



✦ Local Sentiment 2022 ✦

# Survey Method

Online Survey



Face-to-face Survey



Quantitative



Qualitative





# Survey Background



Back in 2005, the Aruba Chambers of Commerce surveyed the Aruban Community to understand the sentiment of residents of Aruba. In 2018, Aruba Tourism Authority repeated one survey question to measure the local's view on tourism.

Now two years after the global pandemic, the Aruba Tourism Authority decided to measure the sentiment of the residents in order to see if any changes that might have occurred as part of the COVID-19 unprecedented event.

The survey questionnaire has primarily remained the same as 2018's except for two added questions related to the pandemic.

In May 2022, a self-completion survey was conducted. ATA used different methods to invite locals to participate in the 2022 local sentiment survey. We used both face-to-face and online survey collecting.

The face-to-face method was done with the help of five Universidad Aruba students, where locals were approached randomized. The students went around town and different businesses with paper-based survey. The survey data were then input via Qualtrics.

This year ATA introduced online data collection using different online platforms. The data was collected via Qualtrics online using a URL link and a QR code. Both were shared via multiple Press websites, newspaper ads, as well as Aruba Tourism Authority's Corporate 's Facebook and Instagram account.



# Methodology



The purpose of the sentiment analysis was to measure local's views on the Tourism economy of Aruba and the positive and negative impact of the Tourism industry. With a deeper dive in the economic and social development sentiment of the locals.

Survey data was collected between May 23, 2022 and June 18, 2022.

In total, 2811 surveys were collected. However, after the data clean-up (excluding not living in Aruba and unfinished surveys), the final sample size was 1983 in total.

Respondents qualified if they:

- Were currently living in Aruba.
- 18 years or older.

To acquire an in-depth understanding of the views and opinions of the local population, we created profiles by generation in 2018.

We compared the results from 2018, by generation and we also added new profiles:

Young professionals, Single mothers, Generation Z, Comparison by District, Comparison by Sector (Public and Private Sector)

These profiles allow the reader to see the differences in opinion from different aspects.

A mixed method of quantitative and qualitative analysis was used.

Thematic Analysis was used to code and score the qualitative data.



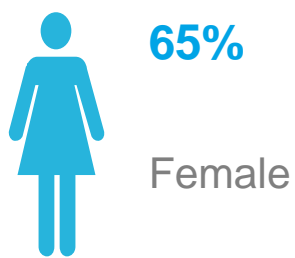
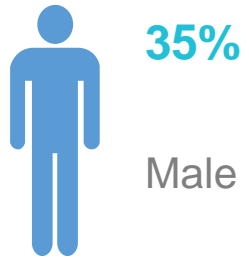
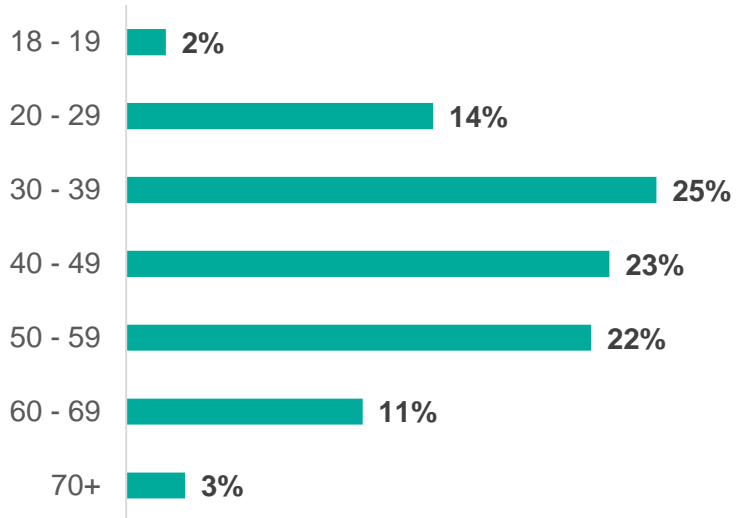
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# Demographics



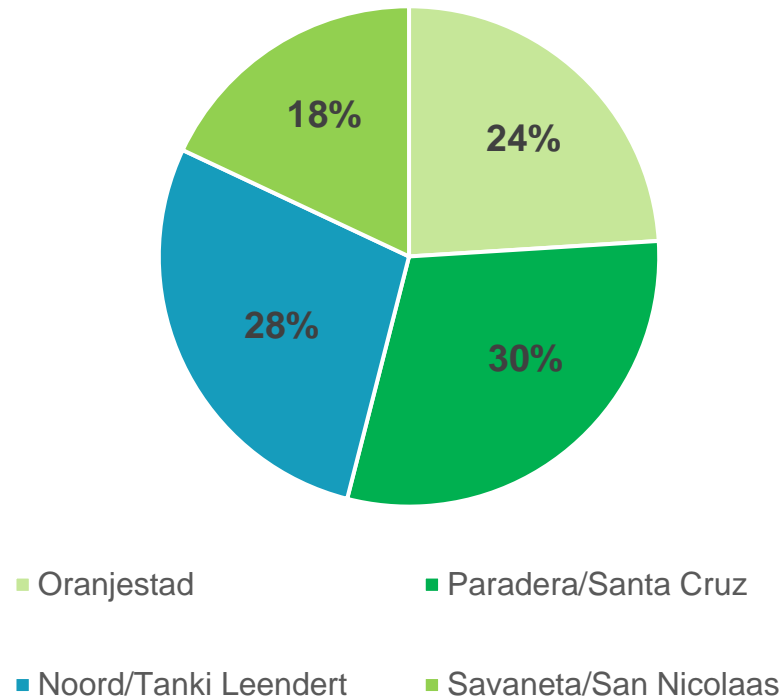
# Demographics

## Age & Gender



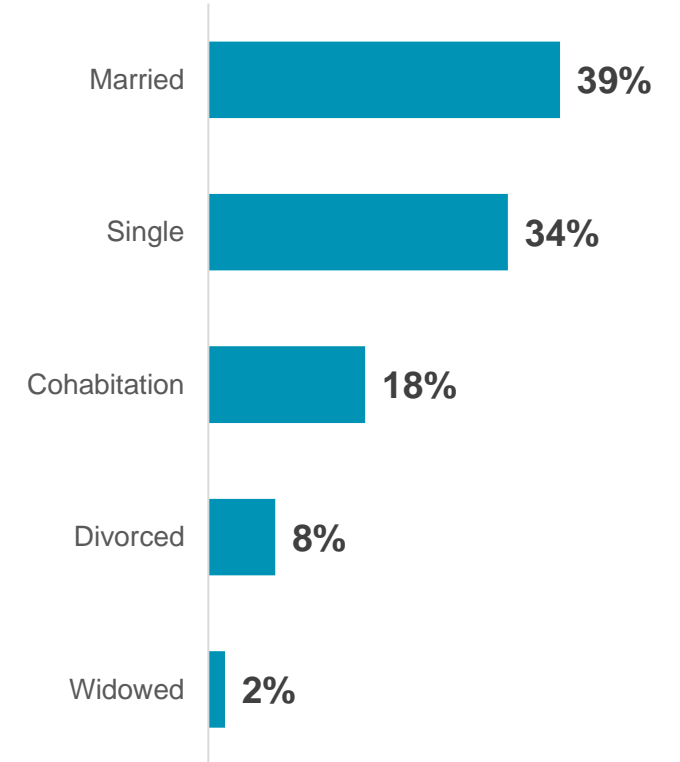
13% of the respondents were between 35-39 and majority were female (65%)

## District



30% of the respondents were from the district of Paradera /Santa Cruz

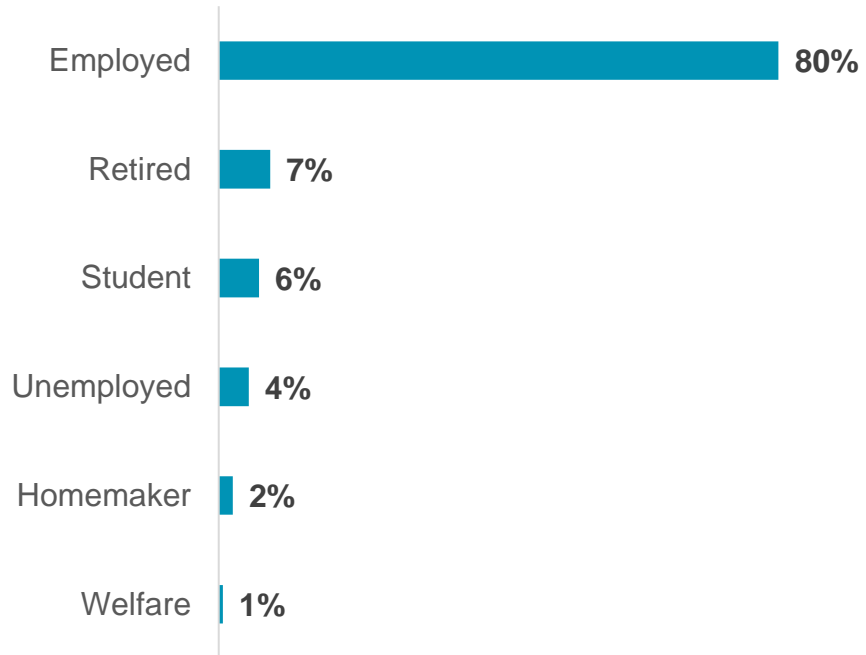
## Marital Status



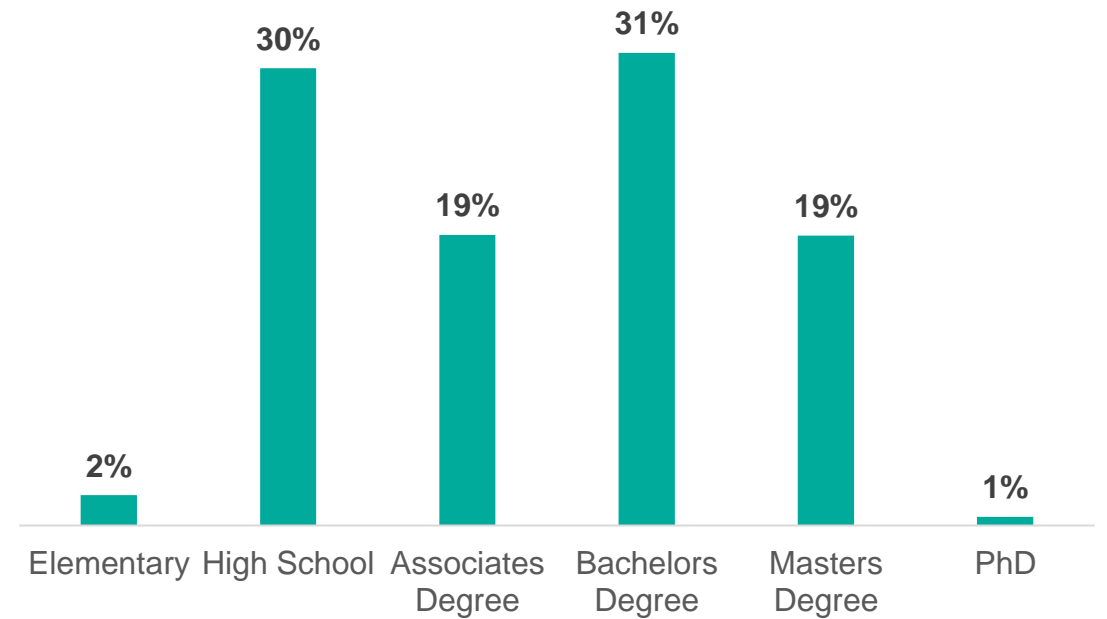
39% of the respondents were married

# Demographics

## Employment Status



## Education Level

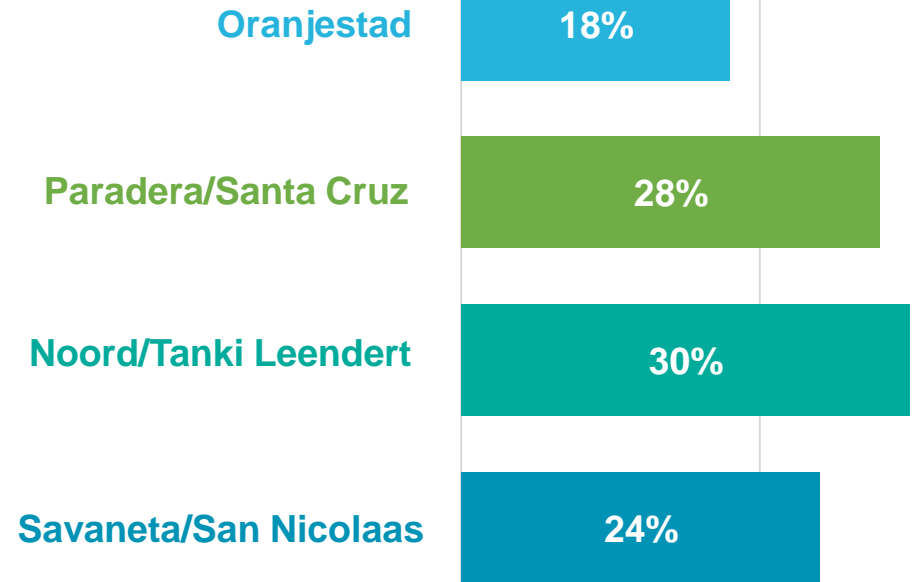
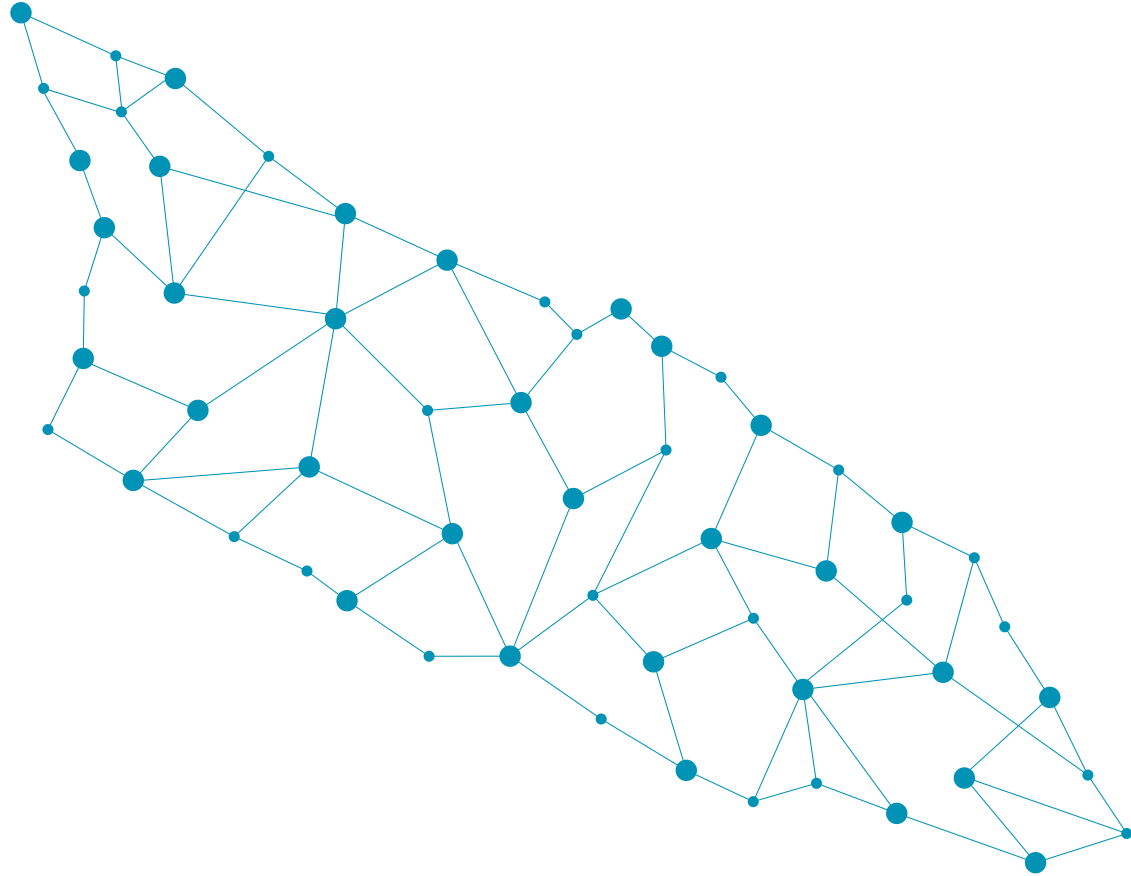




# Demographics



District Percentage Share







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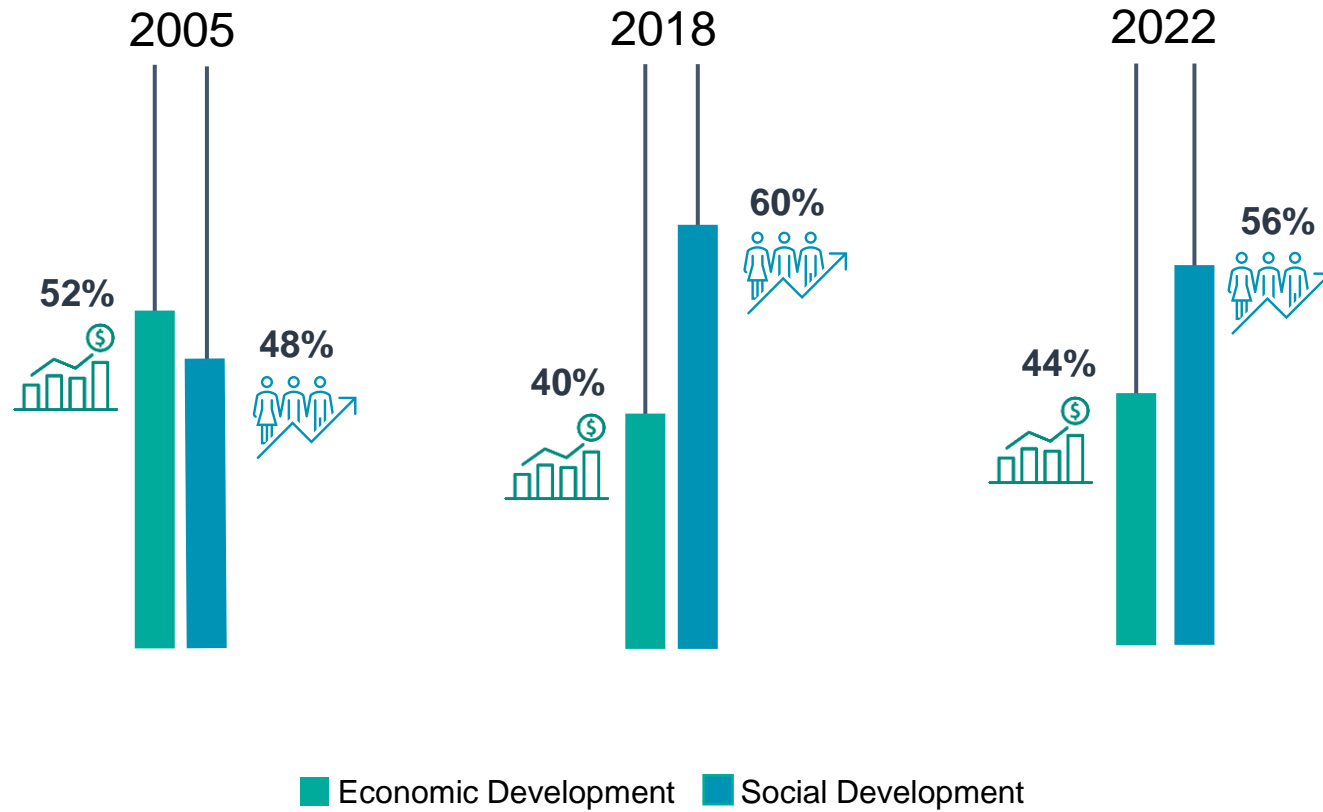
# Comparison

Economic Development vs. Social Development

# Comparison

2005, 2018, & 2022

Economic Development vs. Social Development



# ★ Economic vs. Social ★

## Comparison

### Key Takeaways

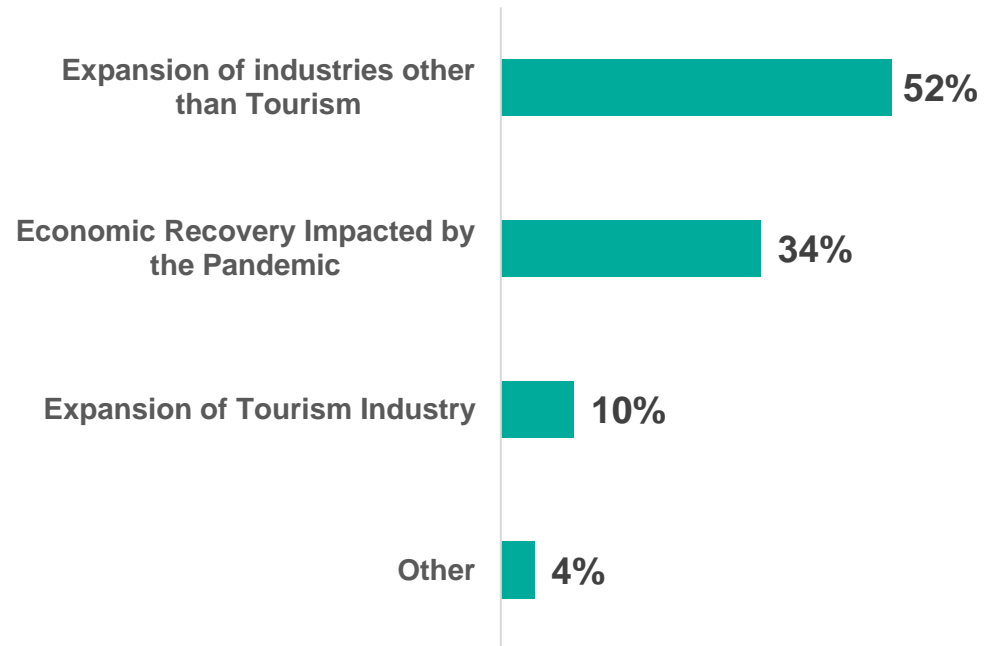
#### **Past:**

- 2005: Research conducted by the Chamber of Commerce showed that the locals indicated that social development (48%) and economic development (52%) were both equally important, with economic development slightly more important.
- 2018: ATA used the same question as the Chamber of Commerce in the local sentiment survey; the results showed that there was an increase in social development (60%) which scored significantly higher in importance compared to economic development (40%).

#### **Present:**

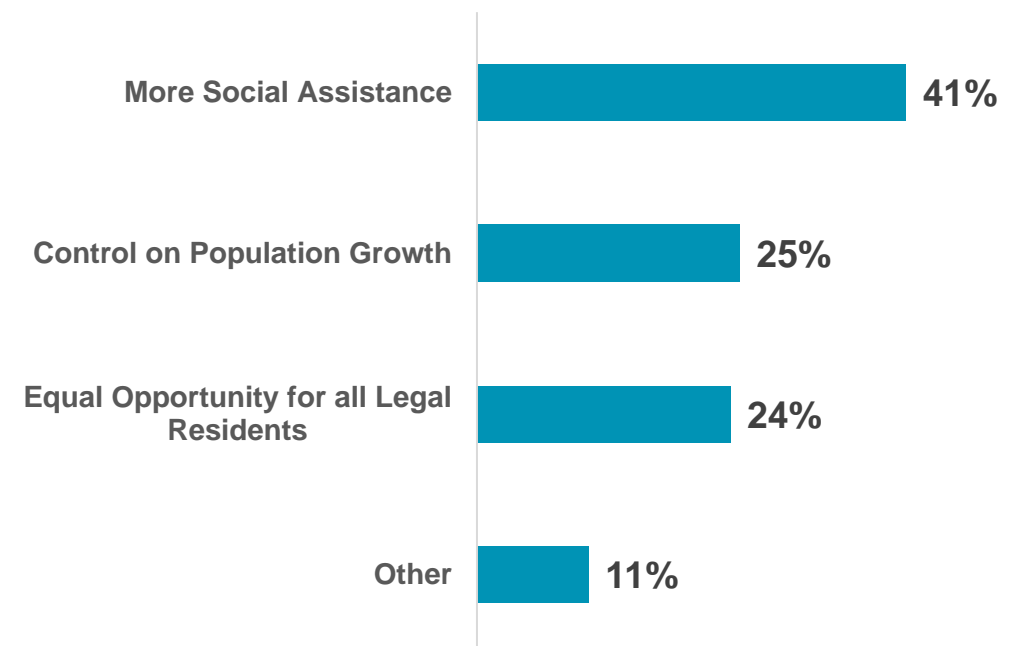
- 2022: The results now show that social development (56%) is still more important compared to economic development (44%).
- However, compared to 2018 results, social development had a slight decrease (4%), and economic development had a slight increase (4%).
- The local sentiment suggests that even though there was a financial hit to the Aruba economy after the global pandemic, social development is still of utmost importance in the community.

# Economic Development



44% respondents selected Economic Development - of which indicated that "Expansion of industries other than Tourism" (52%) is the most important when it comes to economic development.

# Social Development

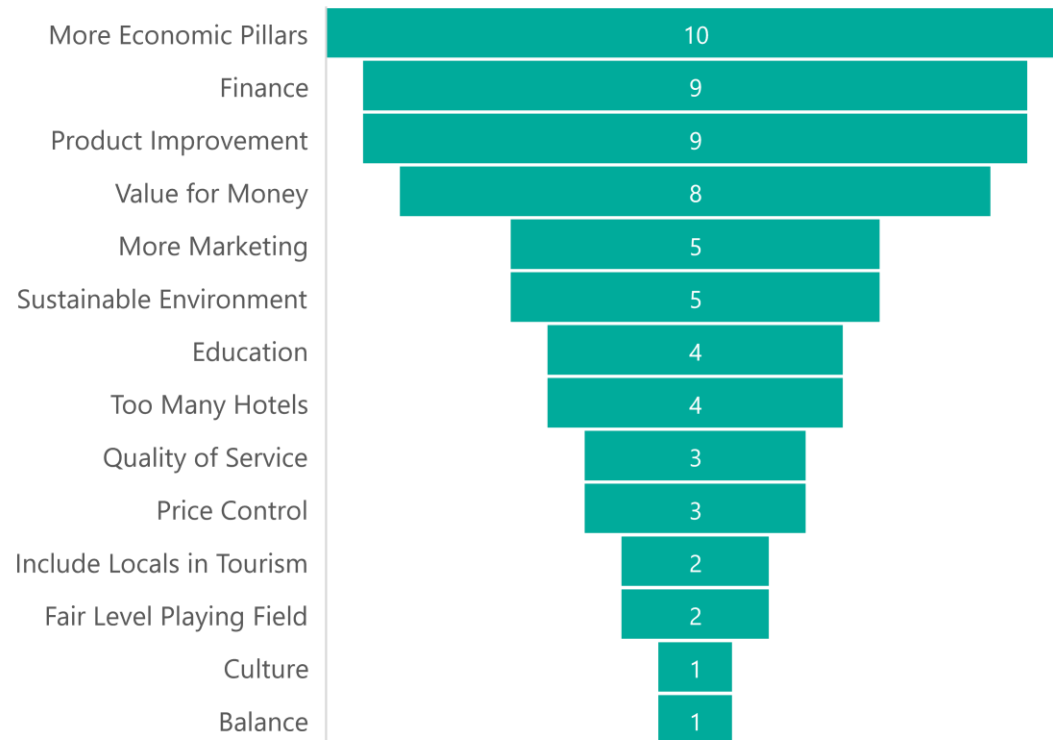


56% respondents selected Social Development - of which indicated that "More Social Assistance" (41%) is of the utmost importance when it comes to social development.

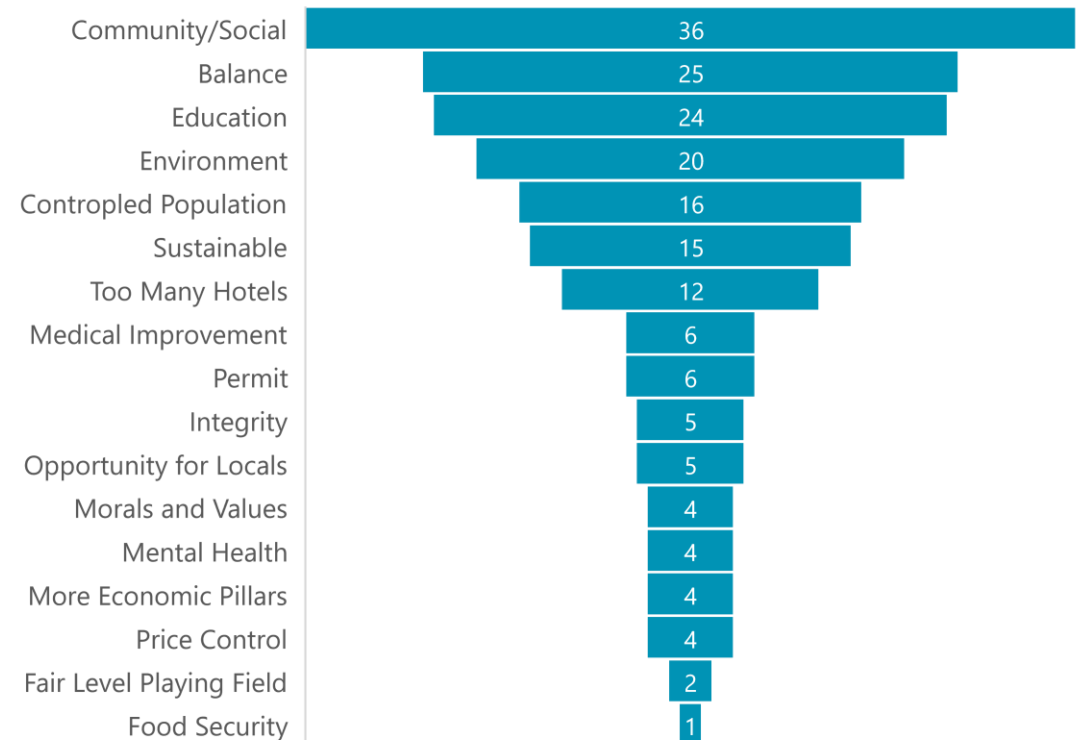
# Main Topics Comments

Comments were coded based on themes to provide a scoring. “More Economic Pillars” had the most mentions (Economic), followed by “Finance”, and “Product Improvement”. While as a comparison, “Community/Social”, “Balance”, and “Education” had more mentions. Thus, indicating that these sentiment themes are top of mind among the locals.

## Economic Development



## Social Development





# Economic Development

## Comments

Cuida e isla y su cultura. Y proteja nos beach nan. Mucho kiosks ariba beach.

Proteha bienestar di e pilar economico pa comunidad compronde importancia di preserva nos amabilidad, hospitalidad

Mantene nos turismo

Cost of living matching salaries. Even in 3rd world countries the cost of living matches the salary. Aruba needs to have a higher salary and stop taking advantage of multi-generation Households allowing the government to pay such a low salary.

logra yega na un maneho sano duradero di finansa publico

conecta desaroyo economico cu educacion y entrepreneurship

Agricultura pa tin cuminda na lugra di core tras di placa!

Otro pilar economico

Otro pilar di economia cu NO ta Turismo.

Nos mester estabilidad. No mas hotel. Ban jena nan cu turista di calidad y traha duru riba educashon di nos hubentud y coergi infraestructura

Duna Arubiano mas option pa drenta comercio. Kita barrera pa asina nan por uza creatividad pa por para riba nan propio pia y reduci dependencia riba multi-nationals cu no ta contribui un fair share den caha di Aruba.

Crea otro idea nan pa atrae mas turista pa nos isla pa asina nos por recupera mas liher economicamente y por steun mas miho na nos bienestar social. Door di tin capital lo por afford pa hasi mas pa comunidad.

Urgent awareness of the way of thinking, process management and resource implementation.

Inverti den upgrade den nos atracionan existente y den nos hendenan.

Focus on quality not quantity in tourism

Diversifica economia

Mehora calidad di turista cu ta bishita nos isla

Recuperacion economico door di impacto di pandemia mester explora mas ariba sona Turistico y atrae mas inversionista pa juda lanta nos economia

No expansion di industria turistico pero mejoracion (atrae turista cu mas \$\$)

Nos arubiano nan mester ta central den e trabounan di turismo. Nos comercio local mester ta den nos localnan. Expande nos comercio y industria despues di esaki atrobe cu nos localnan promer na trabou.

Expansion semper ta bon, pero 2 factor ta stroba nos isla di crese: investors nan ta bin AUA, fall in love cu AUA pero na final di dia, costo di bida ta asina caro cu no ta bai por sostene nan plannan. Mescos awo: turista ta stima AUA pa varios motibo, pero awo tur cos ta asina caro (hasta pa esun ma cu tin bon manera pa por travel y spend) cu nan ta opta pa cuminsa explora otro pais nan. Esey ta pika!

# Social Development Comments

Think about **local people not only tourists!** Everything **build, made or maintained is tourist orientated** at the moment. But what about **beautifying Aruba in local areas?** **Ask the local residents** what they would like to see to make their lives better. **Aruba one happy island, counts for tourist and the elite residents** but not so much for the rest. **Beaches** where we used to be able to find a quite **spot are overrun by tourists**, north shore where we after being run off said beaches found our peace are **now dusty and noisy** and **overrun by atv's quad tours.**

Pa kiko bin cu **mas hotel si no tin hende pa traja** a den cada biaha mester **importa mas stranhero** pa por traha den hotel i e **peso ta rifleha** riba **nos cuido medico** tur hende nobo cu bin ta haja seguro mescos cu nos cu a paga semper di nos bida mester **drecha e maneho** aki

Cultura y Tradicion.

Maneho di reduction di poblacion: vol is vol

**Pueblo no por sufri ten koste di e turismo.** Gobierno tin cu busca un **balansa den esey. No inverti solamente den turismo, inverti den bo pueblo tambe.** Si pueblo ta sinti bon, yuda y aprecia, tur lo cana hopi mas bon...ami ta pensa.

Stop wasting money at government level

maneho riba crecimiento di turismo

Maneho riba medioambiente menos bloki y asfalt tur caminda

**NO mas hotel/timeshare/condominium , NO tin suff. infra / NO tin suff. personal local / NO tin mas espacio** pa NOS propionate hendenan manera ta pa años caba !

**Mas enfasis riba desaroyo nan sustenibel, tanto ecologico como social**

Maneho pa no laga e turismo sigui crece, moratorium riba construction di hotels

Pa ami **tur 3 opcion** aki mensiona ta **importante** y ta gevelecht den otro. Cu **un maneho di poblacion** ( no mas gastarbeiders) mas hende por haja **mas ajudo social** si mester y lo por tin **mas oportunidad pa tur.** Bisando esey nos **poblacion mester stop di bira mas hopi. Solamente crecimiento natural y no importa.**

Tin mucho hopi hende riba e isla, e ta druk.

Inverti den educashon

**Menos corrupcion, mas maneho riba Turismo y infraestructural** (demasiado hotel!) Y pa proteha nos naturalesa.

**Miho maneho den education** di nos hobentud pa asina por garantiza un miho futuro pa nos pais

**Sociaal y crecimiento di poblacion** ta bai huntu

Medio ambiente (menos rosamento y construction di condominium)

Balance di tur 3, actualment e ta off

**Maneho riba crecimiento di turismo.** Mas no semper kermem miho. Nos tin cu **hanja un balance** unda e turista ta cu ta bin kier sigi bin pasobra e local ta contento pa ricibinan. **Actualmente tin un desbalance** unda cu nos ta **bayendo pa complace e turista y ta lubida di e local.** Nos ta **destruyendo local ta hasi nos ken nos ta pa e sake di placa**

Problema principal na Aruba ta **problema Social.** Nos **no tin consecuencia pa nos actonan.** So, all laws have to be respected. No dunando mas asistencia social, pero exige y duna respet, disciplina y menos tolerancia.

**Inversion den educacion:** programanan pa **desaroyo social-emocional; trahadornan social** pa asisti; **upgrading di maestronan** pa nan por guia mucha y mayor miho.

