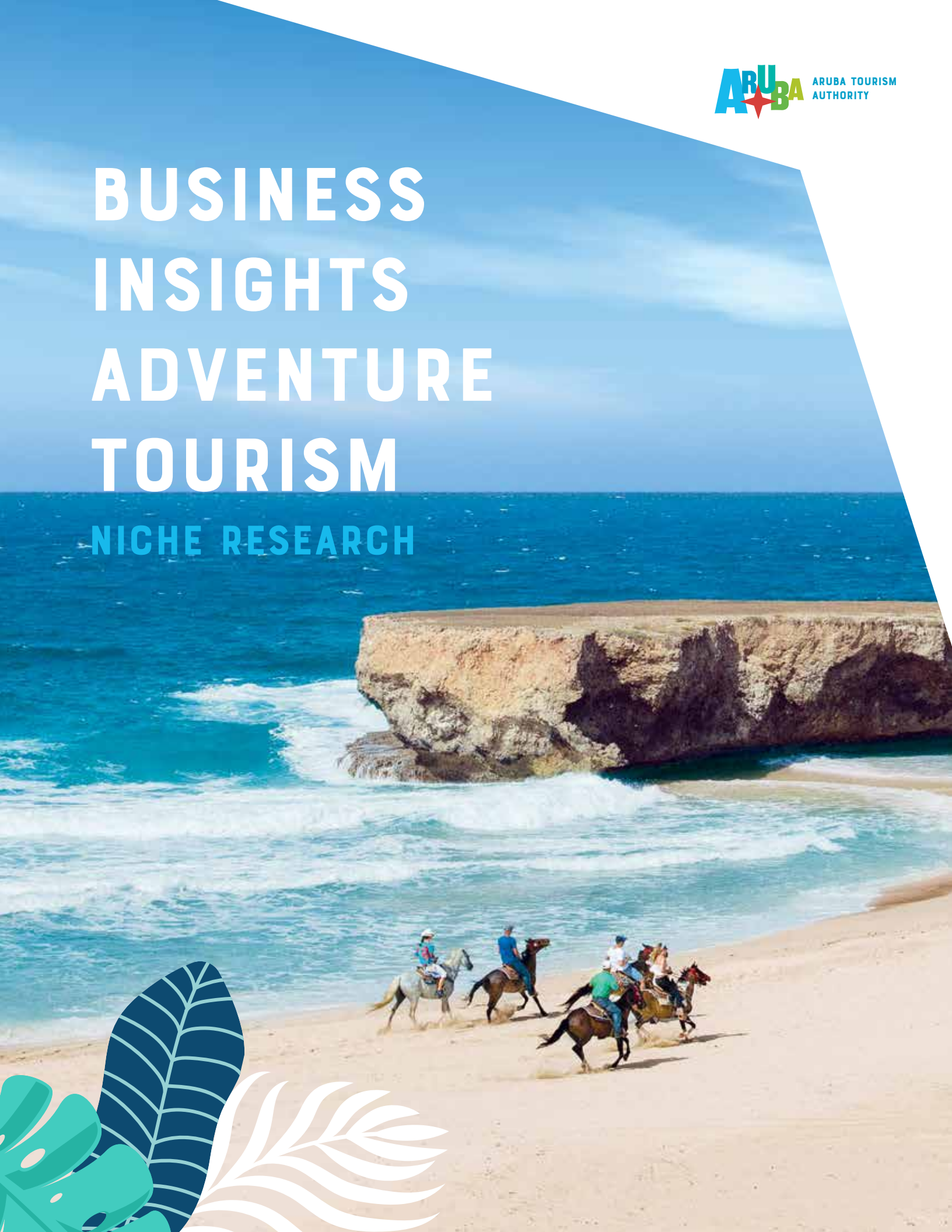


# BUSINESS INSIGHTS ADVENTURE TOURISM

NICHE RESEARCH



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## NICHE RESEARCH



## PRELUDE

In efforts to propel Aruba's road to discovery and coming stronger out of this pandemic, we as a nation need to reinvent ourselves. Through niche research completed by Aruba Tourism Authority, we are providing you with free business highlights and insights that can be applied to your business with the purpose to create additional value to your operation, resulting in higher revenue as we meet the needs of ever-changing visitors.

The summary below focuses on further understanding and developing the Adventure niche segment directed on Adventure tourism. Aruba's rugged climate allows for adventure tourism in a plethora of forms. The insights in this document indicate where we are doing well and how we can improve. Finally, the objective is to create improved product offerings or completely new ones, taking into account the needs and desires of our visitors.



