value Guest

We shift from excessive growth in number of visitors, to balancing tourism by attracting high-value guests who share our responsible tourism values. This shift will be supported by product development and education at every stage of the customer journey, redefining Aruba's international brand positioning.



Evolution of The Aruba Effect

On an international front brand Aruba will talk more about responsible tourism. Our Aruba Effect guest attraction strategy will evolve to include "Protect it" emphasizing the preservation of Aruba's wildlife, culture, and quality of life. This will guide our messaging to both local and international audiences, promoting a responsible guest economy and encouraging behavioral change.



Protect and Maintain

We will strengthen our commitment to preserving Aruba's culture, heritage, and natural assets, while actively involving residents and communities in the guest economy experience. Additionally, we will invest in finalizing key product development projects and maintaining existing ones.



The Way we Work

The organization is shifting from a predominantly outward-focused, performance-driven approach to becoming people-centric and purpose-driven, exemplifying ethical, socially, and environmentally responsible conduct through role clarity, empowerment, collaboration, and a strong commitment to ESG principles.

Key Shifts Guiding Our Transition

Our Aruba Effect communication strategy

Protect It is at the heart of what we do and influences how we communicate with which audience. **First Time guest**

Feel It Provides inspiration

Our brand-level marketing initiatives are focused on fostering affinity with consumers by providing inspiration and generating curiosity.

Want It Creates Desire

The message is tailored to cater to specific audiences in search of unique experiences, effectively connecting their specific vacation requirement with an on-island experience.

Get It Encourages Commitment

Involves tracking intent, targeting, and retargeting audiences who have been previously exposed to our marketing or have shown interest in specific aspects of Aruba.



Our Implementation Strategy 2025 – 2035

Our Implementation Strategy visualizes the gradual transition for Aruba as destination and for the A.T.A. as Destination Marketing and Management Organization (DMMO) towards a regenerative guest economy in 2035.



Key Tourism Indicators

We measure our progress using a set of MACS Key Indicators aligned with each strategic pillar. These indicators track both industry-wide outcomes, which rely on collective efforts, and internal performance metrics specific to the Destination Marketing and Management Organization (DMMO).

As the DMMO, we monitor broader destination performance and assess the implementation and results of specific A.T.A. initiatives aligned with MACS.

While we play a critical role in overseeing progress, we do not bear sole accountability for outcomes that require collaboration among multiple stakeholders.

Together, these Key Indicators provide a transparent view of how our collective tourism efforts drive the destination's success and guide us toward a regenerative guest economy that sustains and enriches Aruba's environment, culture, and community.

Disclaimer: As the DMMO, we monitor industry-wide outcomes within our authority role. In addition to the highlighted Key Indicators, the A.T.A. tracks multiple KPIs internally covering various objectives and tactics, reflective of the accountability and performance of our team members and engaged partners.

Dashboard

Notes:

- Targets are A.T.A.'s internal performance metrics
- Projections are industry-wide outcomes, greatly reliant on collective efforts

A.T.A.
KPIs Measured by A.T.A. as DMMO

I. Quality of Life & Place

Resident Satisfaction with Guest Economy

Projection:
Establish Baseline

Source A.T.A.

II. Quality of Experience

Guest Satisfaction

Projection:
Establish Baseline

Source A.T.A.

III. Quality of Economic Impact

High Value Guest Arrivals

Projection: +2%

Target US First Timers with HHI +\$150K: +5%

Target EU & LATAM: Establish Baseline

Source A.T.A.

IV. Quality of Natural Environment & Cultural Heritage

Responsible behavior of Residents and Guests

Projection:
Establish Baseline

Source A.T.A.

V. Quality of Organization

Employee NPS

Target:
Establish Baseline

Source A.T.A.

INDUSTRY
KPIs Measured by Stakeholders and / or in partnership

Resident Livability Index

Multiple Sources

Guest Experience

Projection:
Establish Baseline

Source A.T.A.

Guest Spend

Projection:
Establish Baseline

Tourism Receipts

Projection: 3%

Source CBA/ A.T.A.(projection)

Guests Cultural Experience Satisfaction

Resident Perception of Tourism's Environmental Impact

Projection:
Establish Baseline

Multiple Sources

Key Indicators – Industry-wide and A.T.A. Internal

I. QUALITY OF LIFE & PLACE	II. QUALITY OF EXPERIENCE	III. QUALITY OF ECONOMIC IMPACT	IV. QUALITY OF NATURAL ENVIRONMENT & CULTURAL HERITAGE	V. QUALITY OF ORGANIZATION
<p>Resident Perception Indicators</p> <ul style="list-style-type: none"> • Satisfaction with the Guest Economy Residents' overall satisfaction with the impact of tourism on their community and quality of life. • Perceived Impact on Infrastructure Residents' assessment of tourism's effect on the quality and availability of roads, parking, and public services. • Spatial Experience Resident perceptions of tourism's presence and impact across key areas—downtown Oranjestad, San Nicolas, hotel zones, and beach areas. • Safety Perception Residents' sense of safety in their communities • Density and Congestion Residents' views on crowding and congestion linked to tourism in public spaces and transport. <p>Resident Livability Index</p> <ul style="list-style-type: none"> • Housing Affordability Index • Cost of Living Index (local consumption basket) • Local Infrastructure & Services Capacity Index 	<p>Guest Satisfaction</p> <ul style="list-style-type: none"> • Guest Satisfaction (NPS & GEI) • Likelihood to Recommend • Likelihood to Return <p>Guest Experience</p> <ul style="list-style-type: none"> • Guest Spatial Experience (access to and quality of public spaces) • Density & Congestion Levels from a Guest perspective • Guest Safety Perception 	<p>Tourism-Specific Impact</p> <ul style="list-style-type: none"> • Tourism Receipts (Average Daily Tourist Spend (ADTS)) • Average Daily Expenditure (ADEX) • Percentage share of High Value Guests • Niche Tourism Revenue Share <p>Accommodation Performance</p> <ul style="list-style-type: none"> • Average Daily Rate (ADR) • Occupancy Rate • Revenue per Available Room (RevPAR) • Average Length of Stay <p>Airlift and Cruise Performance</p> <ul style="list-style-type: none"> • Airlift performance • Cruise performance <p>Marketing & Promotion</p> <ul style="list-style-type: none"> • Brand Appeal • Intent to Visit • Return on Marketing Investment <p>Macro Indicators</p> <ul style="list-style-type: none"> • Tourism Revenue Retained in Local Economy (% leakage) 	<p>Responsible behavior of Residents and Guests (On-island Communications and DSU efforts)</p> <ul style="list-style-type: none"> • TBD <p>Natural Environment</p> <ul style="list-style-type: none"> • Environmental Quality Index • Tourism's Environmental Impact <p>Cultural Heritage</p> <ul style="list-style-type: none"> • Heritage Preservation & Cultural Engagement • Guests' Cultural Experience Satisfaction 	<p>Employee Experience</p> <ul style="list-style-type: none"> • Employee Net Promoter Score (eNPS) • Exit Survey Feedback <p>Organizational Excellence</p> <ul style="list-style-type: none"> • Sustainability Scorecard (TBD) • Volunteer Program Participation (# of programs, staff participation rate) - TBD • Crisis Response Rate <p>Advocacy & Engagement</p> <ul style="list-style-type: none"> • Advocacy Agenda Completion Score • Stakeholder Satisfaction (TBD) • Corporate Communications Indicators (e.g. Social Media Sentiment, Engagement)

4

CHAPTER 4

Corporate Plan 2026

- Strategic Areas of Focus
- Key Initiatives by Strategic Pillar

Strategic Areas of Focus

Guided by our Aspiration and the High-Value, Low-Impact model, the 2026 Strategic Areas of Focus will advance Aruba toward responsible tourism, laying the foundation for a sustainable and ultimately regenerative tourism model by 2035, ensuring benefits for residents, guests, and the natural environment.

1

Stabilize Guest Arrivals and Increase the Share of High-Value Segments

The focus will be on stabilizing overall guest arrivals while increasing the proportion of high-value visitors — guests who contribute positively to the economy and respect Aruba’s culture and environment. This value-driven shift is supported by a strengthened brand positioning, a unified communications framework, and a targeted segmentation and diversification strategy.

Efforts will concentrate on attracting high-value guests from key source markets, reinforcing the message that Aruba is a premier destination for responsible tourism focused on value over volume.

Touchpoints with Strategic Pillar: III

Source: DestinationNEXT 2025 Futures Study

2

Drive Responsible Guest Economy Agenda – shaping awareness and responsible behavior

The A.T.A. will bring guests, locals, and partners closer together through shared values and meaningful engagement.

Community-driven initiatives ensure local voices are heard while promoting environmental sustainability, cultural preservation, and equitable economic benefits.

We are placing greater emphasis on empowering the local community to shape the future of tourism and we enhance collaboration with partners. All in line with priority are, being; community engagement which includes raising awareness and ensuring that local voices are heard and valued. Concerns such as environmental sustainability, cultural preservation, and equitable economic benefits are to be addressed through active collaboration. The community is to be made aware of the benefits trickling through tourism.

Through clear and consistent communication, we also help everyone understand their role in protecting and celebrating what makes Aruba unique.

Touchpoints with Strategic Pillar: I

3

Enhance Guest Flow Management

The A.T.A. is enhancing how guests move through and experience Aruba by co-funding key infrastructural projects, strengthening on-island communication, and fostering strategic partnerships.

While guest flow systems are in their pilot phase, these efforts lay the foundation for a more seamless and enjoyable guest experience. These initiatives and their future advances are carried out in close collaboration with government entities and other stakeholders to ensure alignment with broader public infrastructure efforts and long-term tourism objectives.