**Mehor maneho riba area social** cu ta inclui e **crecimiento incontrola di e poblacion,** asina como e maneho di entre otro educacion, salud, husticia, seguridad, bienestar general

Diversificacion di nos economia



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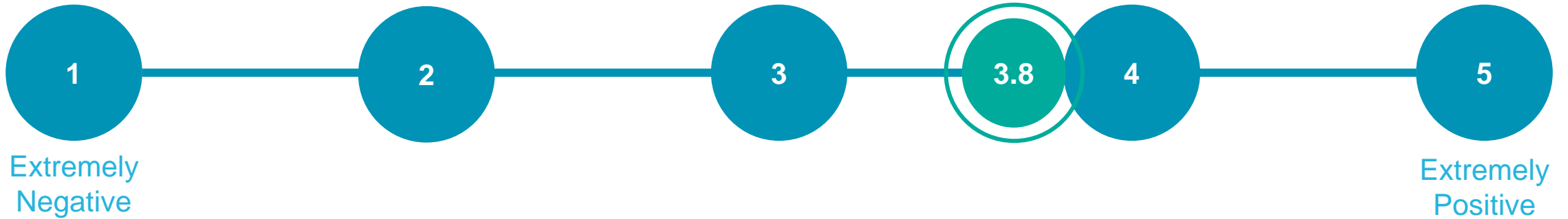
# Tourism Impact

Including impact buying power



# Tourism Impact On Aruba

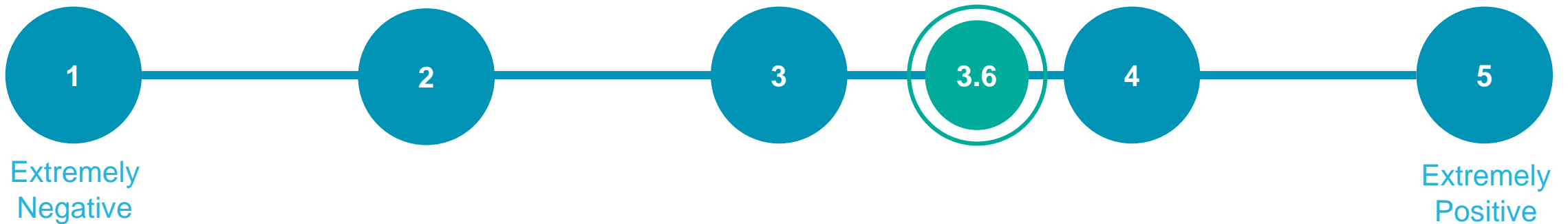
On a scale of 1-5, locals indicated that Tourism has a positive impact (41.15%) on Aruba in general, resulting in an average of 3.8



Results	
Extremely Negative	3.98%
Negative	7.56%
Neither Negative nor Positive	21.28%
Positive	41.15%
Extremely Positive	26.02%

# Tourism Impact On You & Your Family

On a scale of 1-5, most locals indicated that Tourism has neither a positive nor negative impact on themselves and their families (38.02%) and leaned more towards the positive, resulting in an average of 3.6

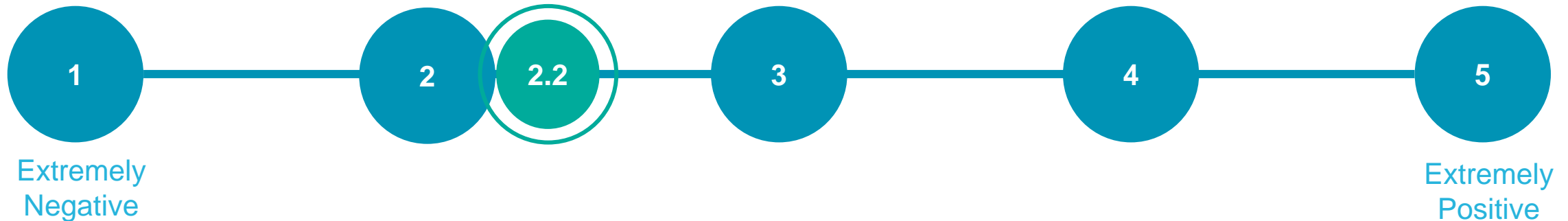


Results	
Extremely Negative	3.43%
Negative	6.91%
Neither Negative nor Positive	38.02%
Positive	28.95%
Extremely Positive	22.69%



# Financial Impact On Buying Power

On a scale of 1-5, locals indicated that their buying power for the next 12 months compared to before the pandemic has been extremely negatively impacted (41.55%), resulting in an average of 2.2



Results	
Extremely Negative	41.55%
Negative	15.83%
Neither Negative nor Positive	26.93%
Positive	10.14%
Extremely Positive	5.55%



An aerial photograph of a tropical beach. The left side of the image shows clear, turquoise water with several people swimming. The right side shows a wide, white sandy beach lined with numerous colorful beach umbrellas in shades of red, orange, yellow, blue, and green. People are scattered across the beach and in the shallow water.

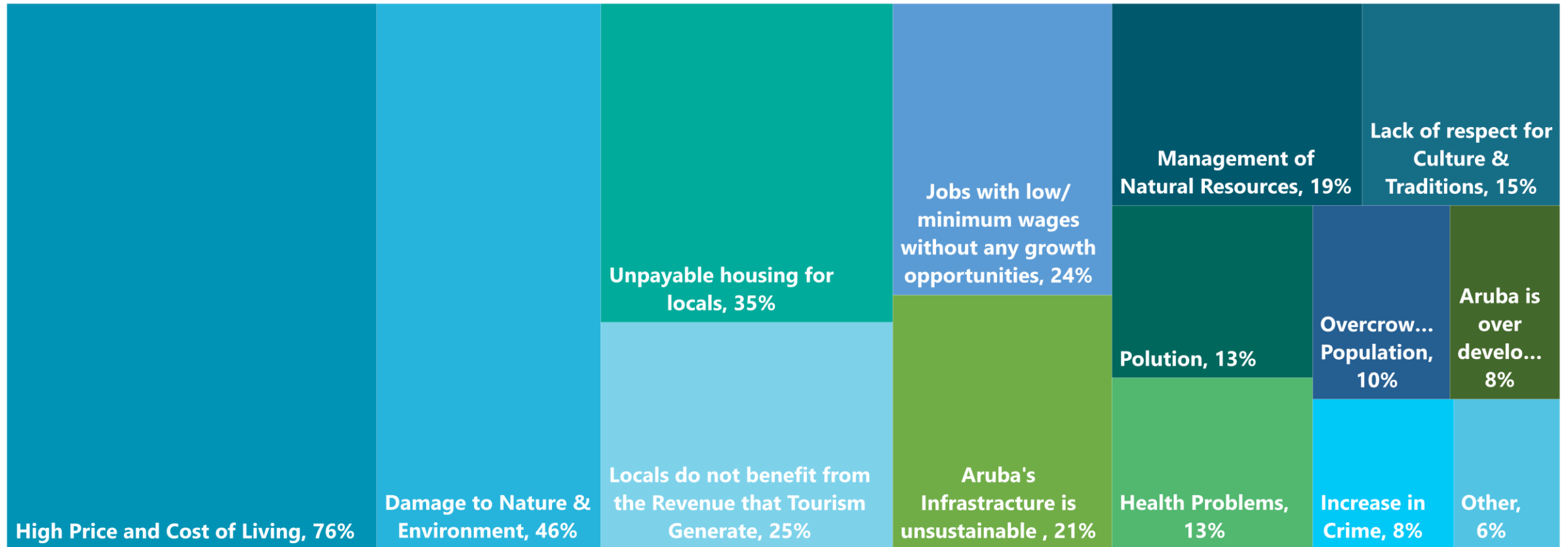
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# Top Tourism Concerns



# Top Tourism Concerns

Top 3 Tourism concerns: the highest scored by all is “High Price and Cost of Living” (76%), followed by “Damage to Nature & Environment” (46%), and “Unpayable Housing for Locals” (35%).

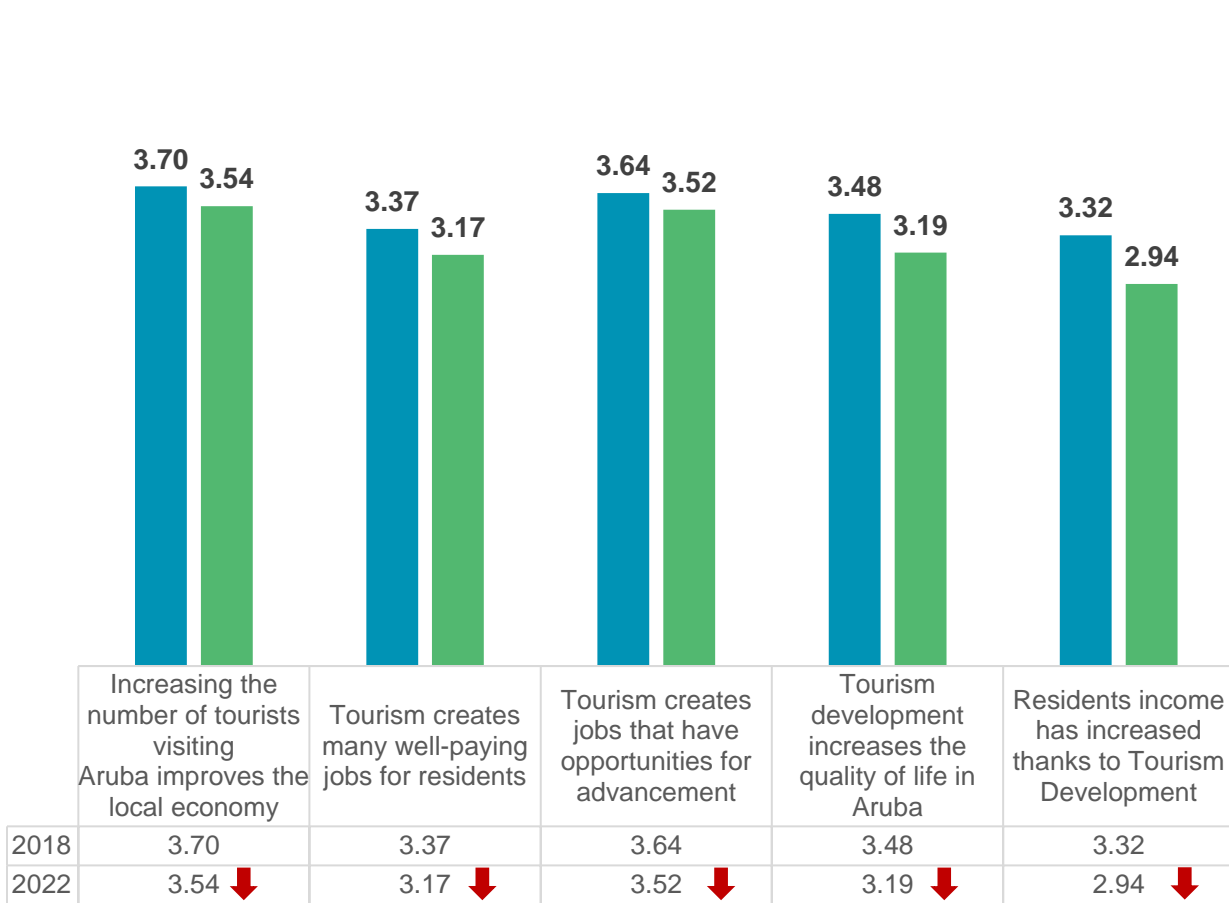


# Comparison

2018 vs. 2022

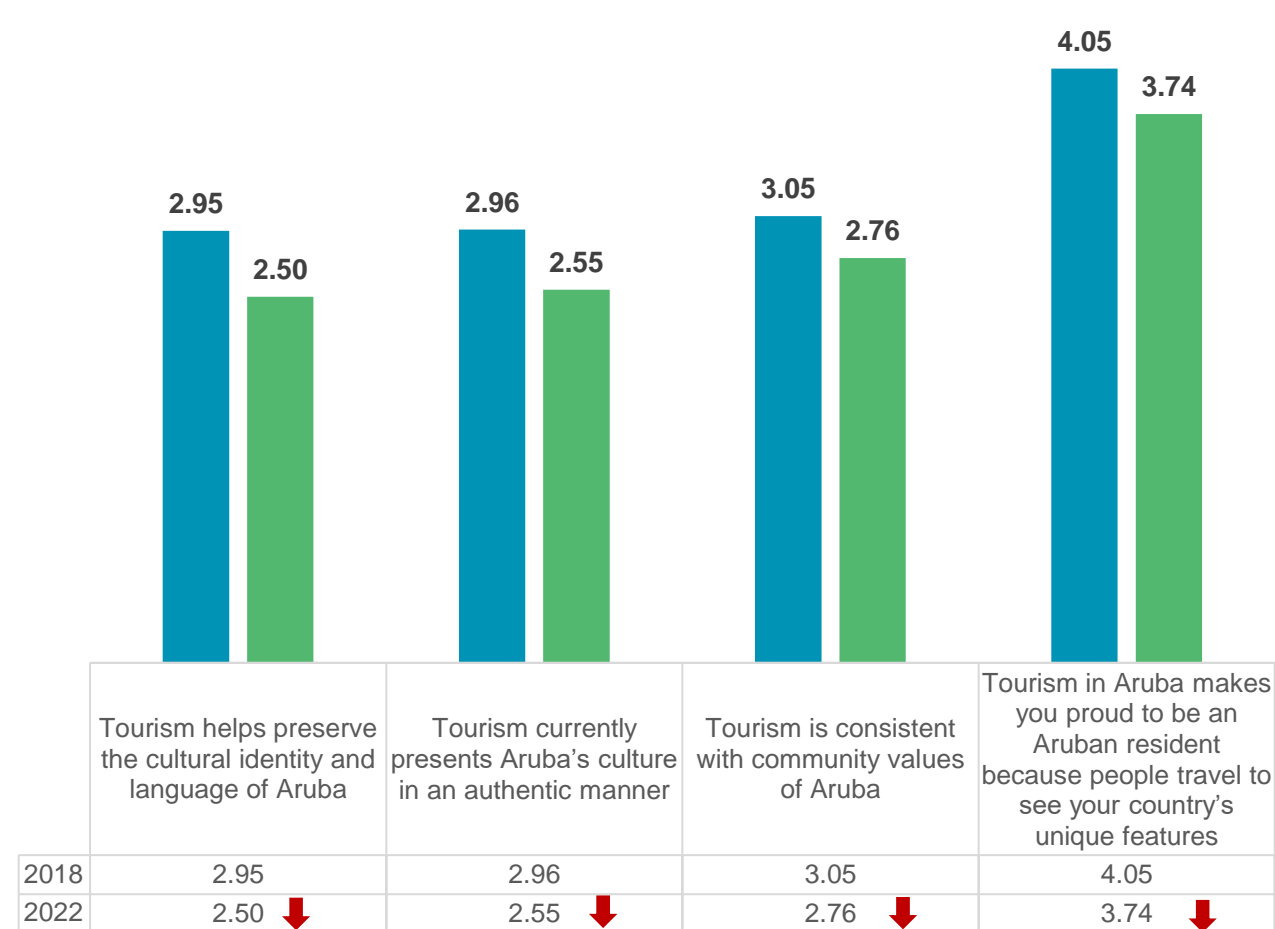
## Economic Impact

■ 2018 ■ 2022



## Culture Impact

■ 2018 ■ 2022



Using a 5-point scale where 5 = strongly agree and 1 = strongly disagree.

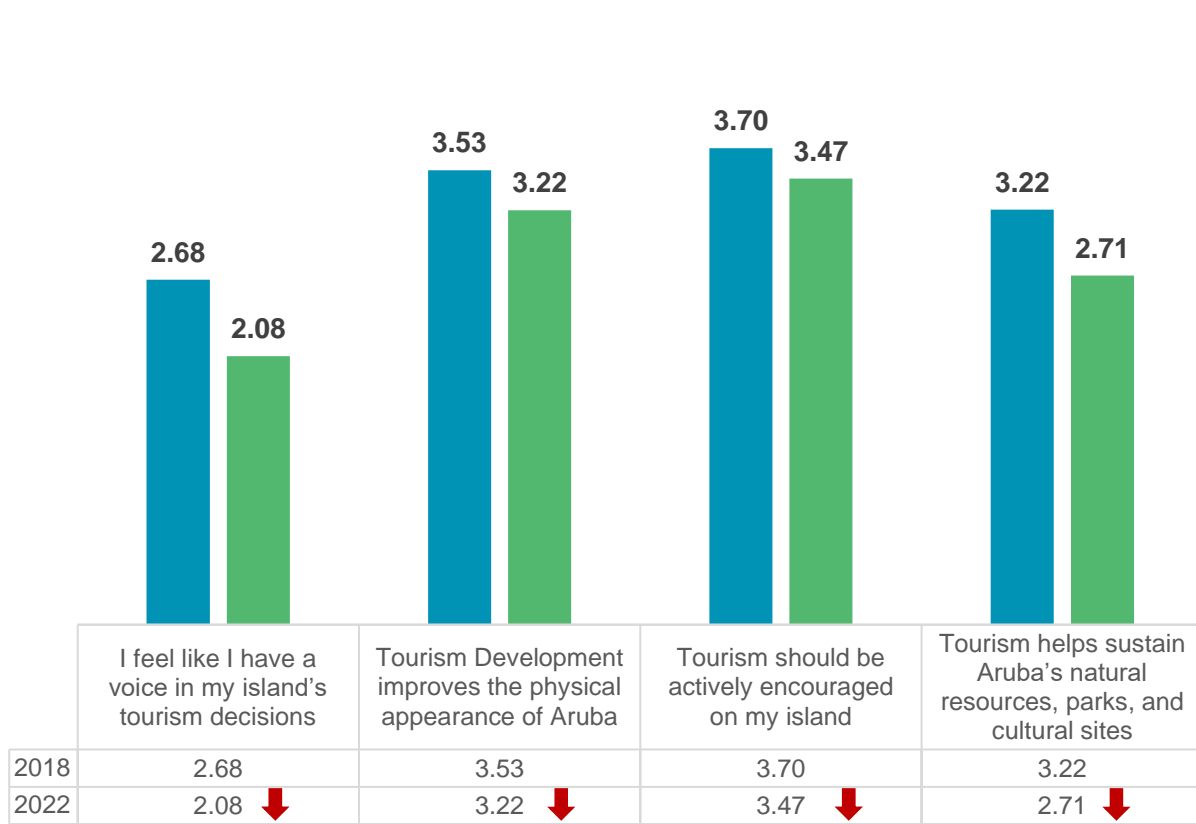
2018 N: 2000 - 2022 N: 1983

# Comparison

2018 vs. 2022

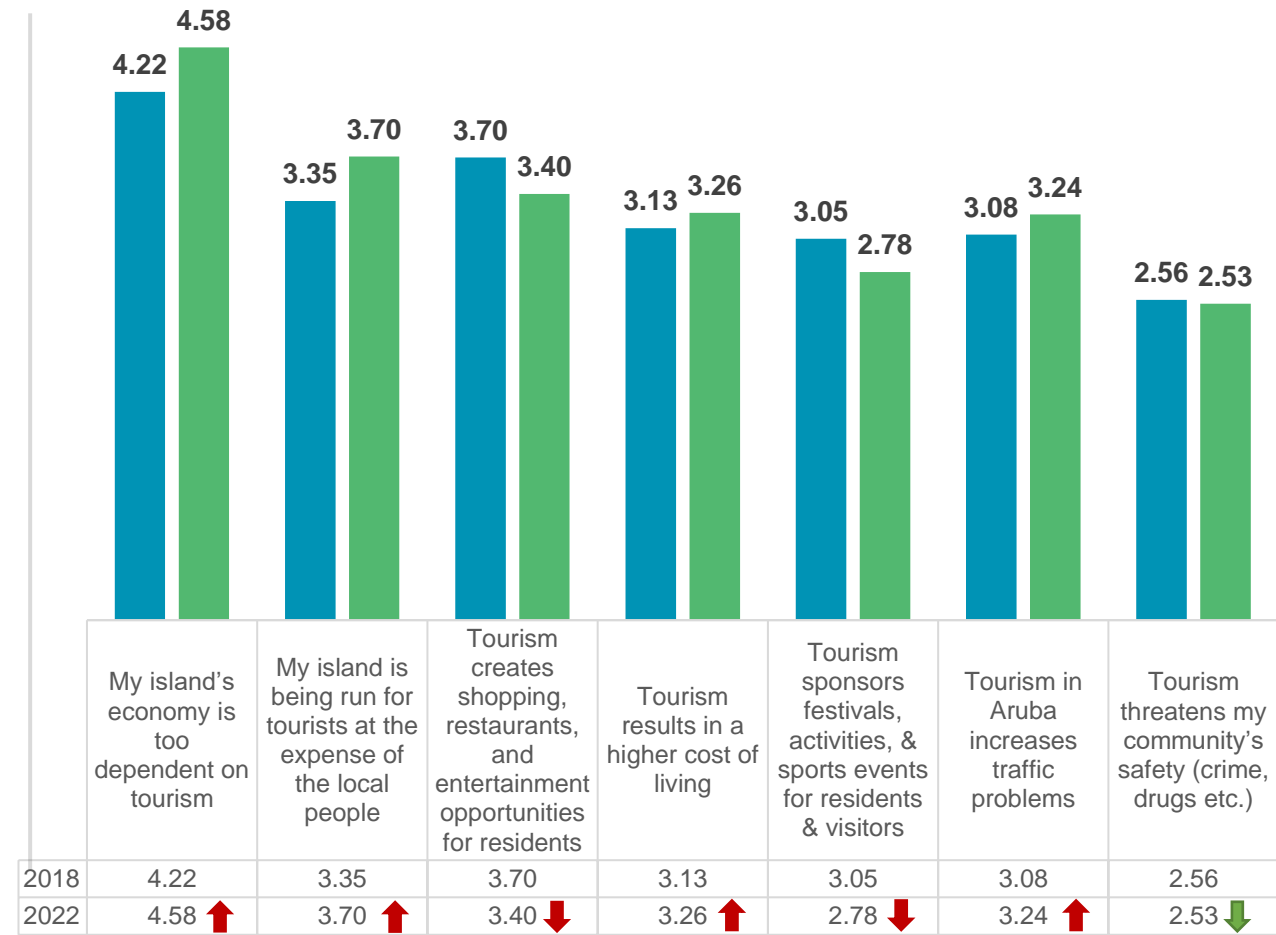
## Involvement Impact

■ 2018 ■ 2022



## Tourism Spin-Offs

■ 2018 ■ 2022





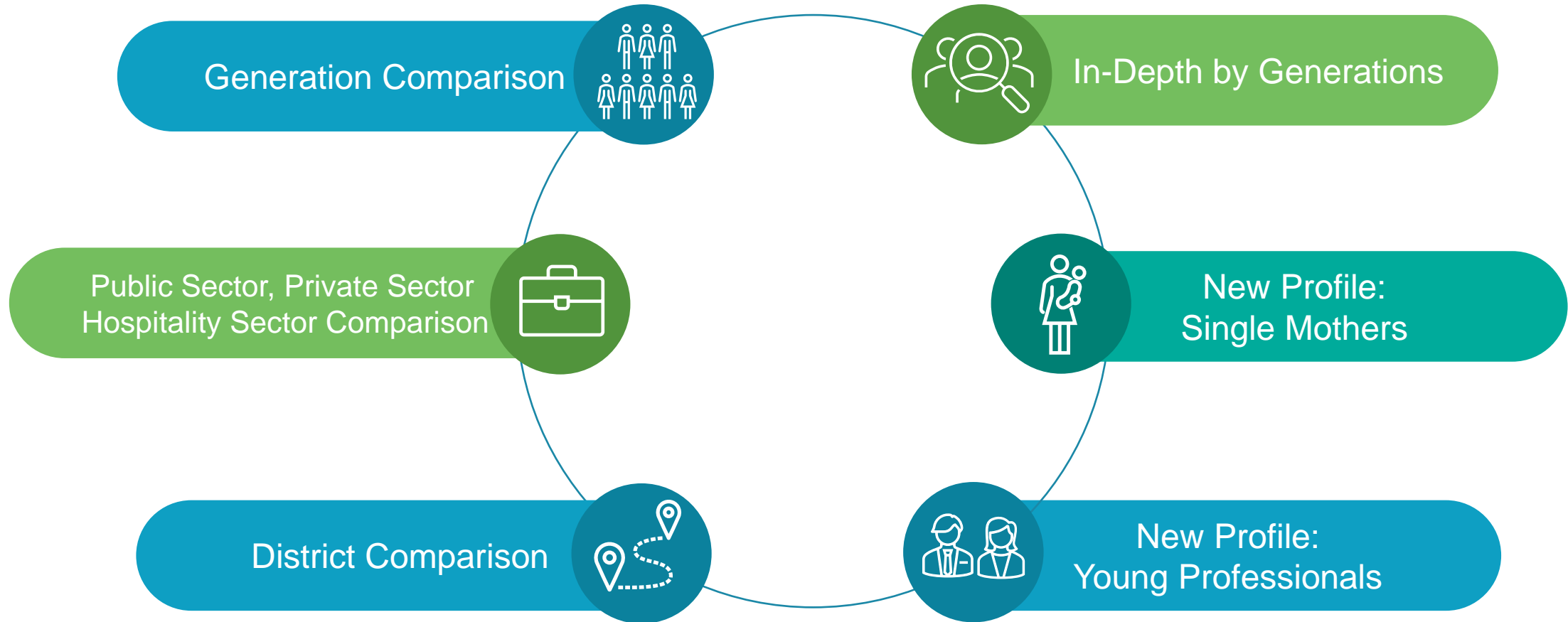


# Key Findings



- While the locals feel that tourism positively impacts Aruba in general, they also think that Tourism has a more positive impact on themselves and their families.
- We can see that they do feel as though tourism brings concerns to their quality of life, such as “High Price and Cost of Living,” “Damage to Nature & Environment,” and “Unpayable Housing for Locals.”
- When comparing the 2022 results with the 2018 results, you can see a negative decline/increase in the local’s sentiment on economy, culture, involvement, and spin-offs.
  - I feel like I have a voice in my island’s tourism decisions **22% decline**
  - Tourism helps sustain Aruba’s natural resources, parks, and cultural sites **16% decline**
  - Tourism helps preserve the cultural identity and language of Aruba **15% decline**
  - Resident’s income has increased thanks to Tourism Development **11% decline**
  - My island is being run for tourists at the expense of the local people **11% negative increase**
- Seeing the comments regarding economic and social development, the locals expressed their thoughts on wanting a stop on more hotels and condos, higher quality tourists, and more protection for Aruba’s nature.
- While social development, the locals expressed their thoughts on wanting control of the population – this goes hand in hand with overtourism and building more hotels, thus bringing in more foreign workers and their families, overpopulating the island.

# Profiles



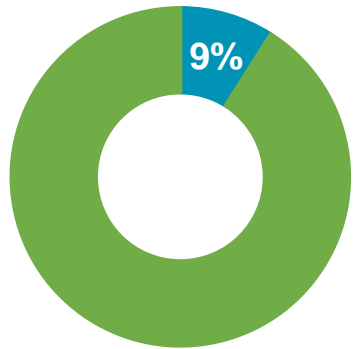
# Generation Comparison



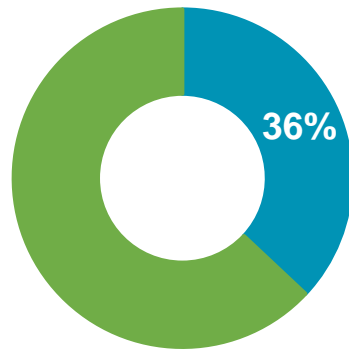
# Comparison

By Generations  
Percentage Share

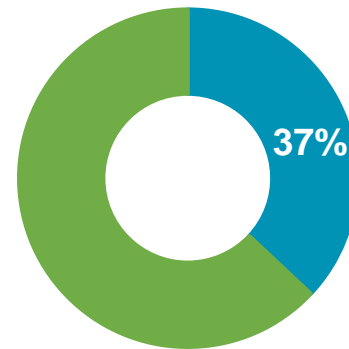
Gen Z



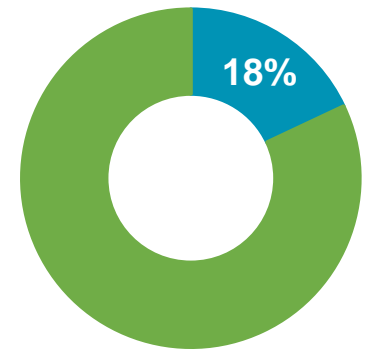
Millennials



Gen X



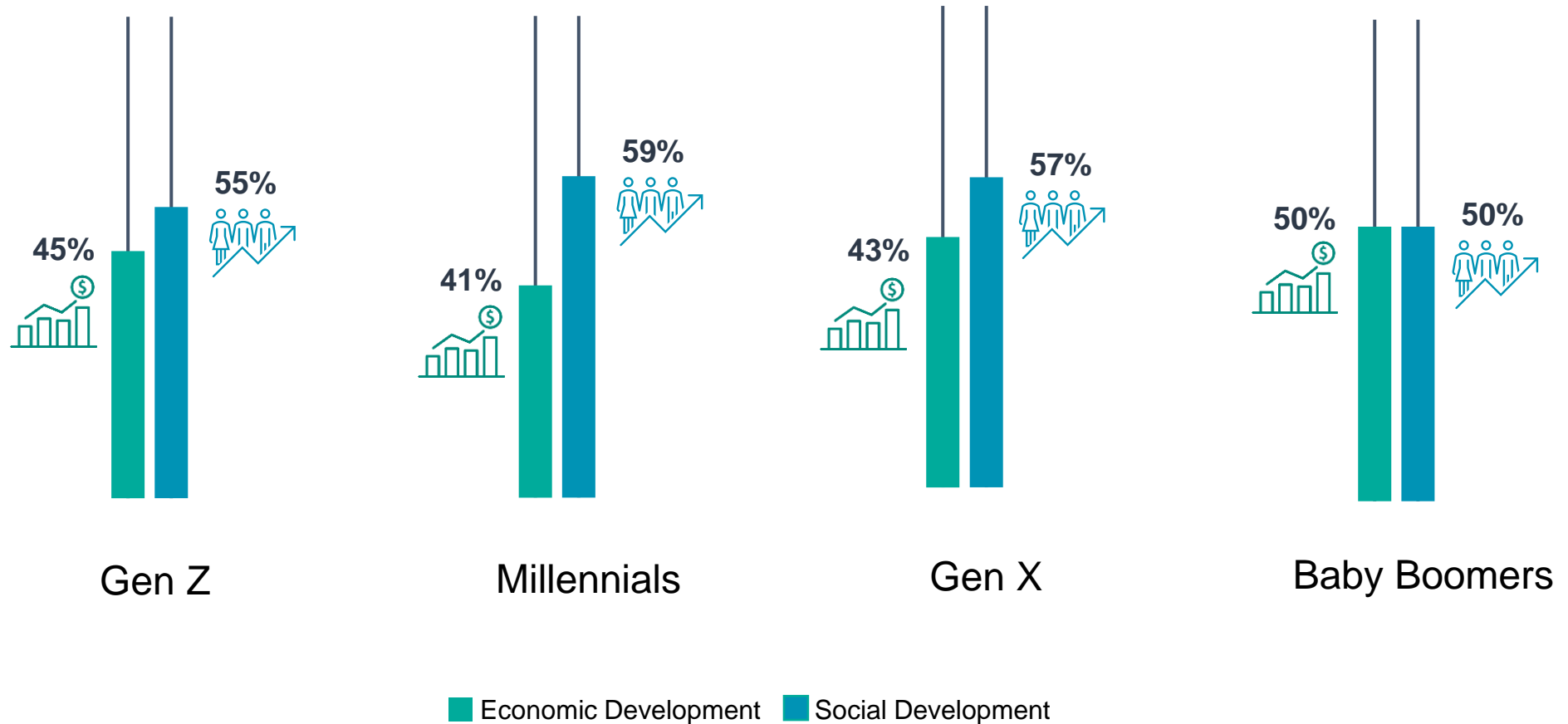
Baby Boomers





# Generation Comparison

Economic Development vs Social Development

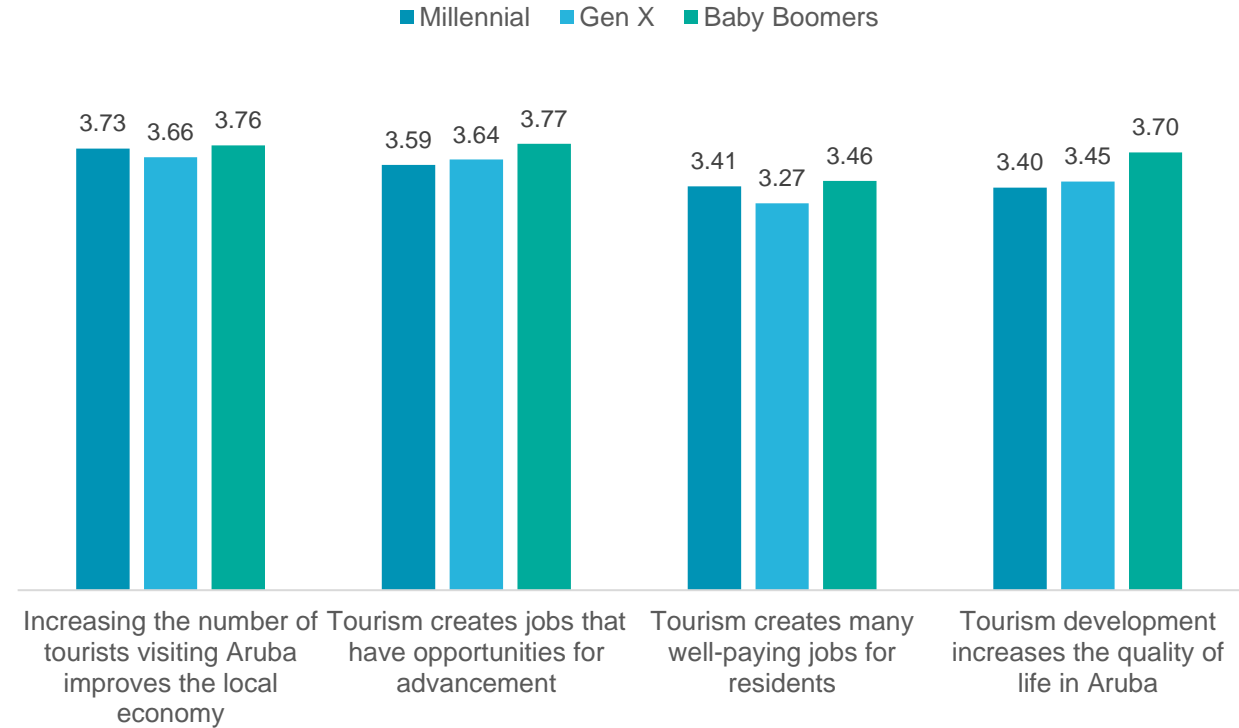
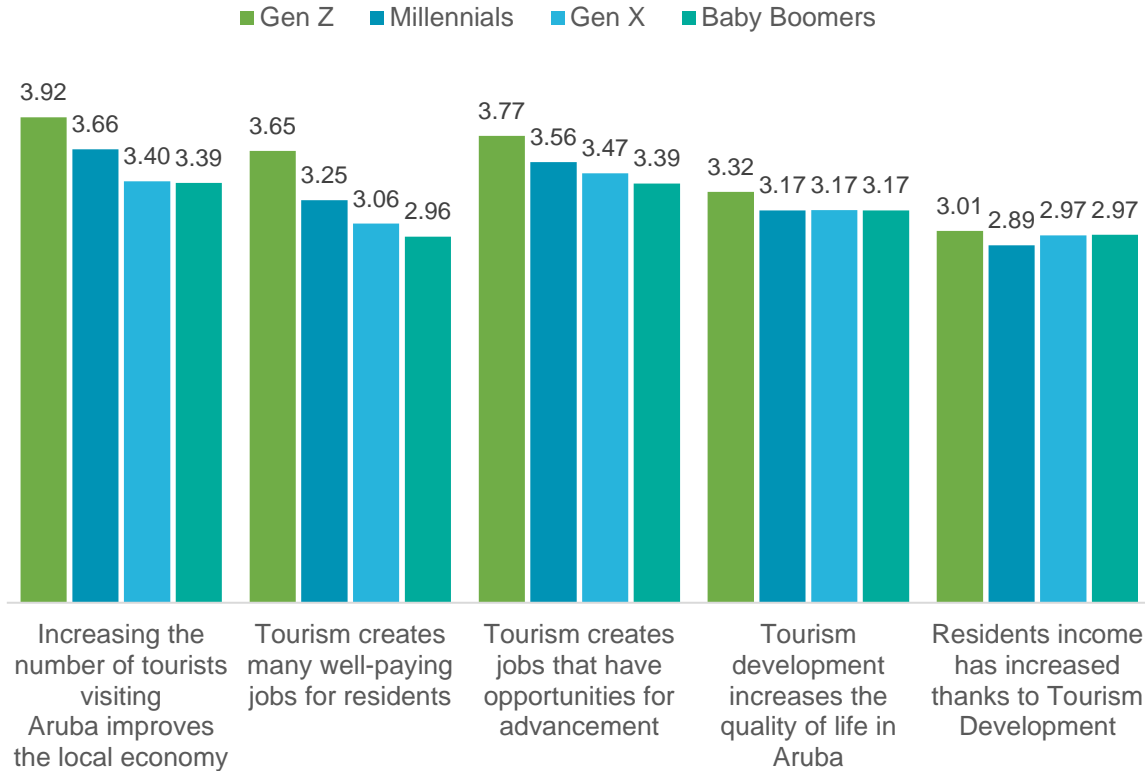


# Comparison Economic Impact

2022

By Generations

2018



In 2018, all generations supported the statement that more tourist visiting Aruba improves the economy (Average generations excluding Gen Z: 3.73). However, unlike the Millennials and Gen X, the Baby Boomers agree that tourism development increases the quality of life in Aruba (Baby Boomers 3.70). Yet all three generations are not fully convinced that tourism creates many well-paying jobs for residents especially the Baby Boomers (3.77).