# 01. DEFINITION

## ADVENTURE TOURISM IS A MAJOR TOURISM SEGMENT AND IS DEFINED AS LEISURE TRIPS THAT FEATURE THREE CORE ATTRIBUTES:



### 1. PHYSICAL ACTIVITY

e.g. kitesurfing, kayaking, cycling, hiking, diving, walking, swimming etc.



### 2. INTERACTION WITH NATURE

e.g. bird watching, safari



### 3. CULTURAL EXCHANGE

e.g. food tourism experiences such as lunch with the locals, hands-on crafting of local goods, art classes with local artists

Adventure activities are further categorized into hard and soft adventure niche activities, according to activity type and level of skill required. Soft adventure is typically less physically demanding and is deemed low risk as opposed to hard adventure, which requires greater levels of skill, may demand specialist equipment, and incorporates the more significant risk. Soft adventure activities are often based on their hard adventure equivalents but at a much less physically demanding level. While not exhaustive, examples of each type include:

#### SOFT ADVENTURE NICHE ACTIVITIES

Bird watching	Kayaking/canoeing
Boat trips	Safaris/off-road 4x4 driving
Cycling	Scuba diving
Ecotourism	Snorkelling
Fishing	Swimming
Food tourism	Volunteering
Hiking, walking	White water rafting
Horse riding	
Hunting	

#### HARD ADVENTURE NICHE ACTIVITIES

- Abseiling/rappelling
- Climbing (mountain/rock/ice)
- Jungle survival
- Kite surfing
- Land sailing
- Mountain biking
- Paragliding
- Trekking
- White water rafting
- Wind surfing
- Yachting/sailing

Soft adventure is by some margin the larger segment of the two as hard adventure accounts for far fewer participants and activities, although it is reasonably common that soft and hard adventure activities may be combined on one trip.

# 02. THE GLOBAL PICTURE

## MARKET SIZE, VALUE, TRENDS

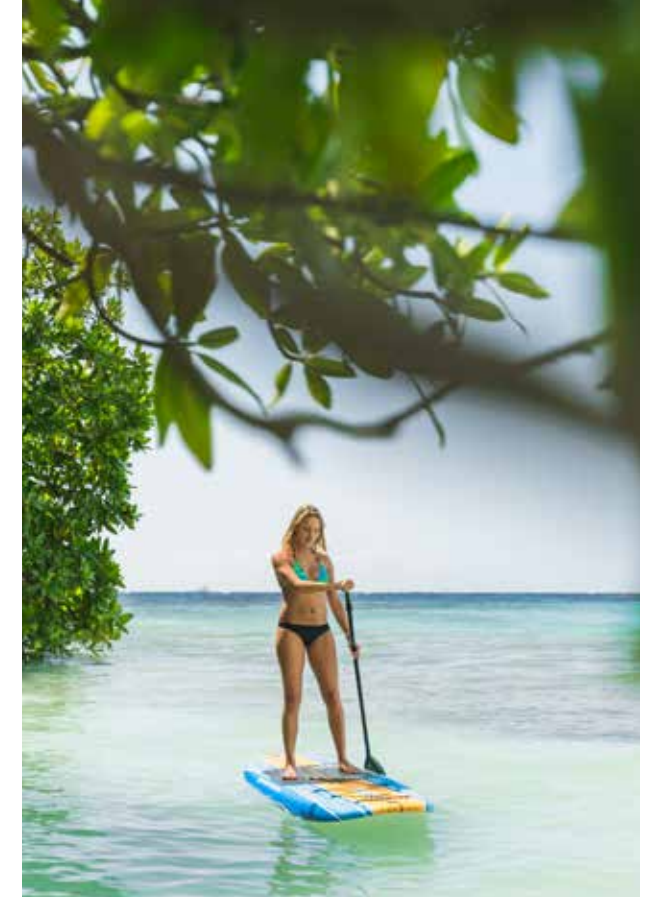
Adventure tourism is one of the biggest tourism niche markets and as global tourism grows and travelers seek new experiences and destinations, the adventure market is without a doubt set to expand. Alongside this OF Next to this, there is a clear indication that the conventionally accepted definition of adventure tourism is undergoing a significant shift in perception. Recent research by the Adventure Travel Trade Association (ATTA) found that adventure travelers today make less mention of 'risk', 'extreme' and 'physical' as key factors of adventure travel; now the focus is firmly on 'being in the natural environment', 'learning' and 'meaningful experiences'. As a result, adventure travelers are demanding more authentic experiences with strong socially responsible elements alongside challenging, physical activities, which satisfy a quest for personal fulfillment and achievement. Consequently, it is becoming increasingly likely that many more leisure trips encompass some form of adventure activity.