Touchpoints with Strategic Pillars: I, II, III and IV

Strategic Areas of Focus

4

Develop High-Value Niches to Drive a More Sustainable and Balanced Guest Economy

The A.T.A. will continue to develop high-value niches—culinary, wellness, and weddings—as a core strategy to attract high-value guests, increase guest spend, and offer meaningful and differentiated experiences. Cultural and eco-conscious elements remain integrated within the overarching “Masha Danki” Responsible Tourism approach.

An events strategy will also be established, guided by the Events Position Paper and Policy, with a shift toward responsible experiences that emphasize wellness, health, and luxury. Additionally, A.T.A. will work to strengthen alignment across the guest economy to support long-term niche development and ensure consistent execution of these strategies.

Touchpoints with Strategic Pillars: I, II, and III

5

Partnering for Education and Workforce Readiness in a Sustainable Guest Economy

The A.T.A. actively contributes as a strategic partner to enhance training programs aimed at strengthening workforce skills, establishing consistent standards across guest industry sectors, and reinforcing responsible practices. We also support alignment around a national strategic workforce plan.

Additionally, we will intensify our efforts to promote responsible behavior across all segments of society—from children to businesses and event organizers—in order to help cultivate a lasting culture of care for Aruba’s future.

Touchpoints with Pillars: II, III and IV

6

Data-Driven Progress for a Responsible and Sustainable Guest Economy

A key part of the shift to a value-based tourism model, balance, and long-term sustainability is redefining what we measure.

To align with Aruba’s evolving priorities, A.T.A. will enhance its data-driven approach by integrating other KPIs and prioritizing high-impact, timely research. These efforts aim to demonstrate progress in attracting high-value guests while supporting transparent, trust-building communication with the community. Powered by a well-structured database and advanced AI tools, this approach will enable deeper insights and more strategic, sustainable planning.

Touchpoints with Pillars: I, II, III, IV and V

7

Strengthen Organizational Capacity to Lead Tourism Transition

The A.T.A. will move boldly toward evolving into a stronger, more future-ready organization, grounded in a culture that is people-centric, purpose-driven, and aligned for impact. With a renewed internal structure, cultural alignment and with the continued advocacy for governance adaptation with Aruba’s evolving legal standards, we are laying the groundwork for long-term transformation.

Guided by a regenerative guest economy as our North Star, we will continue to serve as a trusted and visible force in shaping Aruba’s tourism future—deepening collaboration with partners, voicing a clear stance on responsibility and sustainability, and leading with our core values: curason, curashi, curiosidad y compasion.

Touchpoints with Pillar: V

Key Initiatives by Strategic Pillar

This section highlights a selection of Key Initiatives for 2026, organized by Strategic Pillar. These Initiatives represent some of major the projects and activities required to deliver the respective Tactics for Plateau 1 (2025–2026) of our MACS implementation strategy.

Strategic Pillar I - Quality of Life & Place

Strategic Pillar II - Quality of Experience

Strategic Pillar III - Quality of Economic Impact

Strategic Pillar IV - Quality of Natural Environment and Cultural Heritage

Strategic Pillar V - Quality of Organization

Note: Only a selection of Key Initiatives are included here; the full set is detailed in A.T.A.'s Business Unit plans. For an overview of the Tactics, please refer to the appendix



STRATEGIC PILAR I

Quality of Life & Place

STRATEGIC PILAR I

Quality of Life & Place

Strategic Objectives

1.1 Manage Guest Economy Impact

1.2 Invest in Destination Safety

1.3 Placemaking

1.4 Improve Guest Flow Management

1.5 Oversee Current and Future Accommodations

KEY INITIATIVES INCLUDE:

Guest Economy Impact

- **Conduct Research on the Informal Tourism Economy** - to better understand its scope, contributions, and the challenges it presents.
- **Update the Tourism Leakage Study** – to assess how much tourism revenue is retained locally and identify opportunities to strengthen economic linkages within the destination.

Destination Safety

- **Update and Certification of Crisis Communication Plan** - to ensure up-to-date protocols and clear delineation of A.T.A. and Cluster 8 responsibilities.
- **Continue supporting the Aruba Hospitality and Security Foundation (AH&SF)** with amongst other expansion of the Tourism Security Patrol Aruba (TSPA) program to additional areas, including San Nicolas (“Pariba di Brug”).
- **Continuation of buoys and mooring placement**, as well as maintenance thereof - to allow for distinction in swimming areas, buffer zones and other areas to allow for 'code of conduct/behavior protocols' on our waters.

Placemaking

- **Develop comprehensive destination brand guidelines** - to foster a unified and recognizable destination brand.
- **Enhance, Develop, and Maintain Public Area Infrastructure, Assets and Amenities** - to extend their lifespan, improve their functionality, enhance safety, aesthetics, and overall guest experiences, integrating sustainability for cleaner, resilient, and accessible spaces. This includes a range of existing and new sustainability-focused projects; refer to page 31 for an overview of destination development efforts.
- **Provide clear and strategically placed signage island-wide** - to ensure effective direction, educational information, and behavioral guidance, all while maintaining uniformity and brand consistency.
- **Support and collaborate on Government Initiatives** – such as reforestation and cleanliness efforts to enhance the destination’s sustainability and appeal.
- **Advance the development of the Guest Inspiration Center** in Oranjestad - focusing on content, communication assets to deliver an immersive visitor experience.

STRATEGIC PILAR I

Quality of Life & Place

KEY INITIATIVES INCLUDE:

Guest Flow Management

- **Analyze peak visitation times, capacity thresholds, and guest behavior** - to develop a comprehensive visitor flow management plan.
- **Leverage digital tools to enhance guest flow management** - to help optimize on-island movement, minimize congestion, and improve the overall guest experience, ensuring smoother logistics and a more enjoyable visit for all.

Community Engagement

- **Support community-led initiatives**, including partnerships with CEDE Aruba and cultural events such as Celebracion Dia di Brazil, to preserve and foster local culture. Support partnerships with educational institutions such as Colegio EPI, EPB Aruba, the University of Aruba, the Aruba Excellence Foundation, and Comite Olimpico Arubano to strengthen their programs. Additionally, support NGOs such as Stimami Sterilisami and their spay-and-neuter campaign to address the island's stray-pet overpopulation.
- Support of government-led activations (e.g. Carubbian, Ban Bek Caya), continuation of the culinary event 'Autentico', as well as events roadmap implementations benefitting the local community.

Advocacy

- **Advocate to enhance Aruba's tourism framework and guest experience** by strengthening monitoring and enforcement, advancing policies for watersports and motorized vehicles, implementing robust safety protocols, improving facilities for all guests, managing short-term vacation rentals, and elevating tourism products.

DESTINATION DEVELOPMENT EFFORTS INCLUDE:

Development & Enhancements

1. **Equestrian Horse Back Trails**
2. **Mountain Bike Trail** Salina Druif
3. **Lighthouse** Initiation phase vehicle flow and parking organization for preservation
4. **Casibari** Initiation phase Flow and parking optimization
5. **Bushiribana** Initiation phase Managing visitor access
6. **Bushiri Beach** Development
7. **Public Toilets**, Eagle Beach, Ayo Rock Formations, Casibari
8. **Rodgers Beach** Name identification sign
9. **Baby Beach** restaurant
10. **Baby Beach** kiosk restaurant

Refurbishment

11. **Mangel Halto** phase 3, pier & platforms repair and refurbishing
12. **Rodgers Beach** boat ramp refurbishing
13. **Palapas Refurbishing at Casibari and Ayo**

Maintenance

14. **Beach Cleaner and Maintenance**
15. **Beach Buoys Management**
16. **Street & Beach Signage Cleaning & Maintenance**
17. **Palapas & Gazebos** contribute with DOW for the maintenance plan
18. **Enhanced Waste Management**, recycling plastic, metal and glass
19. **Palm Beach Tower**, maintenance for longevity
20. **Baby Beach** tennis & multi court, longevity warranty maintenance
21. **Mountain Bike Trail** maintenance

Environmental Protection, Conservation, and Regeneration

22. **ACF Visitor Amenities**
23. **ACF Signage System**
24. **ACF Responsible behavior**

Others

25. **VIC Oranjestad**, development
26. **Visitor Flow Management**, Finalize Pilot phase





STRATEGIC PILAR II

Quality of Experience

STRATEGIC PILAR II

Quality of Experience

Strategic Objectives

2.1 Develop Niches

2.2 Enable and Support Delivery of Diverse Quality Experiences for Everyone

2.3 Enhance On-island Communication

2.4 Drive Exceptional Service Quality

KEY INITIATIVES INCLUDE:

Develop Niches

- **Review and Update the Niche Framework Document** - to emphasize sustainable niche development and to align niche strategies with the latest market and consumer insights along with product offerings and ensure a long-term, responsible growth focus across all sectors.
- **Further develop and integrate niche experiences and events** - culinary (Autentico), wellness (a.o. the KLM Marathon, the Aruba Beach Tennis Open and the Aruba Hi-Winds competition) and culture (a.o. Art Fair, Dia di Brasil, Carnival).
- **Collaborate with Stakeholders and Align Across the Guest Economy** – Work with partners to enhance effectiveness, ensure consistent execution, and support long-term, responsible niche development.

Diverse And Unique Quality Experiences

- **Develop and roll-out on-island communications strategy for guests** - to enhance their overall travel experience, allowing them to fully enjoy and explore all that Aruba has to offer in a responsible way.
- **Advocate for the re-establishment of Cosecha** – to preserve and celebrate Aruba’s rich cultural heritage, and provide guests with access to unique, authentic local souvenirs and art.
- **Establish the Events Strategy** - focused on responsible experiences that emphasize wellness, health, and luxury. Prioritize sustainable practices and deliver meaningful, mindful, and high-quality experiences that meet growing visitor expectations.
- **Support introduction of the Aruba Happy One Pass (AHOP)** – to build on Aruba’s innovative leadership in digital travel with a privacy-by-design identity program that streamlines arrivals, removes the need for physical documents, and increases the overall travel experience.