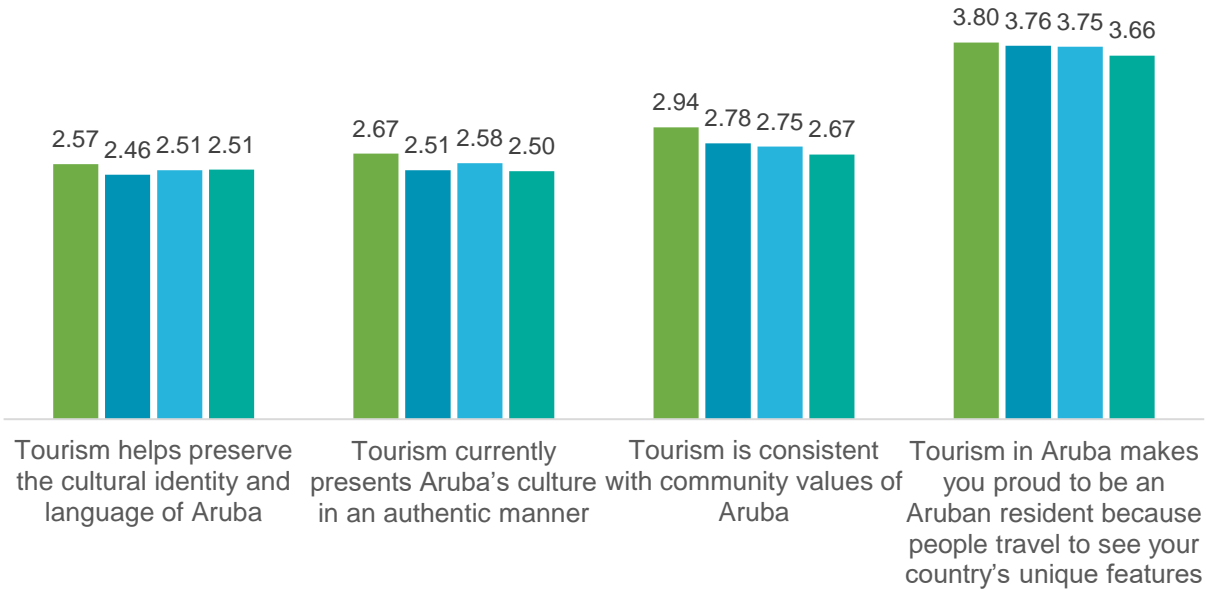
Note: 2022 includes Generation Z  
Using a 5-point scale where 5 = strongly agree and 1 = strongly disagree.  
N: 1983

# Comparison Culture Impact

## By Generations

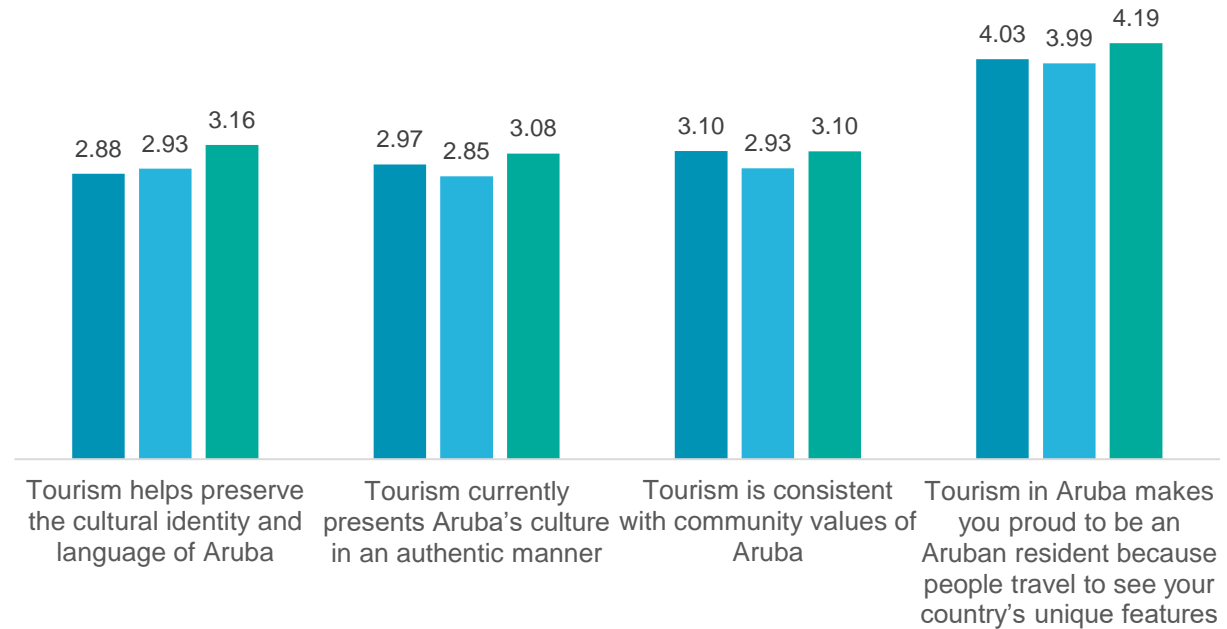
2022

■ Gen Z ■ Millennials ■ Gen X ■ Baby Boomers



2018

■ Millennial ■ Gen X ■ Bab Boomer



In 2018, all generations (excluding Gen Z, average all generations 4.07) strongly agreed that Tourism in Aruba makes them proud. However, they did not feel that Tourism helped preserve Aruba's culture & language (Average all generations excluding Gen Z: 2.99) nor represent the culture authentically (Average all generations excluding Gen Z: 2.97). In 2022, The local's pride in Tourism in Aruba remained relatively agreed upon. As well as the disagreement that Tourism helps preserve and present Aruba's cultural sentiment statements. Compared to 2018, the average scores are lower.

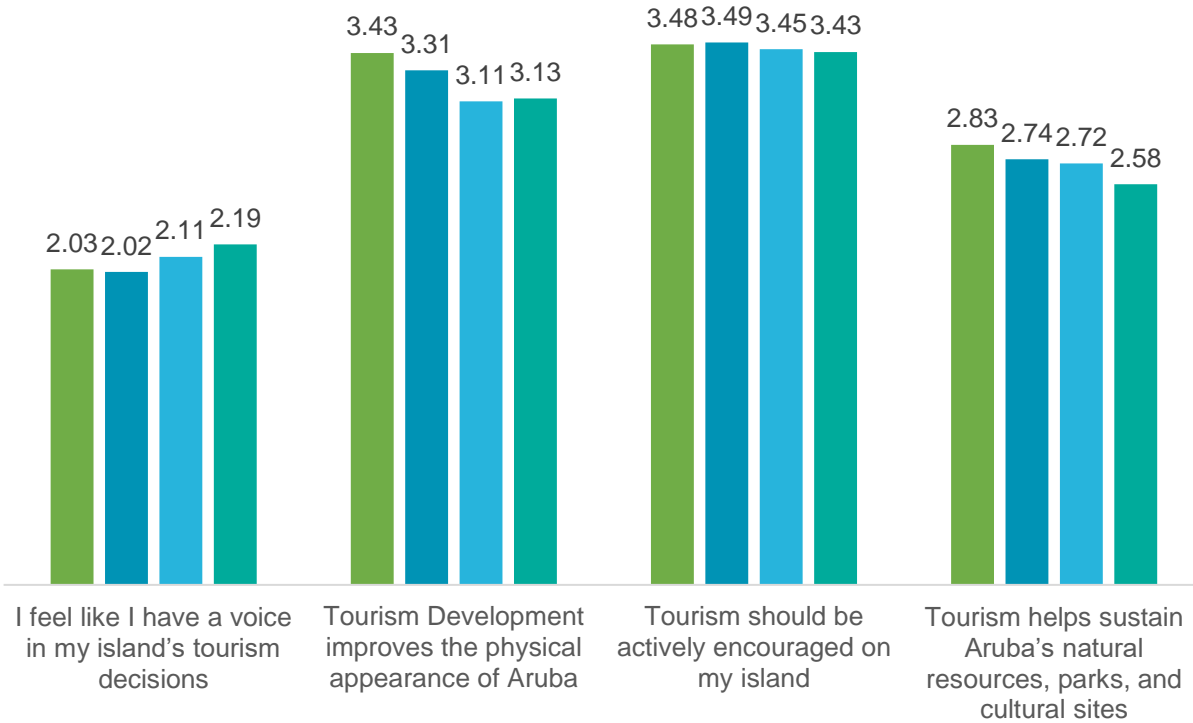
Note: 2022 includes Generation Z  
Using a 5-point scale where 5 = strongly agree and 1 = strongly disagree.  
N: 1983

# Comparison Involvement Impact

By Generations

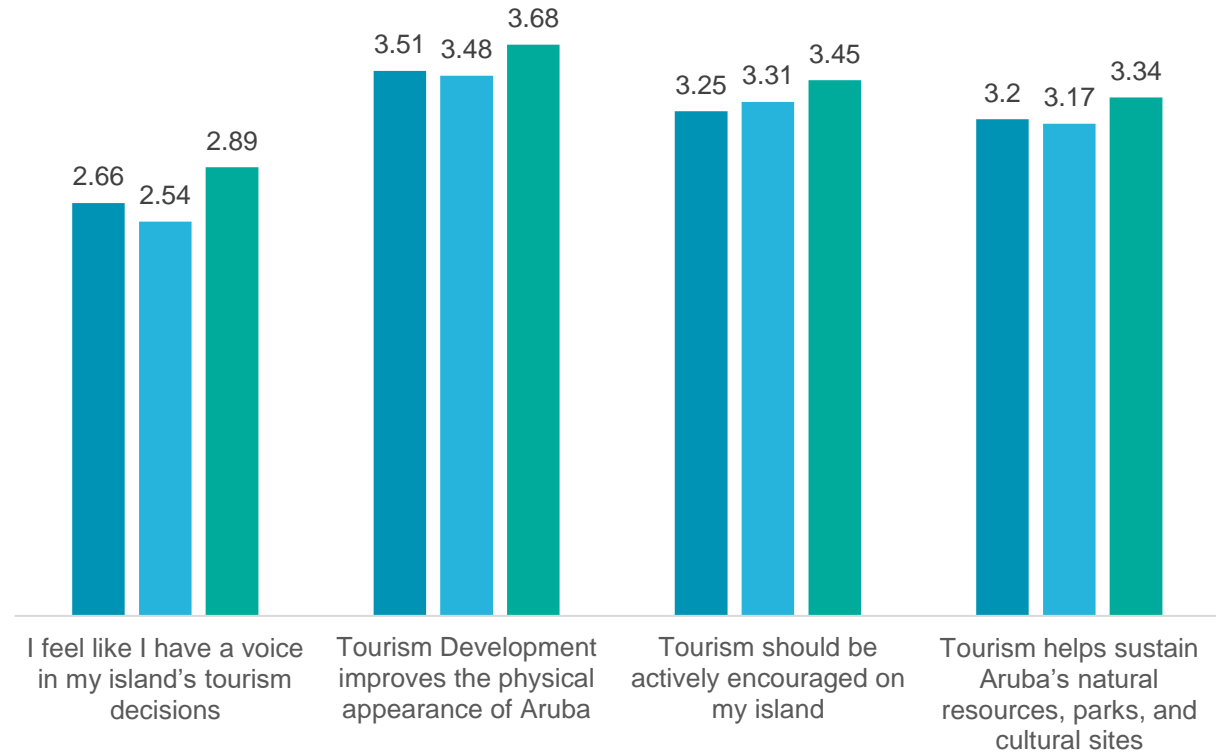
## 2022

■ Gen Z ■ Millennials ■ Gen X ■ Baby Boomers



## 2018

■ Millennials ■ Gen X ■ Baby Boomers



Note: 2022 includes Generation Z  
Using a 5-point scale where 5 = strongly agree and 1 = strongly disagree.  
N: 1983

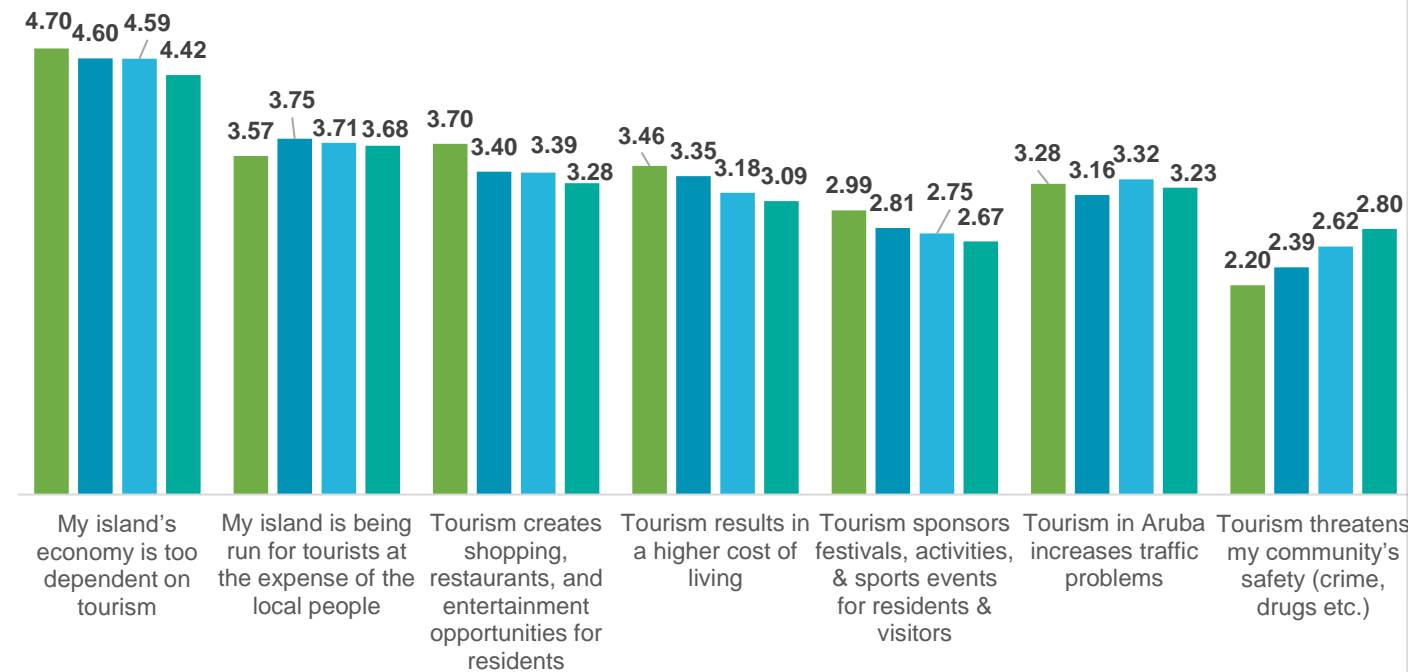


# Comparison Tourism Spin-Offs

By Generations

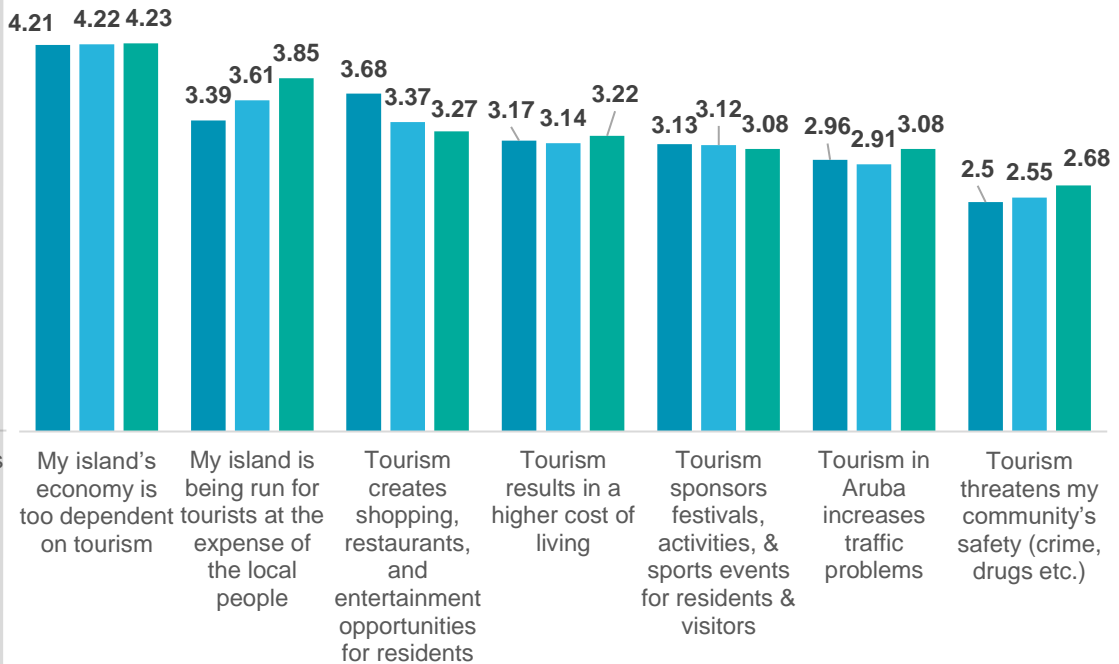
## 2022

■ Gen Z ■ Millennials ■ Gen X ■ Baby Boomers



## 2018

■ Millennials ■ Gen X ■ Baby Boomers

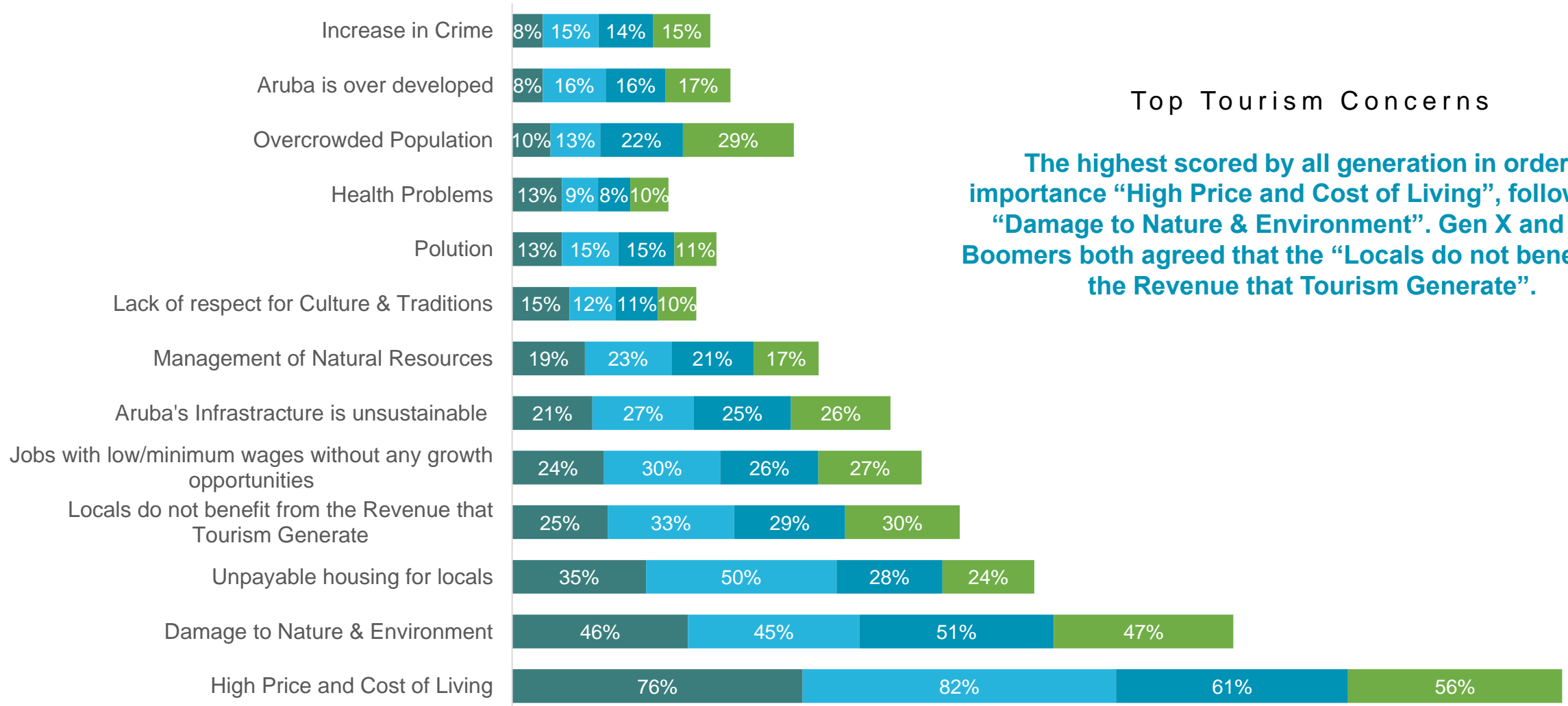


A slight increase across all generations with Millennials 39% increase in locals sentiment that Aruba's economy is too dependent on Tourism.

Note: 2022 includes Generation Z  
Using a 5-point scale where 5 = strongly agree and 1 = strongly disagree.  
N: 1983

# Generation Comparison

■ Gen Z ■ Millennials ■ Gen X ■ Baby Boomers



## Top Tourism Concerns

The highest scored by all generation in order of importance “High Price and Cost of Living”, following by “Damage to Nature & Environment”. Gen X and Baby Boomers both agreed that the “Locals do not benefit from the Revenue that Tourism Generate”.

Public Sector, Private Sector,  
and Hospitality Sector  
Comparison



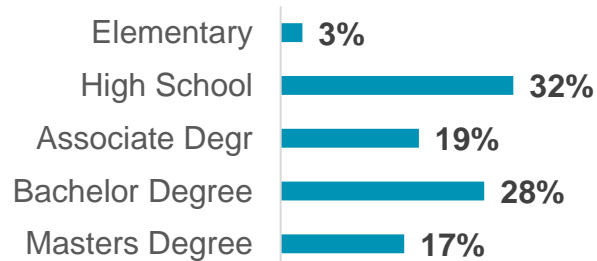
# Demographics

## By Sector

### Private Sector



### Highest Education Level



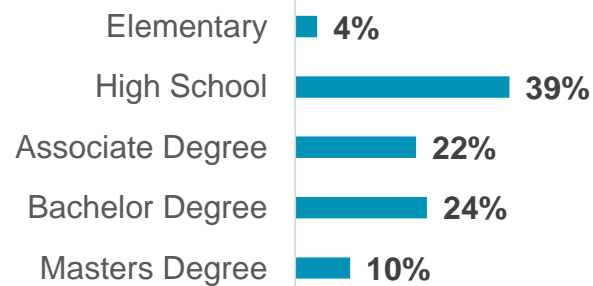
### Employment Status

Top 3 places:  
30% work in Commerce Sector, 29% in the Hospitality Sector, and 16% in the Financial Sector.

### Hospitality Sector



### Highest Education Level



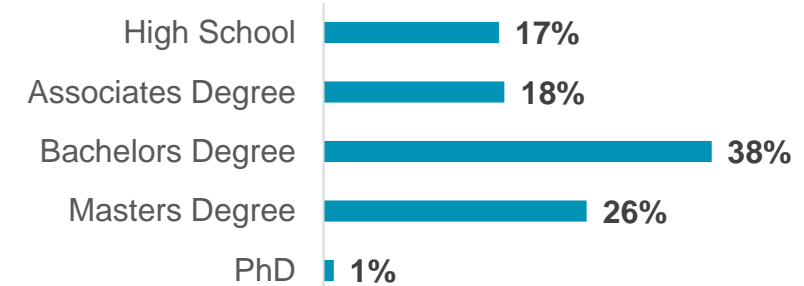
### Employment Status

Top 3 places:  
68% work in Hotel, 22% in Food & Beverage, and 9% in Other Tourism Sectors.

### Public Sector



### Highest Education Level



### Employment Status

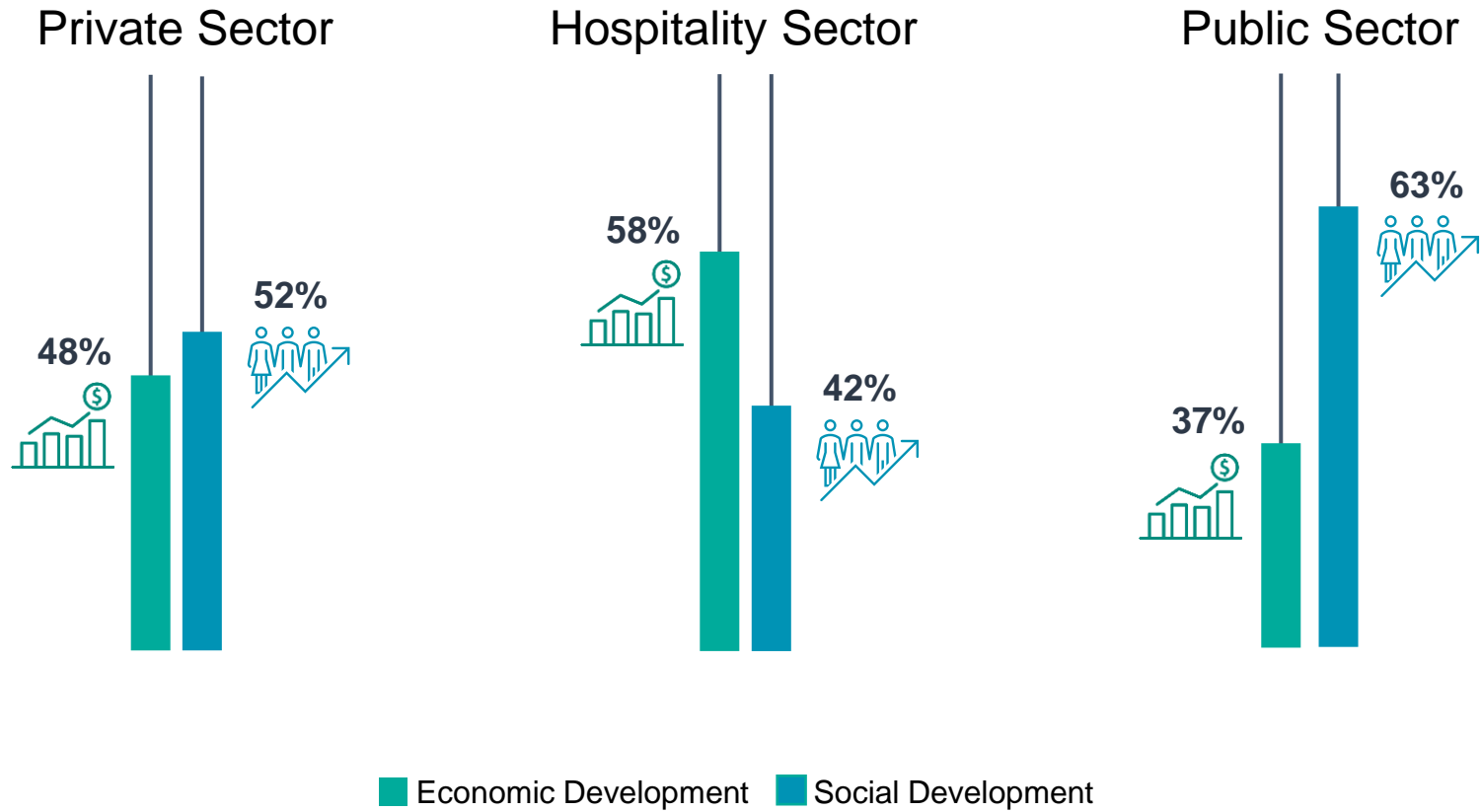
Top 3 places:  
48% work in the Government Sector, 26% in Education, and 14% Healthcare Sector & Social Assistance



# Comparison

by Sector

Economic vs Social Development



Note: Hospitality Sector is included in the Private Sector Share  
Private N: 954 Hospitality Sector N: 247 Public N: 547

# ★ Hospitality Sector ★

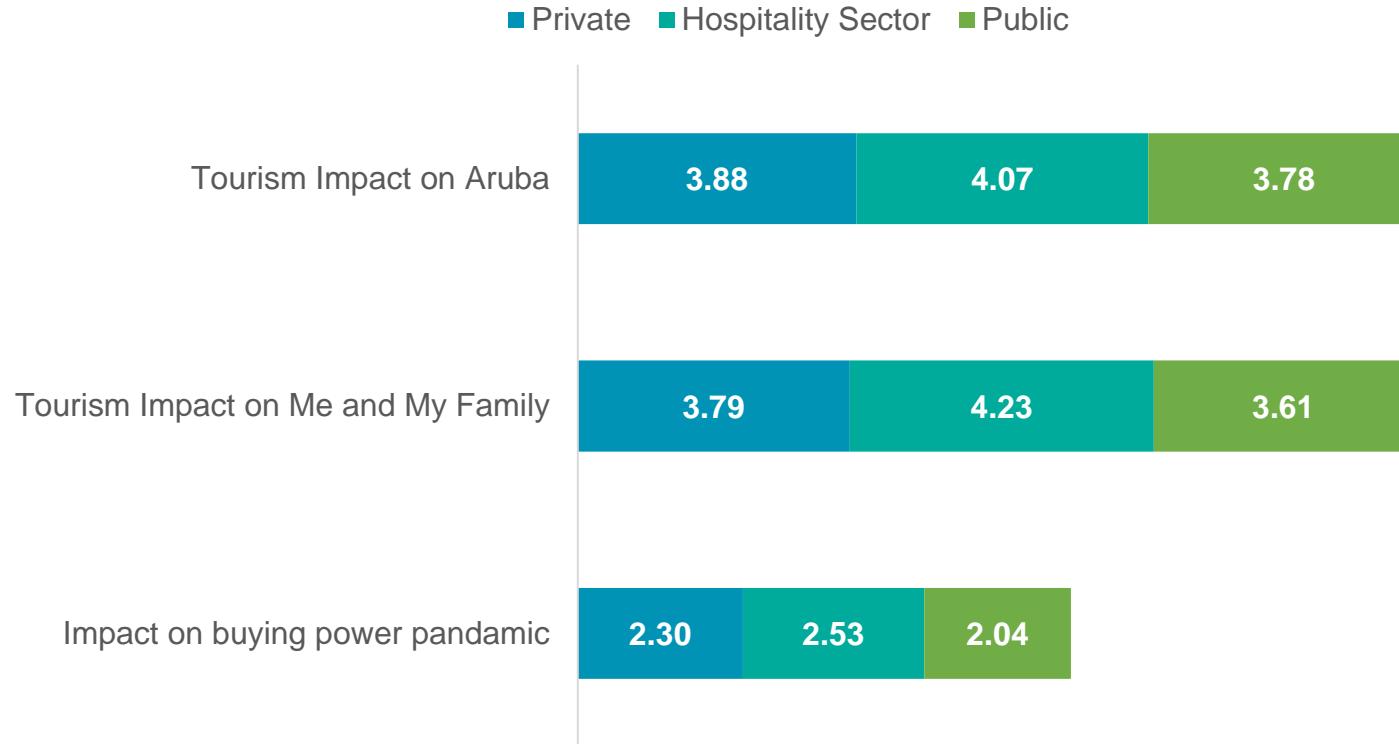
## Comments

Economic Development	Social Development
Proteha bienestar di e pilar economico pa comunidad compronde importancia di preserva nos amabilidad, hospitalidad	Mas enfasis riba desaroyo nan sustenibel, tanto ecologico como social
Sustainable community being social, development, economy, a balanced Aruba	Mas actividad nan deportivo pa familiar. P.e evento nan pa famia, fiesta nan pa famia y mucha cu ta sano y productivo.
Crea otro idea nan pa atrae mas turista pa nos isla pa asina nos por recupera mas liher economicamente y por steun mas miho na nos bienestar social. Door di tin capital lo por afford pa hasi mas pa comunidad.	Sustainable Living and recreation
Keep applying new marketing strategies, to gain more tourist. sometimes it not only the outside marketing but also your product quality	Vooral pa esa cu pa un of otro motivo a cai den addiction/ dropout..
Focus on quality not quantity in tourism	Mester revisa e problematica nan riba un nivel mas profundo pa por duid aan kiko realmente lo mehora e situacion social di un manera sistematico y duradero.
Cuminsa bin cu plan estrategico bijvoorbeeld control riba prijs.. ami ta traha cu turismo y anan mes ta kehando con Aruba a bira caro	Educación adecua pa con pa cumpli cu trabou y actitud responsable
No expansion di industria turistico pero mejoracion (atrae turista cu mas \$\$\$)	Mester hasi Aruba mas barata pa nan por gasta. Awo ta keha so nan ta keha
Cuida e isla y su cultura. Y proteje nos beach nan. Mucho kiosks ariba beach.	More attention for young people in schools.
	asistencia para la juventud.hopi den droga
	Limpiesa, mihor calidad di bida. Mas attention na e derale chikito den nos comunidad