According to ATTA (2021), the following components are part of an effective adventure trip:



### MARKET SIZE AND VALUE

The top five regions of the world for inbound adventure tourism that are receiving increased interest from travelers are South America, Central America, North America, South Africa, and Western Europe. According to United Nations World



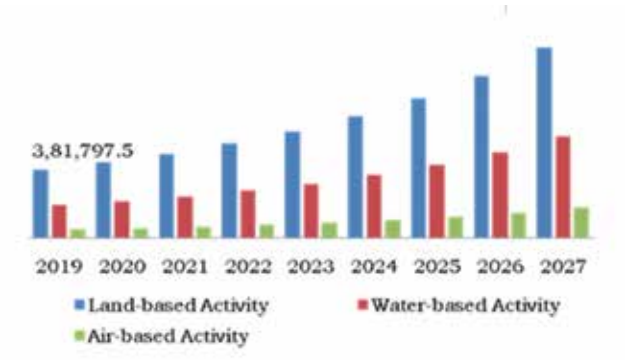
Tourism Organization (UNWTO), international traveler arrivals worldwide reached about 1.1. Billion in 2019.

The value of the adventure tourism sector has grown rapidly since the last decade. ATTA's report of 2017 estimates the value of the global tourism expenditures at \$2.3 trillion; the global adventure tourism expenditures are valued at \$683 billion. The outbound adventure travel market for the Americas is estimated at US\$96 billion. A second study published by the International Finance Corporation (IFC) estimated the global soft adventure market to be worth US\$745 billion. A study that only included hiking, kayaking, rafting, backpacking, viewing nature/ecotourism, bird watching, diving and a cultural tourism element in its valuation.

Another study by Research dive, which focuses a prediction up to 2027, estimates that the adventure travel segment alone will be worth \$1.7 trillion by 2027 compared to the \$609 billion of 2019. Pre Covid-19 data shows opportunities in the adventure market that indicate a high-value market, with the propensity to spend. US outbound



adventure travel data by ATTA 2019 indicate that the group of adventure intensives are worth \$40 billion, representing 7% of the population. Experience samplers are well for \$32.2 billion and are 8% of the US population. Cultural explorers represent 4% of the US population and are valued at \$23.8 billion. The profiles/ preferences are indicated below.



Land-based activities have been valued at \$3.8 million in 2019 and are predicted to grow in the future. Cycling tours, trekking & safaris will be in demand. In addition, travelers there is a rising demand for archaeological expeditions, local fairs, and bird watching.

### ADVENTURE TRAVEL TRENDS 2018

Adventure Tourism continues to be a major tourism trend globally as participants seek 'experiences' according to the Adventure Travel Trade Association (ATTA) in its 20 Adventure Travel Trends to Watch in 2018. 'Recharging deep in nature' was identified as the #1 travel trend in Trekksoft's 2018 Travel Trends, and the #2 trend 'The one-off experience you can't get elsewhere, using the swimming pigs of the Bahamas as an example. Several trends noted in the reports are also likely to have a direct and positive impact on the adventure tourism sector, harnessing your attention on the below points creates financially responsible strategic thinking.

#### 1. Millennials

Officially the largest generation in history and the youngest with disposable income, Millennials have overtaken Boomers as leaders in travel and tourism and are rapidly taking the lead in decision making. Tech savvy, they are demanding technology users, expecting high levels of online convenience to inform decision making and facilitate speedy booking processes. They are set to be the next largest group of adventure tourists

and in 2016 it was predicted the market will be taking 47% more international trips in 2020 than in 2013.

## 2. Active & Adventure Trips

Active and adventure trips were expected to be a key trend for 2017 and beyond, attracting increasing numbers of female participants, more customised experiences and a greater demand for activities such as safaris, hiking and cycling.



## 3. Female Solo Travel

Today it is estimated that 80% of travel decisions are made by women who are increasingly independent and looking to explore new experiences, many choosing to do so alone. In 2014, 72% of American women who travelled alone took a solo adventure – with the emphasis on ‘adventure’. Consequently, 42% of ATTA tour operators are actively developing more itineraries to address the needs of solo travel for both men and women.

## 4. Food Tourism

With 95% of Americans seeking a positive food experience while on holiday and 75% choosing their destination on the basis of some form of culinary activity, participation is high and growing.

## 5. Wellness and Mental Health Benefits

People are increasingly using travel experiences as an opportunity to regain a sense of control among the chaos they encounter during their everyday lives.

To complement these findings, trends identified by ATTA broadly found that:

### 1. General Industry Trends

Adventure travel is entering the mainstream; comfort, safety and security are key concerns; last minute bookings and online bookings are increasing in market share

### 2. Marketing Trends

Aggressive marketing is attracting new customers; blogging and personal review are driving growth

### 3. Activity Trends

Trekking, cycling, food tourism, cultural experiences, community interaction, and mountain biking excursions are incorporated into group tours.