STRATEGIC PILAR III

Quality of Economic Impact

STRATEGIC PILAR III

Quality of Economy Impact

Strategic Objectives

3.1 Evolve Brand Positioning

3.2 Innovate Marketing Communication

3.3 Strengthen High Value Portfolio

3.4 Improve Industry Capabilities

KEY INITIATIVES INCLUDE:

Brand Identity

- **Integrate Responsible Tourism Principles Across all Brand Touchpoints** - positioning responsible tourism at the core of Aruba's brand by leveraging all marketing channels to highlight the island's natural, cultural, and social value- reinforcing the shared responsibility of preserving it for future generations.
- **Promote Low-impact Travel Through Educational Messaging** - by showcasing responsible behavior in campaign content- inspiring visitors to travel mindfully and respect the destination's people, environment, and customs
- **Conduct Brand Tracking Research in Europe** - to measure the level of awareness and knowledge of consumers about the new Responsible Tourism position and niches that Aruba is adopting.
- **Introduce Aruba's New Brand Positioning "When you love Aruba, it loves you back' in Latin America** - emphasizing the messaging of sustainable, low-impact, high-value travelers. With this launch, the campaign will be adopted on a global level in 2026.
- **Develop and introduce a compelling corporate narrative and positioning strategy** - to solidify Aruba's brand identity, with a focus on emphasizing responsible tourism.
- **Update and Enhance Brand Guidelines for Global Consistency** - to ensure alignment across all markets and disciplines, fostering a cohesive and unified global brand image.
- **Develop New Creative Assets** - to effectively communicate Aruba's evolving story and key messages across various channels.
- **Strengthen engagement with high-value segments** - by connecting niche interests to authentic on-island offerings, with wellness and culture at the heart of the reciprocal relationship, culinary becoming a mainline message for all segments, and weddings as ultra-focused messaging.
- **Introduce on-island communication stimulating responsible behavior** – through various Business to Guest (B2G), Business to Business (B2B) and Business to Local (B2L) initiatives to support sustainable and responsible development.

STRATEGIC PILAR III

Quality of Economy Impact

KEY INITIATIVES INCLUDE:

Marketing Communication

- **Align marketing communication to destination brand identity** – to ensure that every touchpoint consistently conveys a unified and compelling narrative, fostering a stronger emotional connection with target audiences, and amplifying our brand's recognition and appeal on a global scale.

High Value Portfolio

- **Attract high-value first-time guests** seeking sustainable and meaningful experiences
- **Further penetrate North America market for high-value segments** – by prioritizing US core and secondary markets with heavier media weight, while applying national targeting, where relevant.
- **Grow high-value Europe markets** - by diversifying portfolio of markets to ensure long-term resilience and sustainable growth in value.
- **Grow high-value Latin America markets** - by growing the high value long-haul markets of Argentina, Brazil, Chile, Peru while increasing the expenditure per market.
- **Explore new high-value market opportunities** across markets - through the Culinary, Weddings and Wellness niches, amongst other.
- **Develop high-value MICE segment** year-round - to ensure a balanced demand across all seasons while maximizing economic and non-economic benefits for the island and its people.
- **Develop airlift strategy** along with the Aruba Ports Authority (APA) - continue to nurture airline partnerships through marketing support, ensuring demand is created from markets which show the greatest potential for high value guest arrivals.
- **Develop high-value sustainable cruise strategy** in collaboration with the Aruba Ports Authority - to increase economic benefits, promoting environmental stewardship, and ensuring the well-being of the local community.

STRATEGIC PILAR III

Quality of Economy Impact

KEY INITIATIVES INCLUDE:

Industry Capabilities

- **Establish a learning platform for guest-related businesses** - to foster knowledge sharing and skills development, hereby empowering businesses to implement best practices and improve guest experiences.

Advocacy

- **Advocate to strengthen Aruba's guest economy and tourism workforce** - by promoting a High-Value, Low-Impact model, supporting national workforce planning, improving employment conditions and housing, increasing local leadership representation, and integrating guest economy education at all levels.

Diversification

North America

Primary/ Core

- New York
- Boston
- Philadelphia
- Washington, DC
- Hartford
- Chicago
- Toronto

Secondary

- Atlanta
- Providence – Bedford
- South Florida
- Baltimore
- Charlotte
- Detroit
- Pittsburgh
- Dallas
- Cleveland
- Houston
- Minneapolis
- Nashville

Tertiary

- Los Angeles

Investigate

- Leverage first-party research to identify localized markets with potential for expansion.

LATAM

Primary/ Core

- Colombia: Bogota, Medellin, Cali, and Barranquilla
- Peru: Lima, Trujillo, and Arequipa.
- Ecuador: Quito, Cuenca, and Guayaquil.

Secondary

- Argentina: Buenos Aires, Cordoba, Rosario, Mendoza, Neuquen, and Salta
- Brazil: São Paulo, Manaus, Rio de Janeiro, Brasilia, Porto Alegre, and Belo Horizonte
- Chile: Santiago, Viña del Mar, Concepción, and Antofagasta
- Uruguay, Montevideo
- Paraguay , Asuncion

Tertiary

- Venezuela

Investigate

- Mexico
- Panama

Europe

Primary/ Core

- The Netherlands - nationwide

Secondary *

- The UK: London, Scotland and, other important KLM hubs
- Italy: Milan, Rome, Turin, Naples
- Germany: Frankfurt, Munich, Berlin, Dusseldorf

Tertiary *

- Switzerland: German speaking area (Zurich & Bern)
- Belgium: Flemish speaking area
- Sweden: Stockholm & Gothenburg.

Investigate

- Switzerland: German speaking area (Zurich & Bern)
- Luxemburg

* The secondary & tertiary markets will also be segmented based on data provided by KLM as to which cities perform well.

Projected Stay-over Guest Arrivals 2026

	Actual 2024	Projection 2025	Forecast 2025	Market Share 2025	% variance F2025 vs A2024	Projection 2026	Market Share 2026	% variance P2026 vs F 2025
NORTH AMERICA								
USA	1,062,610	1,080,000	1,099,131		3%	1,112,455		1%
Canada	70,852	69,000	70,592		0%	71,965		2%
TOTAL NORTH AMERICA	1,133,462	1,149,000	1,169,723	78%	3%	1,184,420	78%	1%
LATIN AMERICA								
Colombia	65,572	59,900	58,761		-10%	58,761		0%
Argentina	27,416	28,900	44,502		62%	55,842		25%
Brazil	17,359	25,900	30,643		77%	35,009		14%
Chile	14,187	16,700	14,212		0%	16,063		13%
Peru	19,798	23,100	21,959		11%	21,894		0%
Ecuador	11,250	11,300	10,794		-4%	10,782		0%
Other LATAM (incl. Venezuela)	26,766	19,200	29,172		9%	31,199		7%
TOTAL LATIN AMERICA	182,348	185,000	210,043	14%	15%	229,550	15%	9%
EUROPE								
The Netherlands	35,713	41,600	37,951		6%	39,878		9%
UK	7,490	7,300	3,979		-47%	4,225		-33%
Italy	6,483	7,700	7,402		14%	7,484		14%
Sweden	902	1,500	3,857		328%	1,843		33%
German Speaking Markets	7,176	10,200	9,078		27%	11,958		35%
Belgium	1,569	2,100	2,116		35%	2,204		3%
Other Europe	10,007	11,100	11,247		12%	12,631		16%
TOTAL EUROPE	69,340	81,500	75,630	5%	9%	80,223	5%	6%
REST OF THE WORLD								
TOTAL ROTW*	36,466	35,000	38,361	3%	5%	34,807	2%	-9%
TOTAL	1,421,616	1,450,500	1,493,757	100%	5%	1,529,000	100%	2%



STRATEGIC PILAR IV

Quality of Natural Environment & cultural heritage

STRATEGIC PILAR IV

Quality of Natural Environment & Cultural Heritage

Strategic Objectives

4.1 Promote Ecological and Social Responsible Behavior

4.2 Facilitate Environmental Conservation & Regeneration

4.3 Facilitate Cultural Heritage Conservation

KEY INITIATIVES INCLUDE:

Ecological and Social Responsible Behavior

- **Introduce on-island communication stimulating responsible behavior** – through various Business to Guest (B2G), Business to Business (BtoB), and Business to Local (B2L) initiatives to support sustainable and responsible development.
- **Co-create and deliver the *Aruba Promise* program to embed ecological and social responsibility across the community and visitor experience** - to empower children, residents, businesses, and guests to protect Aruba's environment, culture, and heritage for generations to come.
- **Integrate ecological and social responsibility into all marketing communications across the traveler journey.** From pre-visit to post-visit, including third-party channels - to inspire responsible behaviors and broaden our reach.
- **Create an Eco-conscious Experience Across All Owned Channels** (the myAruba Assistant, Aruba Promise, and the myAruba App (Ban Serio)) – to ensure a unified and impactful eco-friendly communication strategy.

Environmental Conservation & Regeneration, and Cultural Heritage Conservation

- **Conduct Environmental Impact Assessments** - to support and guide the development of ongoing and future initiatives, including a feasibility study for an underwater museum.
- **Establish long Term Strategic Collaboration Scope with the Aruba Conservation Foundation (ACF) and the Go Cultura Foundation (GCF)** - to align goals, share resources, and strengthen initiatives that safeguard Aruba's natural environment and cultural heritage.
- **Ensure continuous expression of local (visual, performing) arts & crafts and theatre experience** at the 'Cas di Cultura', entering into a long-term strategic agreement, offering sustainable support toward remodeling and enhancements.

