

2024

Aruba Tourism Authority

Local Sentiment Research Highlights

Prepared by: Aruba Tourism Authority
Department: Strategy, Planning, and Research
Field research conducted in March and April 2024

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Heart of the matter

1. A significant number of respondents acknowledge that tourism is a key and only driver of Aruba's economy.

2. 68% of the respondents indicated they are happy with our tourism industry, while for the respondents who indicated to be hospitality employees, 75% said they are happy with the industry.

3. Local respondents did express concerns in several areas. Concerns include high cost of living, unpayable housing for locals, pressure on our infrastructure, lack of benefit that locals derive from tourism-generated revenue, and damage to nature and the environment

4. The perceived challenges the tourism industry faces require a collective effort by stakeholders (public/ private and citizens) to reverse these.

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01. Methodology

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Background

As part of the carrying capacity study conducted in 2018, residents' views and input were collected to measure the local sentiment towards tourism in Aruba. The data collection happened during the celebration of Aruba's national flag and anthem day, during which the Aruba Tourism Authority visited several "Centro di bario" all over the island with the aim of repeating this research every two years.

In 2020, this research was put on hold due to the COVID-19 pandemic. After the pandemic, A.T.A. aimed to reassess resident sentiments to identify any changes due to the pandemic, including one additional question on buying power after COVID-19. In May 2022, a self-completion survey was conducted. A.T.A. deployed a broad approach, using face-to-face and online surveys to collect data. The face-to-face surveys were collected with the help of students from Universidad di Aruba. The data was collected online via Qualtrics using a URL link and a QR code. Both were shared via multiple media websites, newspaper ads, and Aruba Tourism Authority's Corporate Facebook and Instagram accounts.

In 2024, data was collected face-to-face on March 1, 2 and 17, at Plaza Betico Croes during the Evenemento Cultural and on March 18 at various Centro di bario's and locations (San Nicolaas, Savaneta and Brazil, Aruba Aloe and Museo Archeologico, Santa Cruz and Piedra Plat). During the same period, data was also gathered through the online survey link. Until April 15, several businesses and students were approached to complete the paper-based surveys.

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Confidence Level

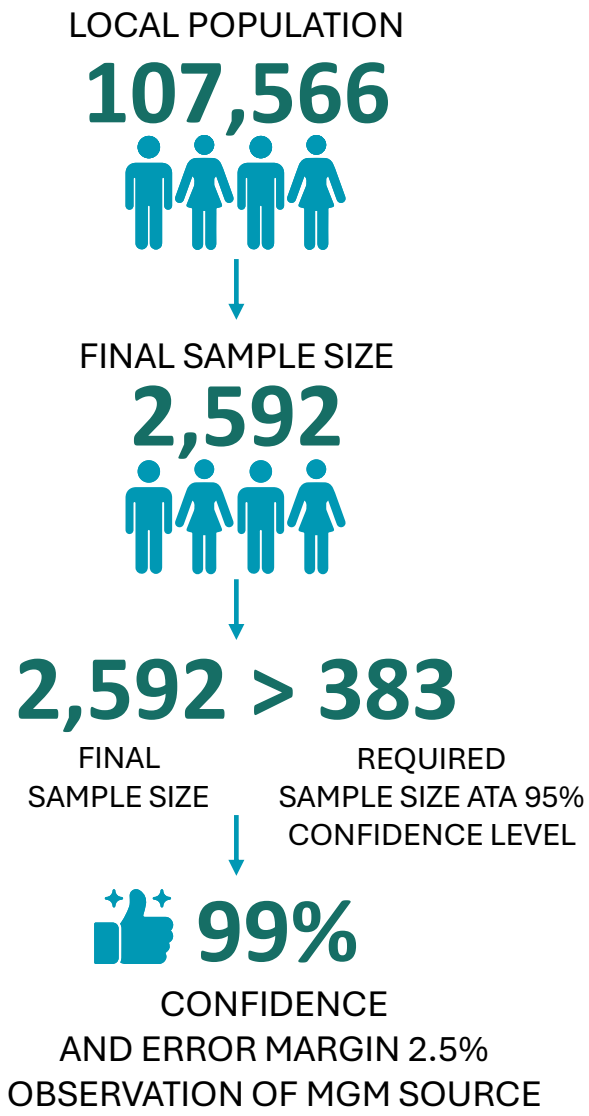
The sentiment analysis has a clear focus. It aimed to measure local views on specific aspects of Aruba's Tourism economy, including its impact on the local community and the environment.

The survey was specifically designed for residents of Aruba, ensuring that their unique perspectives on the local economy and tourism industry were captured. The survey included a question to verify residency, and the logic in Qualtrics allowed the A.T.A. to complete the survey for all residents.

Based on the Local population of 107,566 (CBS 2023), the required sample size is 383, with a 95% confidence level and a 5% margin of error. We collected a total of 3,583, from which 2,053 responses online and 1,530 face-to-face surveys.

After the data cleaning (excluding respondents not living in Aruba and unfinished surveys), the final sample size was 2,592.

Data was collected during March to April.



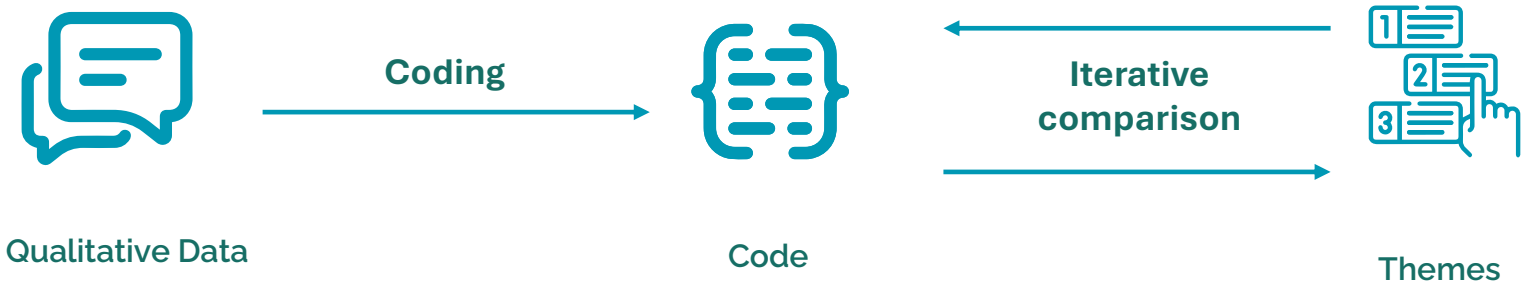
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Thematic Analysis

To further understand the following questions: **“Impact of tourism on the community,”** the **“Impact of tourism on Aruba in general,”** and the **“Impact of tourism on you and your family”** on a 5-point scale, from extremely positive to extremely negative.

1	2	3	4	5
Extremely Negative	Negative	Neutral	Positive	Extremely Positive

Those who provided neutral, negative, or extremely negative ratings were requested to provide additional feedback to give more insight in their scoring.



5 POINTS RATING IMPACT OF TOURISM ON

1. The community
2. Aruba
3. You and your family

↓

If rating is neutral, negative
Or extremely negative

↓

OPEN-ENDED FEEDBACK QUESTION

↓

THEMATIC ANALYSIS

Example:

E daño na naturalesa tin hopi atencion di comunidad → Environmental Impact

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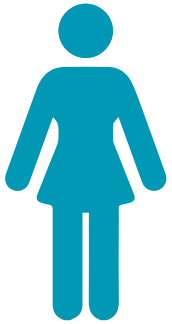
02. Demographics

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Demographics of Respondents

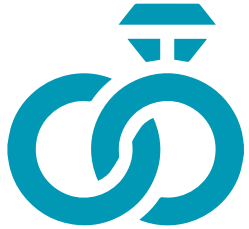
Gender



65%

Are women

Marital Status



55%

Are married and have cohabitation

Children



68%

Have kids

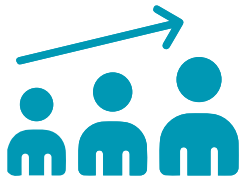
Education



47%

Have Bachelor Degree and higher

Age Group



70%

Between 28-59 years old

Gen Z (18-27 years): 12%
Millennials (28- 43 years): 35%
Gen X (44-59 years): 35%
Baby Boomers (>60 years): 18%