### 4. Themes

Recurring themes that are observed in adventure tourism are conservation, wildlife, nature, ecological awareness, and safety & security.



# 03. COVID & POST COVID



According to travel experts, one thing is for sure, the future of adventure travel is bright despite the pandemic. A research conducted by Destination Analysts concludes that more than half of American travelers say they plan to avoid crowded destinations once the bulk of restrictions have eased, so there is tons of potential for small group focuses activities/ itineraries, open and outside spaces. Aruba can certainly deliver on this aspect, capitalizing on smaller and wide-open space itineraries. The only thing that is required is to be swift and diligent in meeting the needs of your travelers to ensure you come out better than before.

WTTC reports in the Future of travel & tourism in the wake of COVID 19, four general trends that we need to take notice of for the future.

#### Demand Evolution

Traveler preferences and behaviors have shifted toward the familiar, predictable, and trusted. Domestic vacations, extensive planning, and the outdoors will reign in the short term, with tourism businesses and destinations already adapting.

#### Health & Hygiene

Health, safety, and trust are important aspects moving forward. Your travelers need to be able to

experience a safe environment for themselves as well as the staff, this is non-negotiable. Businesses have to work together with the rest of the travel value chain to be well informed as to help ease any uncertainties travelers may have.

#### Innovation and Digitization

Quick and easy fixes to safety concerns should be part of your operations. Now more than ever, travelers are looking to book and pay online, making their part of their experience touch-free and seamless.

#### Sustainability

Being more in tune with nature and reducing a traveler footprint was trending before 2019, and will continue to be more important in the years to come. Slow travel is increasing in popularity. Travelers are seeking an unrushed, deeper connection with nature and the destination itself. We cannot be fleeting with window dressing when it comes to the sustainability aspect, this needs to be legitimate and real, businesses have to go the extra mile to be sustainable.

The Adventure Travel Trade Association provides practical tips on how to minimize the impact of the pandemic on your business:

- Consider your cancellation policy carefully and decide whether it will benefit your long-term relationship with your travelers to offer credits or no cancellation penalties to encourage future bookings. Also, consider allowing them to transfer their bookings to others like a gift certificate.

- Consider if it is best to cancel a booking to protect your traveler's health and ensure a good experience.

- Offer any support needed regarding hotel, air, and transportation cancellations, so be well-informed to assist your travelers.

- Communicate regularly to your travelers and guests pre-arrival.

Reinventing your business to fit the demands of travelers will prove to be beneficial in the future. ATTA 2021 indicates trending elements we need to incorporate in our business models to reap the benefits:

- Customizable itineraries
- Greener, more sustainable and low impact itineraries



- Electric bike itineraries
- Expert of specialist guided trips
- Remote destination/ trails
- Wellness and mindfulness itineraries
- Self-guided itineraries






# 04. PROFILE OF TRAVELERS

## "HOT" TRENDING HIGH-DEMAND TRIPS



-  **1** Custom Itineraries
-  **2** Greener / Sustainable / Low Impact Itineraries
-  **3** Electric Bike Itineraries
-  **4** Expert or Specialist-Guided Trips

-  **5** Destinations and Trails
-  **6** Wellness and Mindfulness Itineraries
-  **7** Self Guided Itineraries





According to ATTA 2019, 50% of adventure travelers are aged between 29-60. Adventure travelers are slightly more likely to be female (53%) and most travel as couples.

The Millennials will become the next core generation of adventure travelers as they age, demand more activities to satisfy their quest for personal fulfillment and new experiences, and their disposable income rises.

### ADVENTURE TOURISTS' MOTIVATIONS

As the market has grown and evolved, so travelers' motivations for adventure travel have become important and are now vital considerations for the industry. ATTA's research into the New Adventure Traveler has identified key motivations, in order of importance:

#### 1. Transformation

Personal growth and challenge, accomplishment, achievement, gratitude, mindfulness

#### 2. Expanded Worldview

Broadened perspective, expanded horizons, cultural understanding

#### 3. Learning

New skills, knowledge and insight, new experiences, enriching the overall experience