# Comparison

By Sector

## Tourism Impact



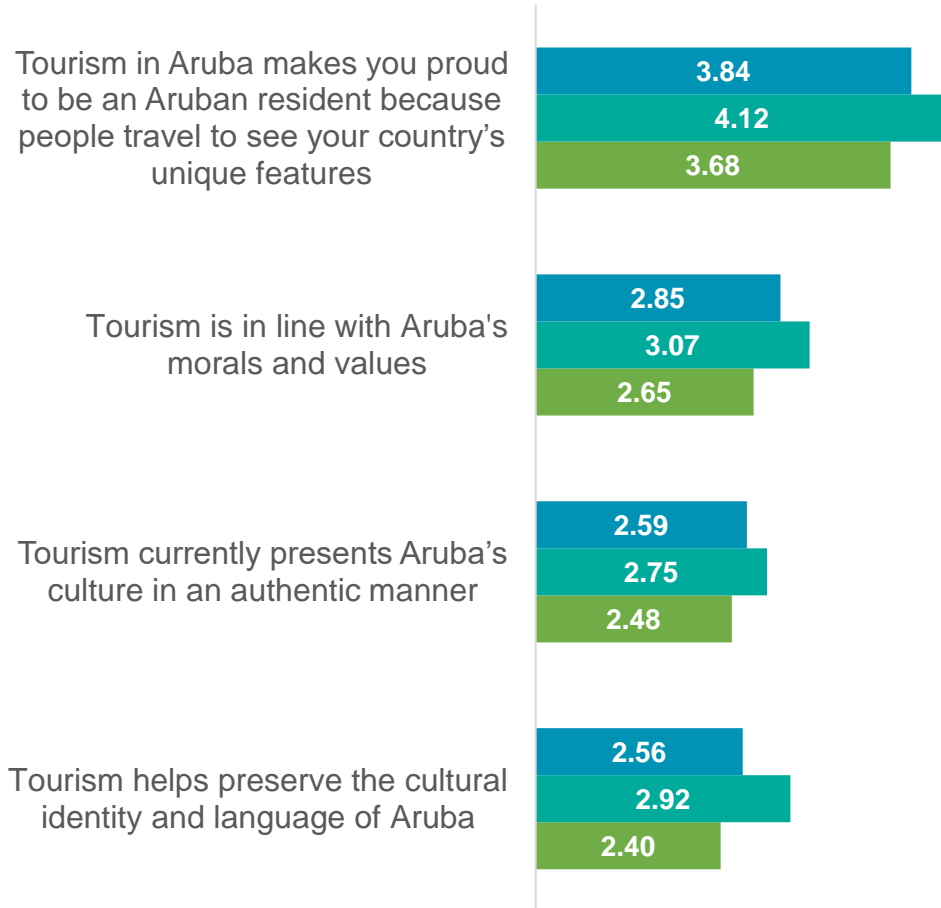
**The Hospitality Sector agreed that Tourism Impacts both the island (4.07) almost strongly agreed them, and their families (4.23) compared to the public sector.**

# Comparison

By Sector

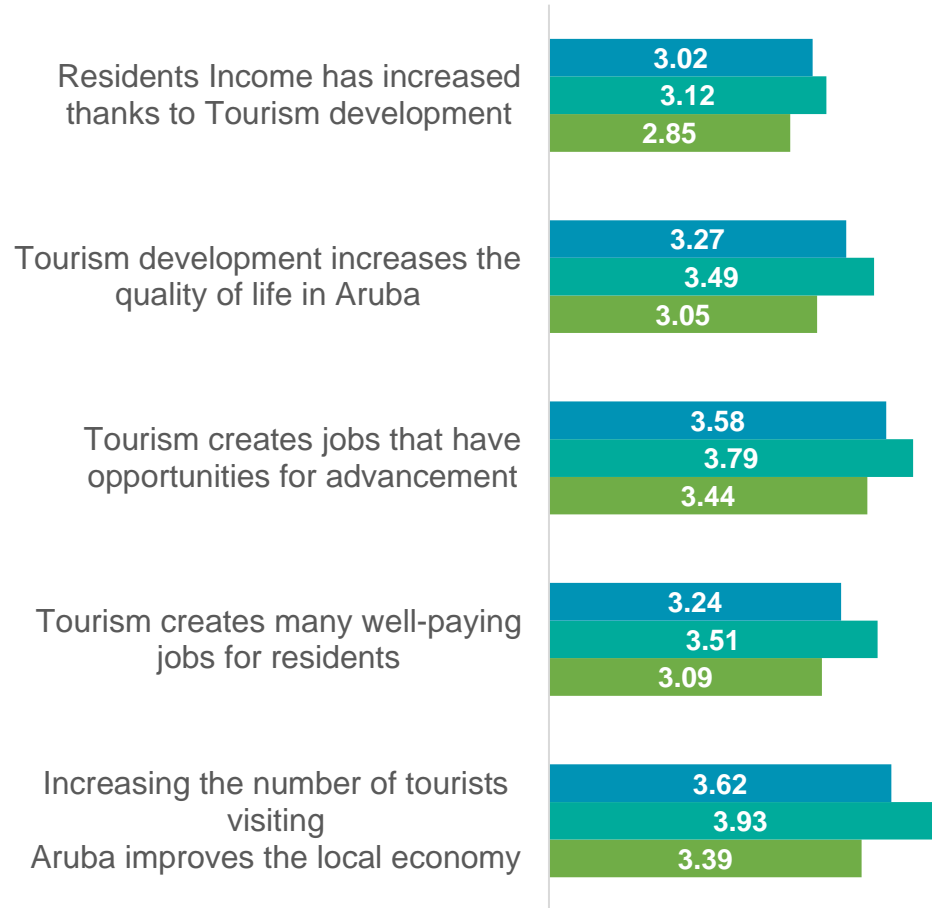
## Economic Impact

■ Private ■ Hospitality and Tourism Sector ■ Public



## Culture Impact

■ Private ■ Hospitality and Tourism Sector ■ Public



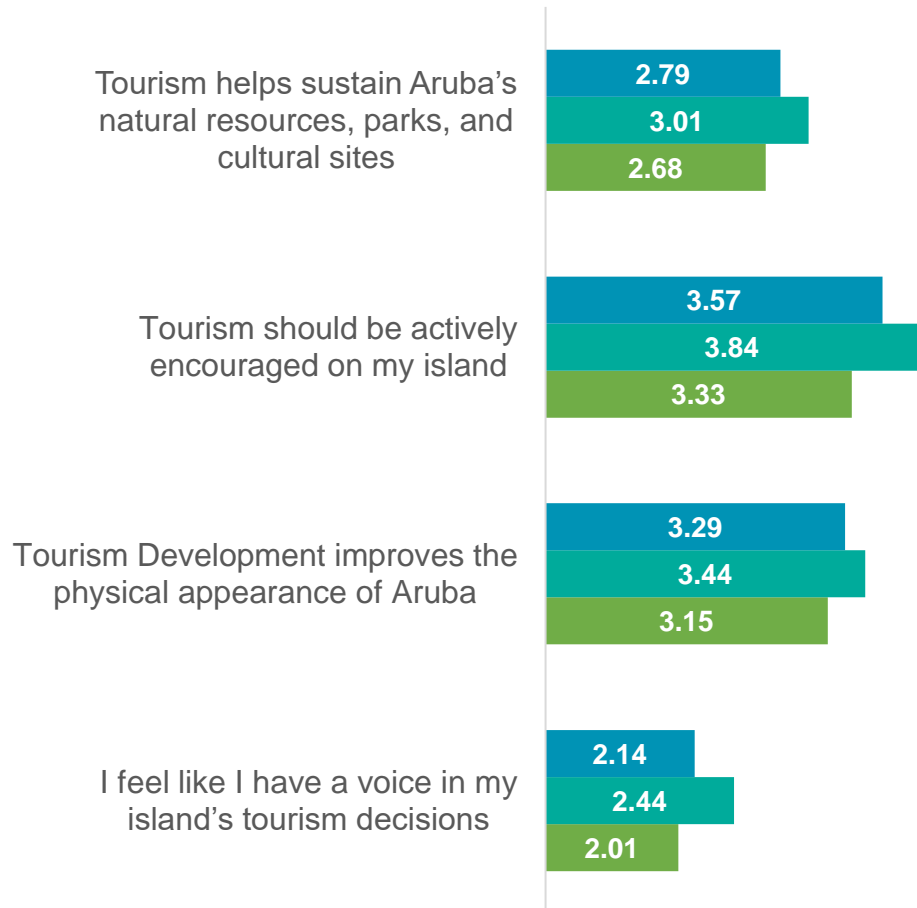
Note: Hospitality Sector is included in the Private Sector Share  
 Using a 5-point scale where 5 = strongly agree and 1 = strongly disagree.  
 Private N: 954 Hospitality Sector N: 247 Public N: 547

# Comparison

By Sector

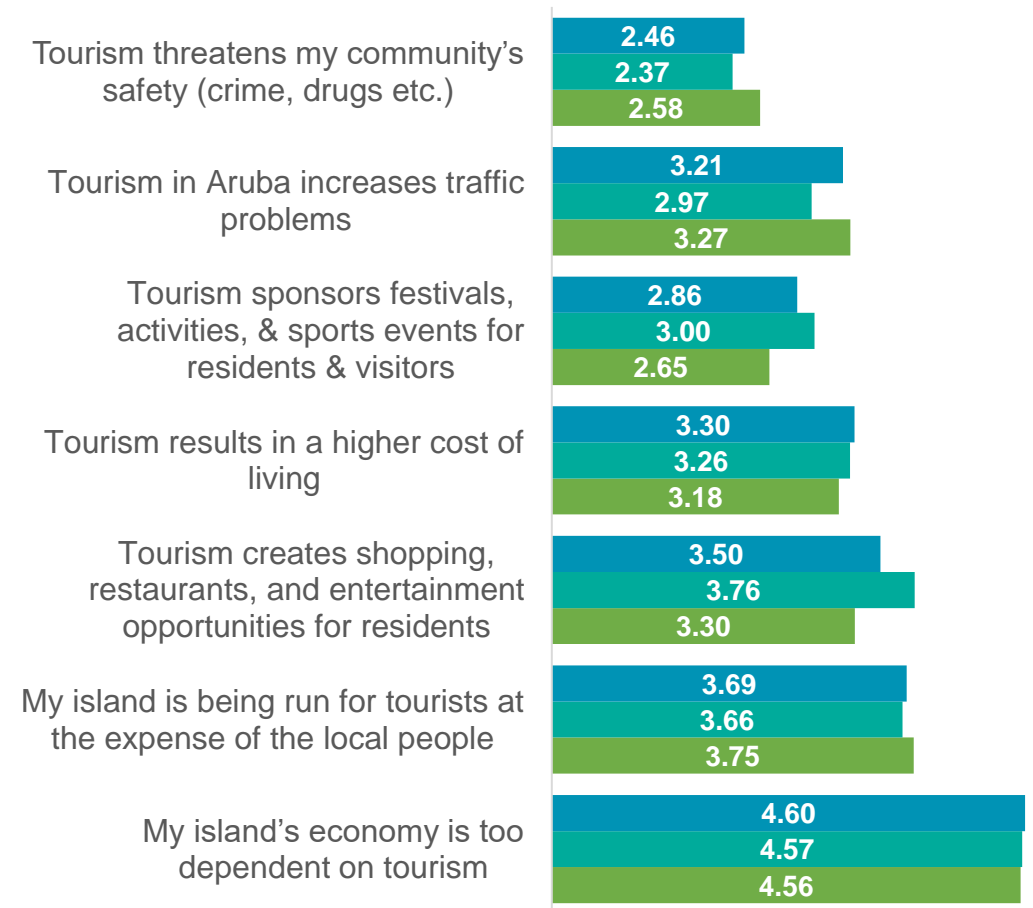
## Involvement Impact

■ Private ■ Hospitality and Tourism Sector ■ Public



## Tourism Spin-Offs

■ Private ■ Hospitality and Tourism Sector ■ Public



Note: Hospitality Sector is included in the Private Sector Share  
 Using a 5-point scale where 5 = strongly agree and 1 = strongly disagree.  
 Private N: 954 Hospitality Sector N: 247 Public N: 547

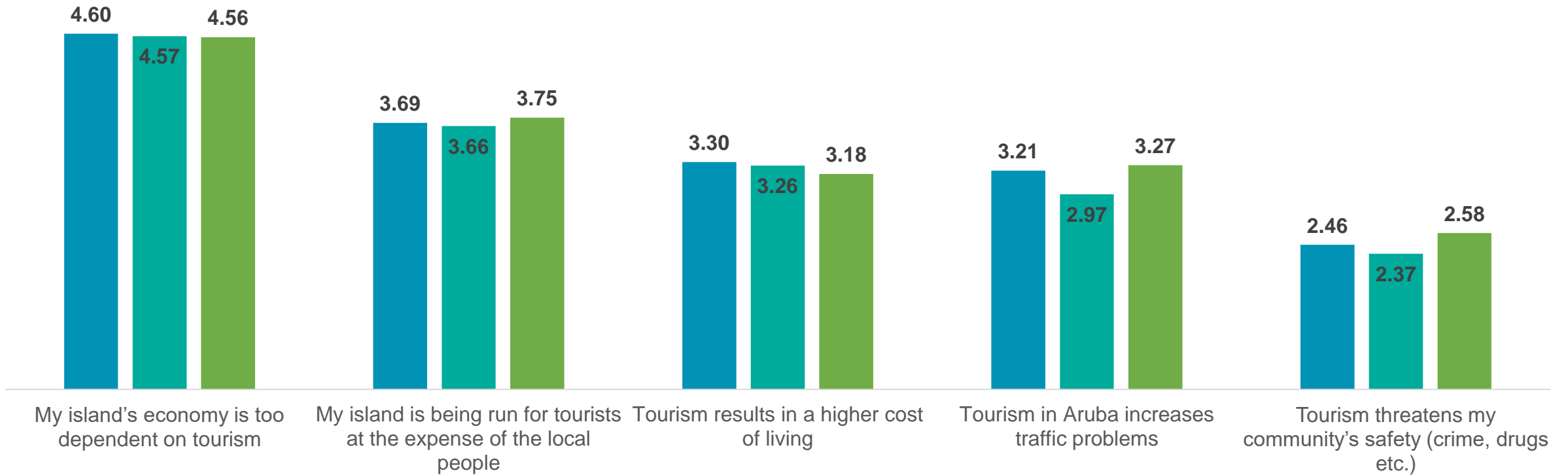


# Comparison

By Sector

## Negative Impact

■ Private ■ Hospitality and Tourism Sector ■ Public

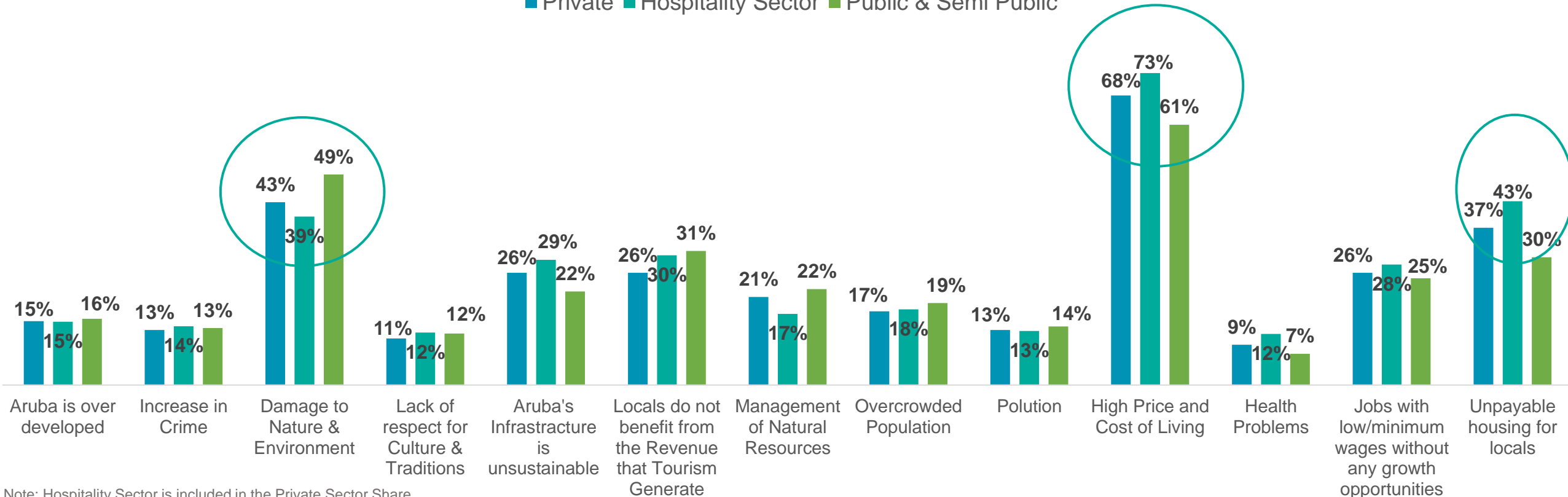


Note: Hospitality Sector is included in the Private Sector Share  
Using a 5-point scale where 5 = strongly agree and 1 = strongly disagree.  
Private N: 954 Hospitality Sector N: 247 Public N: 547

# Problems Created by Tourism: Comparison Public, Private, and Hospitality Sector

- Damage to Nature & Environment: For the public sector they scored higher compared to the private sector
- Aruba's Infrastructure is unsustainable: the private sector scored this higher compared to the public sector
- Locals do not benefit from the revenue that tourism generates: the public sector scored this higher than the private sector
- High price and cost of living: Both sectors scored this significantly higher however the private sector scored it much higher compared to the public sector
- Unpayable housing for locals: private sector scored this much higher than the public sector

■ Private ■ Hospitality Sector ■ Public & Semi Public



Note: Hospitality Sector is included in the Private Sector Share  
 From these 14 Tourism concern sentences, select the top 3 concern.  
 Private N: 954 Hospitality Sector N: 247 Public N: 547

# Hospitality Sector

## Comments

Mericano ta bin Aruba ta mescos cu Merca nan ta jega bek, mucho luhoso mucho moderno, **no tin e feeling vibe di caribe** nos mester tin mas **cosnan cultural folklor dansa** etc... y stop cu musica nan reggae 80' 90's regeton etc.. cu ta **hasi Aruba mescos cu otro isla** nan mesun cancion international mesun manera mester cuminsa nos propio musica unico y mucho **lugarnan junk food** na Aruba tur restaurant den area di hotel tur ta bende cuminda international y nan **no ta bende cuminda criollo** ni ariba caya no tin cuminda criollo pa nos arubiano nan y **kiko nos ta propaganda nada di Aruba** no music di Aruba no folklor di Aruba ni cuminda di Aruba.

**Casonan di corrupcion** menciona tur dia riba medianan dincomunicacion ta **preocupante pa e desarrollo economico** di un pais

Casi tur **negoshi den turismo** ta den **man di stranjero** i ami como arubiano tin casi 20 aña ta bringa pa jega na un tereno comercial

**Aumento di ilegalnan** dentrando Aruba

Hopi lugar ta mantene nan costo abouw y ta **abusa di e trahado** y bisa nos ta den pandemia y e trabou ta mas cu pandemia.

Nos mester ta mas sabi cua desaroyo nan nos ta acepta den futuro. **Menos focus riba quantitative growth**, mas **focus riba qualitative growth**.

**Aruba no mester mas hotel** of zo, **no tin trahador pa housekeeping** y pesey no mester traha mas hotel paso **no por sigui importa hende di afo**

tin efecto negativo! Hopi **naturaleza a bai perdi!**  
**Mucho hopi hotel!**  
**Mucho hopi edificio!**  
haci aruba muestra mahos

Aruba ta **birando demasiado moderniza** cu ela **perde su identidad**. Ni na **capel di alto vista no tin respet** mas. **Yen di kiosk, music duro**. Ya Aruba a bira un business completo nada más.

**costo di bida demasiado halto** placa no ta jega

Nos ta lubidando nos **cultura real** pa e imagen cu nos kier muestra, toxico pa nos salud mental pa esnan trahando den hotel.

Mercado laboral ta **insostenible**. Tin staff trahando den turismo sin sa of kier anto esnan cu sa of kier no ta bon paga of no hanja permiso

Aruba ta mucho **americanisa**

White Supermacy ta tumando lugar, nificando cu Turista nan, e.o americano nan ta sinti nan mes superior cu Arubiano nan y tatrata nan como tal. Tampoco no ta ni reconoce of **respet**a **PAPIAMENTO** of Aruba su **naturaleza**.

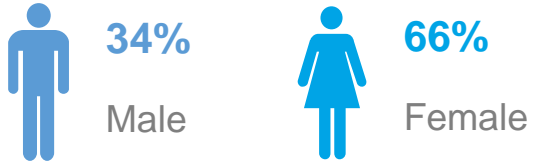
# District Comparison



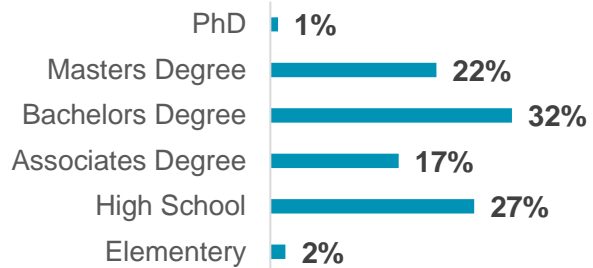
# Demographics

By District

## Noord / Tanki Leendert



### Highest Education Level



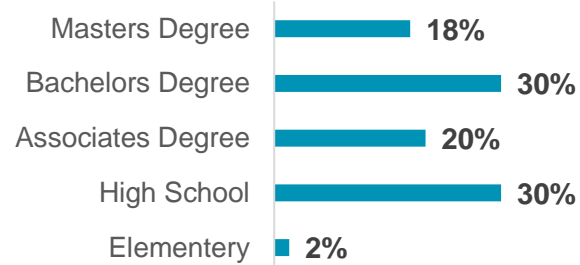
### Employment Status

83% Employed of which 17% works in the Hospitality Sector, 14% in the Commerce Sector, and 10% in the Government Sector.

## Paradera/St Cruz



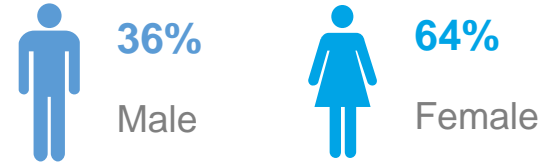
### Highest Education Level



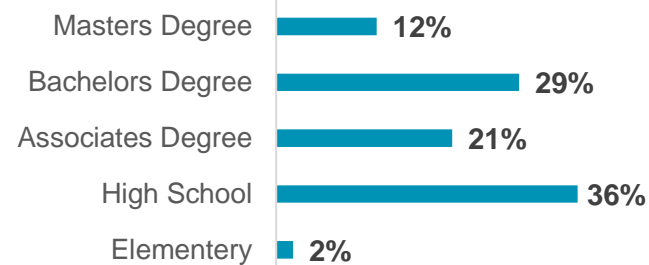
### Employment Status

83% Employed of which 16% works in the Government Sector, 11% in the Commerce Sector, and 11% in the Hospitality Sector.

## Savaneta/San Nicolaas



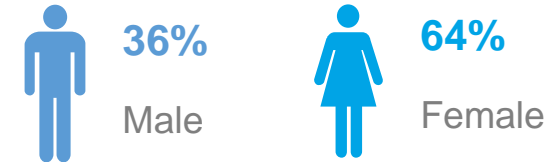
### Highest Education Level



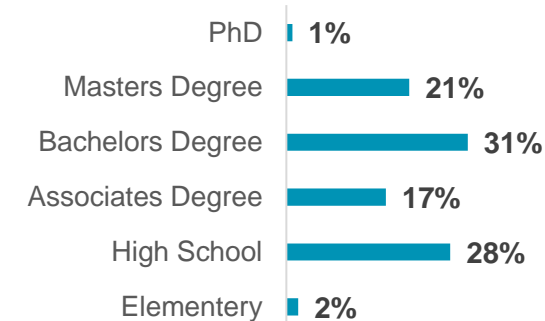
### Employment Status

77% Employed of which 16% works in the Government Sector, 11% in the Commerce Sector, and 11% in the Hospitality Sector.

## Oranjestad



### Highest Education Level



### Employment Status

77% Employed of which 17% works in the Hospitality Sector, 15% in the Commerce Sector, and 11% in the Government Sector.

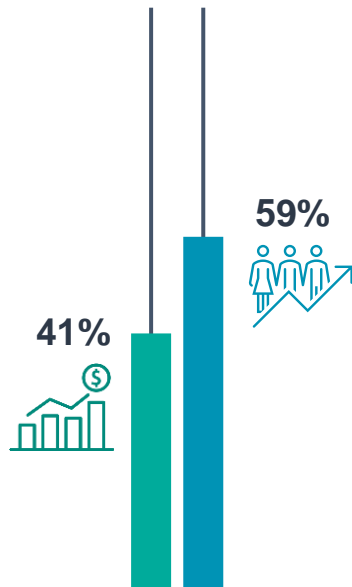


# Comparison

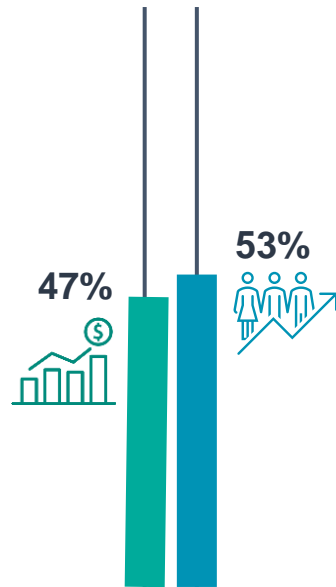
By District

Economic vs Social Development

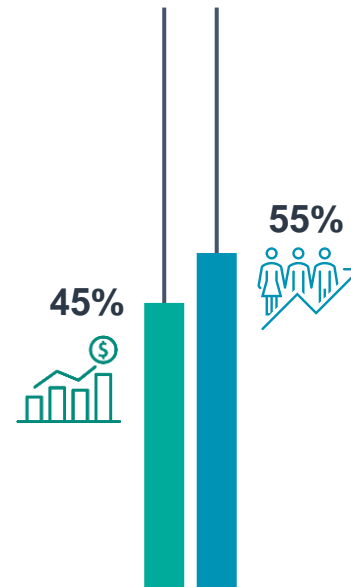
Noord/  
Tanki Leendert



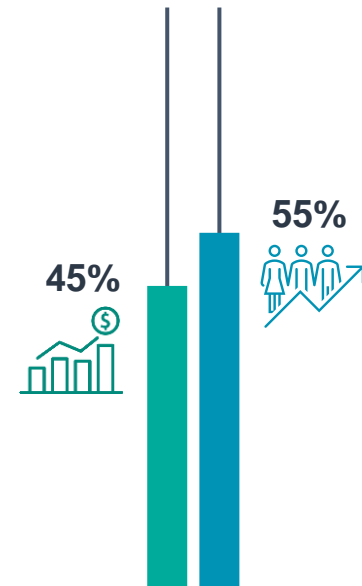
Paradera/  
St Cruz



Savaneta/  
San Nicolaas



Oranjestad



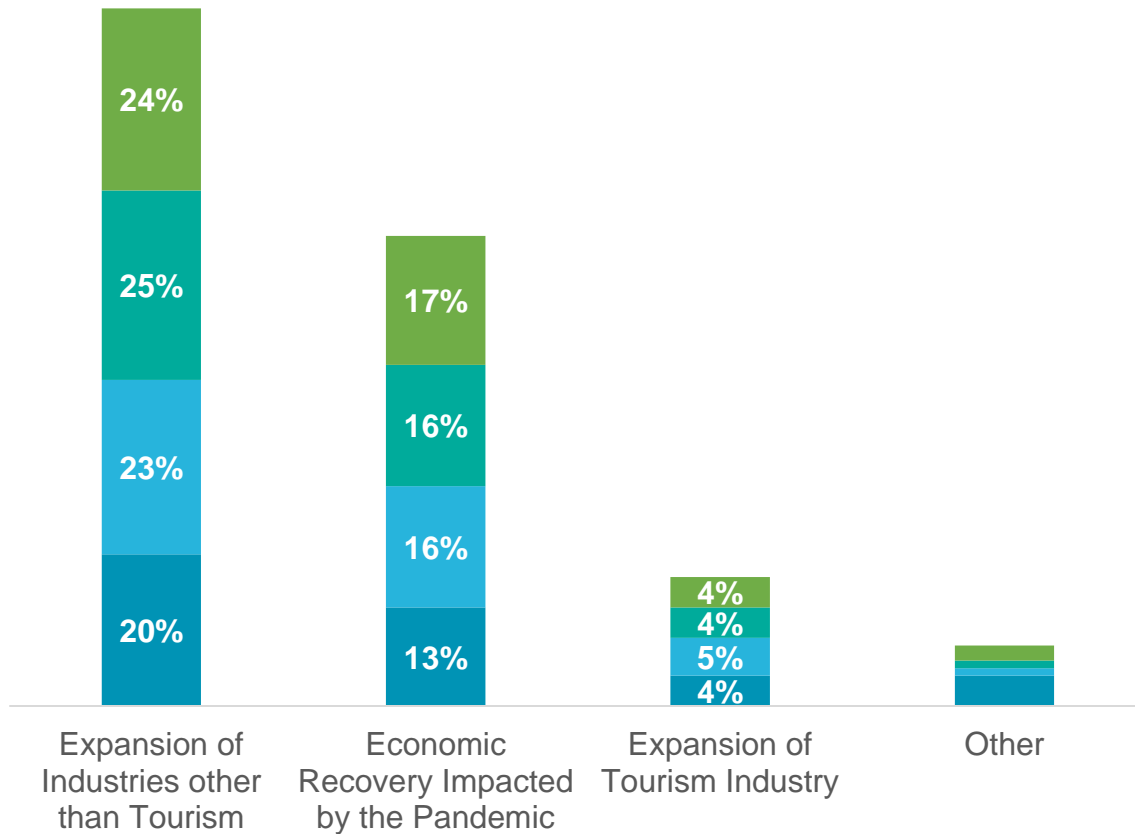
■ Economic Development ■ Social Development

# Comparison

By District

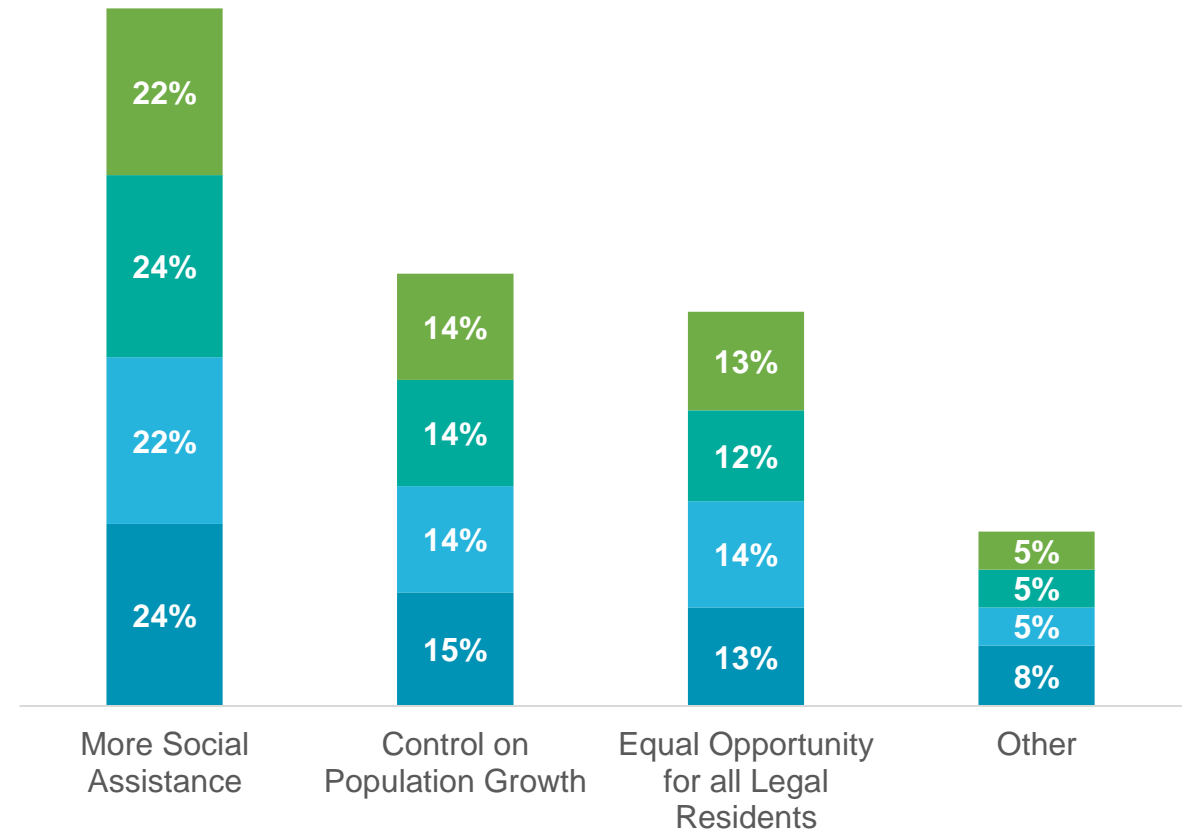
## Economic Development

- Noord/Tanki Leendert
- Paradera/St Cruz
- Savaneta/San Nicolaas
- Oranjestad

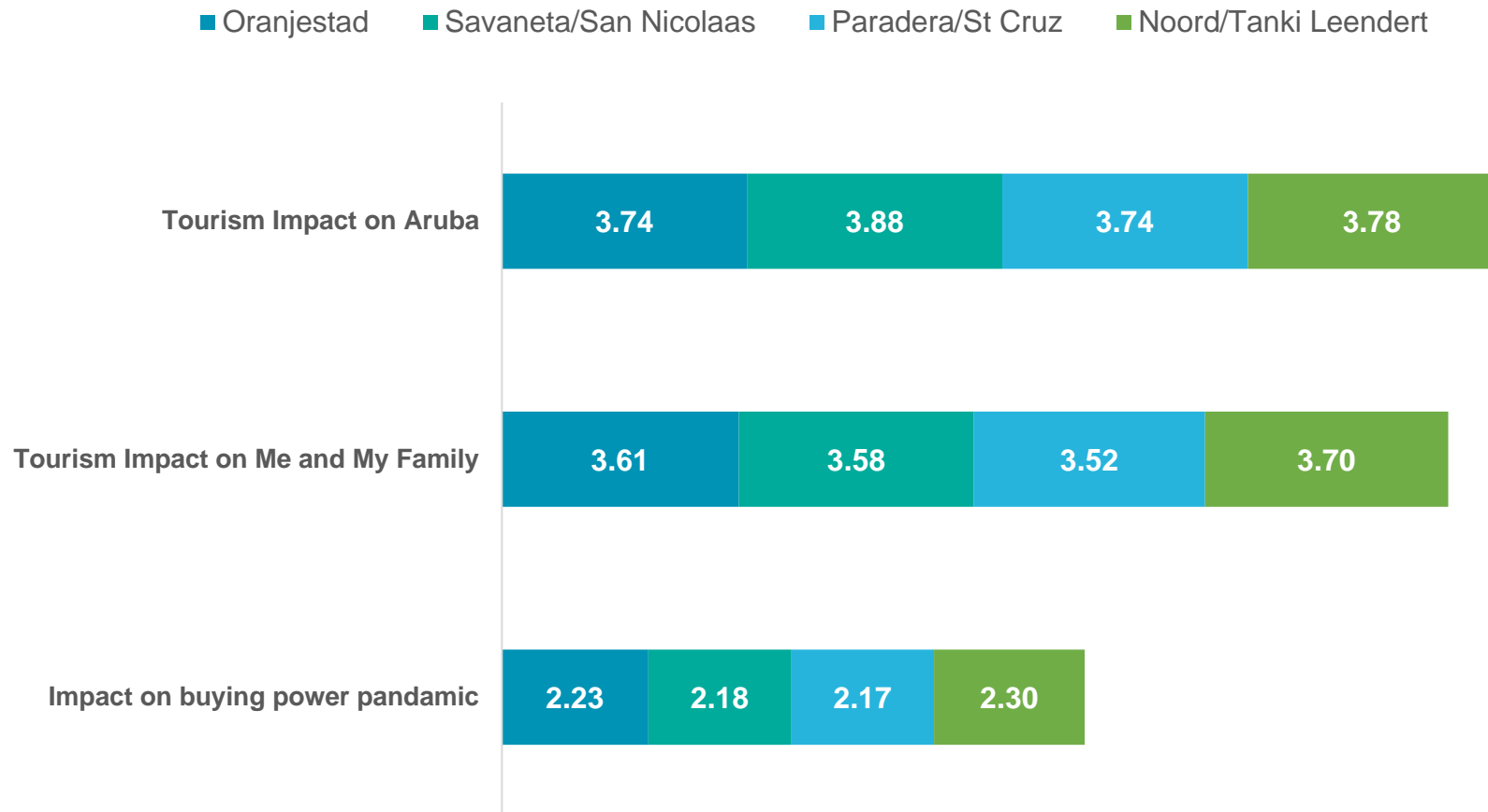


## Social Development

- Noord/Tanki Leendert
- Paradera/St Cruz
- Savaneta/San Nicolaas
- Oranjestad



# Tourism Impact Comparison by District

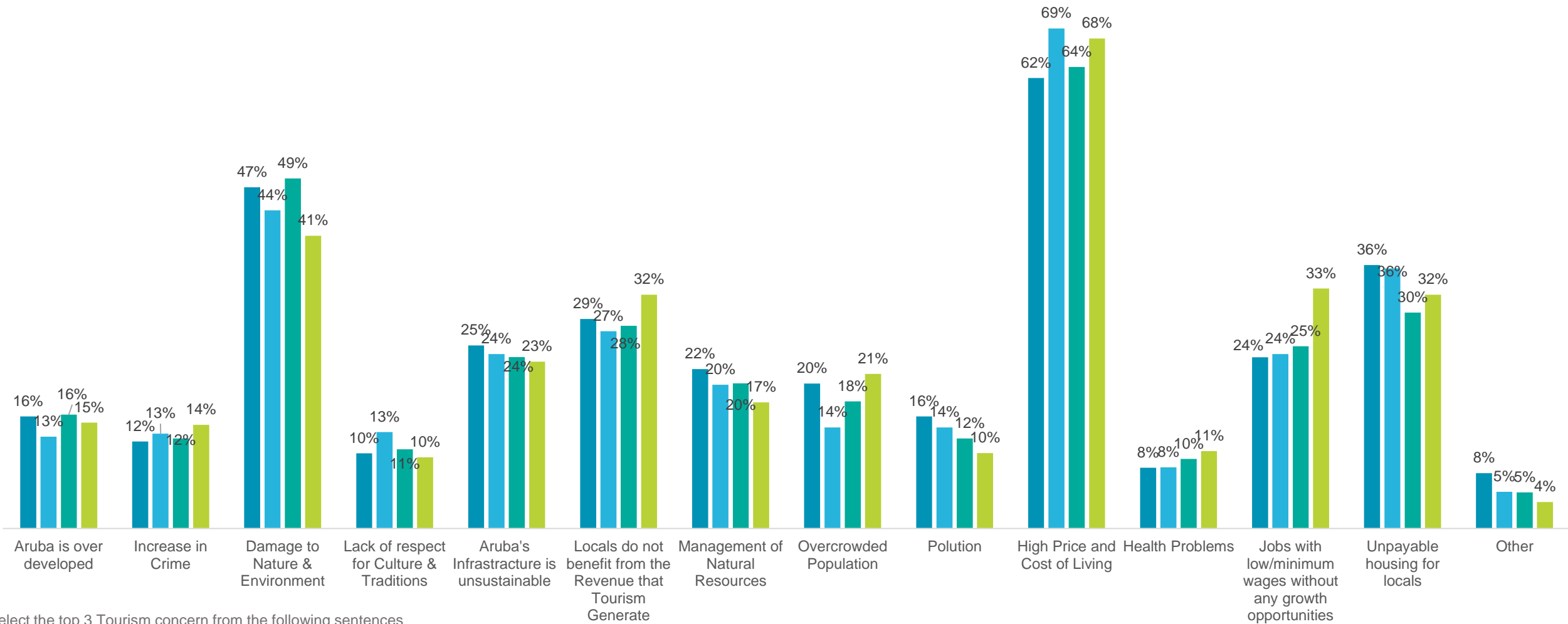


Using a 5-point scale where 1 = Extremely Negative and 5 = Extremely Positive

Noord/Tanki Leendert N: 548 Paradera/St Cruz N: 602 Savaneta/San Nicolaas N: 355 Oranjestad N: 472