Country of Birth



80%

Were born in Aruba

N: 2592

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Demographics of Respondents

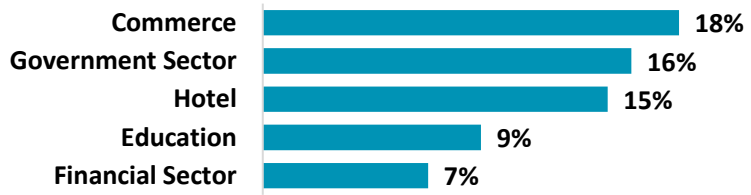
Employment Status

82%

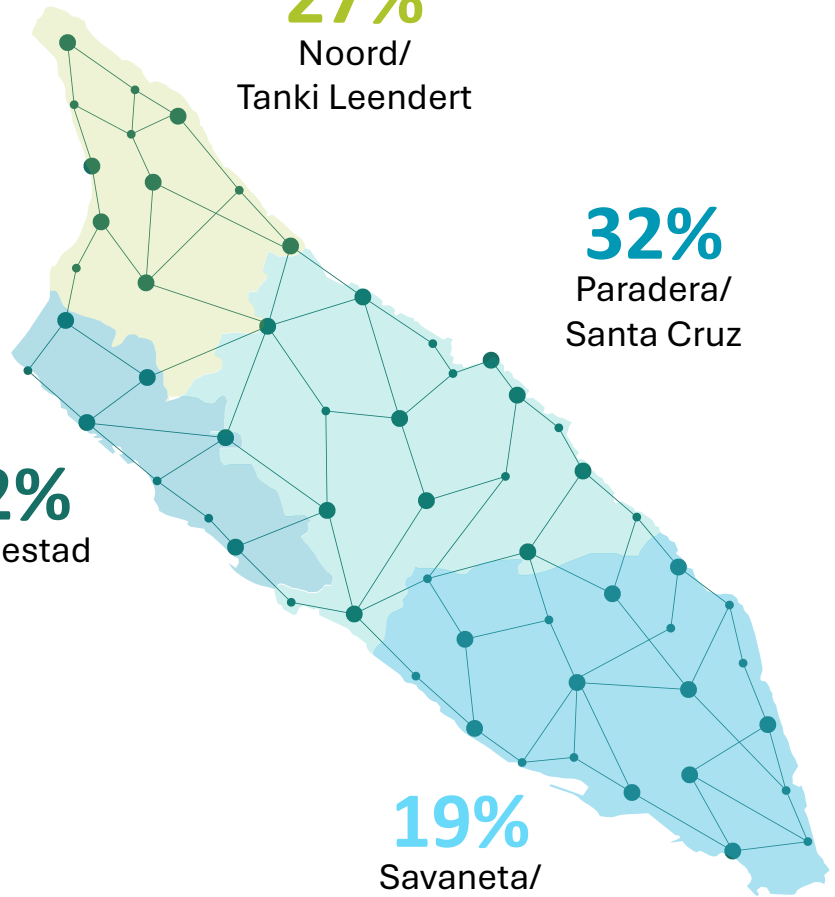
Are employed

Workplace

Top 5 workplaces



Districts



27%
Noord/
Tanki Leendert

32%
Paradera/
Santa Cruz

22%
Oranjestad

19%
Savaneta/
San Nicolaas

N: 2592

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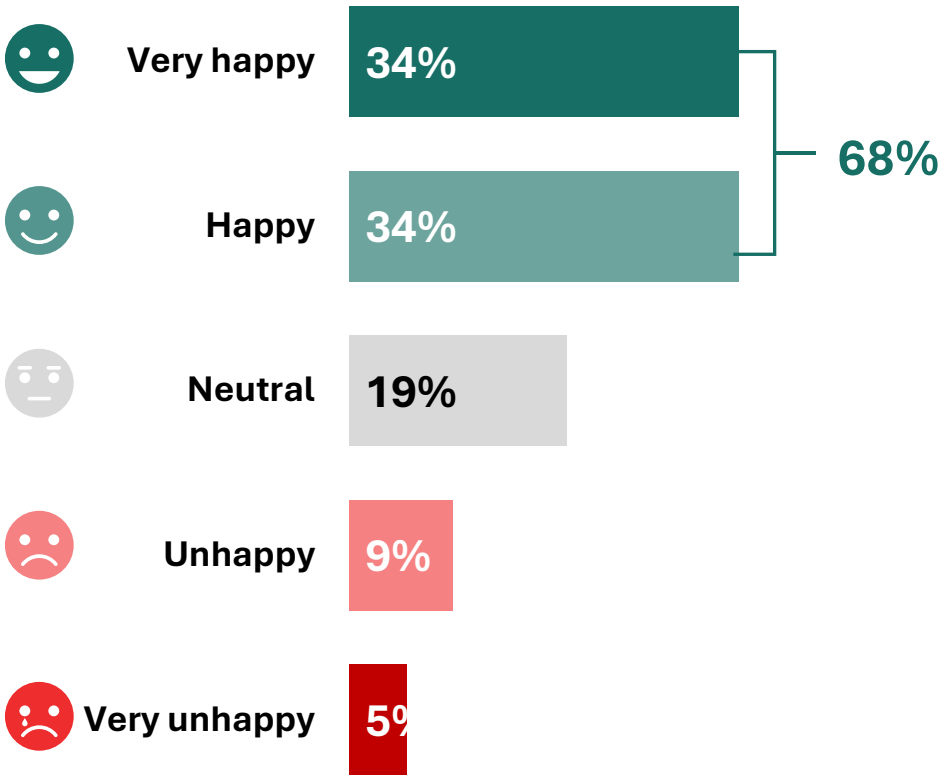


03. Overview of Results

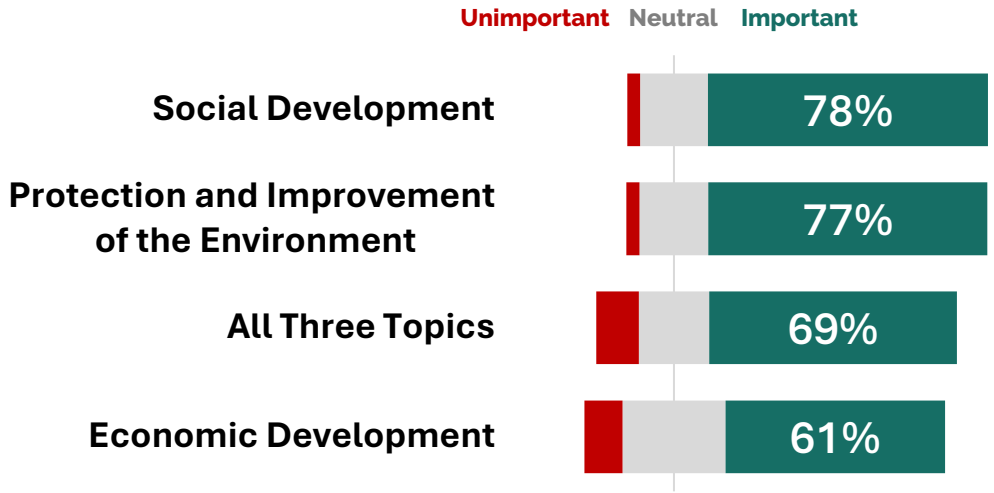
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Overall, 68% of respondents are happy with the Tourism of Aruba…

Happiness with the Tourism of Aruba



Importance of Economics, Social, and Environmental

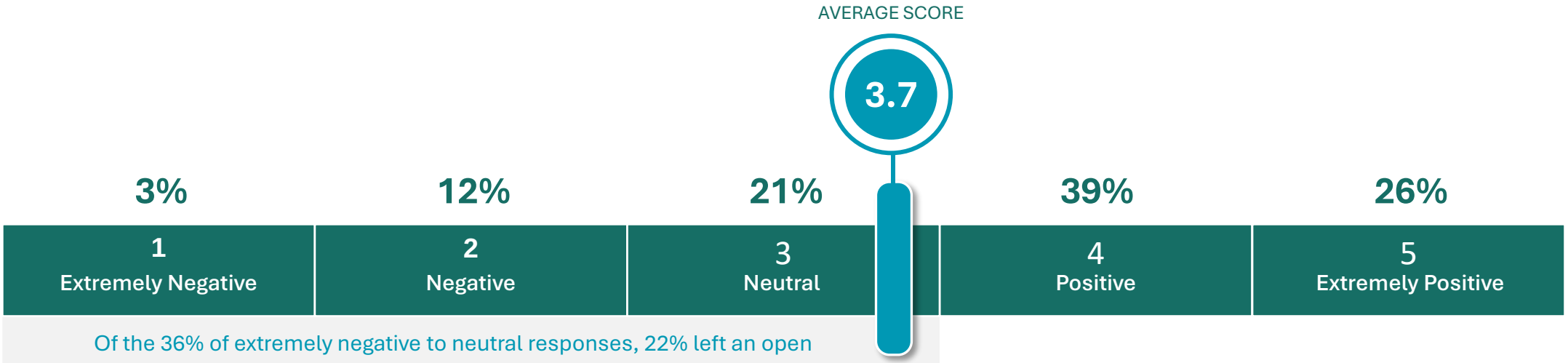


The survey revealed that social development (78%) and environmental protection (77%) scored the highest. The importance of balancing these three aspects was emphasized and ranked higher than economic development. In 2022, despite the financial challenges faced by the Aruban economy in the wake of the global pandemic, social development remained the community's top priority.