#### 4. Nature & Discovery

Environment, the beauty of nature, beautiful scenery

#### 5. Mental Health

Escape and renewal, clear mind, peace, and revolution

#### 6. Fun & Thrills

The adrenaline rush, excitement, feel alive

#### 7. Connection

Bonding, learn about others, meeting new people

#### 8. Meaningful Stories

Reminiscing, experiences to remember, photos

#### 9. Physical Health

Exercise, fitness, strength

#### 10. Unique Experience

Unexpected experiences, going somewhere others don't, feeling of accomplishment











## HOT TRENDING ACTIVITIES

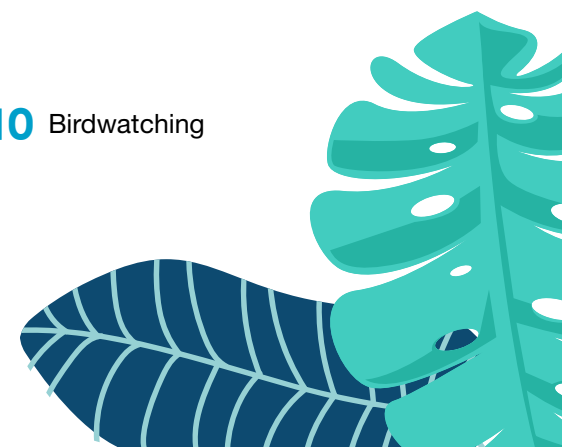


- |   |   |
|---|---|
|  1 Hiking / Trekking / Walking |  6 Safaris / Wildlife viewing    |
|  2 Culinary / Gastronomy       |  7 Expedition Cruising           |
|  3 Cultural                    |  8 Kayaking / Sea / Whitewater   |
|  4 Wellness-focused activities |  9 Photography (wildlife/nature) |
|  5 Cycling (electric bikes)    |  10 Running                      |

## WARM TRENDING ACTIVITIES



- |  |   |
|--|---|
|  1 Sailing                                |  6 Overland 4x4            |
|  2 Cycling (road / paved surface)         |  7 Skiing / Snowboarding   |
|  3 Snorkeling                             |  8 Stand-up Paddleboarding |
|  4 Cycling (mountain / non-paved surface) |  9 Archaeological          |
|  5 Snowshoeing                            |  10 Birdwatching           |





## TOP TRENDING ACTIVITIES BY REGION

HEADQUARTERS	# 1	# 2	# 3	# 4	# 5
NORTH AMERICA	Cultural	Culinary	Hiking/Trekking Walking	Wellness-focused	Safaris Wildlife Viewing
CENTRAL AMERICA CARIBBEAN	Cultural	Snorkeling	Hiking/Trekking Walking	Safaris Wildlife Viewing	Wellness-focused
SOUTH AMERICA	Cultural	Hiking/Trekking Walking	Culinary	Photography (wildlife/nature)	Wellness-focused
AFRICA	Cultural	Safaris Wildlife Viewing	Photography (wildlife/nature)	Birdwatching	Hiking/Trekking Walking
EUROPE	Hiking/Trekking Walking	Cycling (electric bikes)	Cultural	Culinary	Cycling (road/paved surface)
ASIA	Hiking/Trekking Walking	Cultural	Wellness-focused	Safaris Wildlife Viewing	Culinary

\*REGIONS NOT CONTAINING SUFFICIENT SAMPLE SIZE (PACIFIC & MIDDLE EAST) ARE EXCLUDED FROM THIS CHART

# 05.

## OVERVIEW

### OF ARUBA'S PRODUCT

As a Caribbean island that already boasts a wide-ranging adventure tourism product that includes fishing, kayaking, diving, windsurfing, kitesurfing, and land sailing, Aruba is at a good juncture for further development, and there is no doubt that there is considerable potential for Aruba to develop its adventure tourism product further.

The adventure product is a broad mix of land-based and water-based activities that include the following:

#### Land-based

Hiking; exploring caves; mountain biking; horse riding; 4x4/ATV; rock climbing; exploring Arikok National Park; enjoying walking and biking trails; off-roading; beach tennis and land sailing.

#### Water-based

Scuba diving and snorkeling; kayak and canoe; parasailing; paddle boarding; diving; motorized water sports; underwater tours; sailing; deep-sea fishing; windsurfing, kitesurfing, and skydiving.



# 06.

## COMPETING DESTINATIONS



Listings of the best places for adventure trips and activities are naturally subjective and widely available in online publications, blogs, and travel listings. Examples of some of the greatest destinations and adventure activities, but certainly not limited to, include:

### Internationally Renowned

- Trekking on the Great Himalaya Trail, Nepal
- Horseback Riding in Fish River Canyon, Namibia
- Mountain Biking in the Alps, France, Italy, Switzerland
- Scuba Diving, Borneo
- Walking with Wolves in Prince Albert National Park, Canada
- Adventure Adrenalin Sports Tour, South Island, New Zealand
- Primate Viewing, Uganda and Rwanda
- Kayaking and Hiking, Kamchatka, Russia
- Rock Climbing, Yangshuo, China