Advocacy

- **Advocate for policies and programs that protect Aruba's environment and heritage.** This includes sustainability in education, marine and coastal protections, and support for preserving and promoting Aruban culture.



STRATEGIC PILAR V

Quality of Organization

STRATEGIC PILAR V

Quality of Organization

Strategic Objectives

5.1 Strengthen Organizational Outreach

5.2 Achieve Organizational Excellence in ESG

5.3 Enhance Organizational Capabilities

5.4 Nurture Employee Experience

KEY INITIATIVES INCLUDE:

Organizational Outreach

Strengthen and Expand Strategic Partnerships - to support innovative projects and community-focused initiatives to ensure sustained innovation, engagement, and destination excellence.

Establish a centralized, user-friendly performance reporting platform that offers partners real-time access to digital marketing data across owned channels, enabling partners to make informed decisions by providing a clear view of performance insights.

Organizational Excellence in ESG

Seek expert advisory services in Artificial Intelligence and ESG - to guide the organization in leveraging AI responsibly and implementing sustainable, ethical, and impactful practices.

Initiate Sustainable Corporate Events - by applying the Events Position Paper and Policy, and integrating ESG principles into planning and execution, delivering memorable experiences while protecting Aruba's resources, supporting communities, and fostering long-term economic vitality.

Enhance Organizational Capabilities

Remain Current of Digital Technologies - continuously research and adopt relevant digital advancements while increasing organizational awareness of digital marketing strategies to enhance capability and competitiveness.

STRATEGIC PILAR V

Quality of Organization

KEY INITIATIVES INCLUDE:

Organizational Capabilities

- **Conduct a review and realignment of A.T.A.'s organizational structure** - to support A.T.A.'s strategic direction and integrated destination management with enhanced ways of working.
- **Establish the A.T.A. Academy** - to promote learning, skill development, and knowledge sharing, leveraging advanced technologies to foster innovation, continuous improvement, and organizational growth.

Employee Experience

- **Develop and implement the People Strategy for A.T.A.** - to attract, develop, and retain a talented, diverse workforce through training, leadership development, and engagement initiatives, fostering an inclusive culture that drives innovation and aligns staff with A.T.A.'s vision.
- **Strengthen A.T.A.'s value-based culture** - by acting on culture scan insights to reinforce core values, promote alignment, and foster a unified organizational identity.
- **Facilitate Leadership** - by implementing targeted training programs, mentorship initiatives, coaching, and growth opportunities with the goal to strengthen overall leadership capabilities.
- **Enhance employee well-being** - promoting a supportive workplace through wellness programs, mental health initiatives, and a healthy work environment, enabling employees to thrive professionally and personally.

Appendix

- Our Strategic Objectives and Tactics by Pillar
- Key Tourism Indicators

Our Strategic Objectives and Tactics by Pillar

Our Strategic Objectives

We have translated our five strategic pillars into 20 strategic objectives, which define 'the WHAT ' we aim to achieve under each Pillar.

I. QUALITY OF LIFE & PLACE	II. QUALITY OF EXPERIENCE	III. QUALITY OF ECONOMIC IMPACT	IV. QUALITY OF NATURAL ENVIRONMENT & CULTURAL HERITAGE	V. QUALITY OF ORGANIZATION
<p>1.1 MANAGE GUEST ECONOMY IMPACT</p> <p>Enhance insights in efforts and impact to manage the guest economy and livability to an effective balance</p>	<p>2.1 DEVELOP NICHEs</p> <p>Systematic development of and alignment around niches for sustainable long-term development of our island</p>	<p>3.1 EVOLVE BRAND POSITIONING</p> <p>Reshape Aruba's brand to emphasize responsible, sustainable and regenerative guest economy</p>	<p>4.1 PROMOTE ECOLOGICAL AND SOCIAL RESPONSIBLE BEHAVIOR</p> <p>Take co-leadership role in educating and engaging the local community, guest industry, marketing service providers, event organizations and guests on ecological and social responsible behavior</p>	<p>5.1 STRENGTHEN ORGANIZATIONAL OUTREACH</p> <p>Fortify our capabilities to influence and align around shaping the direction of our guest economy through active outreach</p>
<p>1.2 INVEST IN DESTINATION SAFETY</p> <p>Safeguard the safety of guests and residents</p>	<p>2.2 ENABLE AND SUPPORT DELIVERY OF DIVERSE QUALITY EXPERIENCES FOR EVERYONE</p> <p>Stimulate and facilitate delivery of diverse and authentic quality experiences and services aligned to the Aruba brand and niches to appeal to high-value guests and residents</p>	<p>3.2 INNOVATE MARKETING COMMUNICATION</p> <p>Advance shareable and scalable marketing communication and impact through digital excellence</p>	<p>4.2 FACILITATE ENVIRONMENTAL CONSERVATION & REGENERATION</p> <p>Fulfill an active role in the development and deployment of policies and plans on environmental conservation and regeneration through advocacy, advisory, co-creation and support</p>	<p>5.2 ACHIEVE ORGANIZATIONAL EXCELLENCE IN ESG</p> <p>Enhance organizational resilience long-term value creation and reputation by integrating ESG (Environmental, Social, and Governance) principles into our business operations, culture, oversight, and decision-making</p>
<p>1.3 PLACEMAKING</p> <p>Enhance and reinvent functionality and aesthetics of destination public spaces to enrich the experiences of residents and guests</p>	<p>2.3 ENHANCE ON-ISLAND COMMUNICATION</p> <p>Create a seamless and enriching experience for guests by helping them feel well-informed, safe, and deeply connected to the island's offerings at every touchpoint throughout their stay, utilizing full-funnel communication</p>	<p>3.3 STRENGTHEN HIGH VALUE PORTFOLIO</p> <p>Target high-value guest segments from a balanced mix of source markets, emphasizing value over volume</p>	<p>4.3 FACILITATE CULTURAL HERITAGE CONSERVATION</p> <p>Fulfill an active role in the development and deployment of policies and plans on cultural heritage conservation through advocacy, advisory, co-creation and support</p>	<p>5.3 ENHANCE ORGANIZATIONAL CAPABILITIES</p> <p>Improve organizational focus and efficiency to enable effective integrated destination management</p>
<p>1.4 IMPROVE GUEST FLOW MANAGEMENT</p> <p>Optimize the flow of guests, reducing congestion and minimizing environmental impacts</p>	<p>2.4 DRIVE EXCEPTIONAL SERVICE QUALITY</p> <p>Stimulate the service quality improvement in the hospitality and services sector to provide more personalized and attentive services true to our unique Aruban hospitality which sets us apart from other destinations</p>	<p>3.4 IMPROVE INDUSTRY CAPABILITIES</p> <p>Help build the skills and resources needed to support a sustainable and competitive guest economy</p>		<p>5.4 NURTURE EMPLOYEE EXPERIENCE</p> <p>Cultivate a work environment that fosters empowerment, ownership and a sense of engagement, well-being and growth</p>
<p>1.5 OVERSEE CURRENT AND FUTURE ACCOMMODATIONS</p> <p>Align both current and future lodging with long-term sustainability goals</p>				

Key Tactics | Strategic Pillar I

I. QUALITY OF LIFE & PLACE				
1.1 MANAGE GUEST ECONOMIC IMPACT Enhance insights in efforts to manage the guest economy and livability to an effective balance	1.2 INVEST IN DESTINATION SAFETY Safeguard the safety of guests and residents	1.3 PLACEMAKING Enhance and reinvent functionality and aesthetics of destination public spaces to enrich the experiences of residents and guests	1.4 IMPROVE VISITOR FLOW MANAGEMENT Optimize the flow of guests, reducing congestion and minimizing environmental impacts	1.5 OVERSEE CURRENT AND FUTURE ACCOMMODATIONS Align both current and future lodging with long-term sustainability goals
1.1.1 Assess environmental, social and economic guest economy impact	1.2.1 Create a masterplan for maintenance actions	1.3.1 Update destination brand guidelines	1.4.1 Create guest flow management plan	1.5.1 Advocate to curtail and enhance short-term vacation rental
1.1.2 Develop guest economy impact KPIs in support of HVLI model	1.2.2 Advocate for development, implementation and enforcement of watersports and terrestrial motorized vehicles policies	1.3.2 Enhance and develop maintenance public area infrastructure, assets and amenities	1.4.2 Implement advanced guest flow management systems	1.5.2 Conduct a timeshare accommodation segment assessment
1.1.3 Conduct sentiment/satisfaction surveys	1.2.3 Lead Cluster 8 of national crisis team and assist in national crisis management	1.3.3 Provide clear signage for direction, education and behavioral guidance	1.4.3 Advise, collaborate with and support partners on capacity management in urban and protected areas	1.5.3 Communicate with residents regarding short-term vacation rental policies and developments
1.1.4 Communicate with residents on visitor economy	1.2.4 Facilitate funding for Aruba Hospitality & Security Foundation	1.3.4 Support the cultural and historical preservation and revival of neighborhoods		1.5.4 Advocate for elevation of the existing product
1.1.5 Create Independent Watchdog Platform	1.2.5 Advocate for advanced safety protocols	1.3.5 Advocate for and support projects for guest-related facilities adapted to visitors with disabilities, seniors and families with young children		
1.1.6 Advocate for enhanced tourism related monitoring and enforcement mandates in national legal framework		1.3.6 Support ACF with enhancement of visitor infrastructure and engagement at sites		
1.1.7 Advocate for national holiday "Dia di turismo" on World Tourism Day for local community				