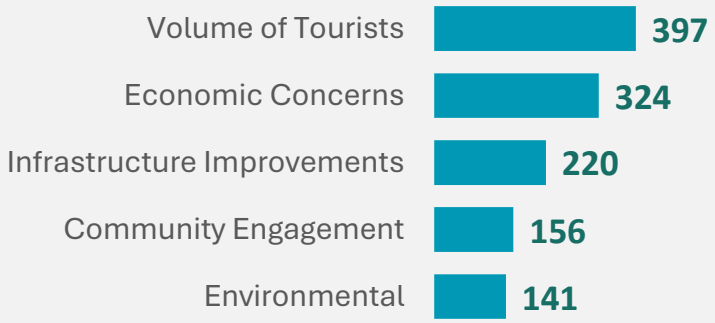
Q: Please indicate the level of importance you assign to the following topics using the scale: Unimportant, Neutral, Important.
N: 2592

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The impact of tourism on the community resulted in a positive average score of 3.7



Of the 36% of extremely negative to neutral responses, 22% left an open comment. The main topics mentioned in the comments of those who scored 1 (extremely negative) to 3 (neutral) were:



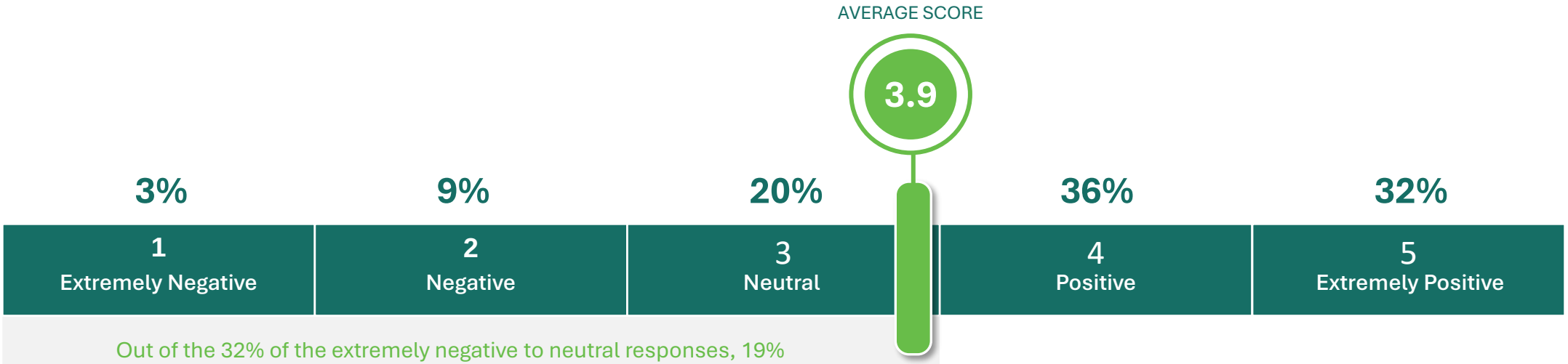
On a scale of 1 to 5, 65% of respondents scored between positive to extremely positive and thus indicated being optimistic about the impact of tourism on the community, with an average score of 3.7.

This question was newly added in 2024.

Q: Indicate what impact Tourism in its totality has on the community, using a 5-point scale where 5= extremely positive and 1= extremely negative
N: 2592

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The impact of tourism in general resulted in a positive average score of 3.9



Out of the 32% of the extremely negative to neutral responses, 19% decided to leave an open comment. The main topics mentioned in the comments of those who scored 1 (extremely negative) to 3 (neutral) were:



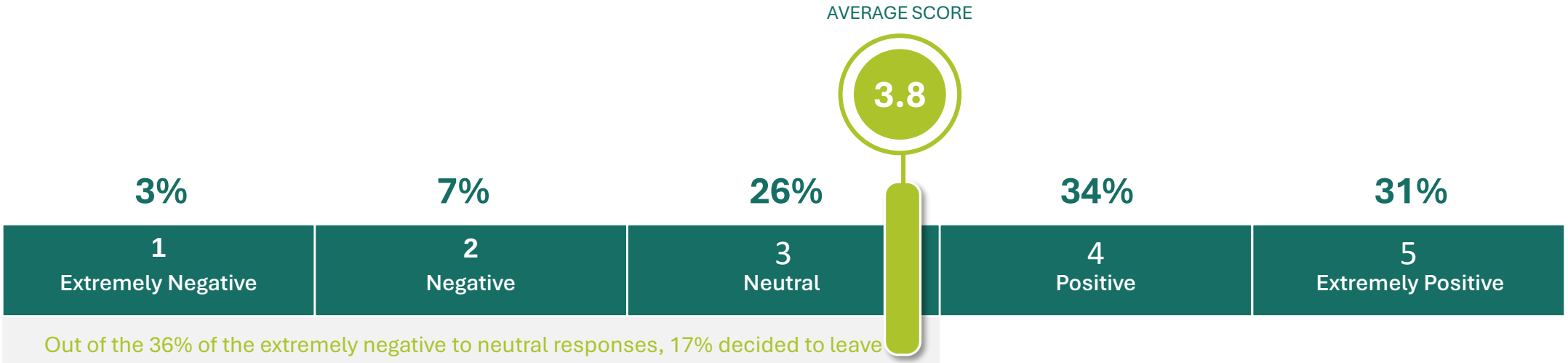
In 2024, on a scale of 1 to 5, 68% of respondents scored positive or extremely positive. In 2018, 78% scored positive or extremely positive, while in 2022, this was 67%.

In 2024, with an Overall Average score of 3.9.
2018 Overall Average: 4.0
2022 Overall Average: 3.8

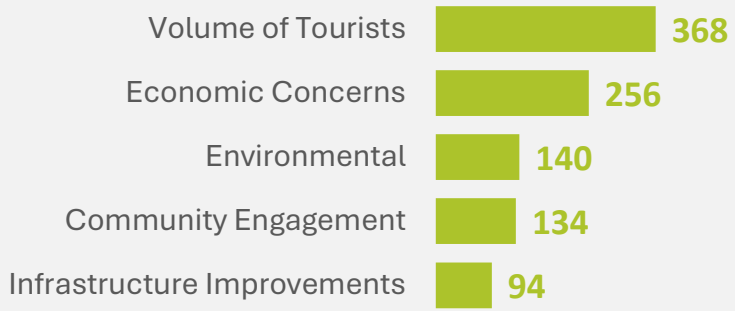
Q: Indicate what impact Tourism in general, using a 5-point scale where 5= extremely positive and 1= extremely negative
N: 2592

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The impact of tourism On You and Your Family resulted in a positive average score of 3.8



Out of the 36% of the extremely negative to neutral responses, 17% decided to leave an open comment. The main topics mentioned in the comments of those who scored 1 (extremely negative) to 3 (neutral) were:



In 2024, on a scale of 1 to 5, 65% of respondents scored positive or extremely positive. In 2018, 61% scored positive or extremely positive, while in 2022, this was 52%.

In 2024, with an Overall Average score of 3.8.
2018 Overall Average: 3.7
2022 Overall Average: 3.6

Q: Indicate what impact Tourism on you and your family, using a 5-point scale where 5= extremely positive and 1= extremely negative
N: 2592