### Regionally Important in South and Central America

- Amazon Riverboat Adventure, Brazil
- Discovering Iguazu Falls by Raft, Argentina
- Galapagos and Otavalo Highlands, Ecuador
- Hiking the Inca Trail, Peru
- Horseback Riding in the Pantanal, Brazil
- Mountain Biking in Bolivia
- Patagonia Rafting Safari, Chile
- Sailing round Cape Horn, Chile
- Scuba Diving in Venezuela
- Trekking in Torres del Paine, Chile
- White Water Rafting on the Mendoza River, Argentina
- Exploring and Boarding Volcanoes, Nicaragua
- Sea Kayaking and Snorkelling, Belize
- White Water Rafting on the Mosquito Coast, Honduras
- Microlight (or ultralight) excursion in Belize



## ATA COMPETITOR DESTINATIONS

The Aruba Tourism Authority (ATA) identified Aruba's five main competitor destinations as The Bahamas, Jamaica, St. Lucia, St. Martin, US Virgin Islands.

The niche product offer of each of these competitor destinations was analyzed by assessing the destination's online marketing activity and the reviews and coverage of the destination by key travel bloggers, review sites, and tour and experienced distributors. This methodology was used to replicate what a potential visitor would find by undertaking Internet research of each destination. Aruba's niche product was reviewed using the same methodology.

### BAHAMAS

#### Sports

- Sports – marathon, cycling, tennis, football, softball, tennis, running
- Events – track, basketball
- Active Beaches – volleyball, beach soccer, basketball, water sports

#### Ecotourism

- Blue Flag Marina Programme which have made a commitment to strict environmental and safety criteria.
- Selection of short videos – animal park, sea park, Lucayan National Park with unique cave system, ancient sites etc

#### Water Sports

- Skim boarding (skimmers run towards the water with a flat board, jump on the board at just the right second and ride the waves)
- Parasailing, jet packing – Nassau, Paradise
- Snorkelling
- Swim with dolphins of Bimini
- Surfing on Eleuthera's east coast October to April
- Kayaking/canoeing
- Underwater tours – submarine
- Fishing
- Paddle boarding
- Water skiing

### JAMAICA

'Packed with things to do, get out there, come alive and discover the island'.

#### Land-based

- Horse riding, horse riding tracks, ride and swim, polo, 4x4 river jeep safaris, zip lining
- Outdoor adventures – the trails less travelled – nature reserves, plantation houses, Blue and John Crow Mountains National Park, river rafting.
- Sports are also popular – equestrian, cricket, football, netball, tennis, running

#### Water-based:

- Rafting, tubing, scuba, snorkelling, water sports, diving, snorkelling, beaches

### ST LUCIA

#### Land-based

- Soufriere hotwire rides
- Tree-top adventure park
- Rainforest adventures
- Segway tours
- ATV tours
- Mountain biking
- Hiking – Piton Mountains (UNESCO WHS), Pigeon Island National Park, Tet Paul Nature Trail, Diamond Botanical Gardens & Waterfalls
- Horseback riding

#### Water-based

- Whale, dolphin, turtle watching (camp overnight to see Leatherback turtles laying eggs on Grand Anse island between March and August)
- Diving, snorkelling, SNUBA
- Sailing

### ST MARTIN

#### Land-based Adventure

Ecotourism is promoted as a sub-section of Adventure and there is a wealth of flora and fauna that the island makes continued efforts to protect. Hiking, pony-trekking, mountain biking, quad biking and kayaking are offered as ways to explore the island without damaging its natural resources.

Loterie Farm: a former sugar plantation at the foot of Pic Paradis has become the top ecotourism



and gastronomic venue, offering zip-lining experiences for all ages, dining experiences and from 2011, multi-level swimming pools connected by cascades and surrounded by lush tropical vegetation. 11 cabanas are available for day trips, each accommodating up to 10 guests. 'Wine, dine, climb, hike and glide over the treetop canopy'. (Currently being rebuilt/renovated after hurricane damage.)

Rainforest Adventures at the Rockland Estate features the world's steepest zip line, opened in November 2017, dropping 1,050 feet, zipping over greenery at 56 mph. Other zip lines are due to open in 2018. Local guides have created 17 walking trails around the island, ranging from 1km to 6km, along varying terrain. Paragliding and skydiving are also possible in St Martin.

#### Water-based Adventure

Water sports is the mainstay for most visitors: diving; water skiing and wakeboarding; windsurfing; surfing; jet skiing; kitesurfing; kayaking; SUP; Hawaiian canoe; flyboarding; pedal boat; deep sea fishing; parasailing. Climate provides good conditions for water sports year-round.

St Martin is an exceptional extreme fishing destination as the waters of the Caribbean Sea and Atlantic that surround the island are fish-

rich and renowned for being home to the largest blue marlin in the world. Other species include barracuda, mahi-mahi, black fin and yellow fin tuna, and wahoo. Annual contests are held attracting an international clientele – The Marlin Cup (May) and the BillFish Tournament (June).