Key Tactics | Strategic Pillar II

II. QUALITY OF EXPERIENCE

<p>2.1 DEVELOP NICHEs Systematic development of and alignment around niches for sustainable long-term development of our island</p>	<p>2.2 ENABLE AND SUPPORT DELIVERY OF DIVERSE QUALITY EXPERIENCES FOR EVERYONE Stimulate and facilitate delivery of diverse, and authentic quality experiences and services aligned to the Aruba brand and niches to appeal to high-value guests and residents</p>						<p>2.3 ENHANCE ON ISLAND COMMUNICATION Create a seamless and enriching experience for guests by helping them feel well-informed, safe, and deeply connected to the island's offerings at every touchpoint throughout their stay, utilizing full funnel communication.</p>	<p>2.4 DRIVE EXCEPTIONAL SERVICE QUALITY Stimulate the service quality Improvement in the hospitality and services sector to provide more personalized and attentive services true to our unique Aruban hospitality which sets us apart from other destinations</p>
<p>2.1.1 Further develop framework and road map for long-term and sustainable niche development</p>	<p>2.2.1 Develop wedding niche strategy and toolkits</p>	<p>2.2.4 Develop wellness niche strategy and toolkits</p>	<p>2.2.7 Execute culinary niche strategy</p>	<p>2.2.10 Develop culture experiences strategy and toolkits</p>	<p>2.2.14 Develop eco-conscious experiences strategy and toolkits</p>	<p>2.2.17 Expand Aruba Signature Experience program with an Aruba Authentic Products Program</p>	<p>2.3.1 Develop and roll-out On island communications strategy</p>	<p>2.4.1 Revamp & further develop Aruba Quality Seal</p>
<p>2.1.2 Align government, industry stakeholders and investors around a common vision for long-term and sustainable niche development of the island as our home</p>	<p>2.2.2 Engage wedding niche markets to elevate/innovate product and services through education, knowledge sharing, events and support</p>	<p>2.2.5 Engage wellness niche markets to elevate/innovate product and services through education, knowledge sharing, events and support</p>	<p>2.2.8 Engage culinary niche markets to elevate/innovate product and services through education, knowledge sharing, events and support</p>	<p>2.2.11 Engage culture experiences to elevate/innovate product and services through education, knowledge sharing, events and support</p>	<p>2.2.15 Engage eco-conscious experiences markets to elevate/innovate product and services through education, knowledge sharing, events and support</p>	<p>2.2.18 Develop and execute Events Strategy</p>	<p>2.3.2 Assist visitors in navigating the island and accessing key attractions</p>	<p>2.4.2 Support educational and vocational institutes for enhanced skill-building for quality service</p>
<p>2.1.3 Measure niche performance</p>	<p>2.2.3 Advocate for seamless delivery of experiences for wedding niche</p>	<p>2.2.6 Advocate for seamless delivery of experiences for niche segment wellness</p>	<p>2.2.10 Advocate for seamless delivery of experiences for niche segment culinary</p>	<p>2.2.12 Re-establish the Cosecha Artisan Crafts store or similar concept</p>	<p>2.2.16 Advocate for seamless delivery of experiences for eco-conscious/experiences segment</p>		<p>2.3.3 Establish Destination Officers</p>	
				<p>2.2.13 Advocate for seamless delivery of culture experiences</p>				

Key Tactics | Strategic Pillar III

III. QUALITY OF ECONOMIC IMPACT

3.1 EVOLVE BRAND POSITIONING Reshape Aruba's brand to emphasize responsible, sustainable and regenerative guest economy	3.2 INNOVATE MARKETING COMMUNICATION Advance shareable and scalable marketing and impact through digital marketing excellence	3.3 STRENGTHEN HIGH VALUE VISITOR PORTFOLIO Target multiple high-value visitor segments from a balanced mix of source markets and niches, emphasizing visitor value over visitor volume		3.4 IMPROVE INDUSTRY CAPABILITIES Help build the skills and resources needed to support a sustainable and competitive guest economy.
3.1.1 Evolve the Aruba brand positioning	3.2.1 Align marketing communication to destination brand identity	3.3.1 Build research and big data analytics capabilities	3.3.8 Develop high-value MICE segment	3.4.1 Advocate and support development of national strategic workforce planning for the tourism industry
3.1.2 Identify high-value guest segments in desired source markets	3.2.2 Evolve marketing channels to amplify our reach and impact	3.3.2 Further penetrate North America market for high-value segments	3.3.9 Develop high-value cruise strategy	3.4.2 Advocate for better employment conditions, benefits and affordable housing for visitor industry workforce
3.1.3 Introduce on-island communication stimulating responsible behavior	3.2.3 Foster synergy and effective content creation and distribution across channels	3.3.3 Grow high-value Europe markets	3.3.10 Support APA strategy for strategic enhancements to port infrastructure and facilities, including shore power	3.4.3 Assist in the set-up of a central hospitality daycare
		3.3.4 Grow high-value Latin America markets	3.3.11 Co-develop airlift strategy in support of high-value visitors	3.4.4 Advocate for more representation of local leaders in key managerial positions
		3.3.5 Explore new high-value market opportunities (across markets) through the culinary niche	3.3.12 Advocate for integration of High-Value, Low-Impact visitor economy model in National Guest Economy Vision	3.4.5 Advocate for the guest economy to be part of the education curriculum on all educational levels
		3.3.6 Explore new high-value market opportunities (across markets) through the wedding niche	3.3.13 Align visitor economy stakeholders around the National Guest Economy Vision on High-Value, Low-Impact visitor economy	3.4.6 Co-create practical and engaging educational programs for children and youth to spark their interest in and prepare them for guest sector-related careers
		3.3.7 Explore new high-value market opportunities (across markets) through the wellness niche	3.4.7 Elevate capabilities of guest-related businesses in technologies, digital marketing, planning tools, data, insights	

Key Tactics | Strategic Pillar IV

IV. QUALITY OF NATURAL & CULTURAL HERITAGE

4.1 PROMOTE ECOLOGICAL AND SOCIAL RESPONSIBLE BEHAVIOR Take co-leadership role in educating and engaging the local community, guest industry, marketing service providers, event organizations and guests on ecological and social responsible behavior	4.2 FACILITATE ENVIRONMENTAL CONSERVATION & REGENERATION Fulfill an active role in the development and deployment of policies and plans on environmental conservation and regeneration through advocacy, advisory, co-creation and support	4.3 FACILITATE CULTURAL HERITAGE CONSERVATION Fulfill an active role in the development and deployment of policies and plans on cultural heritage conservation through advocacy, advisory, co-creation and support
4.1.1 Develop overarching Aruba Promise Framework	4.2.1 Advice and support incorporation of environmental conservation and regeneration in National Guest Economy Vision and Policy Plan	4.3.1 Advice and support incorporation of cultural heritage conservation in National Guest Economy Vision and Policy Plan
4.1.2 Develop, co-create and support Aruba Promise awareness & educational programs and toolkits on ecologically and socially responsible practices	4.2.2 Advocate for development, implementation and enforcement of watersports policies	4.3.2 Support the cultural and historical preservation and revival of neighborhoods
4.1.3 Develop, co-create and support programs for active engagement of visitors in environmental and cultural heritage, conservation and regeneration	4.2.3 Advocate for marine and coastal management policies and plans	4.3.3 Collaborate with and support cultural heritage institutions
4.1.4 Promote ESG standards and practices towards tourism industry partners throughout the guest economy value chain	4.2.4 Co-create underwater museum	4.3.4 Advocate for and support programs and practitioners to help preserve and perpetuate Aruban culture, and the cultural and creative industry
4.1.5 Advocate for integration of ecologically and socially responsible practices in national education curricula	4.2.5 Collaborate with and support strategic partners and community led environmental conservation and regeneration initiatives	
4.1.7 Facilitate incorporation of ecologically and socially responsible practices in educational programs for guest economy workforce, as well as in marketing communication pre-, during- and post-visit	4.2.6 Advocate for tourism industry waste management, policies and plans	
	4.2.7 Advocate for tourism industry food waste policies and plans	

Key Tactics | Strategic Pillar V

V. QUALITY OF ORGANIZATION				ARUBA TOURISM AUTHORITY	
<p>5.1 STRENGTHEN ORGANIZATIONAL OUTREACH Fortify our capabilities to influence and align around shaping the direction of our guest economy through active outreach</p>	<p>5.2 ACHIEVE ORGANIZATIONAL EXCELLENCE THROUGH ESG Enhance organizational resilience, long-term value creation and reputation by integrating ESG (Environmental, Social, and Governance) principles into our business operations, culture, oversight, and decision-making.</p>	<p>5.3 ENHANCE ORGANIZATIONAL CAPABILITIES Improve organizational focus and efficiency to enable effective integrated destination management</p>	<p>5.4 NURTURE A POSITIVE EMPLOYEE EXPERIENCE Cultivate a work environment that fosters empowerment, ownership and a sense of engagement, well-being and growth</p>		
<p>5.1.1 Strengthen A.T.A.'s voice and influence as authority</p>	<p>5.2.1 Promote environmentally sustainable practices and resource management to minimize A.T.A.'s footprint</p>	<p>5.3.1 Align organizational model for effective integrated destination management</p>	<p>5.4.1 Develop A.T.A. People Strategy aligned to MACS 2035</p>	<p>5.4.8 Modernize performance management model</p>	
<p>5.1.2 Advocate for A.T.A. law amendment</p>	<p>5.2.2 Participate in environmental and social volunteer programs</p>	<p>5.3.2 Develop workforce planning</p>	<p>5.4.2 Cultivate desired global value-based A.T.A. culture</p>	<p>5.4.9 Provide adequate workspace</p>	
<p>5.1.3 Provide business intelligence</p>	<p>5.2.3 Develop sustainable corporate events policy</p>	<p>5.3.3 Enhance strategic, tactical and operational Planning & Control cycle (from MACS to Annual Corporate plan)</p>	<p>5.4.3 Nurture facilitative leadership</p>		
<p>5.1.4 Embed proactive, structured and inclusive stakeholder management</p>	<p>5.2.4 Incorporate sustainability in procurement policy</p>	<p>5.3.4 Streamline procurement process for enhanced efficiency and internal service levels</p>	<p>5.4.4 Strengthen internal communication for enhanced alignment and engagement</p>		
	<p>5.2.5 Improve governance excellence through effective governance practices that promote transparency, accountability, ethical conduct</p>	<p>5.3.5 Strengthen digital and technological capabilities</p>	<p>5.4.5 Focus on nurturing and cultivating employee development and growth</p>		
	<p>5.2.6 Establish ESG reporting</p>	<p>5.3.6 Centralize and standardize document management</p>	<p>5.4.6 Prioritize employee well-being</p>		
		<p>5.3.7 Enhance organizational learning</p>	<p>5.4.7 Update compensation & benefits</p>		