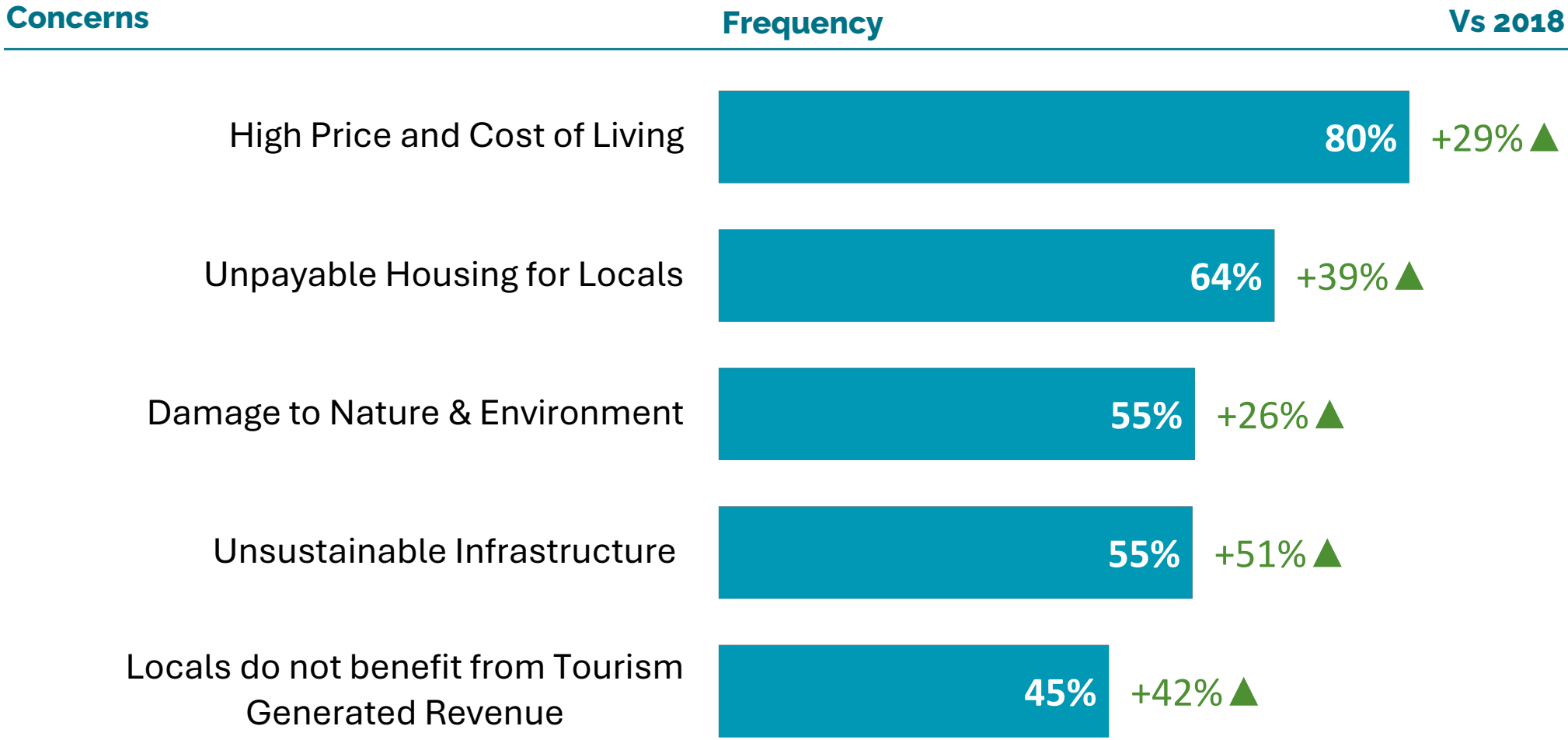
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04. Points of Attention

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Top 5 Points of Attention 2024



Q: Select the top 5 tourism-related concerns that is most important to you
N: 2592

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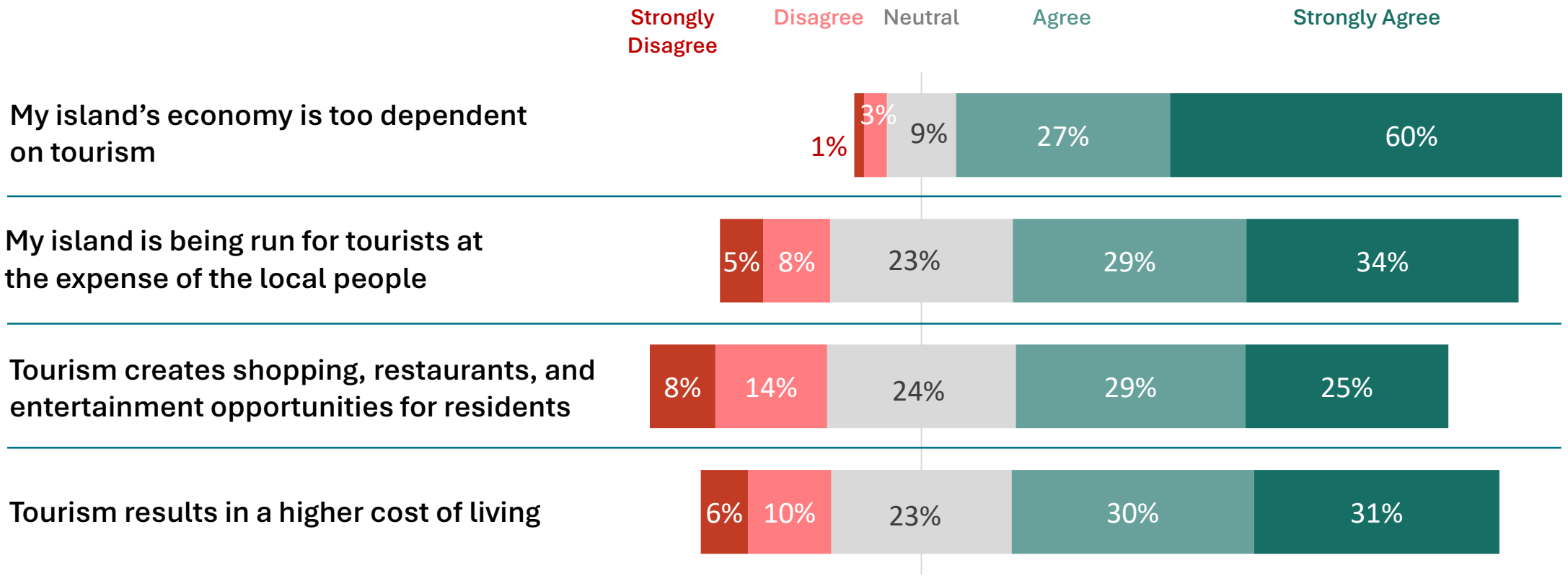
05. Quality of Life

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Tourism Statements

Economic Dependency 2024



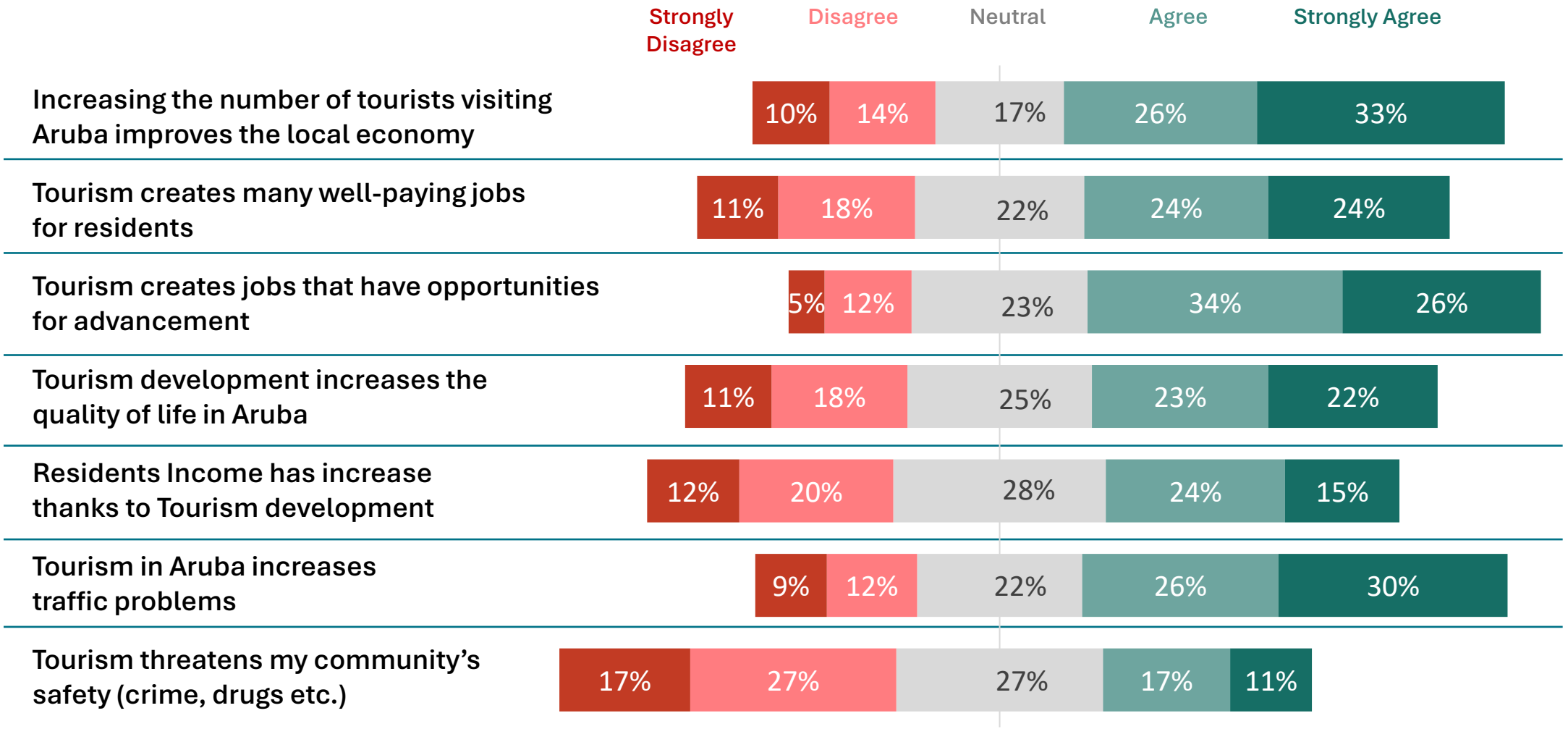
Q: Indicate how much you agree or disagree with the following statements related to tourism, using a 5-point scale where 5= strongly agree and 1= strongly disagree.
2024 N: 2592