### US VIRGIN ISLANDS

#### Land-based ('Sports on the Turf')

- Historical and culture tours
- Eco-adventures
- 4x4 tours, open air safari bus especially on St Croix, the 'Big Island'
- Hiking in rainforest – secluded tidal pools, Heritage trails, more than 12 maintained trails on St John for guided/self-guided hikes, including the Reef Bay Guided Hike
- Petroglyph Trail covers the islands ancient culture through Taino rock carvings
- Biking
- Horseback riding
- Parasailing
- Skydiving
- Zip lining

#### Water-based ('Sports on the Surf')

- Typical water-based activities enjoyed throughout the Caribbean – sailing (plus lessons), sea kayaking, diving, snorkelling, kitesurfing, windsurfing, SUP
- Underwater trail (St John) with markers that

guide snorkelers along a reef (Trunk Bay)

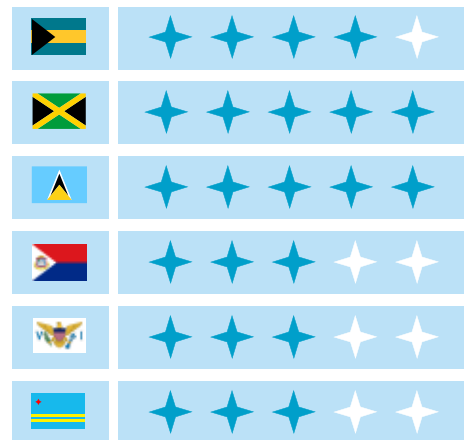
- Windsurfing, kayaks,
- SUP – paddle session from Cruz Bay to Francis or Maho Bays (St John)
- Rent a powerboat or sailboat
- Venture to British Virgin Islands for an island-hopping adventure
- Sportfishing is a year-round activity – blue marlin, wahoo, mahi-mahi and tuna
- Jet skis

## CONCLUSION: ARUBA'S CURRENT POSITIONING

All destinations offer a mix of land and water-based adventure activities with Jamaica, St. Lucia and the Bahamas promoting their adventure product most effectively. **Aruba's adventure offer compares reasonably well with St. Martin and USVI.**

As part of the adventure segment there is a growing trend to promote ecotourism activities and this was evident in the Bahamas, St. Martin and USVI. The findings from the Competitor Analysis were assessed to create a subjective ranking of Aruba's current positioning in the Adventure market related to its main competitors.

## ADVENTURE RANKING



Adventure tourism combines physical activity with the natural environment and cultural experiences. In Aruba the cultural element and engagement with local people is lacking.





# 07. SWOT ANALYSIS OF ARUBA

## STRENGTHS

- Natural assets – beaches, coral reef, inland desert landscape
- Potential cultural assets
- Current adventure portfolio, such as wreck diving, kayaking, paddle boarding, windsurfing, kitesurfing, hiking and sailing, ATV safaris.

## WEAKNESSES

- Lack of environmental protection and enforcement
- Lack of planning
- Current activities e.g. ATVs causing environmental degradation
- Lack of strong indigenous culture
- Lack of engaging cultural experiences
- Lack of well managed nature-based experiences
- Limited outstanding adventure offer
- Current perception as a cruise/all-inclusive destination



## OPPORTUNITIES

- Develop environmental management
- Develop best practice and education for tour operators
- Develop itineraries that maximise cultural and natural landscapes
- Create USP – e.g. Ecotourism = sustainability, celebration and preservation of local cultures, measurable local benefits
- Turn cruise visitors to overnight visitors/ return land-based visitors by developing day tours to showcase adventure activities
- Develop stronger package of adventure offer that highlights desert island environment, incorporates nautical and land activities (e.g., kiting and cycling) and ‘meet the people’ experiences

## THREATS

- Limited geographical variety
- Strong neighbouring competition



# 08. RECOMMENDATIONS



## 8.1 MARKET OPPORTUNITIES

The Caribbean Islands, the Bahamas, and Aruba are identified by ATTA's research as being on the wish list of segments of the US Adventure travelers that account for around 40% of the US tourism market.

The growth segment is considered to be the Millennials, who demand activities that provide personal fulfillment and new experiences which fits with the motivation of 'New Adventure Travelers' (as identified by ATTA's research) which is driven by personal transformation, learning, nature, and the environment, connections with new people, experiences to remember as well as physical fun and thrills. There are similar motivations across elements of the adventure and broader wellness segments.