# Top Tourism Concerns by District

■ Noord/Tanki Leendert ■ Oranjestad ■ Paradera/St Cruz ■ Savaneta/San Nicolas



Select the top 3 Tourism concern from the following sentences

Noord/Tanki Leendert N: 548 Paradera/St Cruz N: 602 Savaneta/San Nicolaas N: 355 Oranjestad N: 472



# In-Depth Profiles





# Generation Z

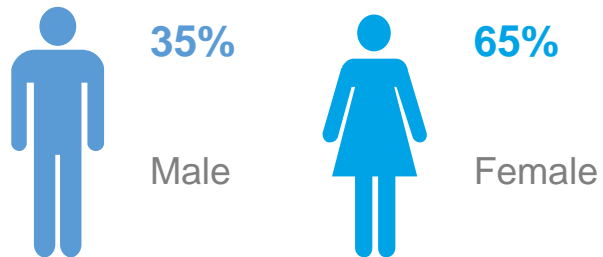
Age: 18 - 25



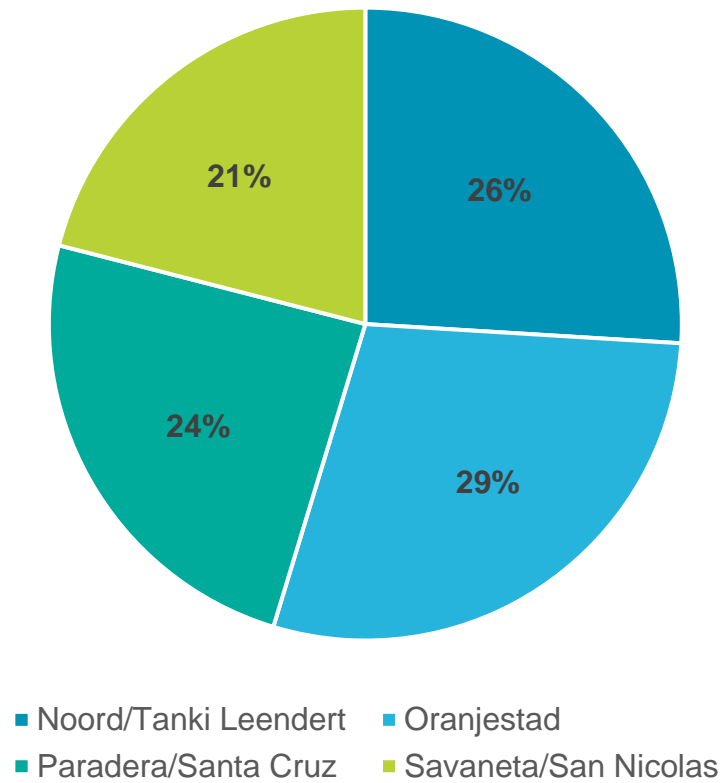


# Demographics Gen Z

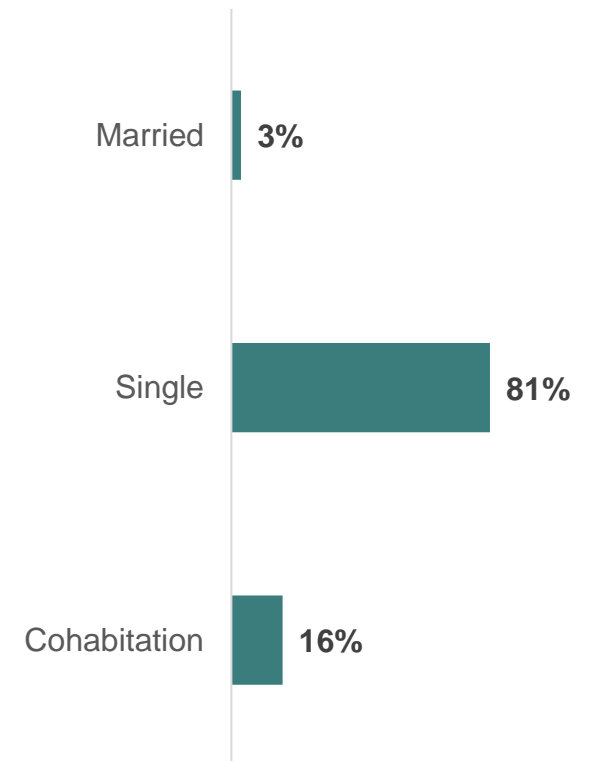
## Gender



## District

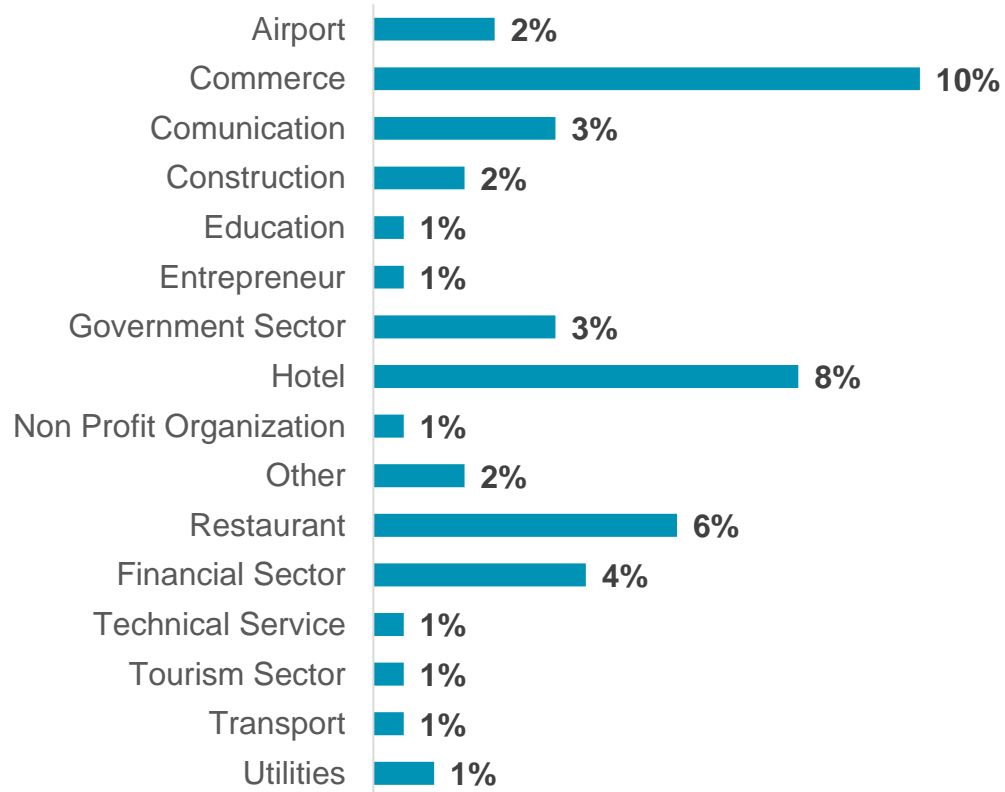


## Marital Status



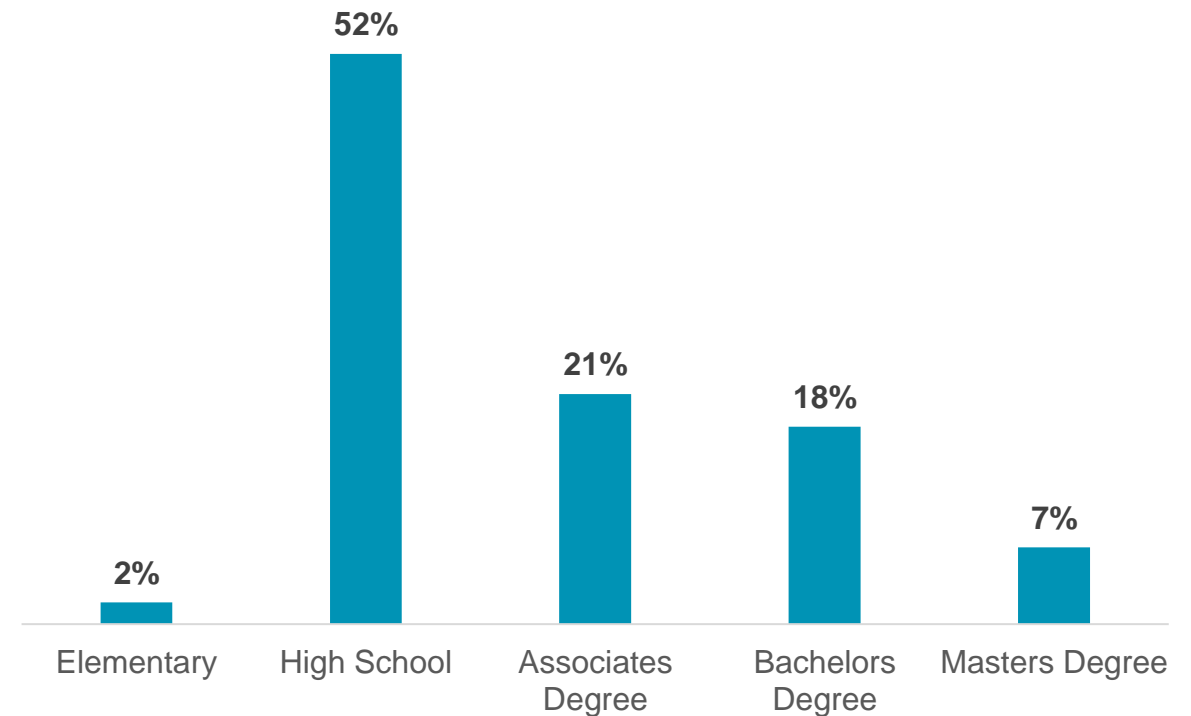
# Demographics Gen Z

## Employment Sector



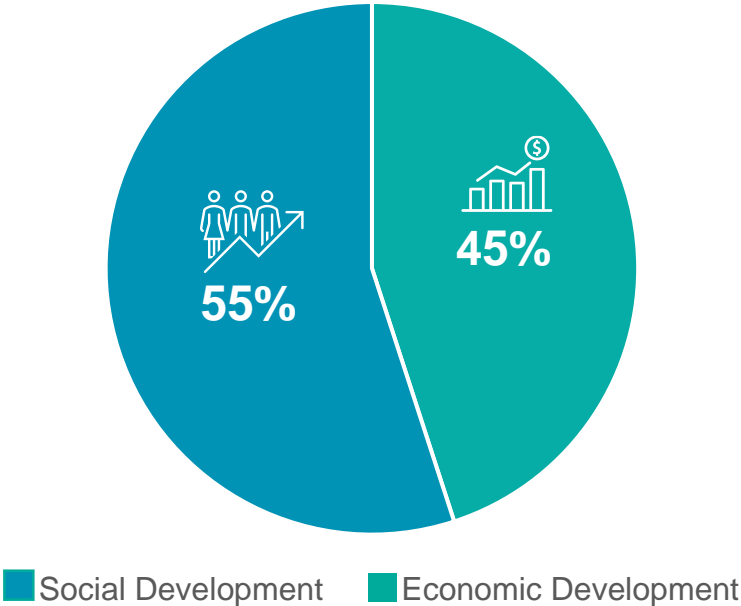
45% of the Gen Z's are employed, of which 81% work in the private sector.

## Education Level

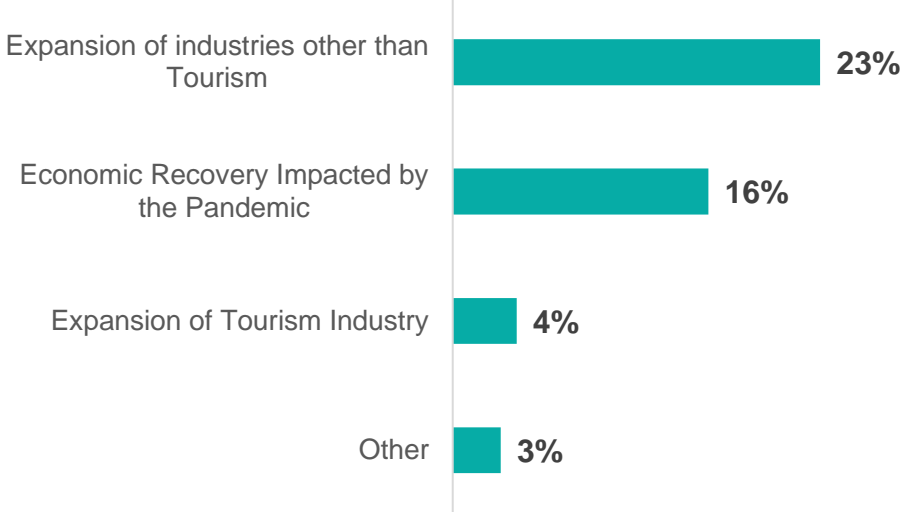


52% of the Gen Z's have a High School Diploma as the highest education level

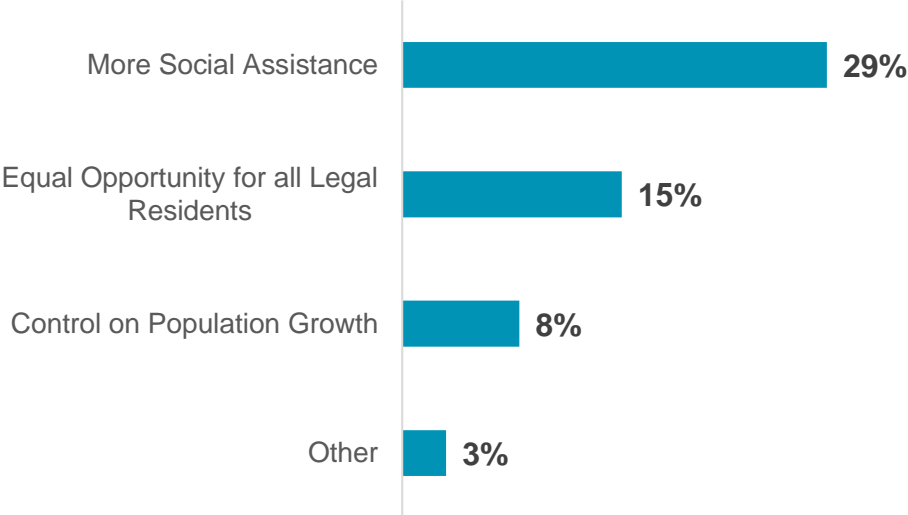
# Economic vs. Social



## Economic Development



## Social Development



# Tourism Impact – Gen Z



How would you rate the overall impact tourism has on Aruba?



How would you rate the impact on your buying power for the following 12 months compared to before the pandemic?

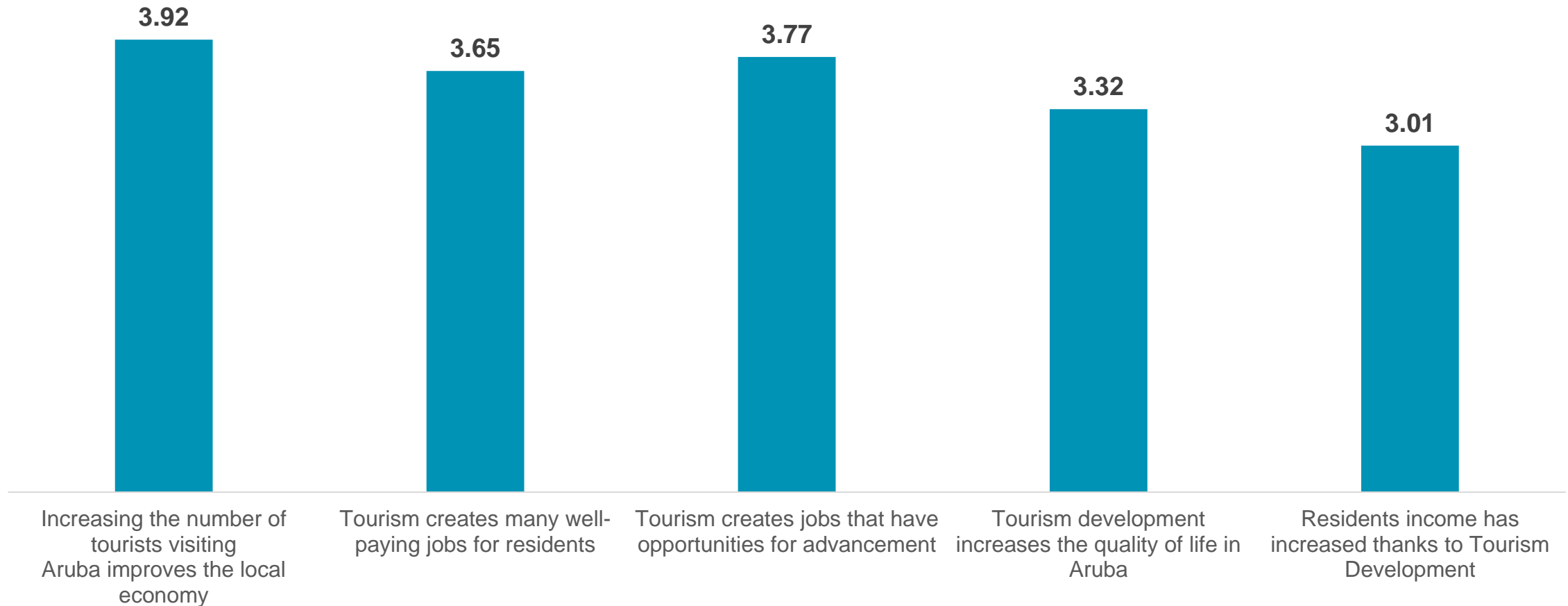


How would you rate the overall impact tourism has on you and your family?

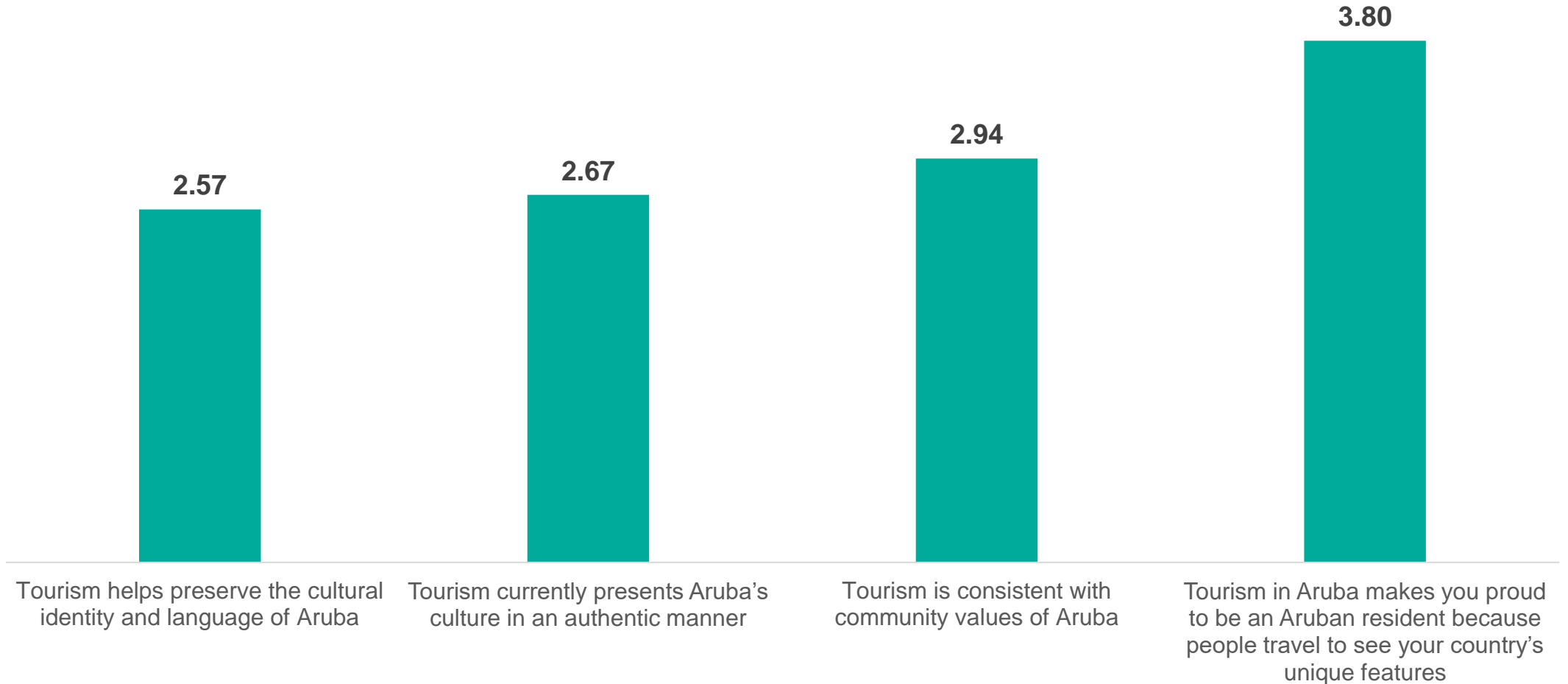
## Tourism Concerns:

1. Higher price/cost of living 76%
2. Damage to Nature & Environment 46%
3. High Housing Costs for Locals 35%

# Economy Impact – Gen Z

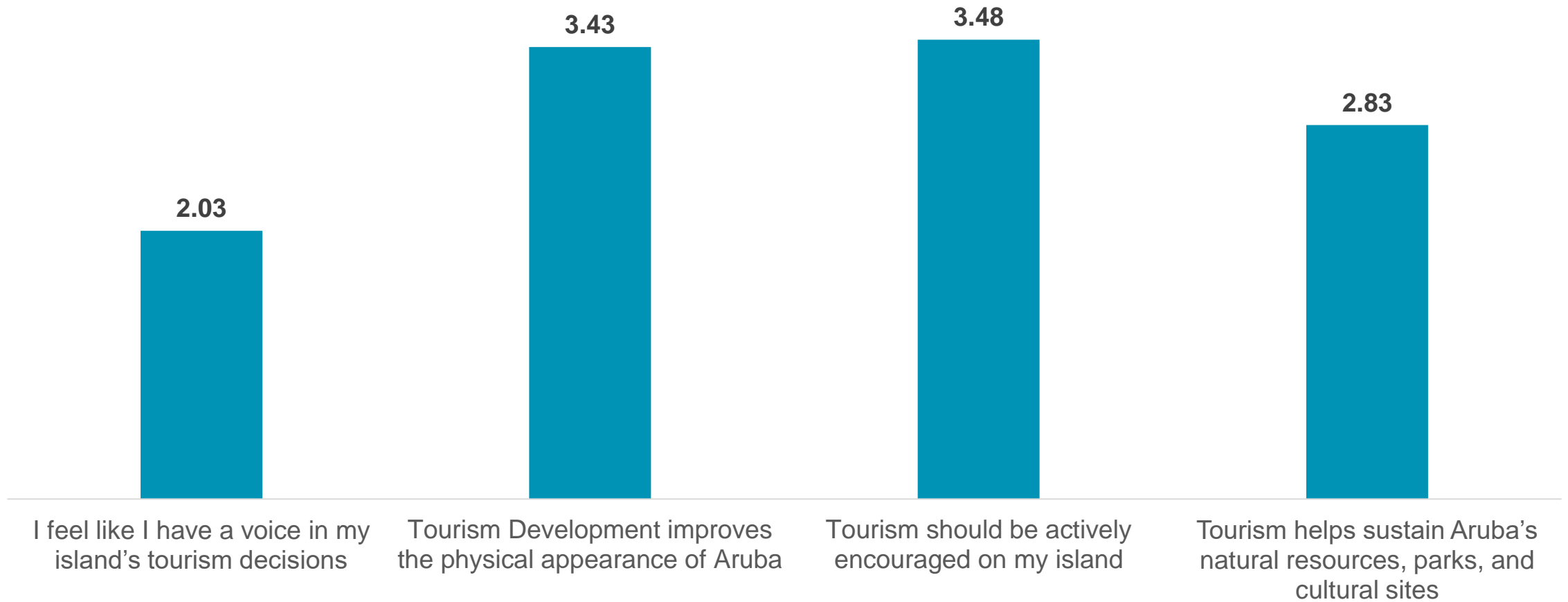


# Culture Impact – Gen Z

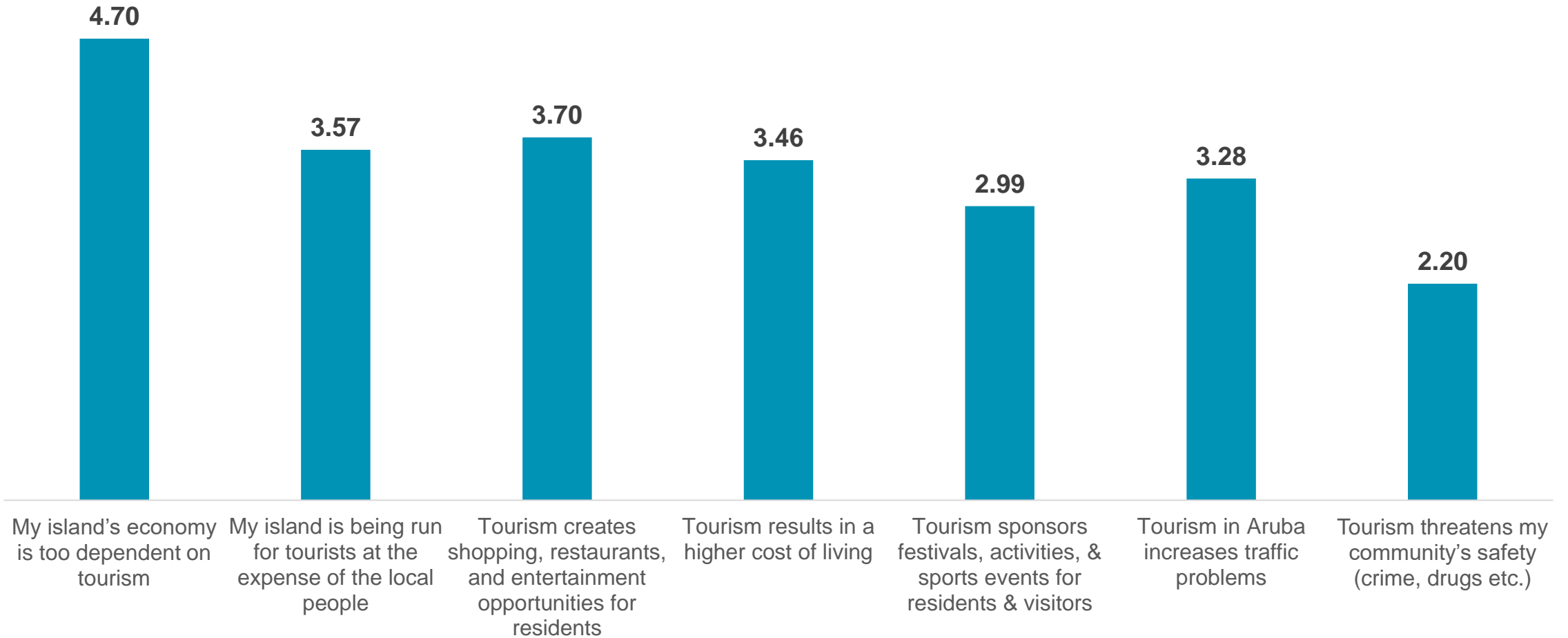




# Involvement Impact – Gen Z



# Tourism Spin-Off – Gen Z



Using a 5-point scale where 5 = strongly agree and 1 = strongly disagree, PLEASE TELL US HOW MUCH YOU AGREE OR DISAGREE WITH EACH OF THE FOLLOWING STATEMENTS