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Tourism Statements

Socioeconomic 2024



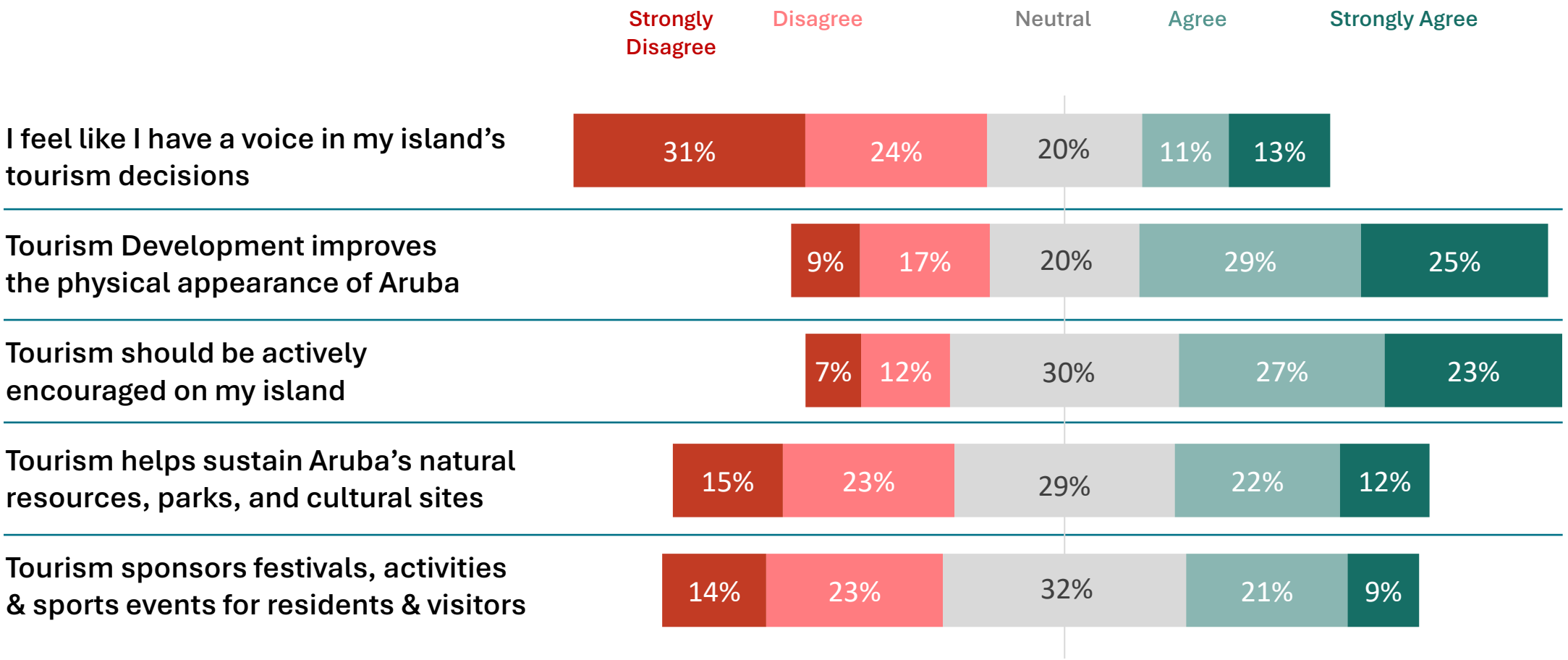
Q: Indicate how much you agree or disagree with the following statements related to tourism, using a 5-point scale where 5= strongly agree and 1= strongly disagree.
2024 N: 2592

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Tourism Statements

Community Engagement 2024



Q: Indicate how much you agree or disagree with the following statements related to tourism, using a 5-point scale where 5= strongly agree and 1= strongly disagree.
2024 N: 2592

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Hospitality Employees

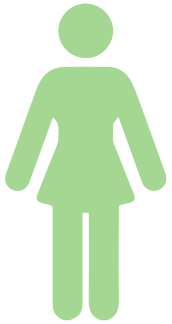
Hotels • Restaurants • Tourism Sector

A.T.A. created various profiles. One profile pertains to all respondents who indicated they work in hotels, restaurants, or the tourism sector in general.

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Demographics Respondents Hospitality Employees

Gender



65%

Are women

Marital Status



51%

Are single and/or divorced

Children



67%

Have kids

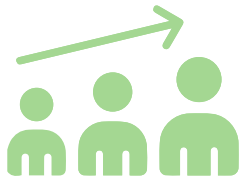
Education



39%

Have Bachelor Degree and higher

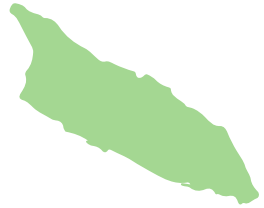
Age Group



74%

Between 28-59 years old

Country of Birth



70%

Were born in Aruba

N: 412

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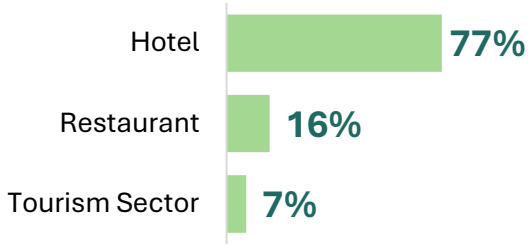
Demographics Respondents Hospitality Employees