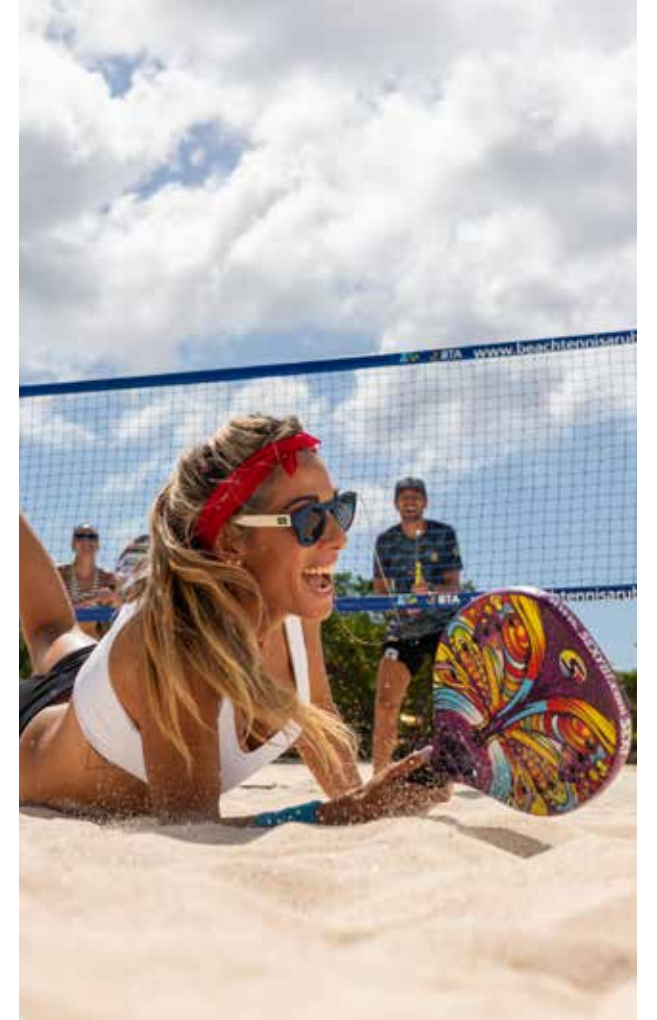
Currently, Aruba offers a competitive range of water-based adventure activities focused around beach locations but lacks well-managed nature-based or engaging cultural experiences.

There is potential for Aruba to tap into the adventure market, attract younger visitors and improve its competitive position in the adventure market, however, to do so it will need to focus on its environmental management and developing its cultural assets.

## 8.2 KEY OPPORTUNITIES

### Environmental Management and Ecotourism

The Carrying Capacity study highlights the need for Aruba to move visitors away from the beach due to the environmental degradation caused by high visitor numbers. However, Aruba's inland environment is also very sensitive, especially in the north area, and rigorous environmental management and regulation will be required and implemented in the short term to ensure the sustainability of creating activities that move visitors away from the beaches and conservation areas.



### Curate Cultural Experiences

Cultural tourism is the most valuable market segment in its own right and engaging cultural experiences are a key element of growing the adventure segment. Aruba's current culture offer is limited; the refurbished National Archaeological Museum in Oranjestad is the only museum that is currently opened.

The San Nicolas area has the potential to develop as Aruba's cultural hub. From a market perspective, as well as from social inclusion and local economic perspective, creating cultural experiences that enable adventure travelers to engage with local people and share their unique culture and history, should be driven by the community.

There are also opportunities to combine cultural and environmental experiences, particularly in the National Park focusing on thematic products for example creating itineraries around the gold route.

### Land-based Activities

Horse riding and some off-road hiking and cycling trails are currently available. These activities appeal to the adventure market and the potential to develop themed trails should be explored in more detail, ensuring that trail development incorporates environmental priorities.

### Marine-based Conservation Attraction

The degradation of the marine environment, increasing visitor management issues on the beaches with conflicts between visitor use and the need for environmental protection, such as the turtle nesting on Eagle Beach and an increasing public concern about the quality of the oceans creates the potential for investment in conservation-minded underwater activities to attract the adventure market.

## 8.3 PRODUCT DEVELOPMENT OPTIONS

Initial ideas for developing products that would appeal to the adventure market are suggested here; however, the development of new products for the adventure market must be undertaken in collaboration with environmental management and specialist organizations, existing businesses in the sector, local communities, and tour operators. Examples of tours that would resonate with travelers:

### Nature, Culture and Active Itineraries

- Create themed itineraries – e.g. the Aruba Gold trail, archaeological tours linking environment and educational experiences and food tours
- Develop riding, cycling trails that identify points of environmental, biodiversity, historic and cultural interest e.g., Lighthouse to Refinery Cycle tours

### Living Culture Experiences

- Host immersive adventure and cultural experiences.
- Art and craft workshops with conservation theme e.g., Lionfish jewellery making workshops
- Hosted culinary experiences.







ARUBA TOURISM  
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