Key Tourism Indicators

Tourism Receipts

2024

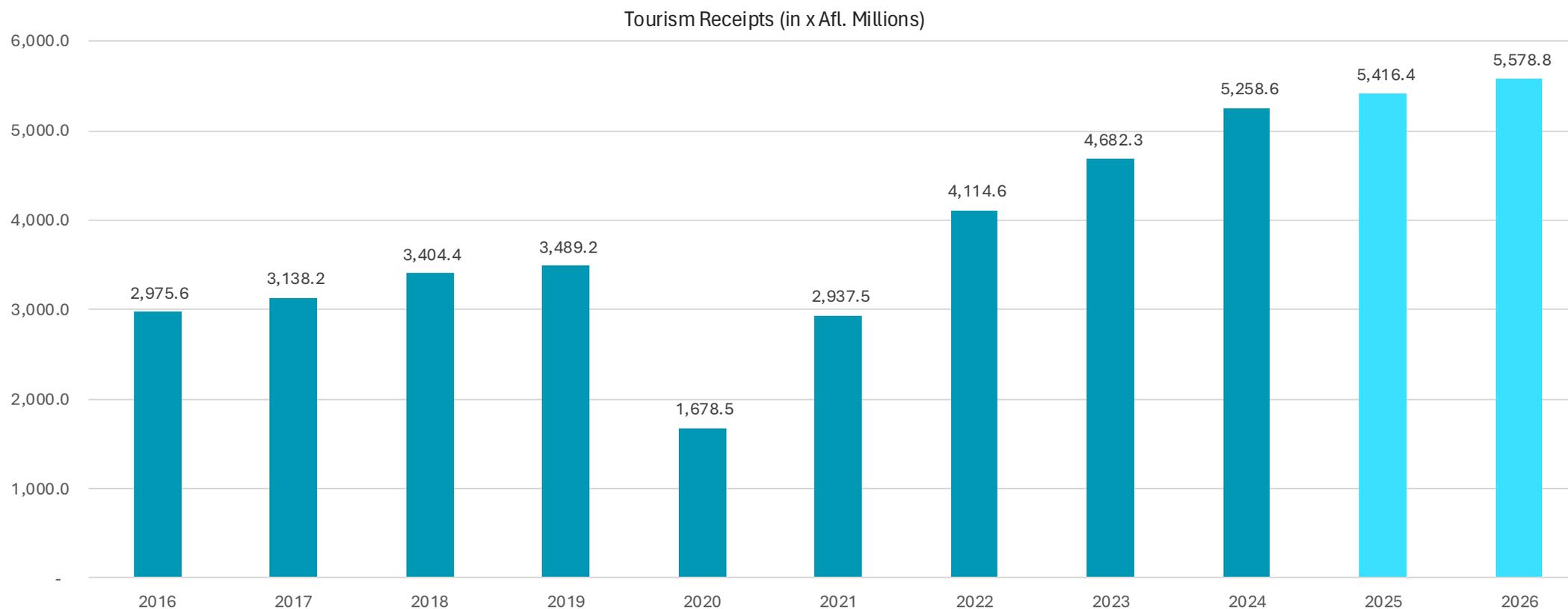
Actual: +12%

2025 vs 2024

Projection: +3%

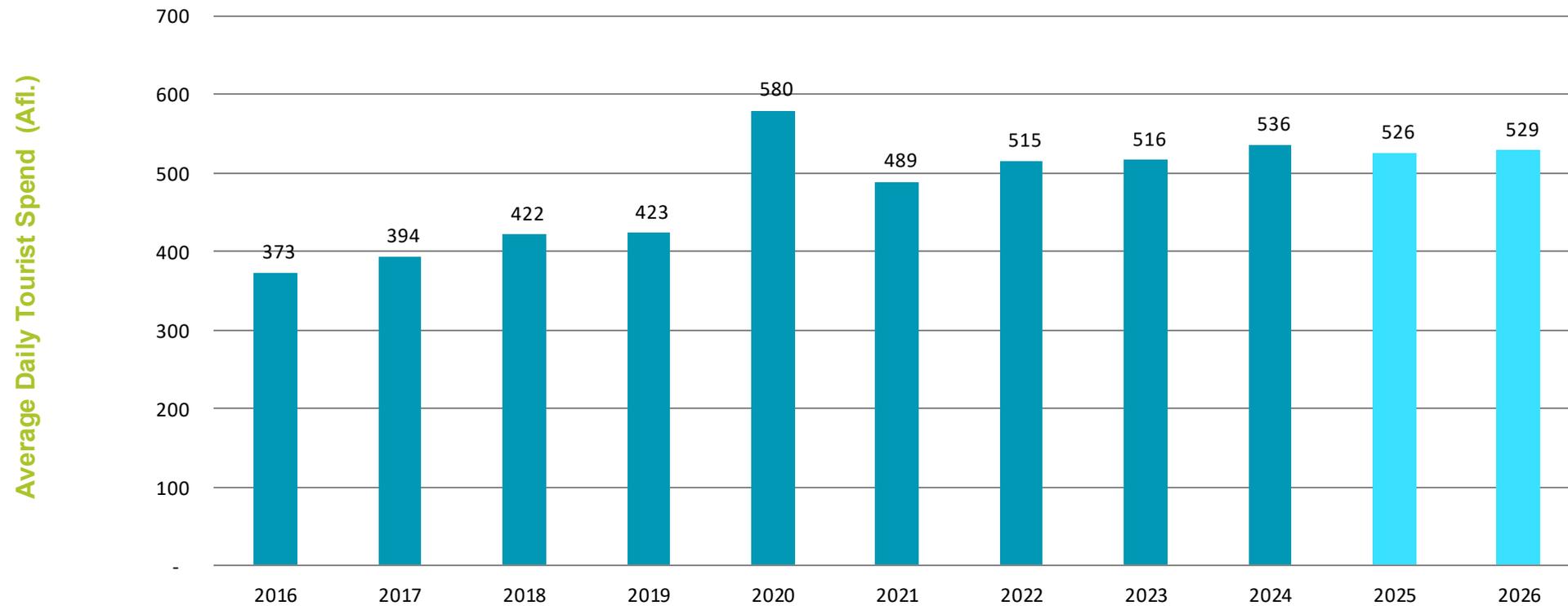
2026 vs 2025

Projection: +3%



Source: Central Bank of Aruba/ Aruba Tourism Authority (2025-2026)