Employment Status

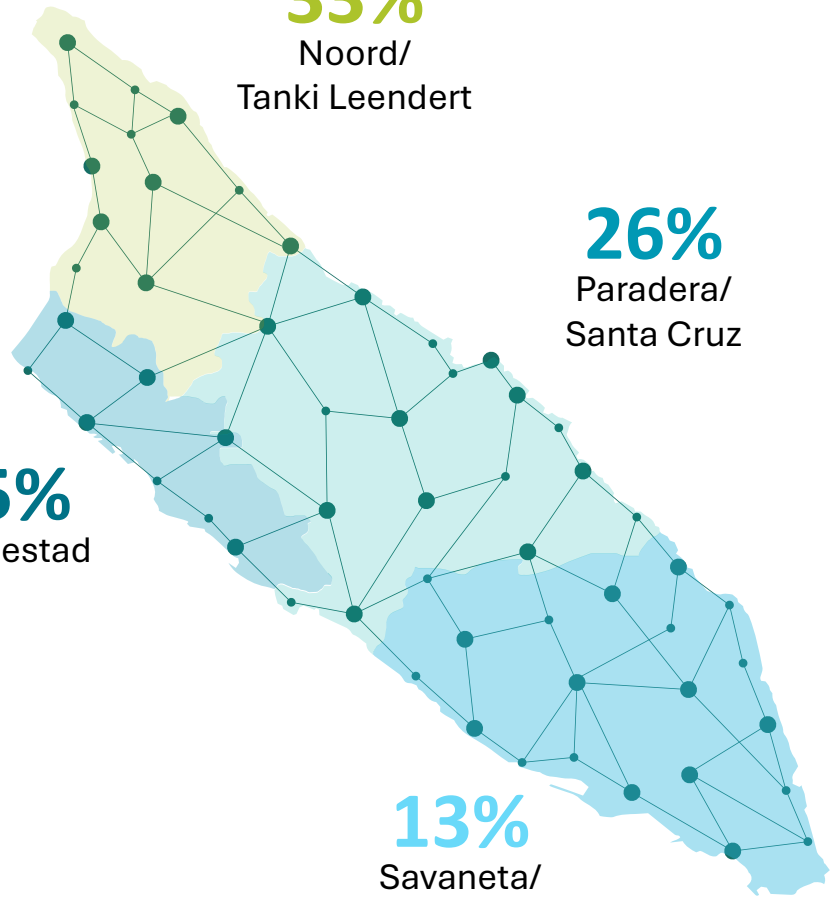
100%

Are employed

Workplace



Districts

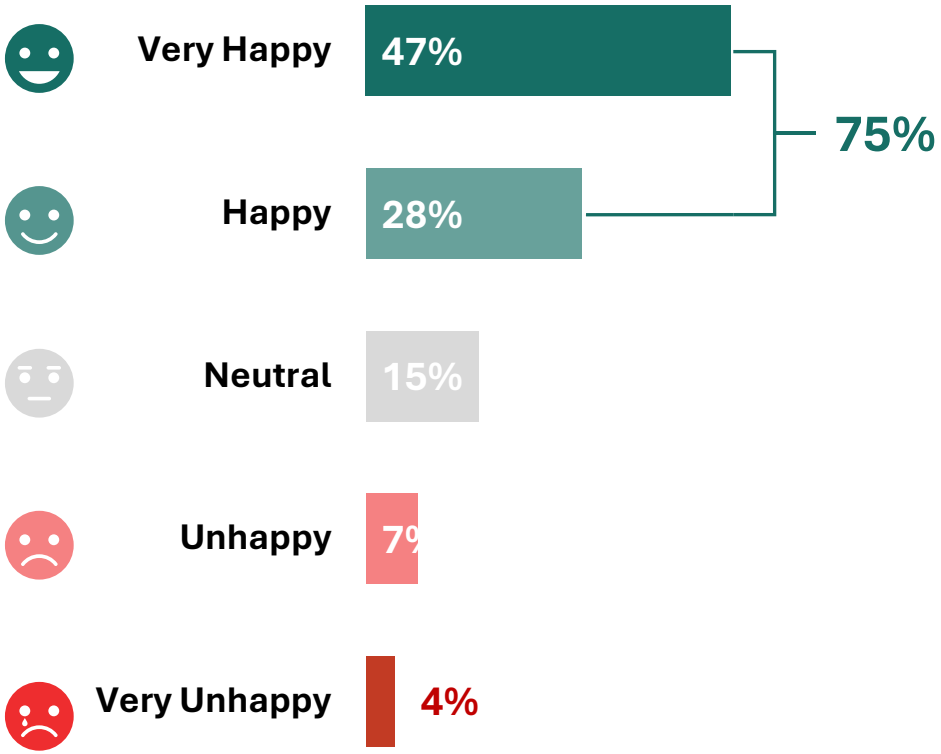


N: 412

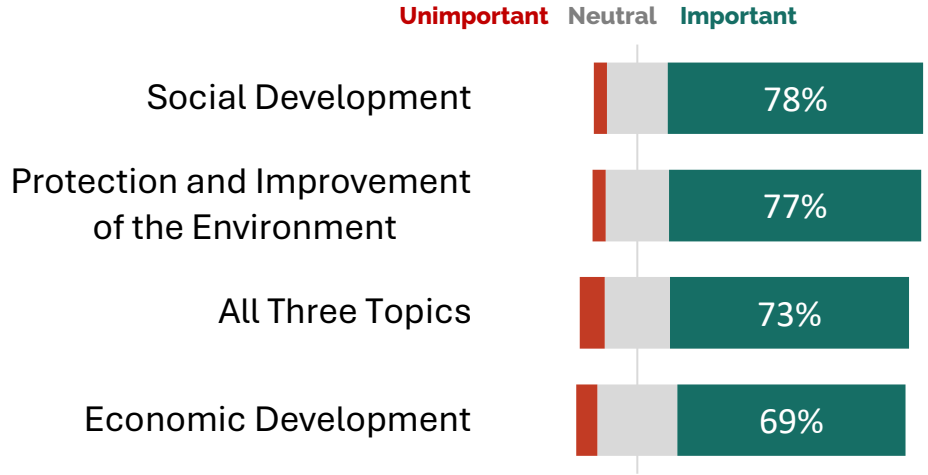
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75% of Hospitality Employees Respondents are happy with the Tourism of Aruba...

Happiness with the Tourism of Aruba



Importance of Economics, Social, and Environmental

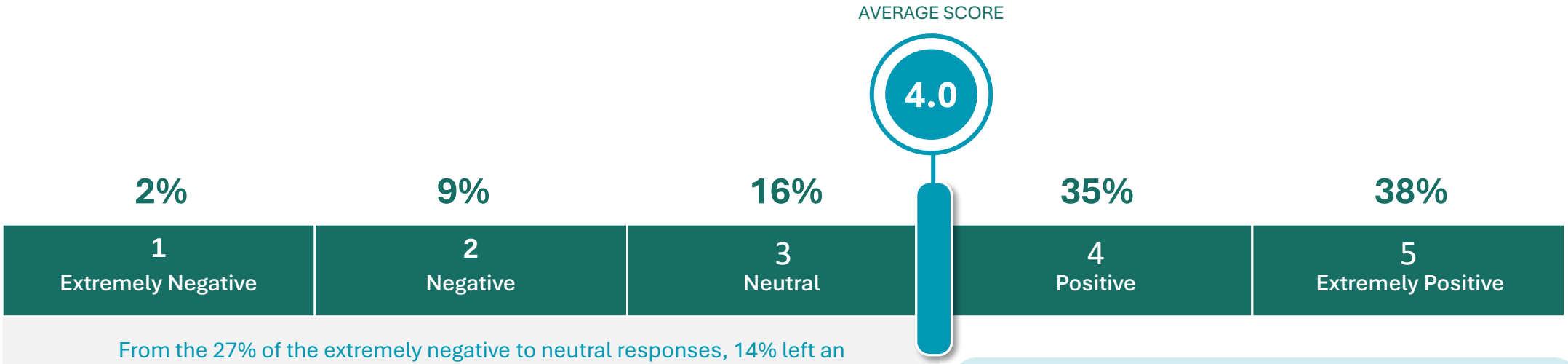


The survey revealed that social development (78%) and environmental protection (77%) are the most pressing concerns. The importance of finding a balance between these three aspects was emphasized and ranked higher than economic development. In 2022, despite the financial challenges faced by the Aruban economy in the wake of the global pandemic, social development remained the top priority of the community.

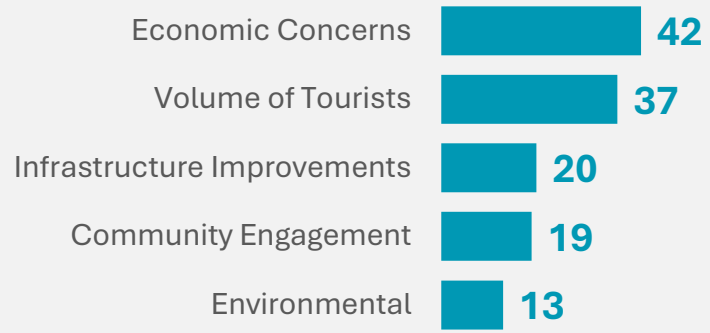
Q: Please indicate the level of importance you assign to the following topics using the scale: Unimportant, Neutral, Important.
N: 412

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The impact of tourism on the community resulted in a positive average score of 4.0



From the 27% of the extremely negative to neutral responses, 14% left an open comment. The main topics mentioned in the comments of those who scored 1 (extremely negative) to 3 (neutral) were:



On a scale of 1 to 5, 73% of the hospitality employees' respondents scored positive to extremely positive and thus indicated being optimistic about the impact of tourism on the community, with an average score of 4.0.

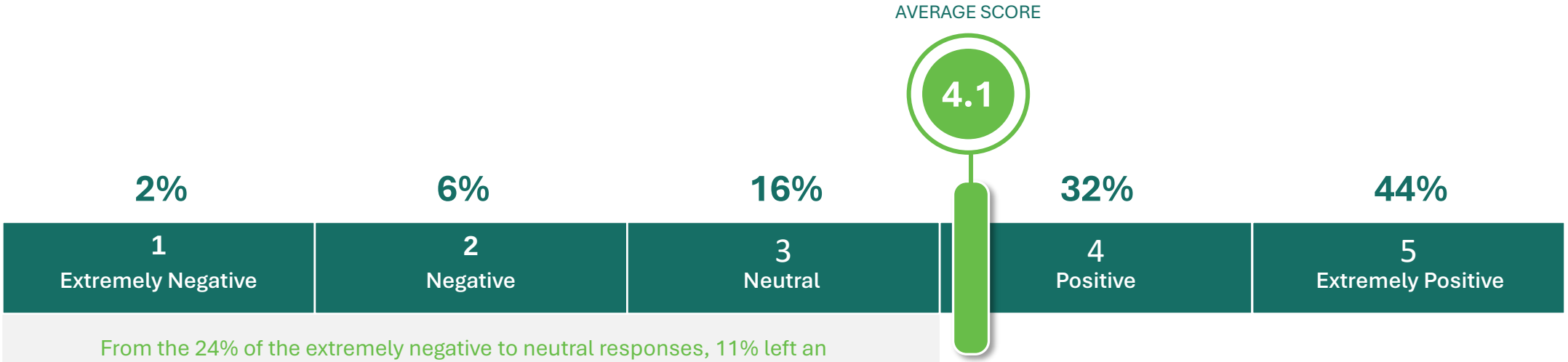
Compared to the total of 2024 respondents with an average score of 3.7, this group scored higher.

This question was newly added in 2024.