N: 181

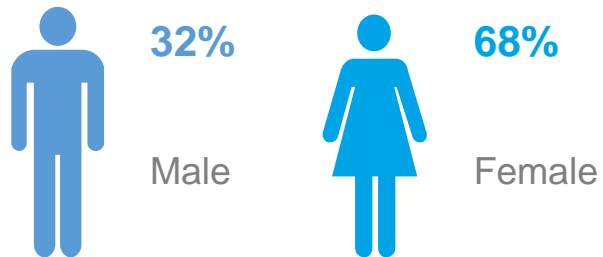
# Millennials

Age: 26 - 41

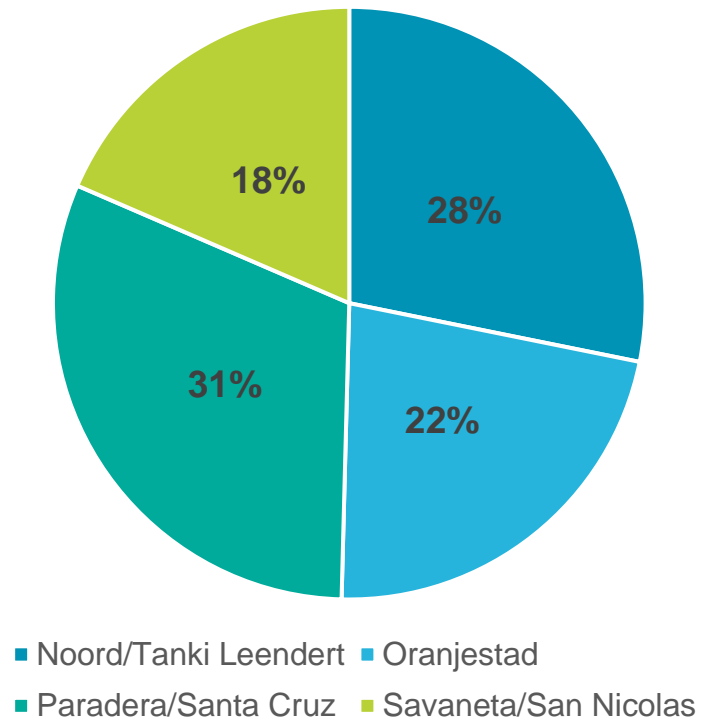


# Demographics Millennials

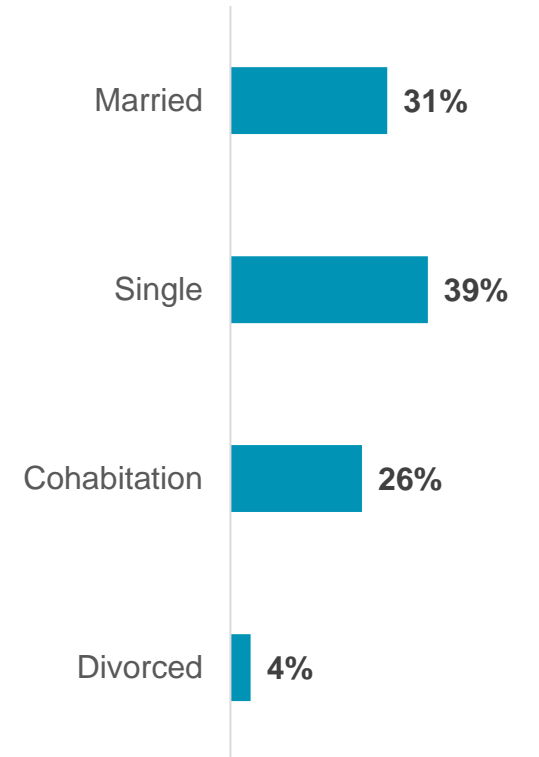
## Gender



## District

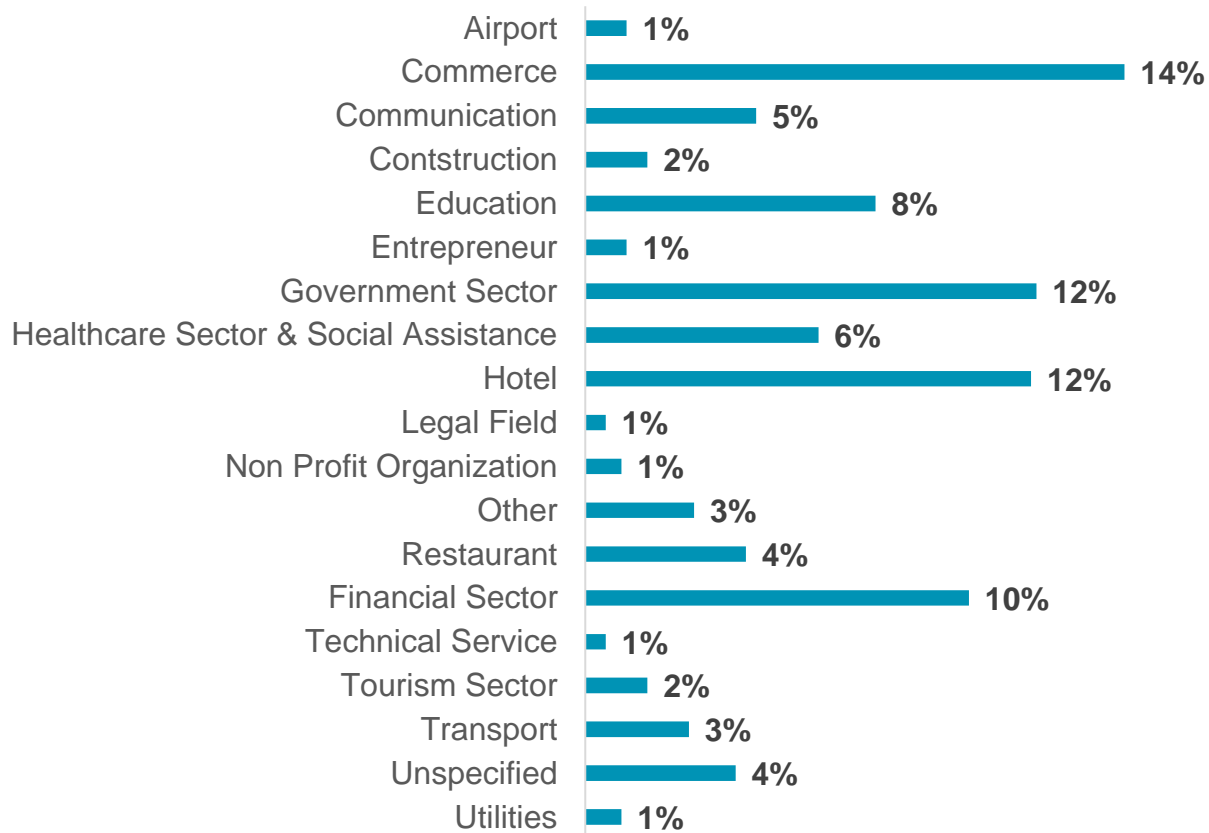


## Marital Status

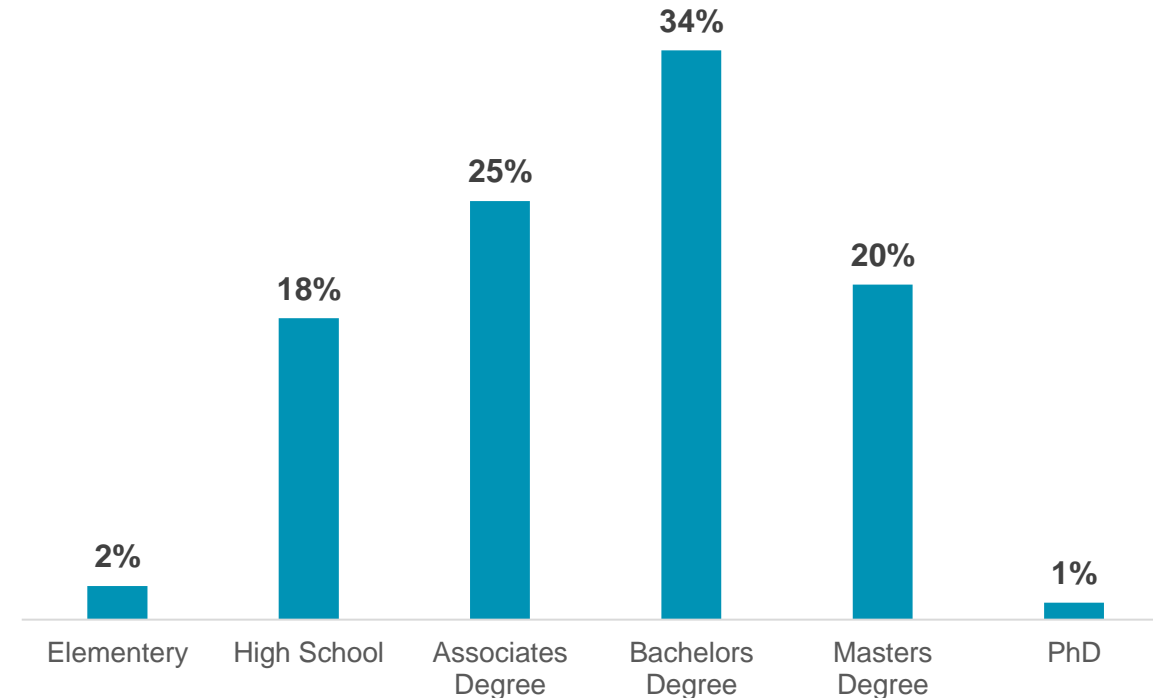


# Demographics Millennials

## Employment Sector



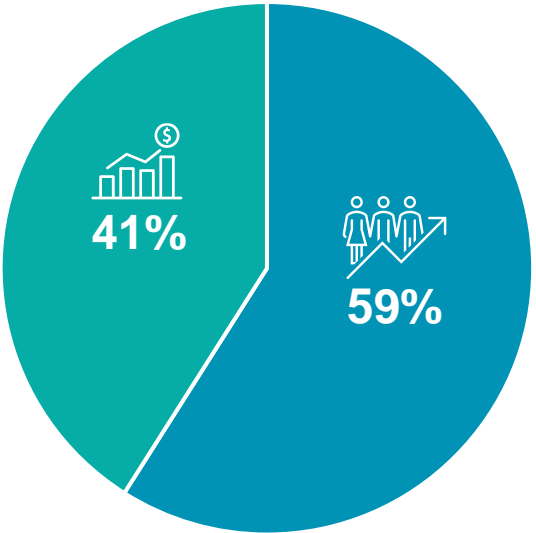
## Education Level



33% of the Millennials are employed, of which 13% work in the private sector. 2018: 70% of the Millennials sample are employed, and hereof 15% work in the private sector

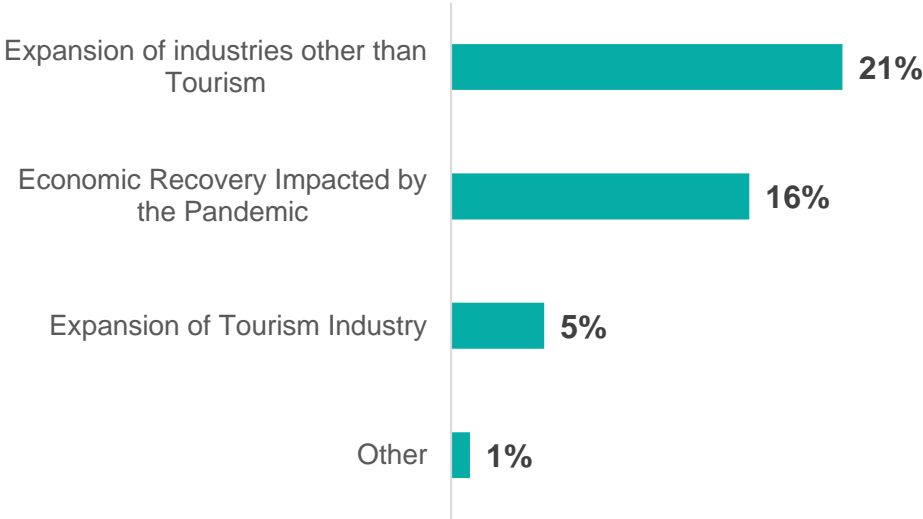
34% of the Millennials have Bachelors Degree as the highest education level

# Economic vs. Social

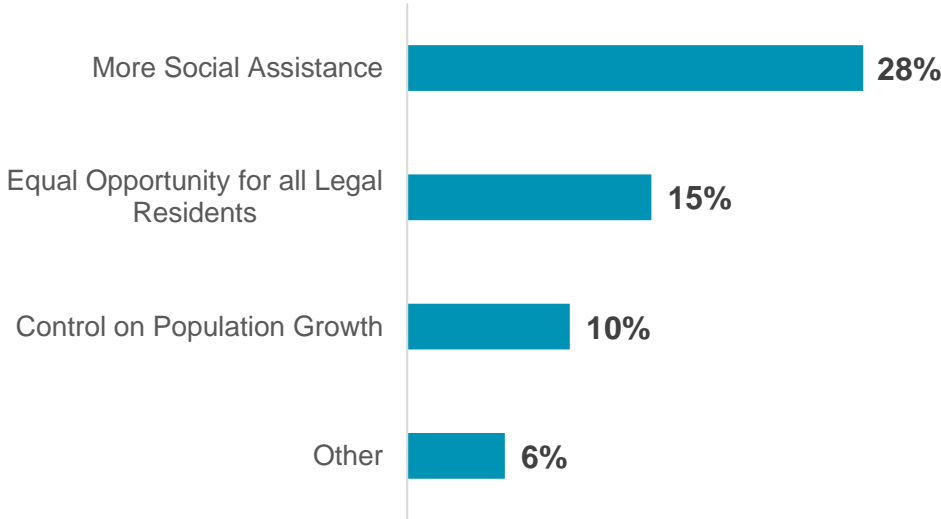


■ Social Development ■ Economic Development

## Economic Development



## Social Development





# Tourism Impact – Millennials



How would you rate the overall impact tourism has on Aruba



How would you rate the impact on your buying power for following 12 months compared to before the pandemic.



How would you rate the overall impact tourism has on you and your family

## Tourism Concerns:

1. Higher prices/cost of living
2. High Housing Cost for Locals
3. Damage to Nature & Environment

Compared to 2018 “The high prices and cost of living” stayed as top 1 concern among the Millennials.

# Tourism Impact – Millennials



How would you rate the overall impact tourism has on Aruba?



How would you rate the impact on your buying power for the following 12 months compared to before the pandemic?



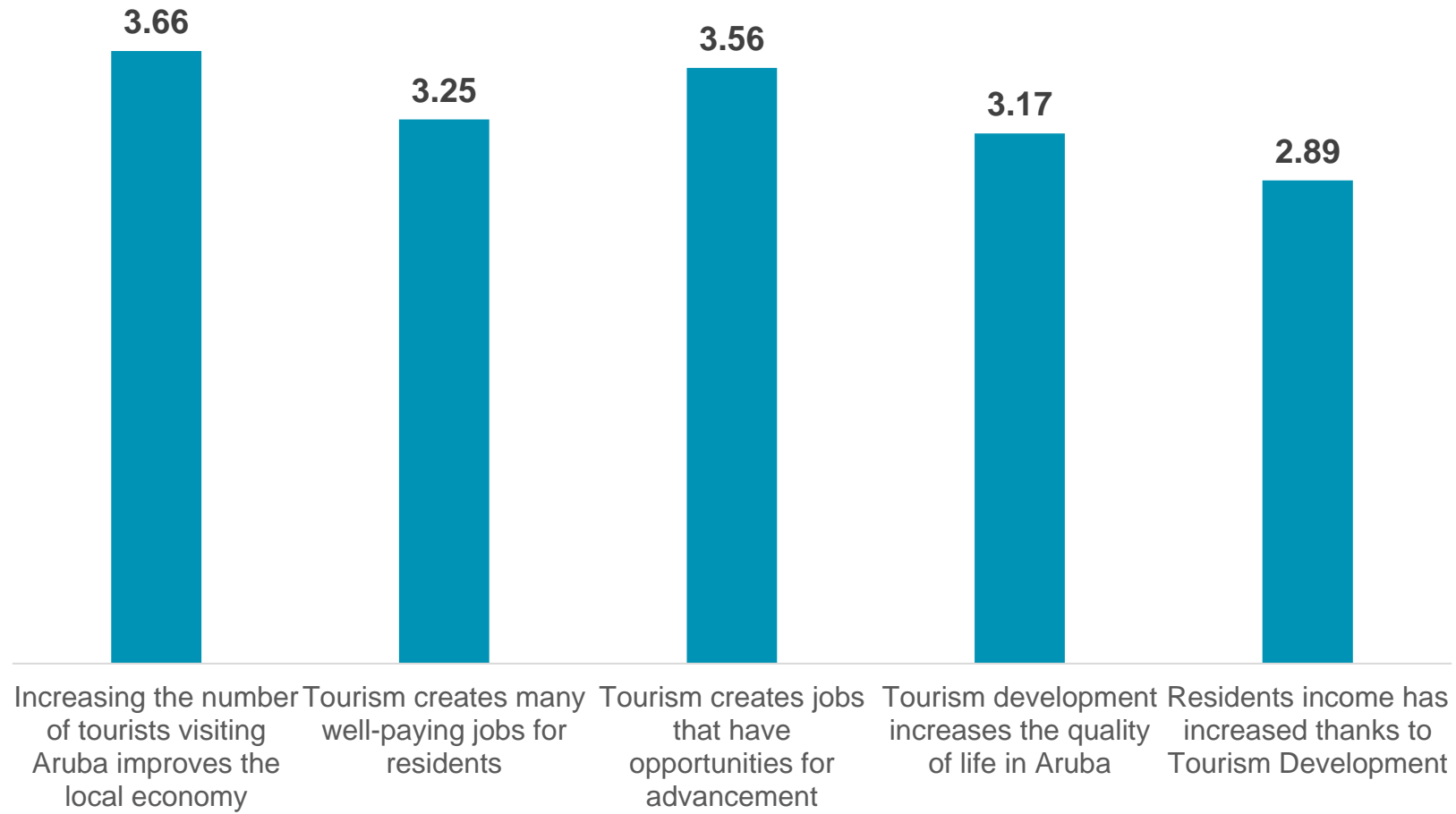
How would you rate the overall impact tourism has on you and your family?

## Tourism Concerns:

1. Higher price/cost of living 76%
2. High Housing Costs for Locals 35%
3. Damage to Nature & Environment 46%

Compared to 2018, “The high prices and cost of living” stayed as the top 1 concern among the Millennials.

# Economy Impact - Millennials

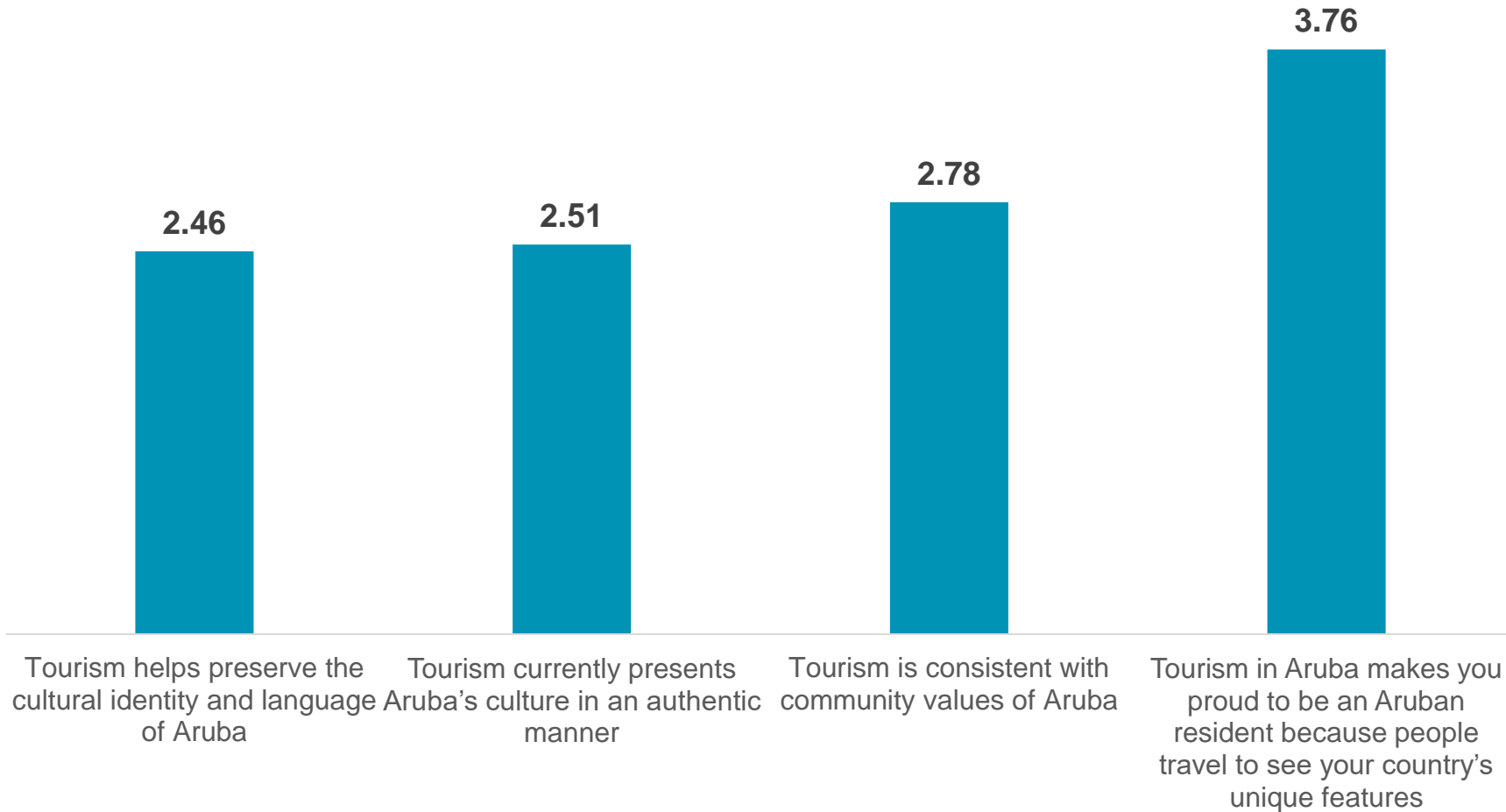


Overall, the scores remained more or less compared to 2018.

In 2018, Millennials support the statement that more tourist visiting Aruba improves the economy (3.7) and agree that tourism creates job opportunities for advancement (3.59).

However, they are not fully convinced that tourism creates many well-paying jobs for residents (3.41) nor that tourism increases the quality of life in Aruba (3.4)

# Culture Impact - Millennials

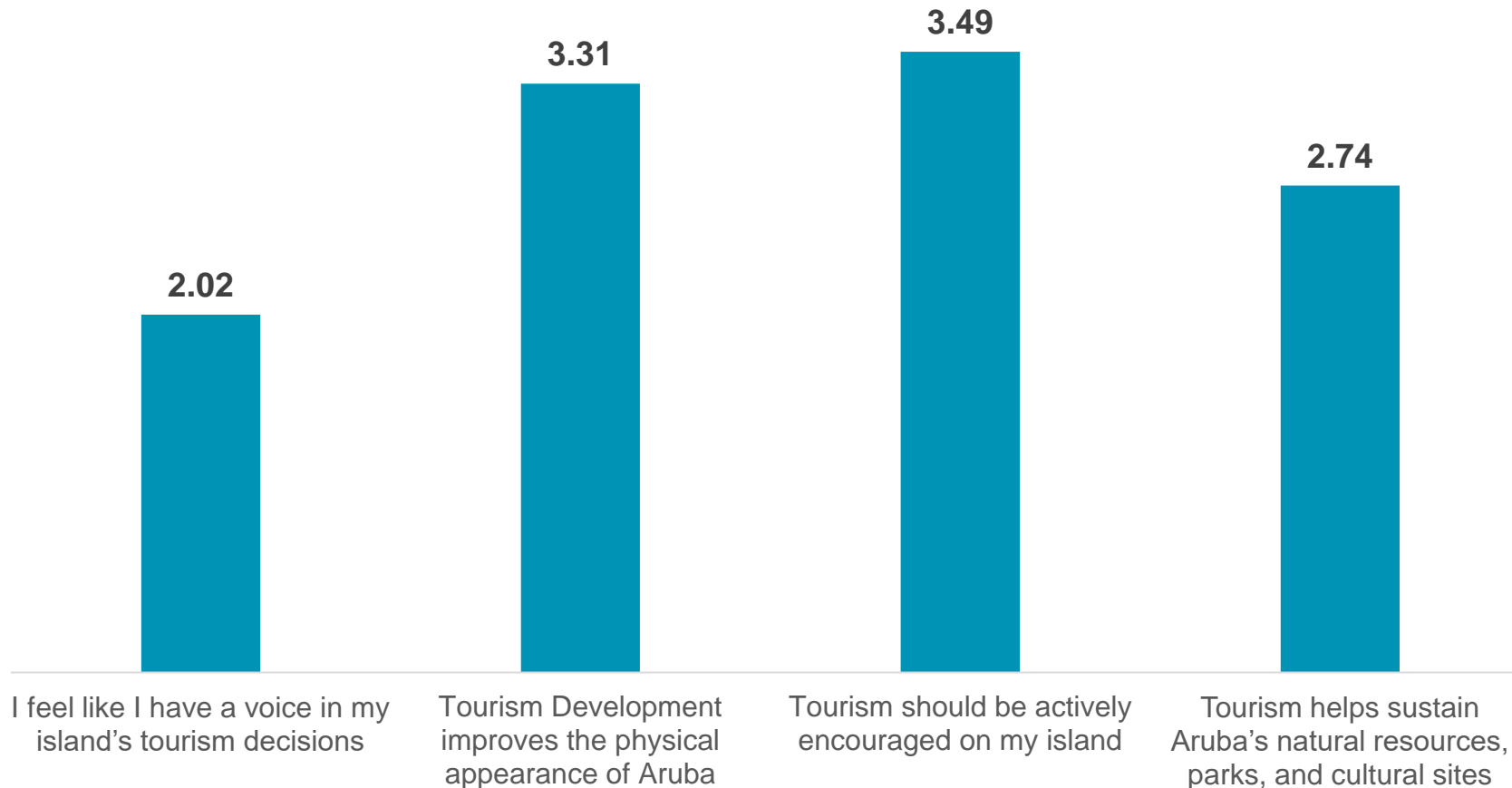


In 2018, this category decreased in scoring.

In 2018, the Millennials indicated to be proud to be an Aruba resident, due to the tourism aspect attributed to Aruba (4.0).

However, the Millennials indicated that currently tourism can present Aruba's culture in a more authentic manner (2.97), and they feel that tourism does not help preserve Aruba's cultural identity and language (2.88).

# Involvement Impact - Millennials

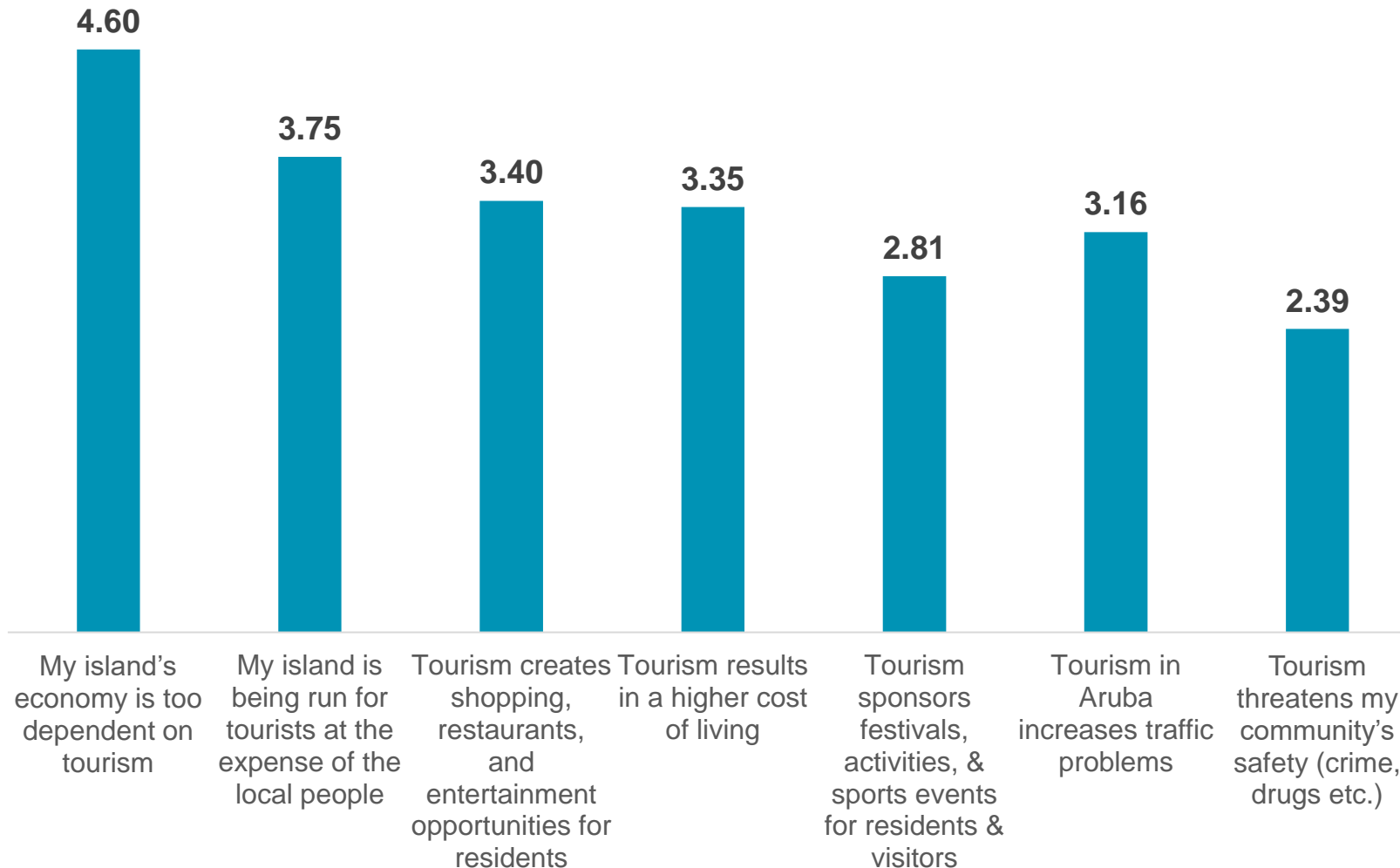


In 2018, Millennials indicated that tourism should be actively encouraged on the island.

However, they feel like they do not have a voice in Aruba's tourism decisions and are not entirely convinced that tourism provides residents with the opportunities to be involved.

Millennials indicated that tourism does improve the physical appearance of Aruba. They are not entirely convinced that tourism helps sustain Aruba's natural resources

# Tourism Spin-Off - Millennials



Overall, in 2018, the Millennials indicated that Aruba's economy is too dependent on tourism (4.21).

However, they do see positive benefits as they believe that tourism creates good shopping opportunities for locals and sponsors activities for locals and visitors (3.68).

In addition, they indicated that tourists are not running at the locals' expense. More importantly, they neither agree or disagreed that tourism leads to a higher cost of living, increases traffic problems, or threatens Aruba's safety.





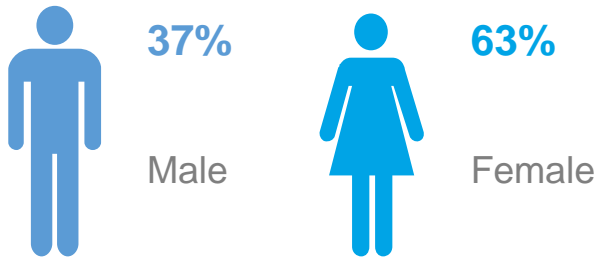
# Generation X

Age: 42 - 57

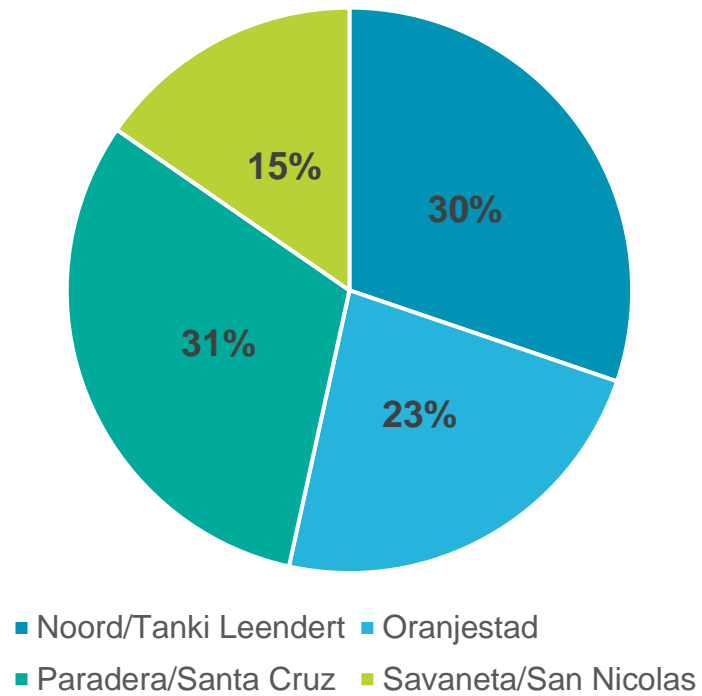


# Demographics Gen X

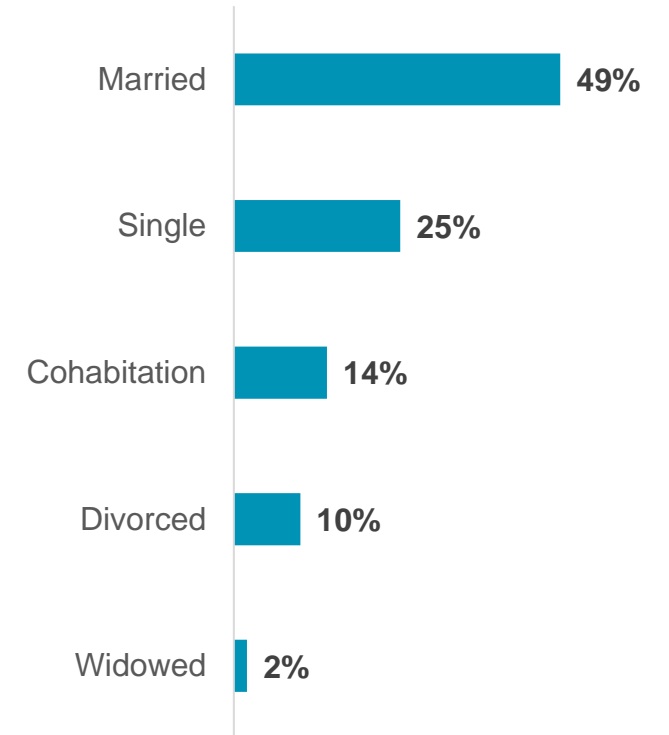
## Gender



## District

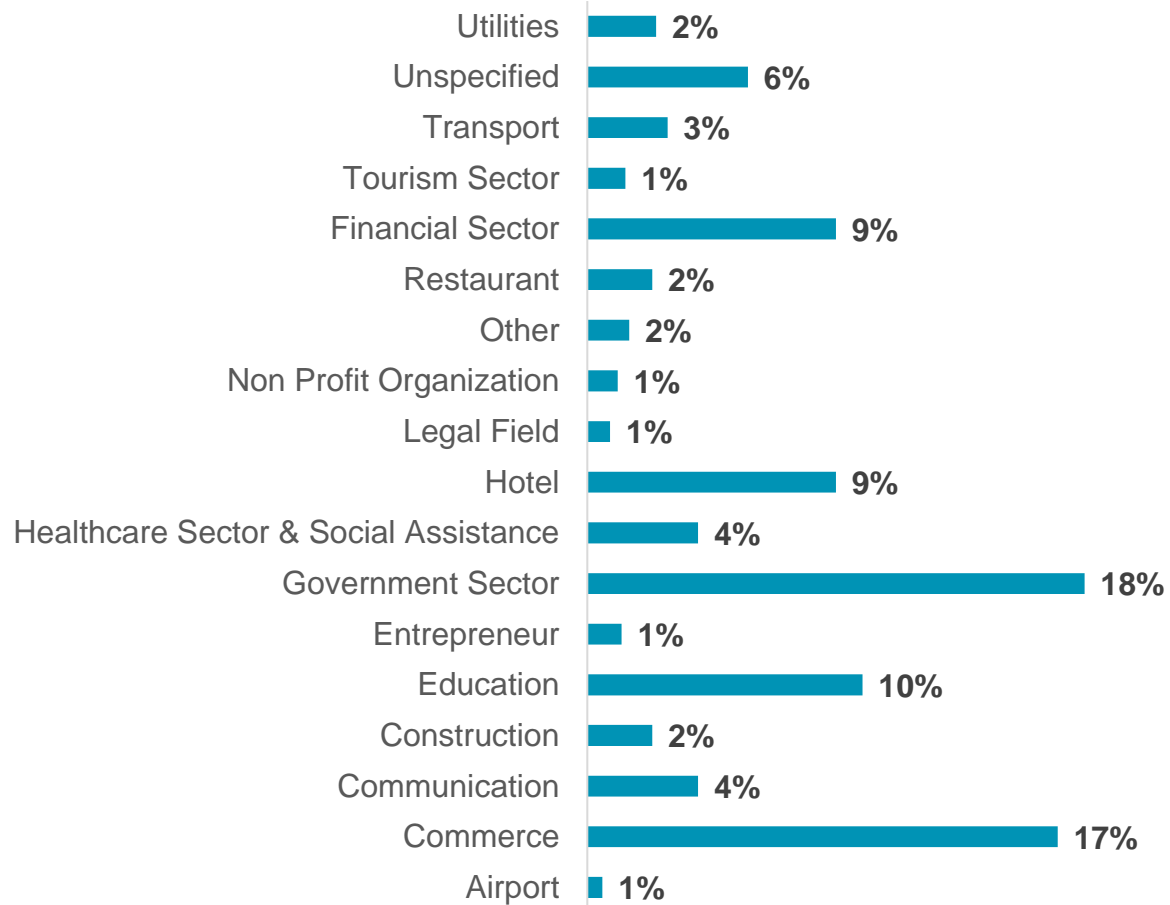


## Marital Status

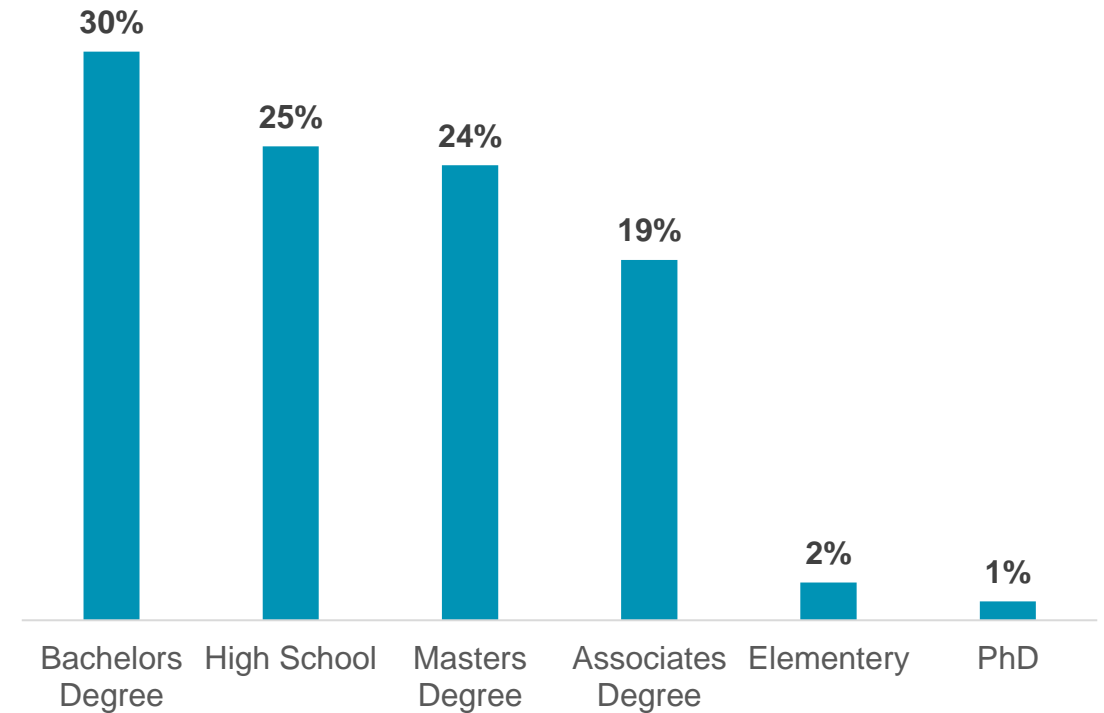


# Demographics Baby Boomers

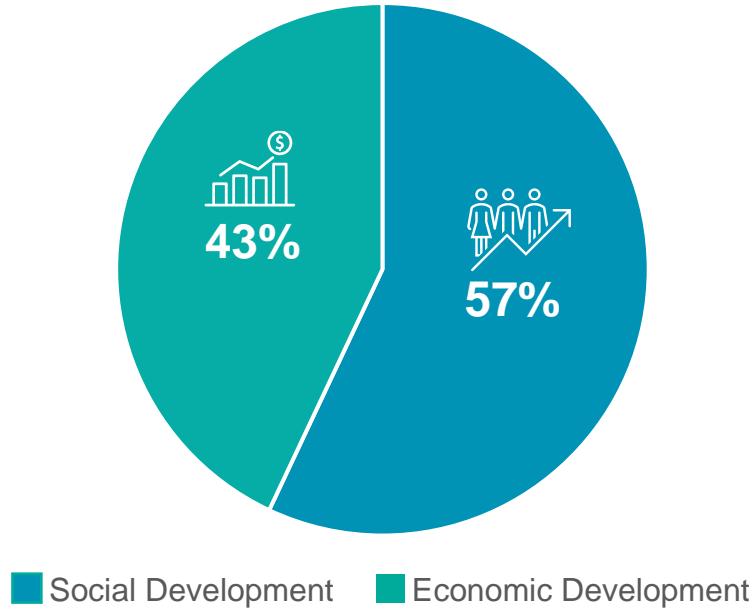
## Employment Sector



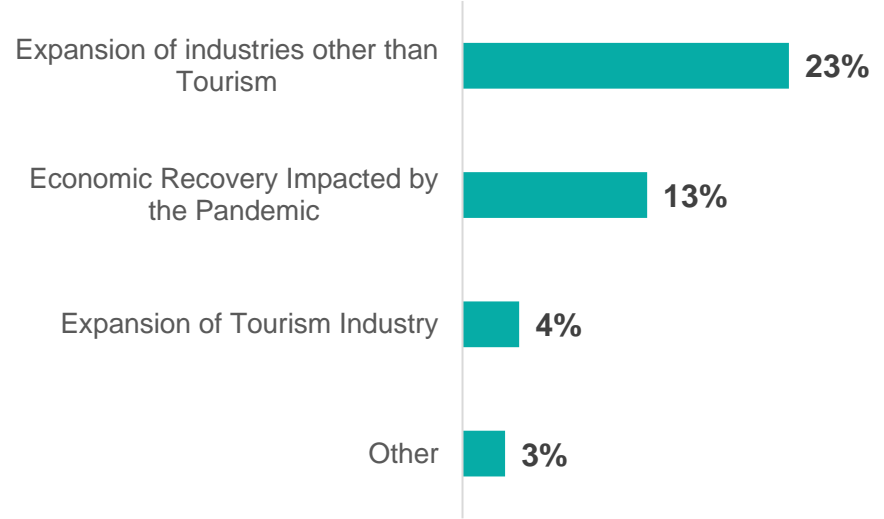
## Education Level



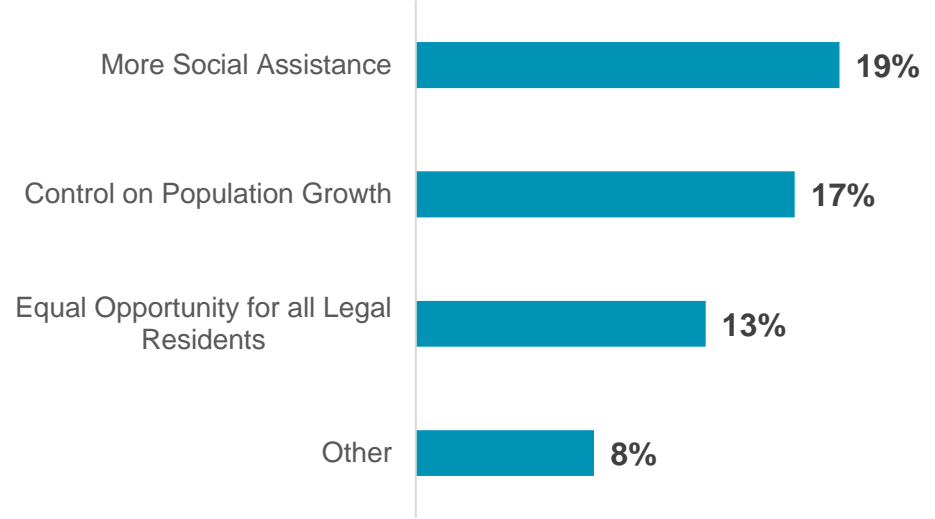
# Economic vs. Social



## Economic Development



## Social Development



# Tourism Impact – Gen X

3.7

How would you rate the overall impact tourism has on Aruba

2.2

How would you rate the impact on your buying power for following 12 months compared to before the pandemic.