Average Daily Tourist Spend



Stay-Over Guest Arrivals

2024

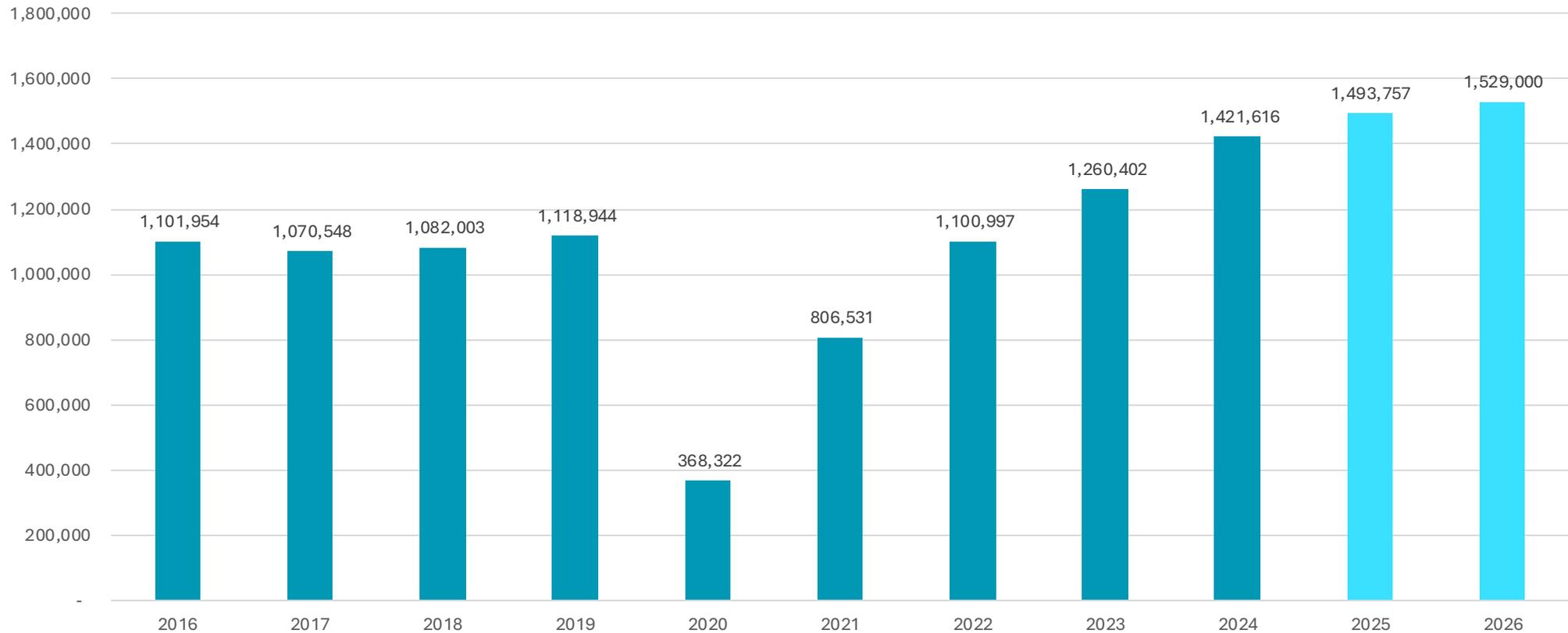
Actual: +13%

2025 vs 2024

Forecast: +5%
Actual YTD July: +5%

2026 vs 2025

Projection: +2%



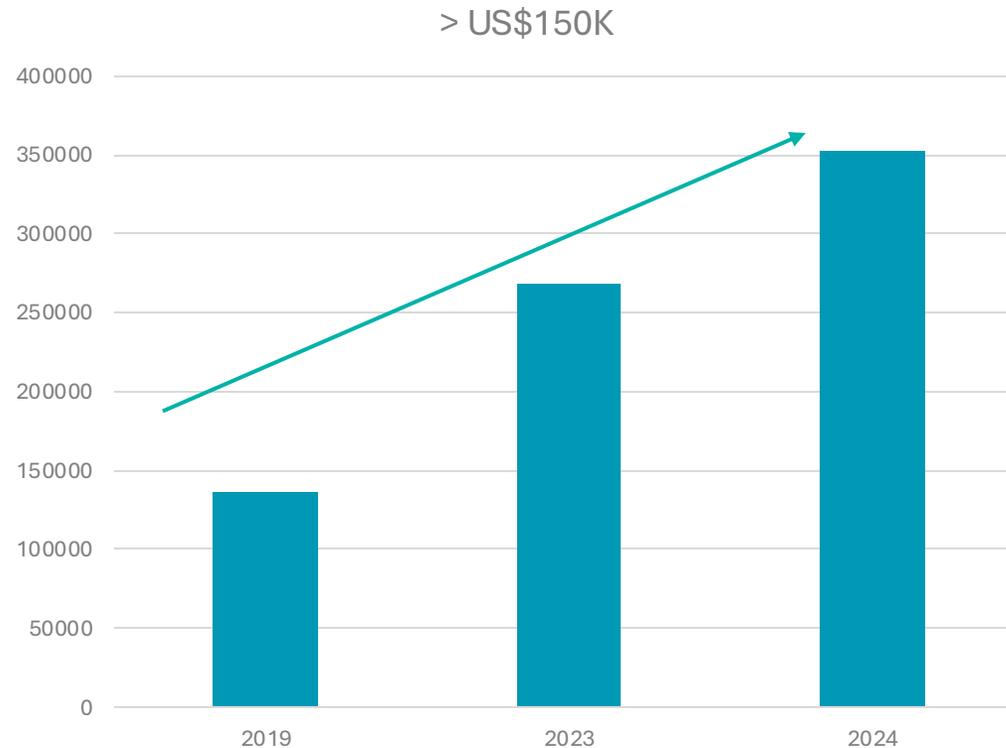
High Value Stay-Over Guest Arrivals Visitors

- For the US market, A.T.A.'s High Value Guest Attraction strategy, shifted over the years, from a focus on US travelers whose household income is over US\$100K to those with a household income above US\$150K. US Affluent travelers with a 'household income' between US\$100K and above the \$200K shall be captured through the HALO effect.
- For the LATAM and European market, the strategy of the A.T.A. based on specific segments based on high household income and lifestyle traits, is TBD.

Target:

US First Timers w HHI +\$150K: +5%

EU & LATAM: Establish Baseline



Hotel Performance

Revenue Per Available Room (RevPAR)

2024

Actual: +12%

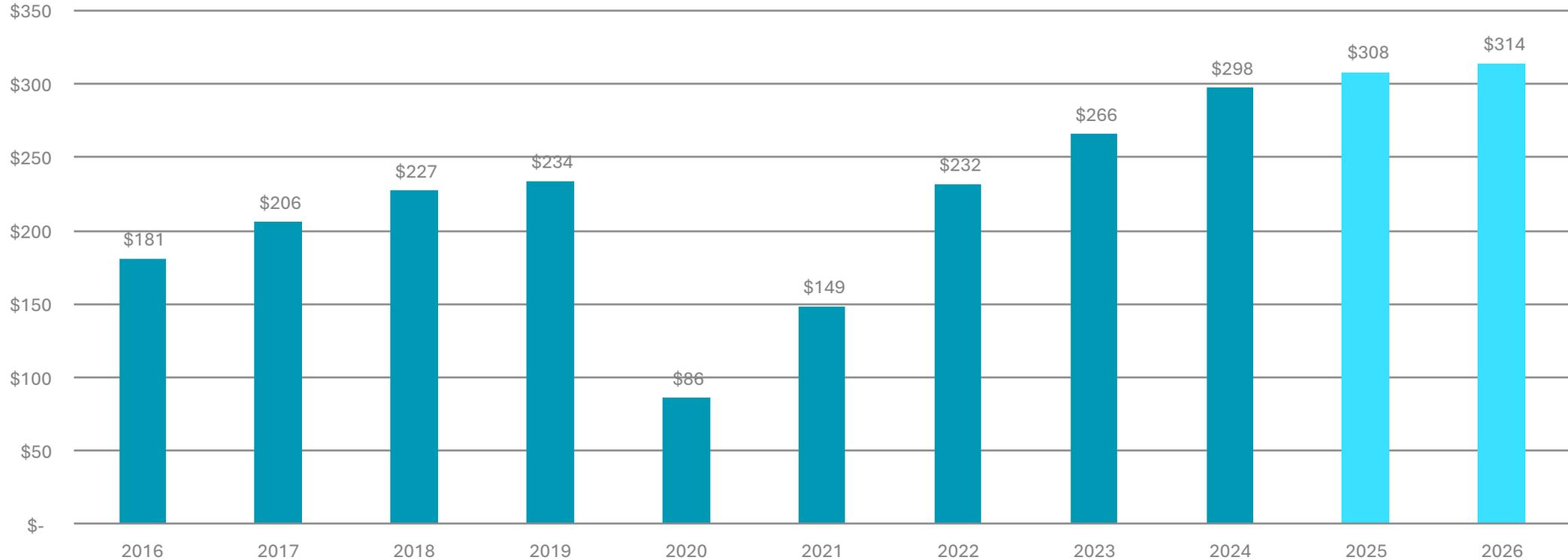
2025 vs 2024

Forecast: +5%
Actual YTD July: +4%

2026 vs 2025

Projection: +2%

RevPAR in US dollars

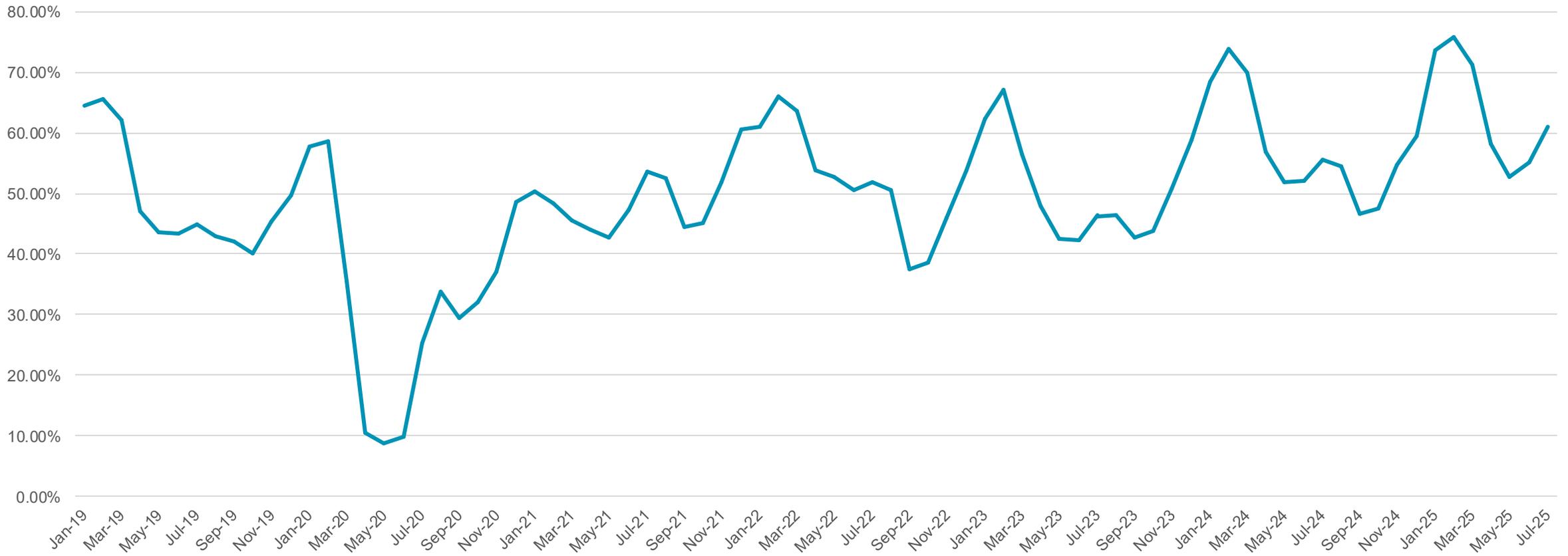


Source: Aruba Hotel and Tourism Association | Aruba Tourism Authority (2025-2026 TIM)