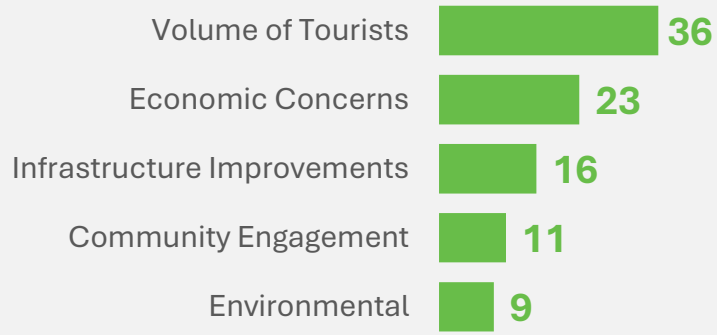
Q: Indicate what impact Tourism in its totality has on the community, using a 5-point scale where 5= extremely positive and 1= extremely negative
N: 412

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The impact of tourism in general resulted in a positive average score of 4.1



From the 24% of the extremely negative to neutral responses, 11% left an open comment. The main topics mentioned in the comments of those who scored 1 (extremely negative) to 3 (neutral) were:



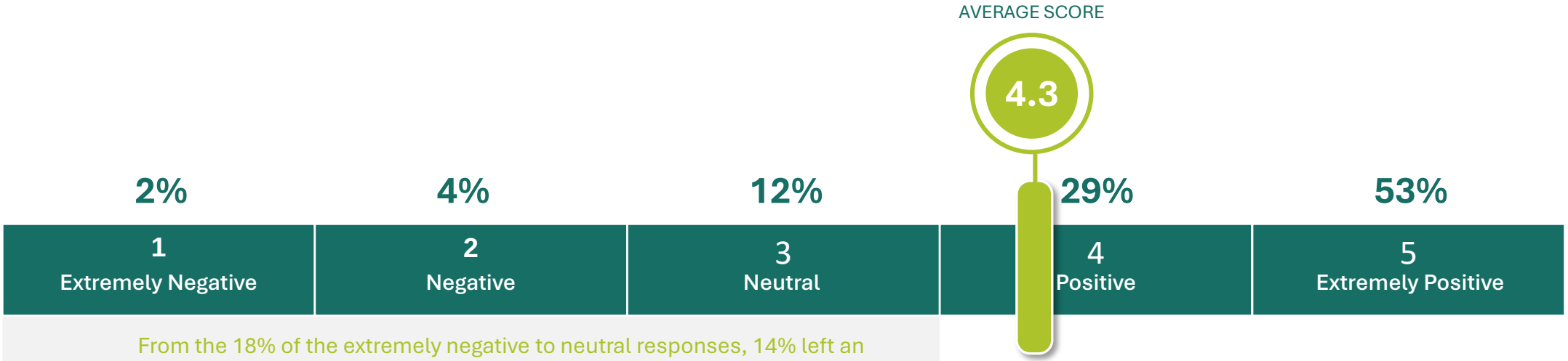
On a scale of 1 to 5, 76% of respondents scored positive to extremely positive, indicating that Tourism generally has a positive impact. The average score was 4.1.

Compared to the total of 2024 respondents with an average score of 3.9, this group scored higher.

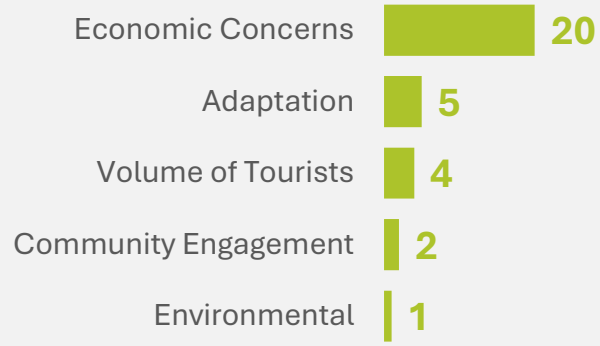
Q: Indicate what impact Tourism in general, using a 5-point scale where 5= extremely positive and 1= extremely negative
N: 412

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The impact of tourism On You and Your Family resulted in a positive average score of 4.3



From the 18% of the extremely negative to neutral responses, 14% left an open comment. The main topics mentioned in the comments of those who scored 1 (extremely negative) to 3 (neutral) were:



In 2024, on a scale of 1 to 5, 64% of the hospitality employees' respondents scored positive to extremely positive, indicating a positive impact on themselves and their families, with an average score of 4.3.

Compared to the total of 2024 respondents with an average score of 3.8, this group scored higher.

Q: Indicate what impact Tourism has on you and your family, using a 5-point scale where 5= extremely positive and 1= extremely negative
N: 412

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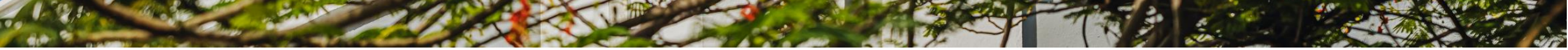
Top 5 Points of Attention 2024

Hospitality Employees

Concerns	Frequency
High Price and Cost of Living	85%
Unpayable Housing for Locals	71%
Unsustainable Infrastructure	50%
Locals do not benefit from Tourism Generated Revenue	45%
Damage to Nature & Environment	44%

Q: Select the top 5 tourism-related concerns that are most important to you
N: 412

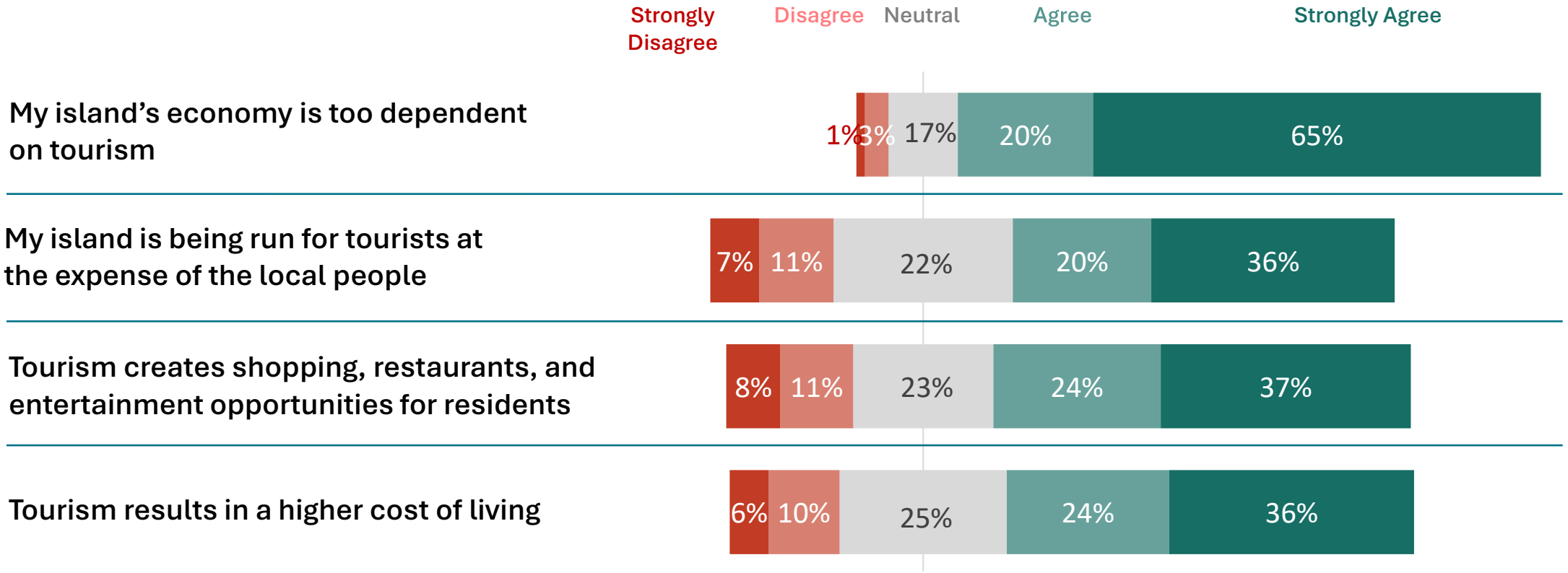
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Tourism Statements