3.6

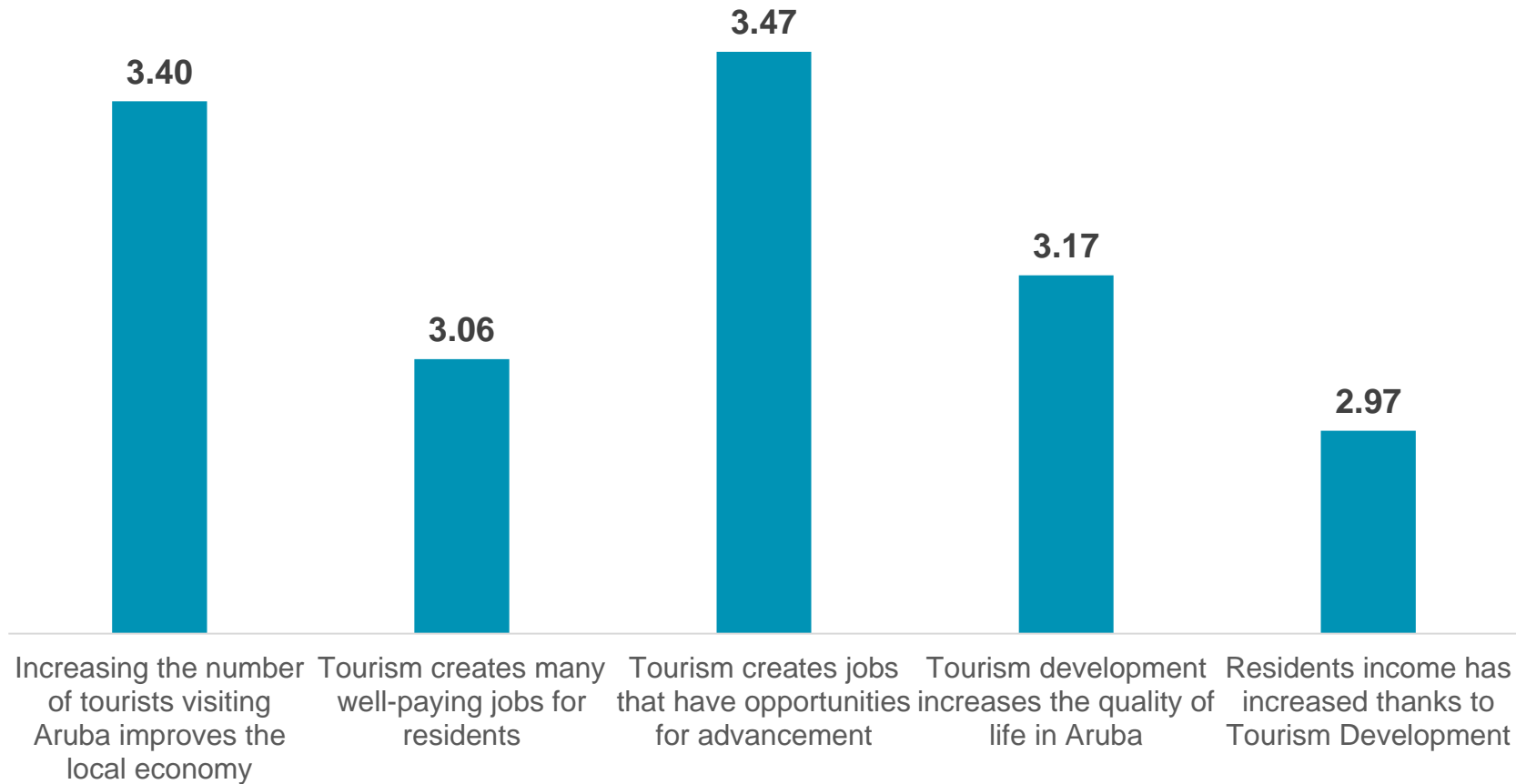
How would you rate the overall impact tourism has on you and your family

## Tourism Concerns:

1. Higher prices/cost of living
2. Damage to Nature & Environment
3. Locals do not Benefit from the Revenue that Tourism Generate

Compared to 2018 Gen X found the sentiment “Locals do not benefit from the revenue that tourism generates” more important in 2022.

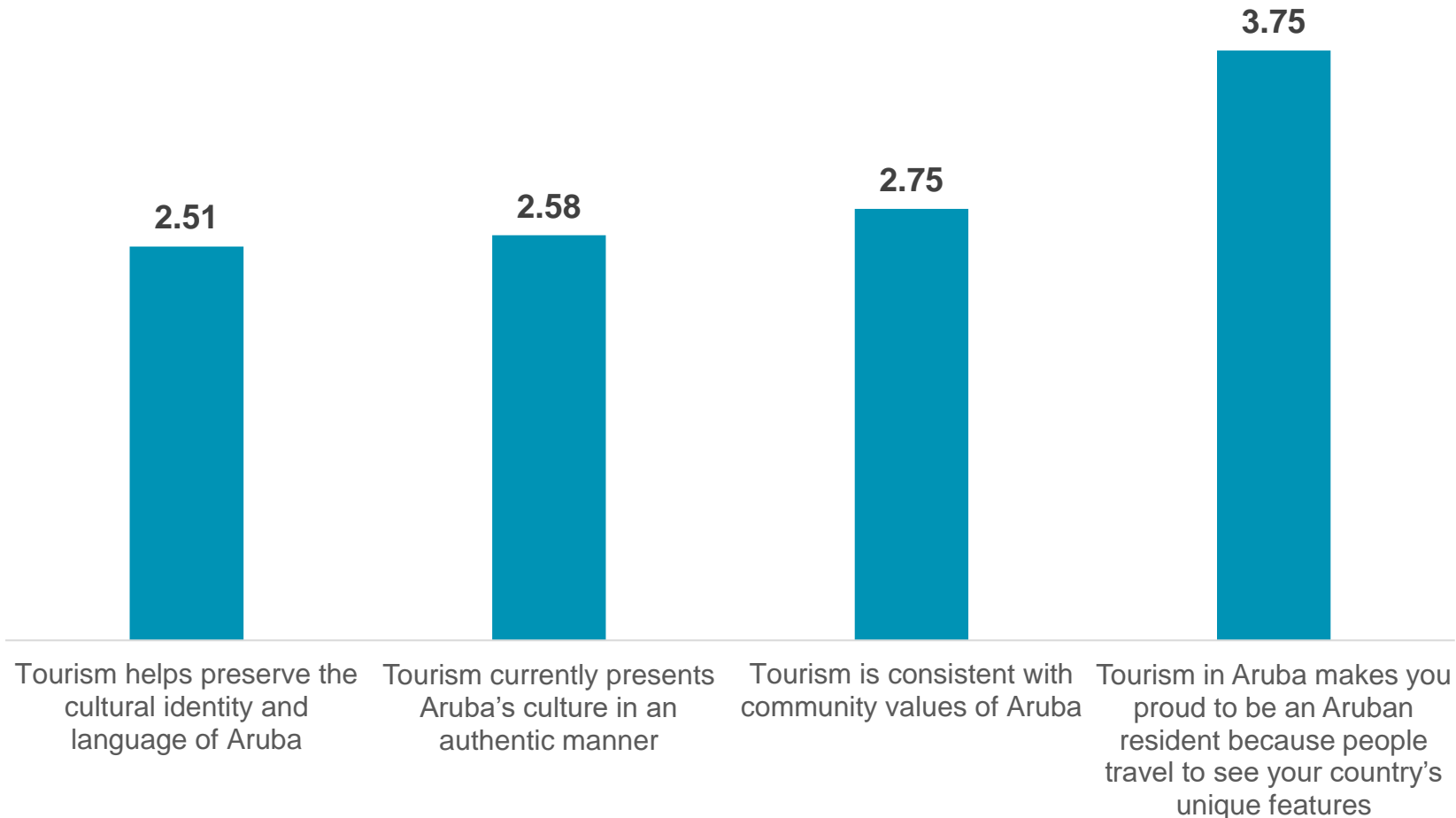
# Economy Impact – Gen X



In 2018, Like the Millennials, Gen X also supported the statement that more tourists visiting Aruba improved the economy (3.66) and agreed that tourism creates job opportunities for advancement (3.64).

However, like the Millennials, they are not entirely convinced that tourism creates many well-paying jobs for residents (3.27) nor that it increases the quality of life in Aruba (3.45).

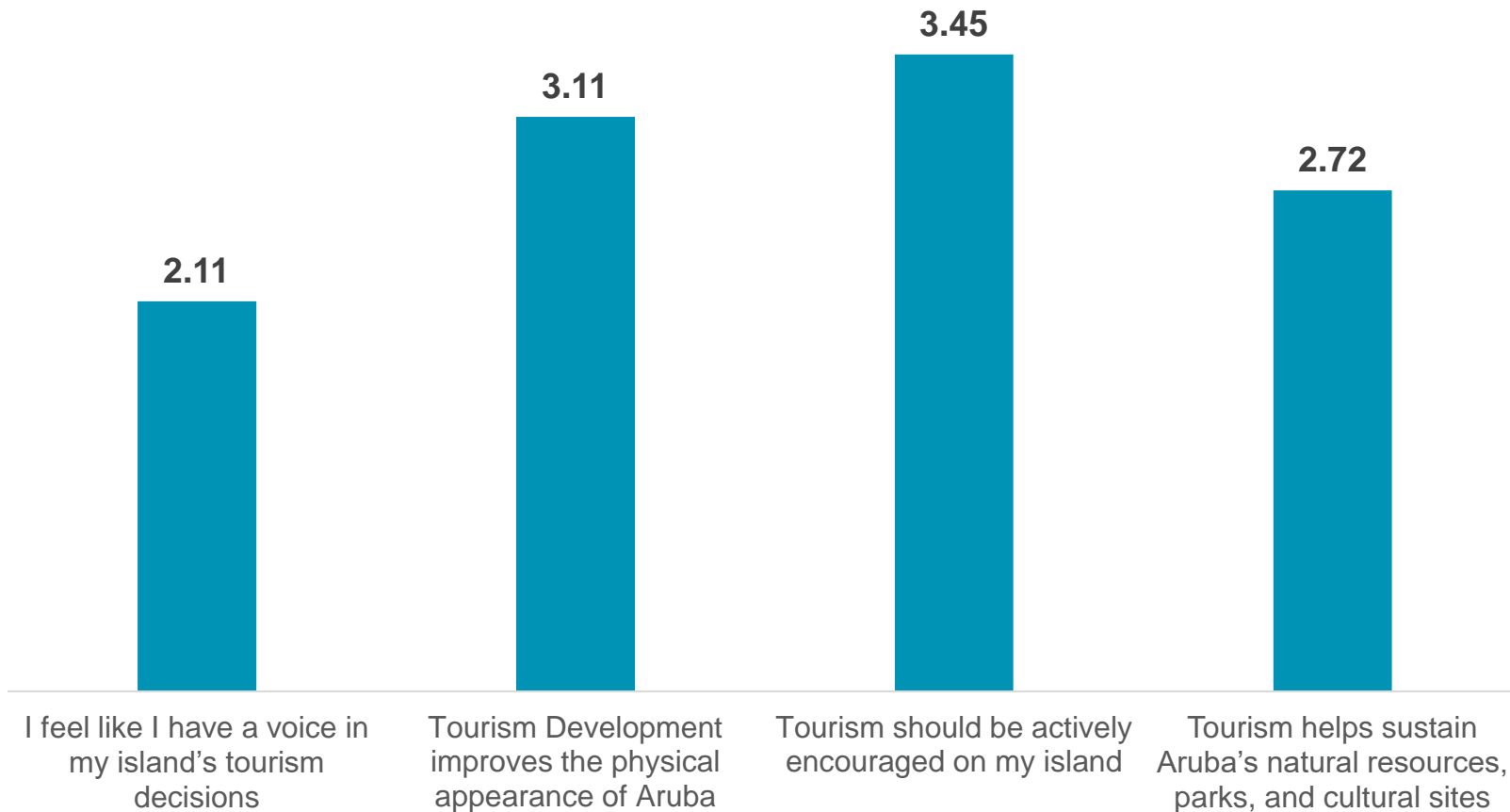
# Economy Impact – Gen X



In 2018, Like the Millennials, Gen X indicated to be proud to be an Aruba resident (3.99) due to the tourism aspect attributed to Aruba. However, unlike the Millennials, Gen X feels that tourism is not consistent with the community values of Aruba (2.93).

In addition, like the Millennials, Gen X indicated that currently tourism can present Aruba's culture in a more authentic manner (2.93), and they feel that tourism does not help preserve Aruba's cultural identity and language (2.93).

# Economy Impact – Gen X

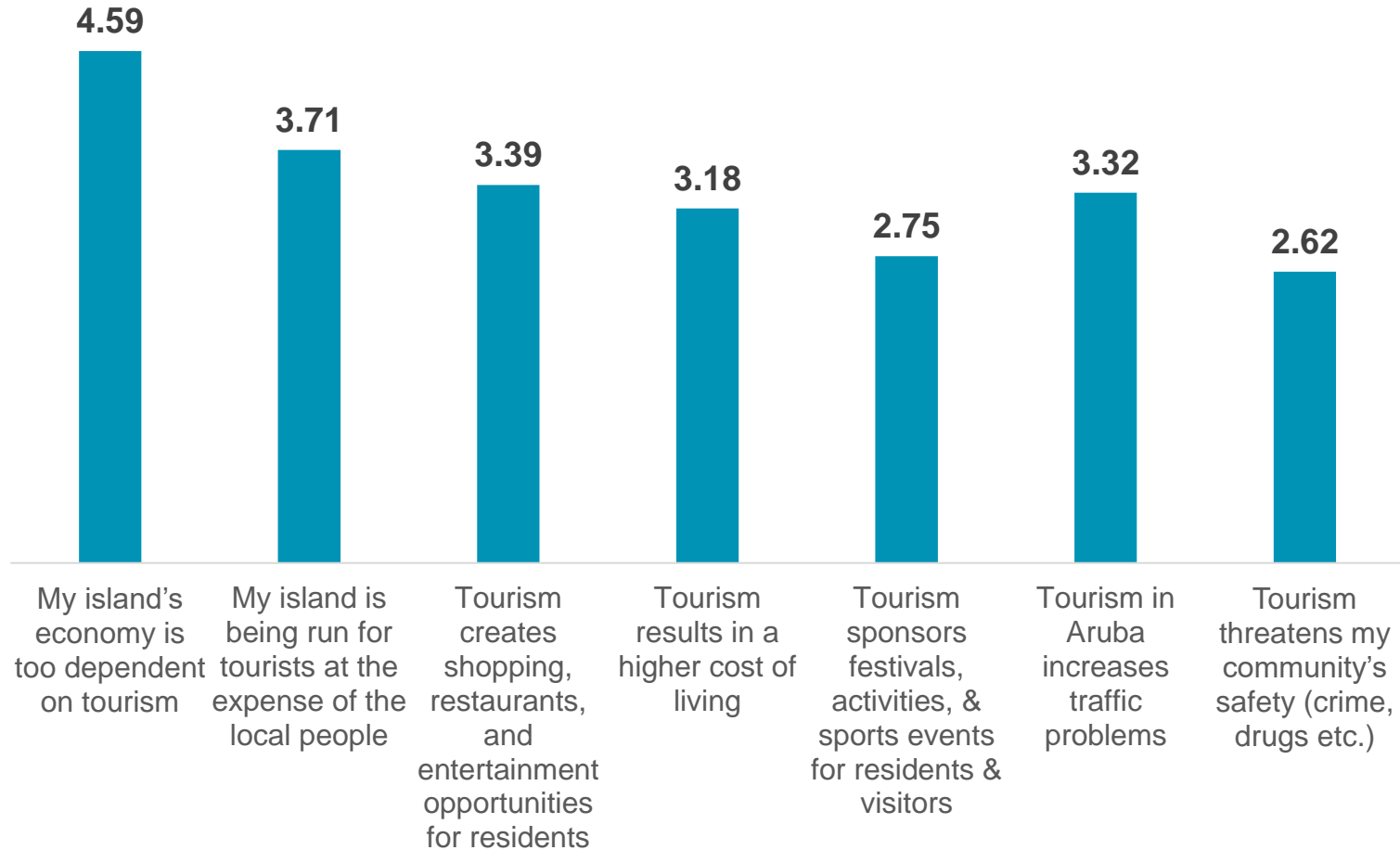


In 2018, like the Millennials, the Gen X indicated that tourism should be actively encouraged on island. However, they feel like they do not have voice in Aruba's tourism decisions, and are not fully convinced that tourism provides residents with the opportunities to be involved

Millennials indicated that tourism does improve the physical appearance of Aruba. They are not entirely convinced that tourism helps sustain Aruba's natural resources. Like the Millennials, the Gen X indicated that tourism does improve the physical appearance of Aruba. However, they are not fully convinced that tourism helps sustain Aruba's natural resources



# Tourism Spin-Off – Gen X



In 2018, overall, like the Millennials, the Gen X indicated that Aruba's economy is too dependent on tourism.

However, they do see positive benefits as they believe that tourism creates good shopping opportunities. In addition, they indicated that tourism is not ran at the expense of locals.

More importantly they neither agreed or disagreed that tourism leads to higher cost of living, nor increase traffic problems nor threaten Aruba's safety. However, unlike the Millennials, the Gen X do not agree that tourism sponsor festivals and activities for locals and visitors.



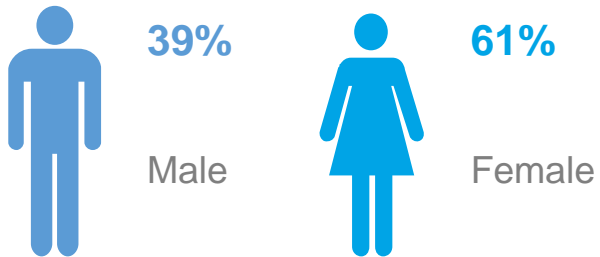
# Baby Boomers

Age: 58 and older

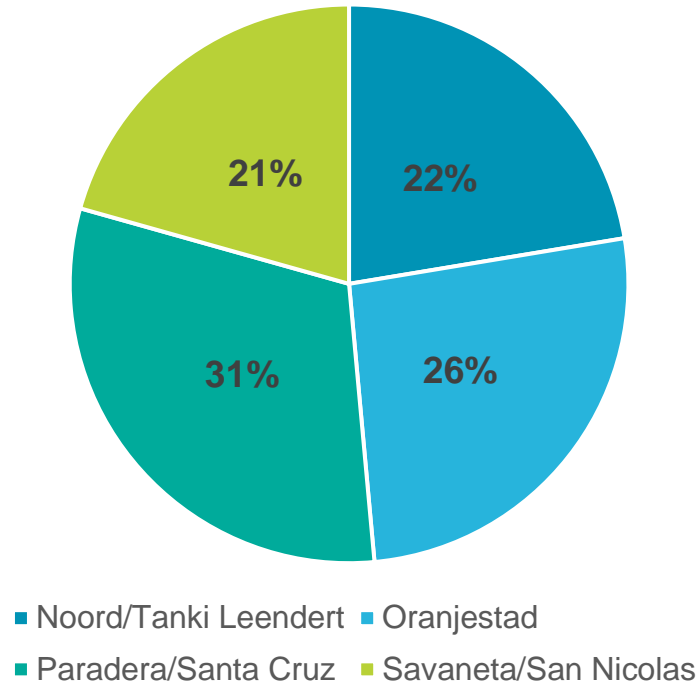


# Demographics Baby Boomers

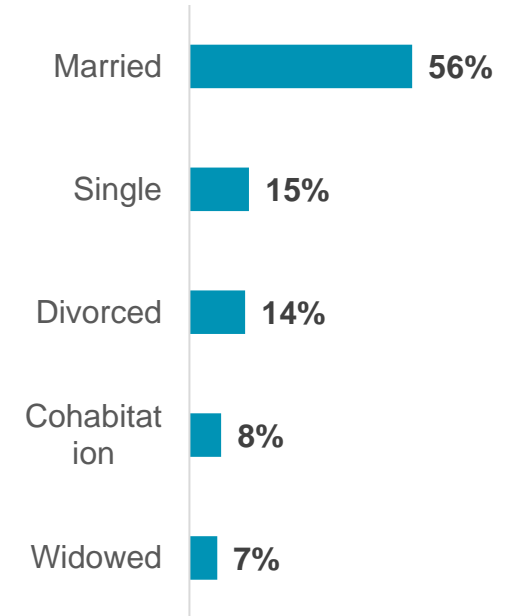
## Gender



## District

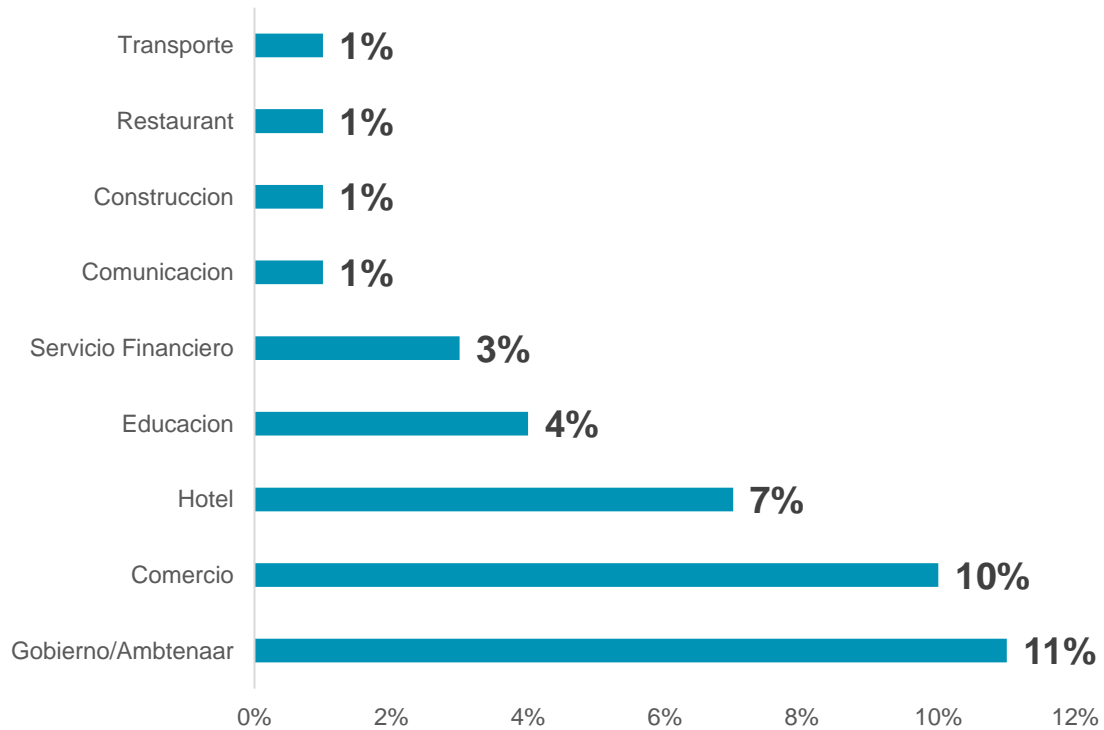


## Marital Status

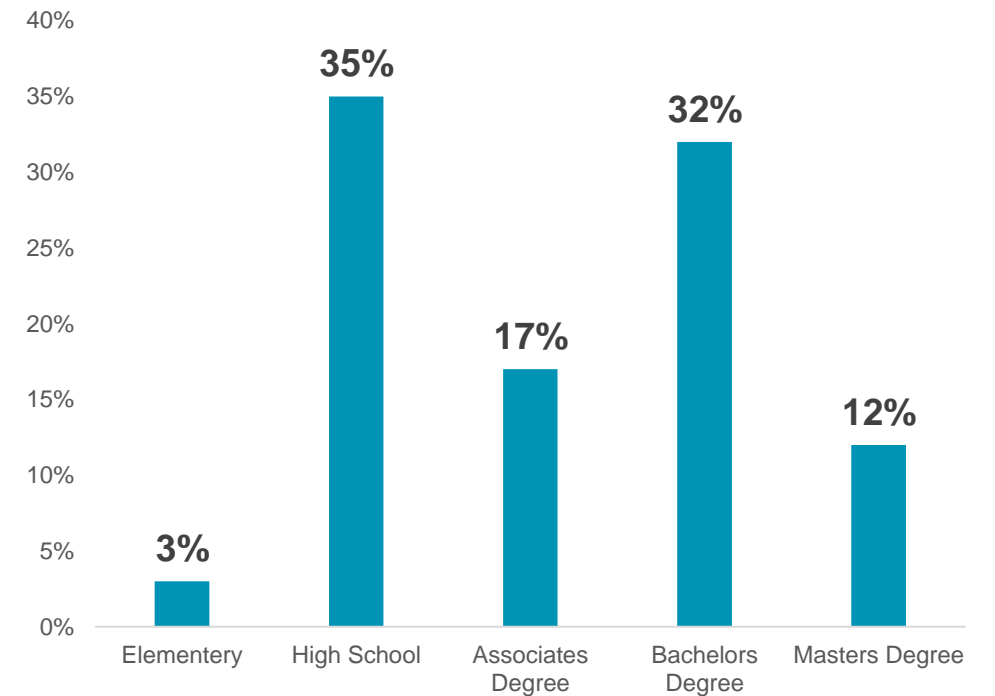


# Demographics Baby Boomers

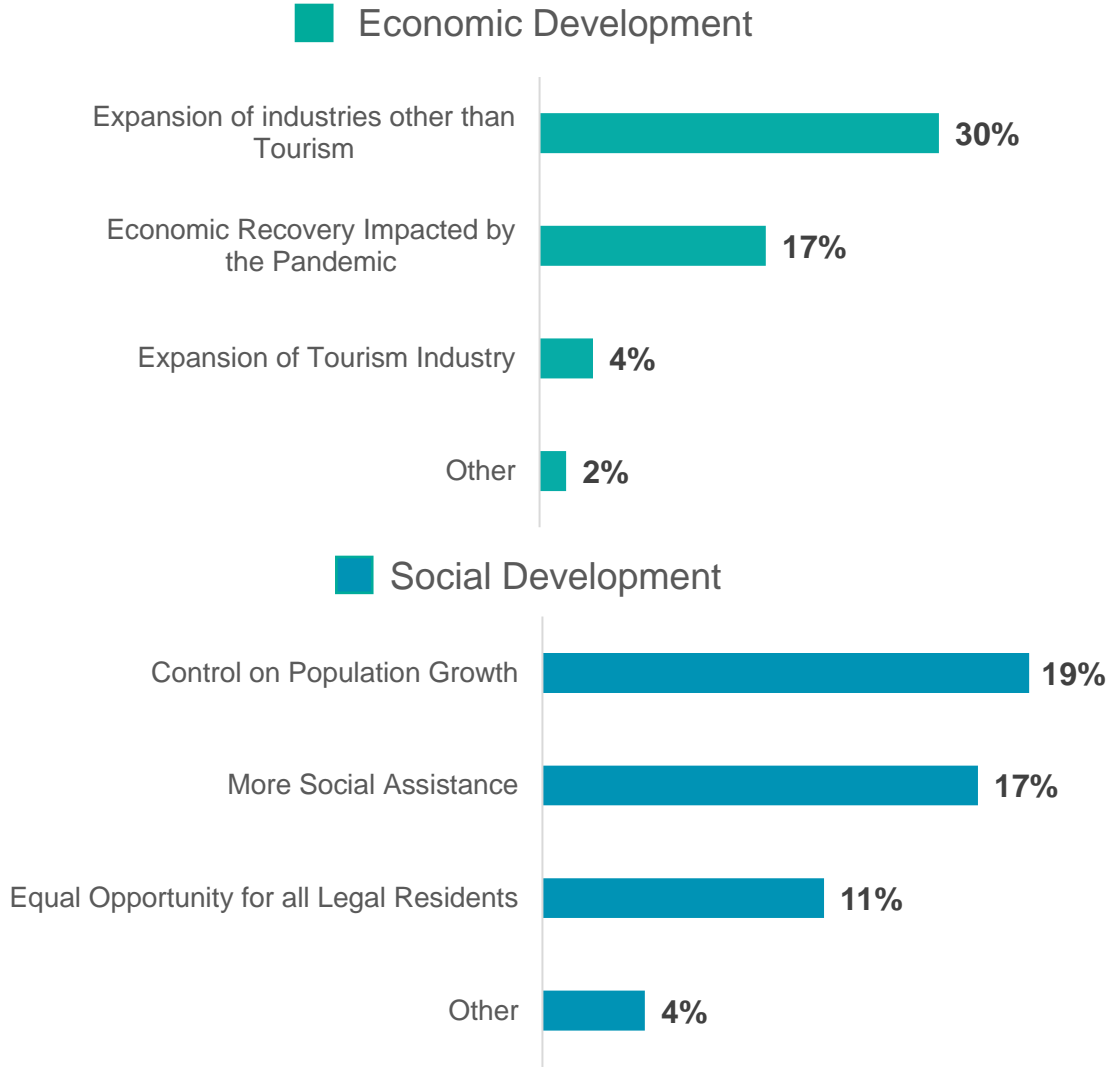
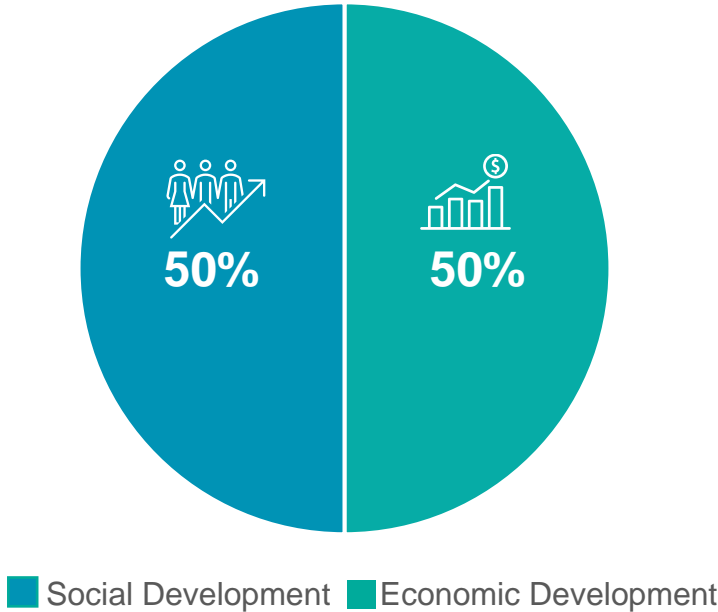
## Employment



## Education Level



# Economic vs. Social



# Tourism Impact – Baby Boomers



How would you rate the overall impact tourism has on Aruba



How would you rate the impact on your buying power for following 12 months compared to before the pandemic.