Short-term Vacation Rentals

OCCUPANCY

JULY 2024 Occupancy: 56% | JULY 2025 Occupancy: 61%

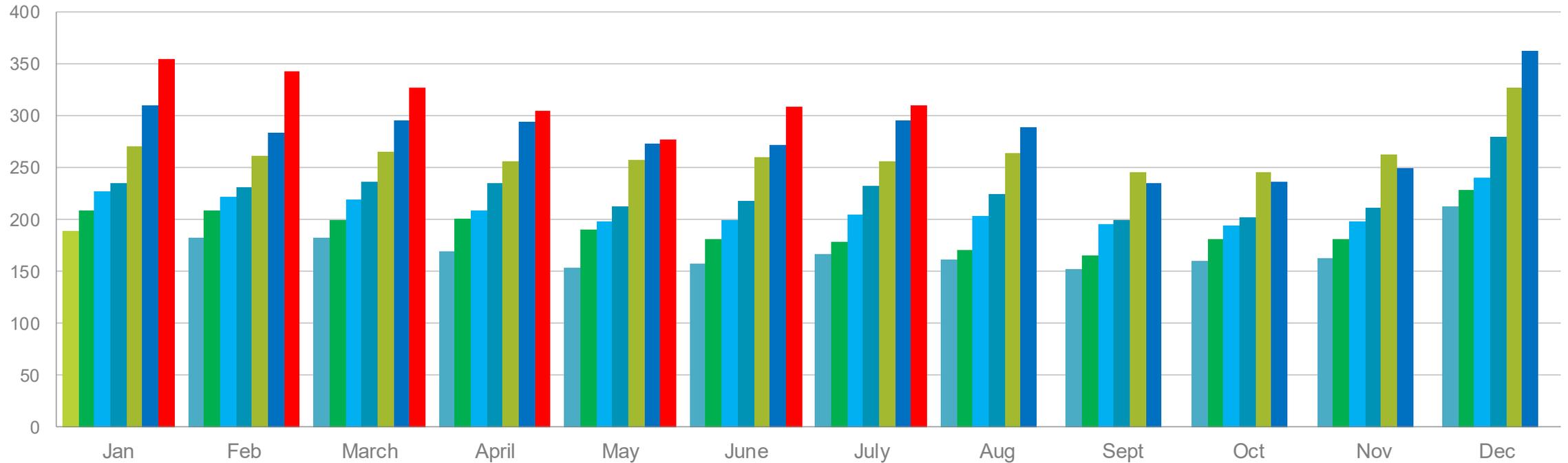


Short-term Vacation Rentals

ADR

JULY 2024 ADR: \$296 | JULY 2025 ADR: \$310

2019 2020 2021 2022 2023 2024 2025



Cruise Guest Arrivals

2024

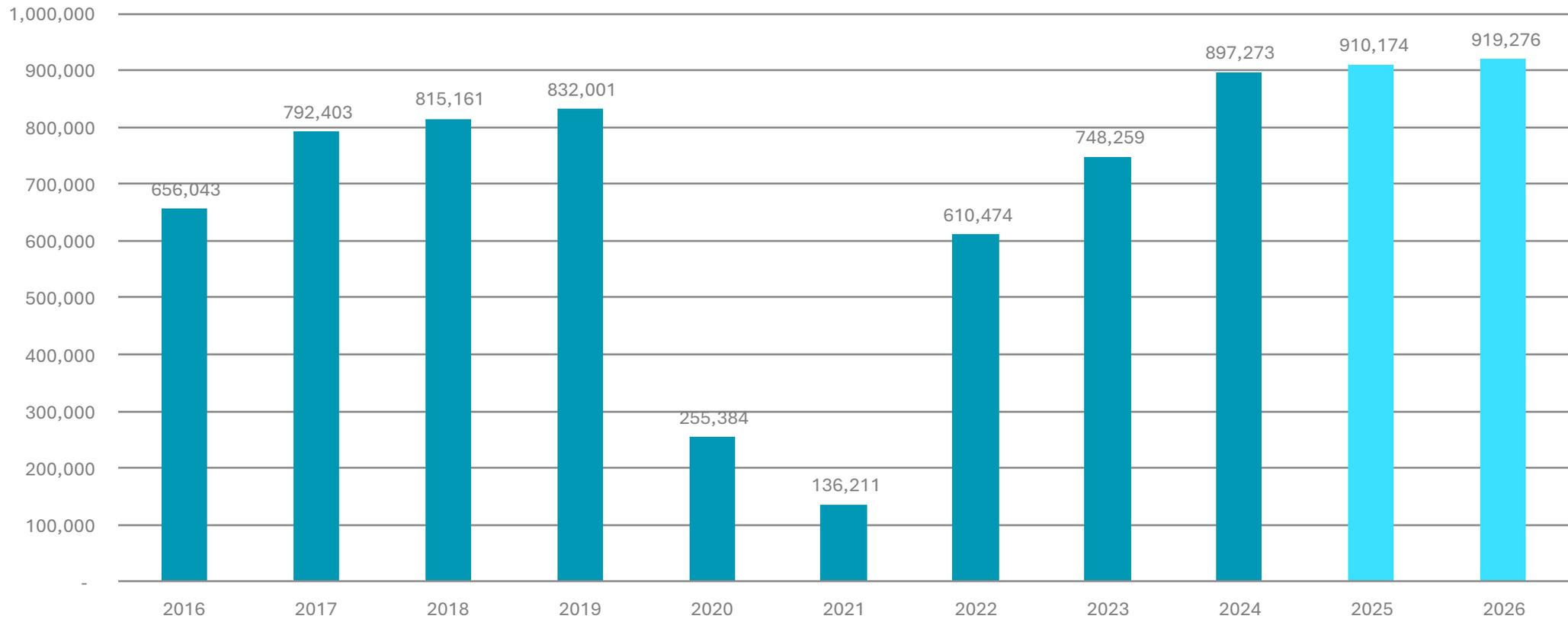
Actual: +20%

2025 vs 2024

Forecast: +1%
Actual YTD June: -5%

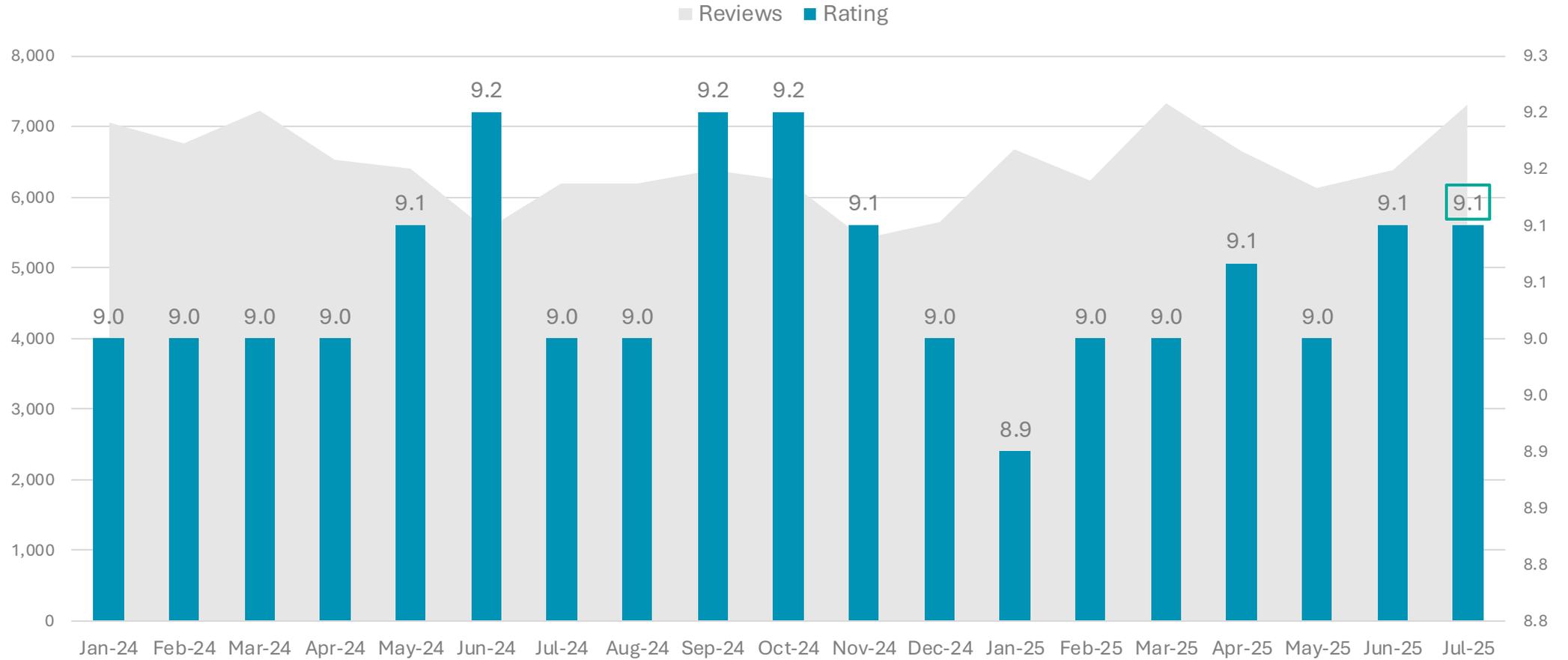
2026 vs 2025

Projection: +1%



Source: Aruba Port Authority | Aruba Tourism Authority (2025-2026)

Guest Satisfaction





Aruba Tourism Industry Corporate Plan & Budget 2026

For more information, please contact:
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