Economic Dependency 2024

Hospitality Employees



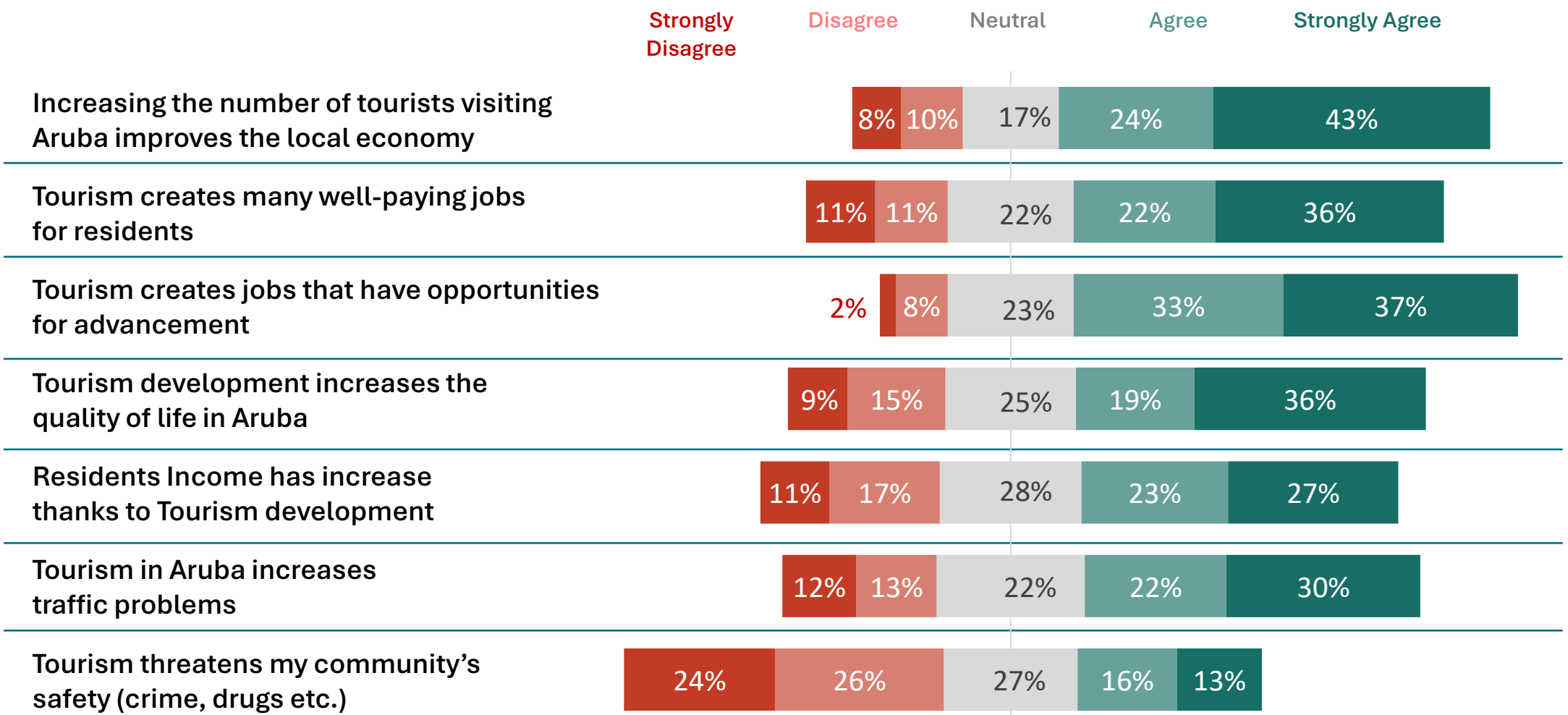
Q: Indicate how much you agree or disagree with the following statements related to tourism, using a 5-point scale where 5= strongly agree and 1= strongly disagree.
N: 412

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Tourism Statements

Socioeconomic 2024

Hospitality Employees



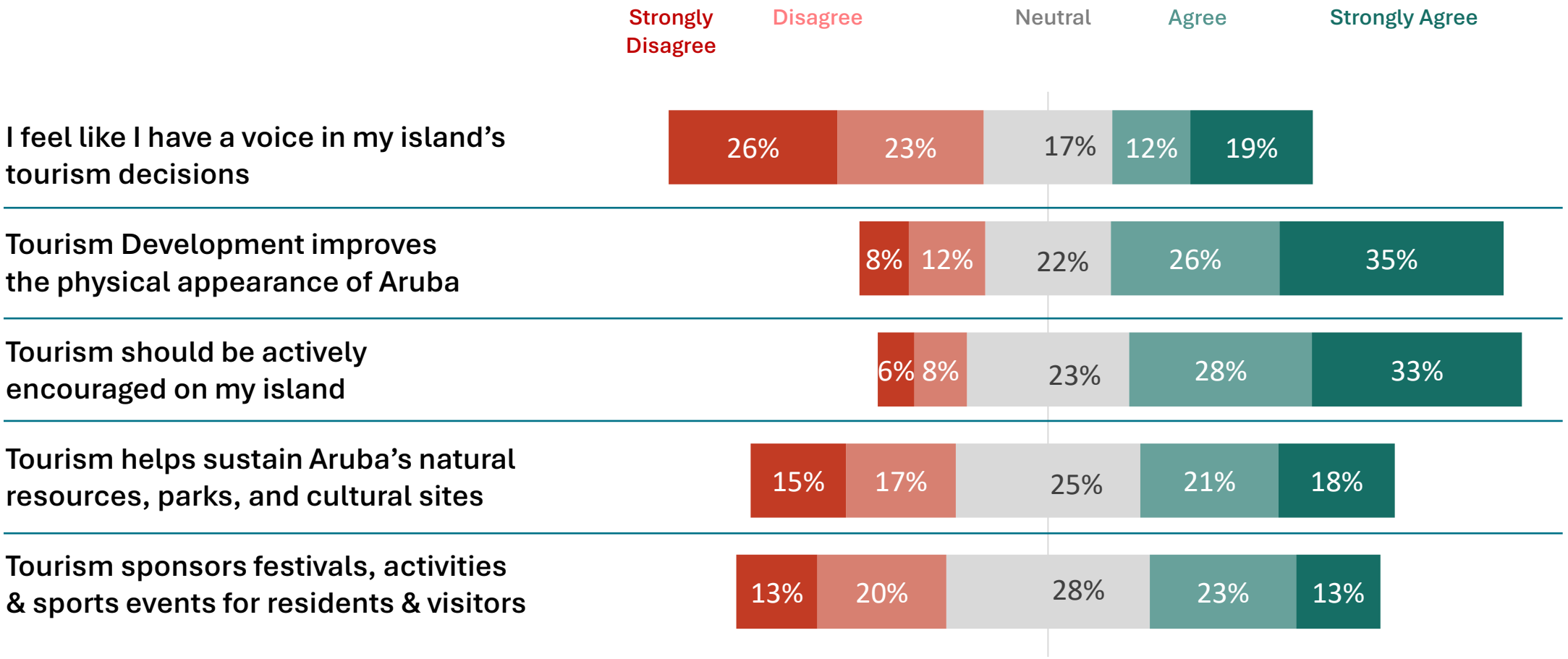
Q: Indicate how much you agree or disagree with the following statements related to tourism, using a 5-point scale where 5= strongly agree and 1= strongly disagree.
N: 412

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Tourism Statements

Community Engagement 2024

Hospitality Employees



Q: Indicate how much you agree or disagree with the following statements related to tourism, using a 5-point scale where 5= strongly agree and 1= strongly disagree.
N: 412

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Appendix

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Independent Methodological Review

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Independent Methodological Review by MGM Source

Local Sentiment Survey A.T.A. 2024

In 2024, A.T.A. commissioned MGM Source to conduct an Independent Methodological Review of the Local Sentiment Survey 2024.

MGM Source adopted a rigorous approach that consisted of the following steps:

1. Set best practices of surveys: Outline best practices and criteria per part of each survey process to benchmark the review. The set selected was based on various reports issued by credible institutions and adapted or applied based on the team's local experience.
2. Review all relevant info: MGM Source reviewed the methodology A.T.A. applied for the local sentiment survey and other relevant material requested/provided.
3. Inquiries/interviews to establish findings: Various sessions were held with A.T.A. to further understand certain processes or to inquire further on matters observed or information needed to draw out resulting observed findings.
4. Assessment against best practice: The key findings were then observed next to the criteria set per category as best practice.
5. Rating of results: After the assessment against best practice, a rating system summarizing the review results was applied to each category. Additionally, where relevant, recommendations were provided.

MGM SOURCE
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Independent Methodological Review by MGM Source

Local Sentiment Survey A.T.A. 2024

MGM Source reviewed a total of 9 categories, which include the following:

1. Methodology applied
2. Survey questions
3. Target market
4. Collection
5. Data Entry process
6. Quality of collected results
7. Confidence Level
8. Effectiveness

MGM Source adopted a rating which ranged from green (equals very good) to yellow (equals satisfactory) and red (equals unsatisfactory). MGM Source concluded that all but one of the above categories scored in the green, which is very good. The only category scoring in the yellow satisfactory was “effectiveness” due to the large effort of the survey compared to completion level and some other related matters. The total review and results are excellent, demonstrating a solid survey overall and credible results.

REPRESENTATIVENESS

Gender	Survey | Aruba
	35% | 47%
	65% | 53%

Age Group	Survey | Aruba*
Baby Boomers	18% | 26%
Gen X	35% | 22%
Millennials	35% | 19%
Gen Z	12% | 10%

* the age distribution differs slightly from ATA, Aruba stats does not sum 100% as children <10 not considered in distribution

Region	Survey | Aruba*
Savaneta/ San Nicolaas	18% | 24%
Paradera/ Santa Cruz	31% | 27%
Oranjestad	21% | 27%
Noord/ Tanki Leendert	27% | 22%
Other	3% | 0%

* distribution as per Census 2020

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Thank You

Aruba Tourism Authority

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