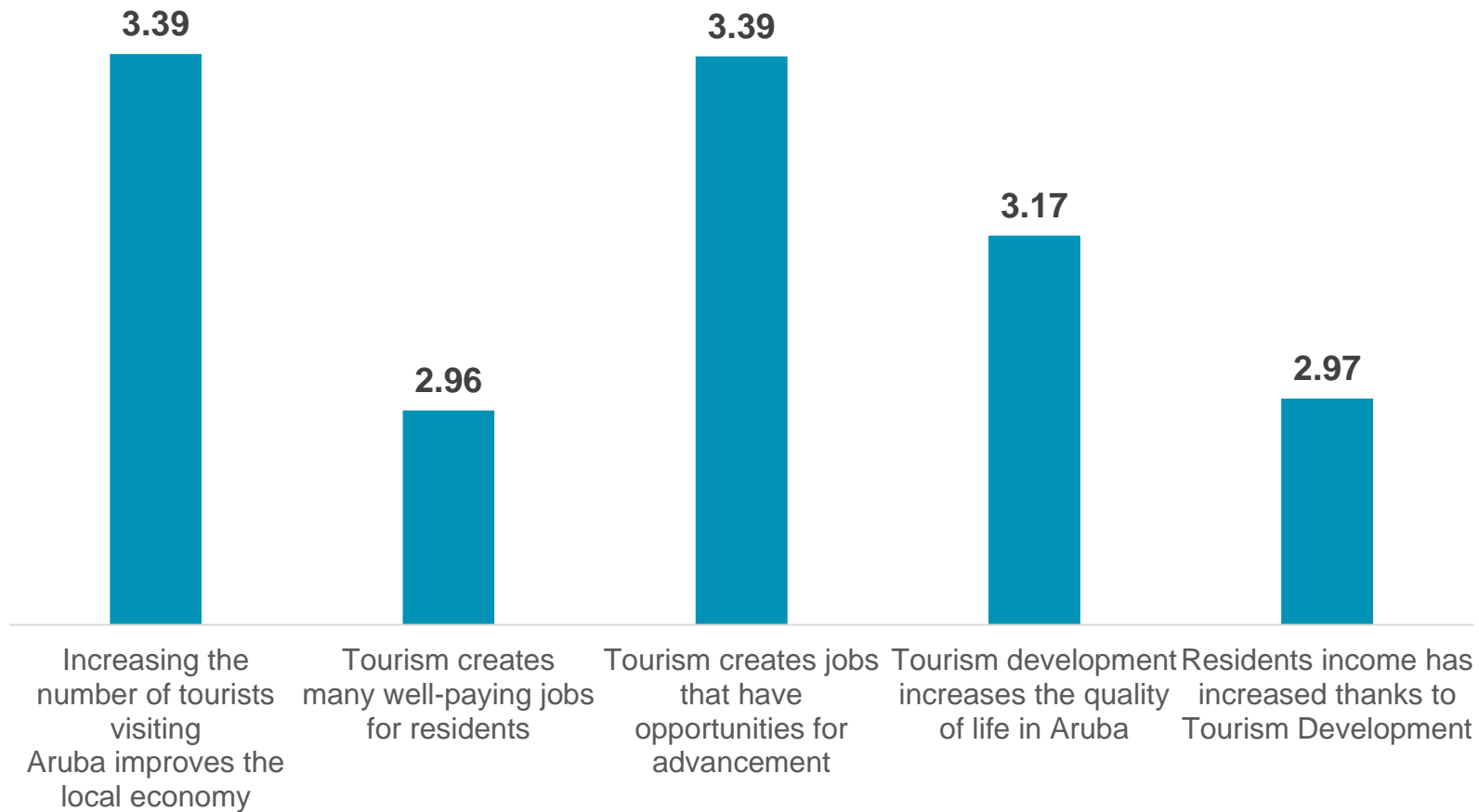
How would you rate the overall impact tourism has on you and your family

## Tourism Concerns:

1. Higher prices/cost of living
2. Damage to Nature & Environment Damage to Nature & Environment
3. Locals do not Benefit from the Revenue that Tourism Generate

Compared to 2018 Baby Boomers found the sentiment “Locals do not benefit from the revenue that tourism generate” more important in 2022.

# Economy Impact – Baby Boomers

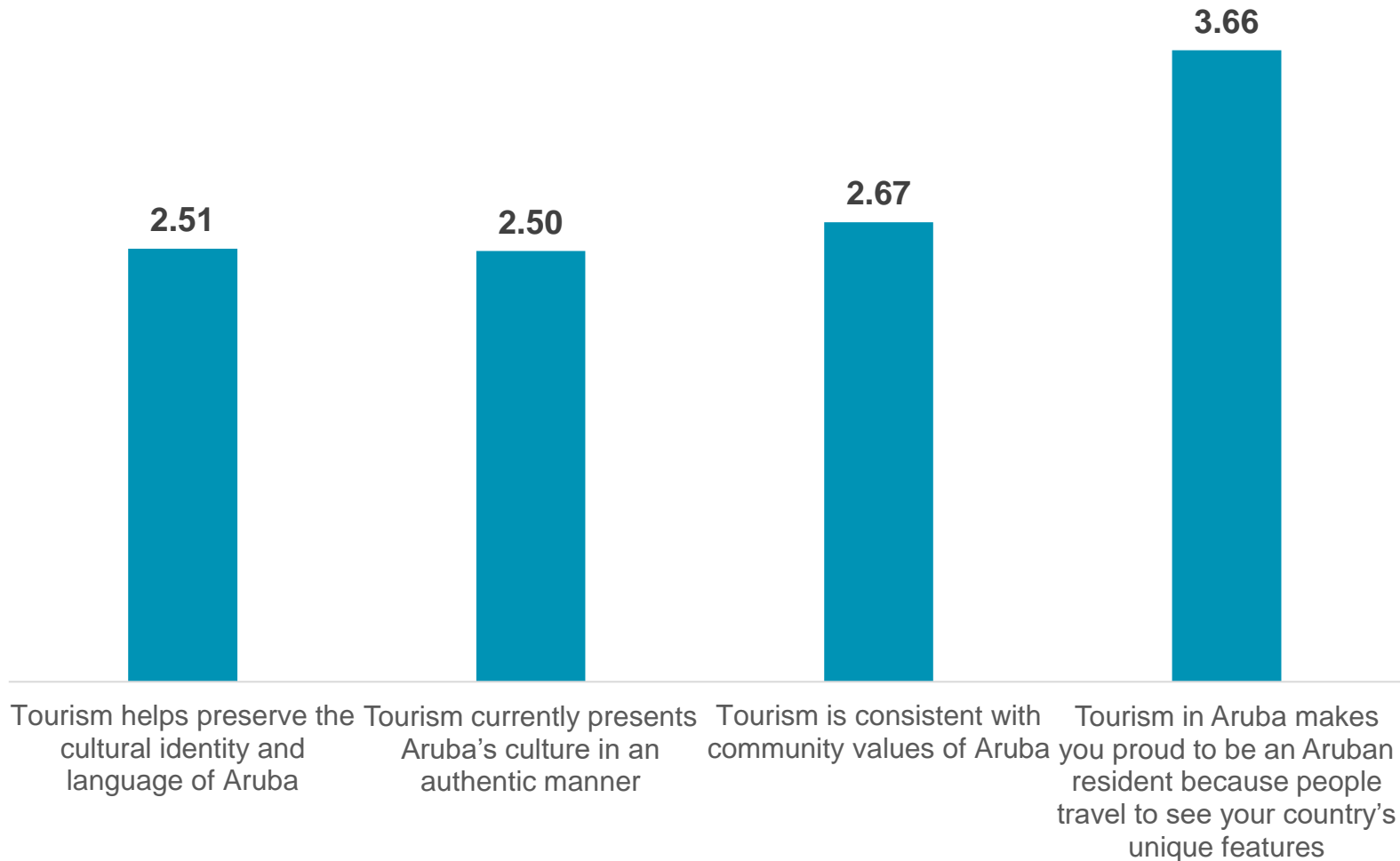


In 2018, like the Millennials and Gen X- the Baby Boomers support the statement that more tourist visiting Aruba improves the economy and agree that tourism creates job opportunities for advancement.

However, unlike the Millennials and Gen X, the Baby Boomers agree that tourism development increases the quality of life in Aruba, yet like the Millennials and Gen X they are not fully convince that tourism creates many well-paying jobs for residents.



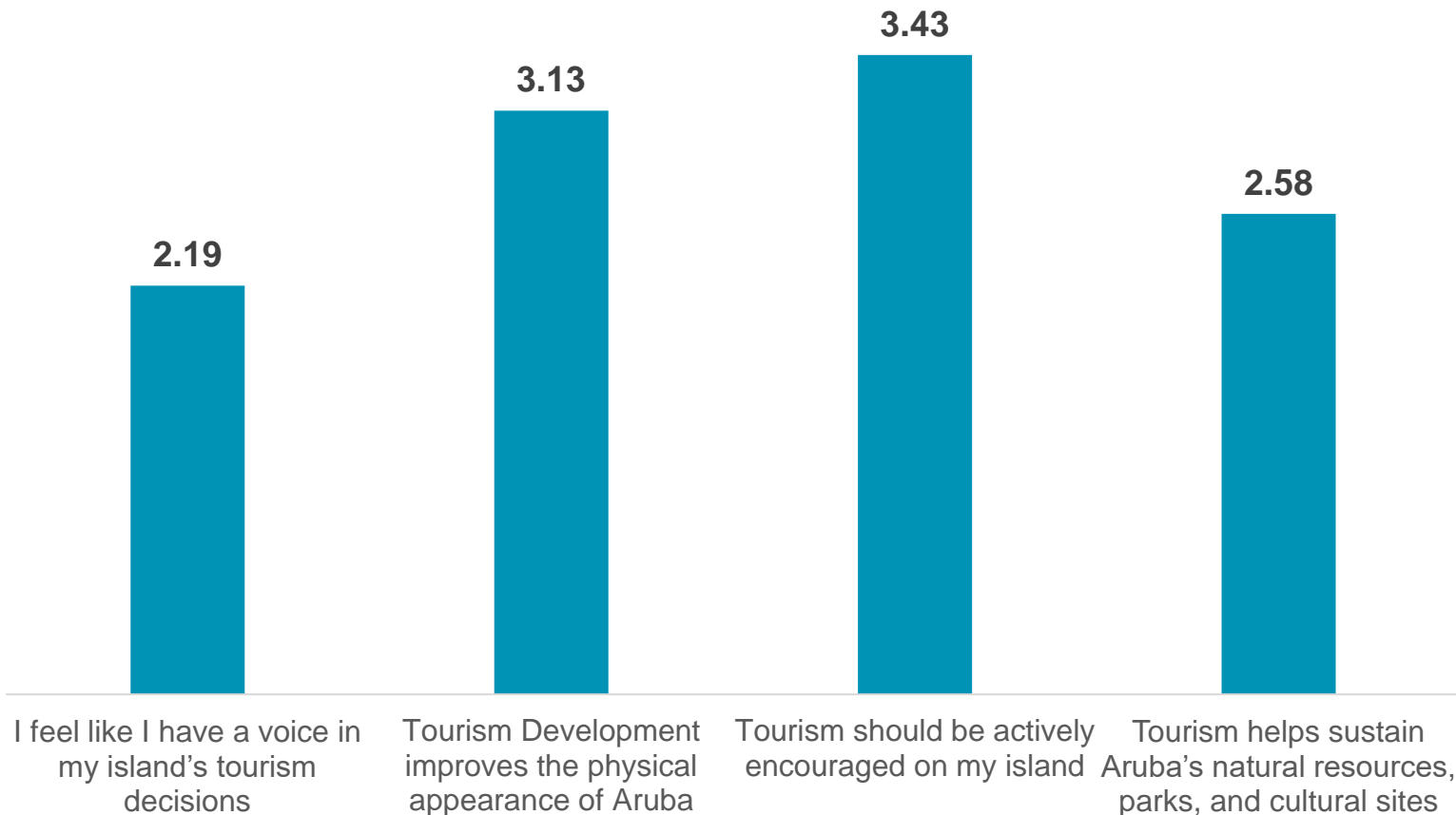
# Culture Impact – Baby Boomers



In 2018, like the Millennials, and Gen X the Baby Boomers indicated to be proud to be an Aruba resident, due to tourism aspect attributed to Aruba, among the three the Baby Boomers share this feeling more strongly.

However, like the Millennials, and Gen X the Baby Boomers indicated that currently tourism can present Aruba's culture in a more authentic manner, and they feel that tourism does not help preserve Aruba's cultural identity and language.

# Involvement Impact – Baby Boomers

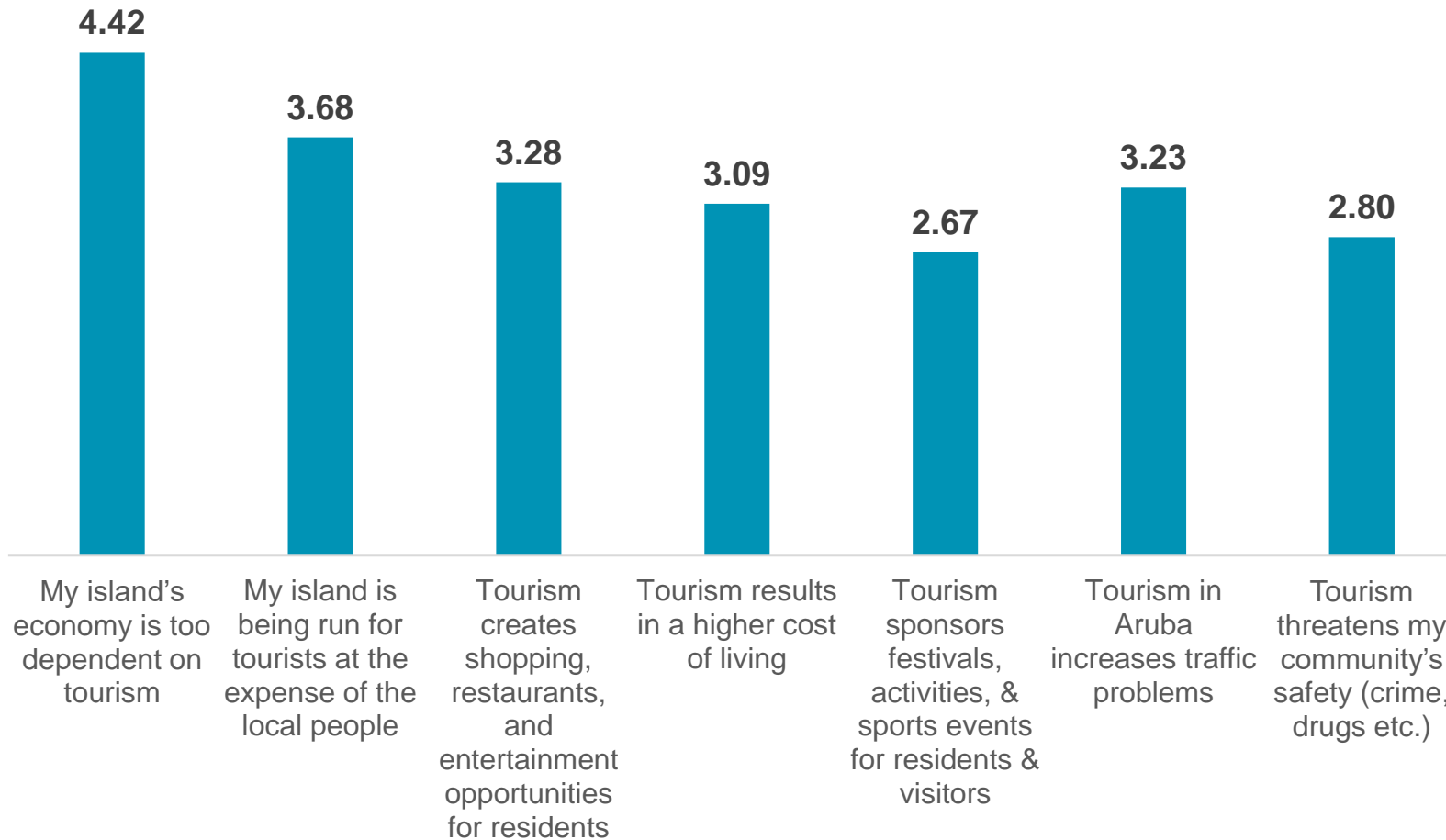


In 2018, similar to the Millennials, and Gen X the Baby Boomers indicated that tourism should be actively encouraged on island.

However, they feel like they do not have voice in Aruba's tourism decisions, and are not fully convinced that tourism provides residents with the opportunities to be involved.

Like the Millennials and Gen X, the Baby Boomers indicated that tourism does improve the physical appearance of Aruba. However, they are not fully convinced that tourism helps sustain Aruba's natural resources

# Tourism Spin-Off – Baby Boomers



In 2018, similar to the Millennials, and the Gen X, the Baby Boomers indicated that Aruba's economy is too dependent on tourism. However, they do see positive benefits as they believe that tourism creates good shopping opportunities. In addition, like the Gen X, the Baby Boomers

indicated that tourism is not run at the expense of locals. More importantly they neither agreed or disagreed that tourism leads to higher cost of living, nor increase traffic problems nor threaten Aruba's safety. However, unlike the Millennials, and like the Gen X, the Baby Boomers do not agree that tourism sponsors festivals and activities for locals and visitors.



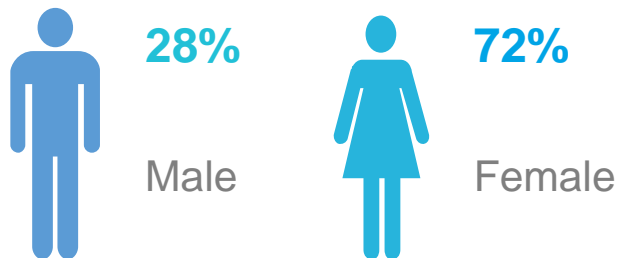


# Young Professionals

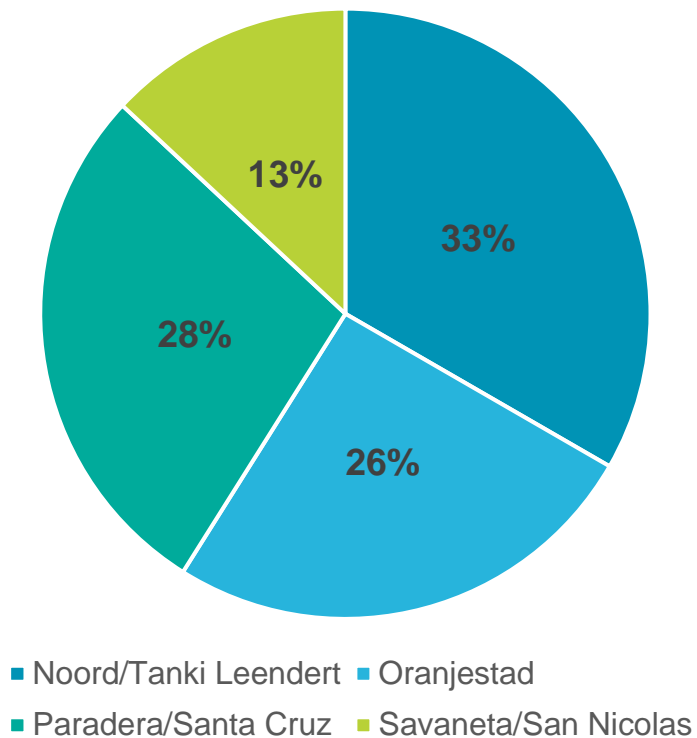
Age 21-35, Employed with a Bachelor's Degree or higher

# Demographics Young Professionals

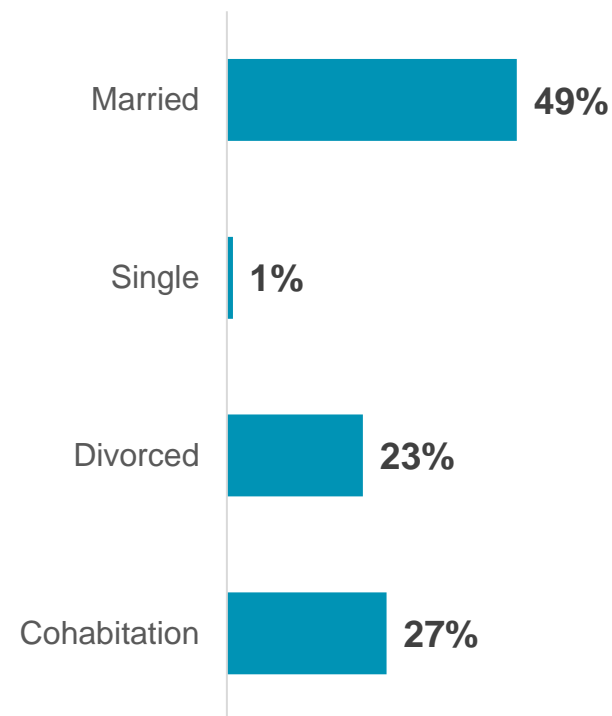
Gender



District



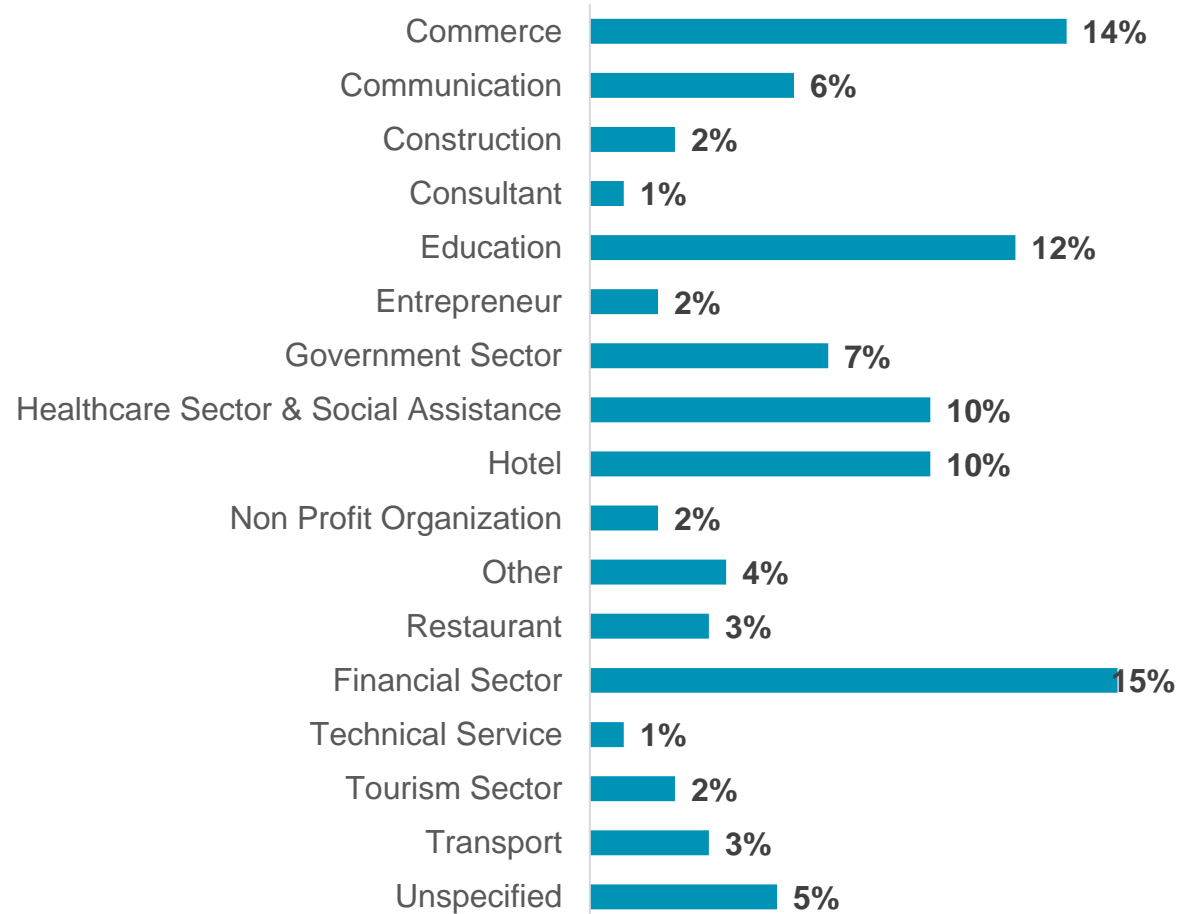
Marital Status



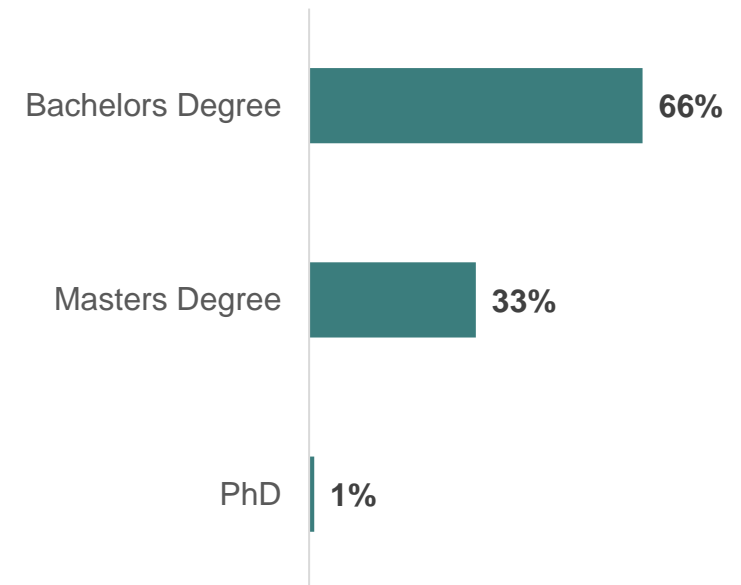
# Demographics

## Young Professionals

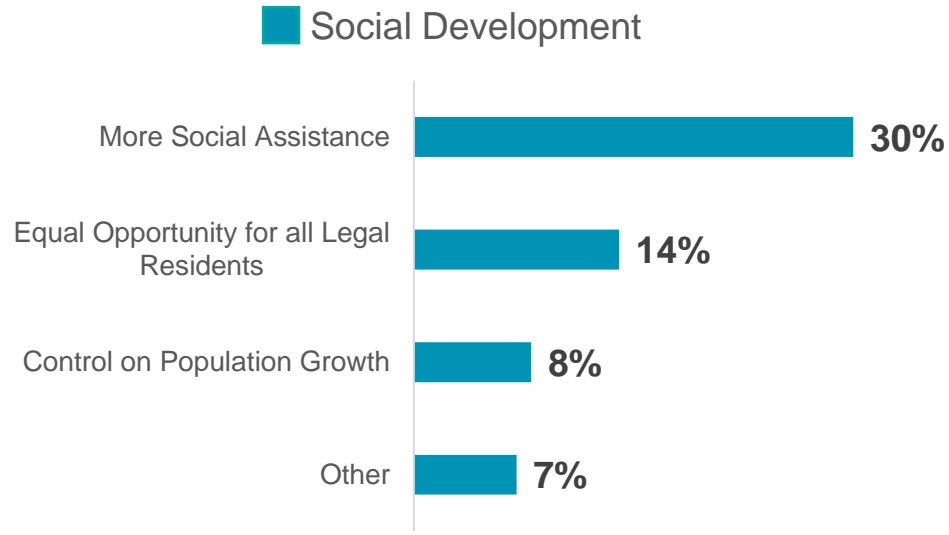
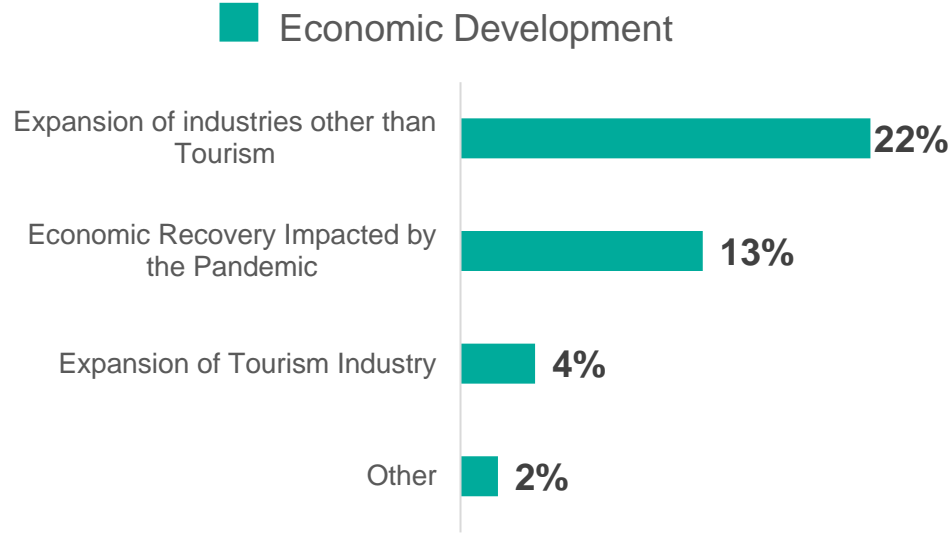
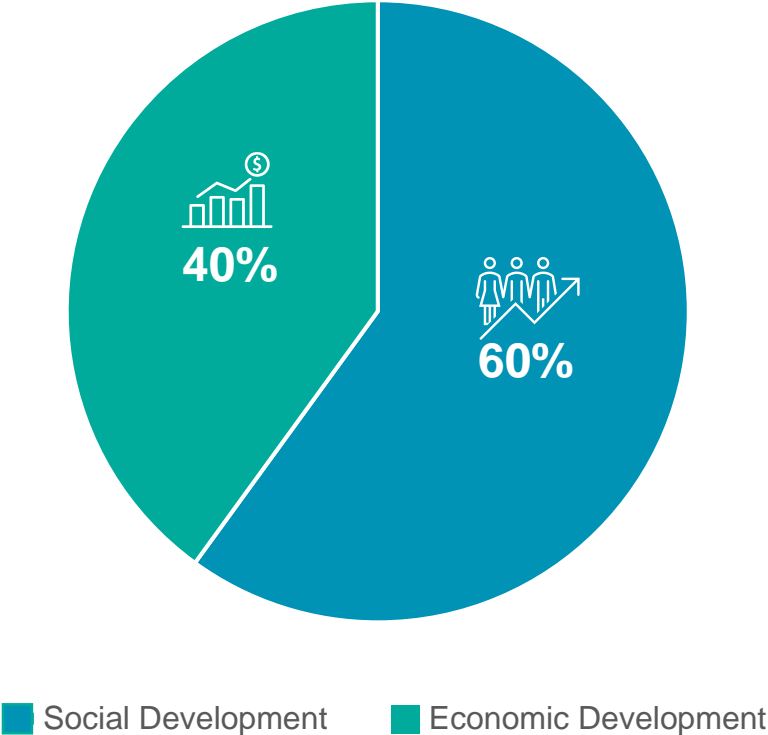
### Employment Sector



### Education Level



# Economic vs. Social





# Demographics – Young Professionals



How would you rate the overall impact tourism has on Aruba?



How would you rate the impact on your buying power for the following 12 months compared to before the pandemic?



How would you rate the overall impact tourism has on you and your family?

## Tourism Concerns:

1. Higher price/cost of living 76%
2. Damage to Nature & Environment 46%
3. High Housing Costs for Locals 35%

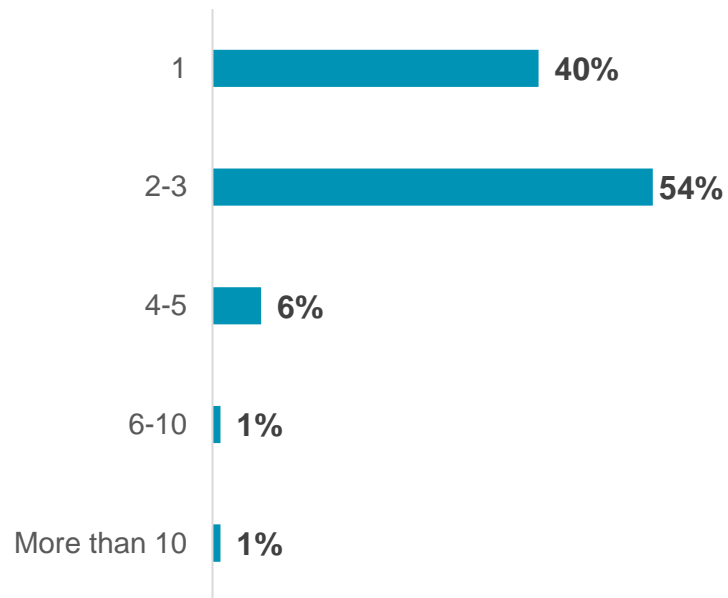
A woman with dark hair tied back, wearing a black floral swimsuit and a beaded necklace, sits on a wooden beach chair. She is smiling and looking down at an open book she is holding. To her left, a woven basket with a blue cloth draped over it sits on the sand. In the foreground, several colorful beach toys (red, yellow, orange, green) are scattered on the sand. In the background, two children are playing in the shallow water. One child, wearing a blue long-sleeved shirt, is crouching and playing with the sand. The other child, wearing a pink and purple swimsuit, is also crouching and playing with the sand. The beach is sandy and the water is clear. In the distance, there are several thatched umbrellas and a building. The sky is blue with scattered white clouds.

# Single Mothers

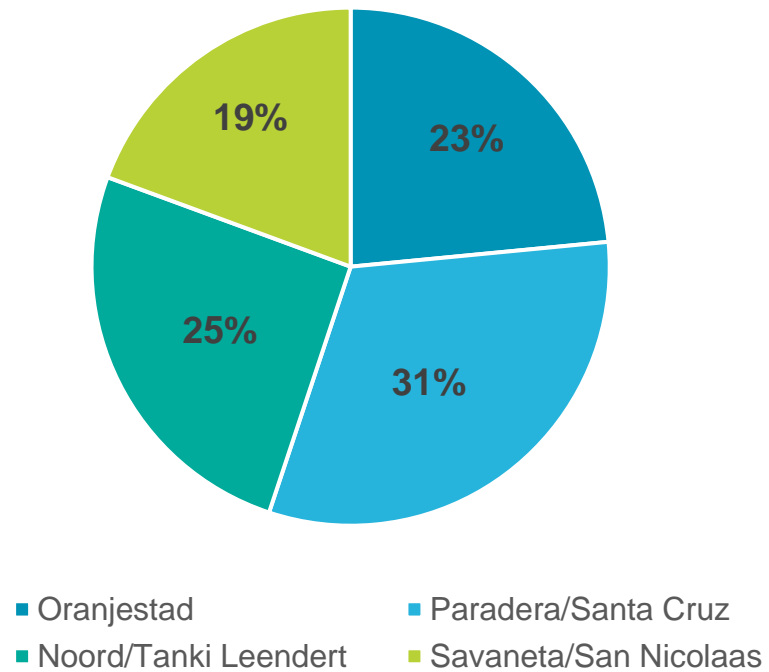
Single Female with Children

# Demographics Single Female

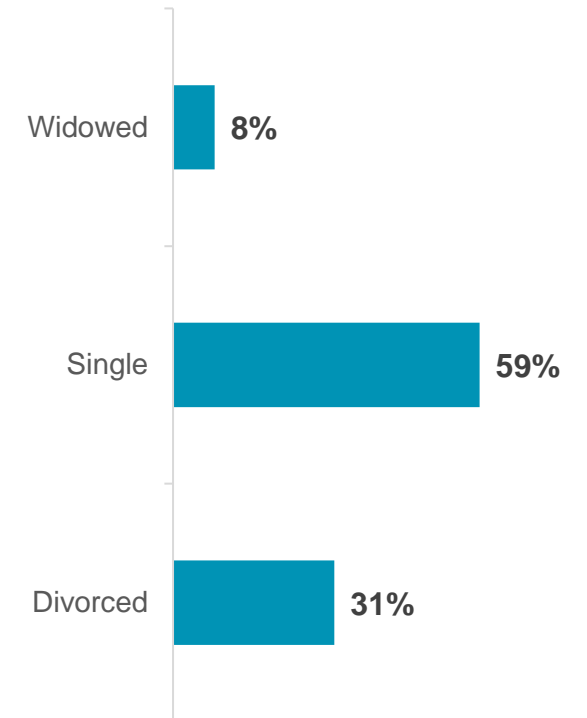
## Number of Children



## District

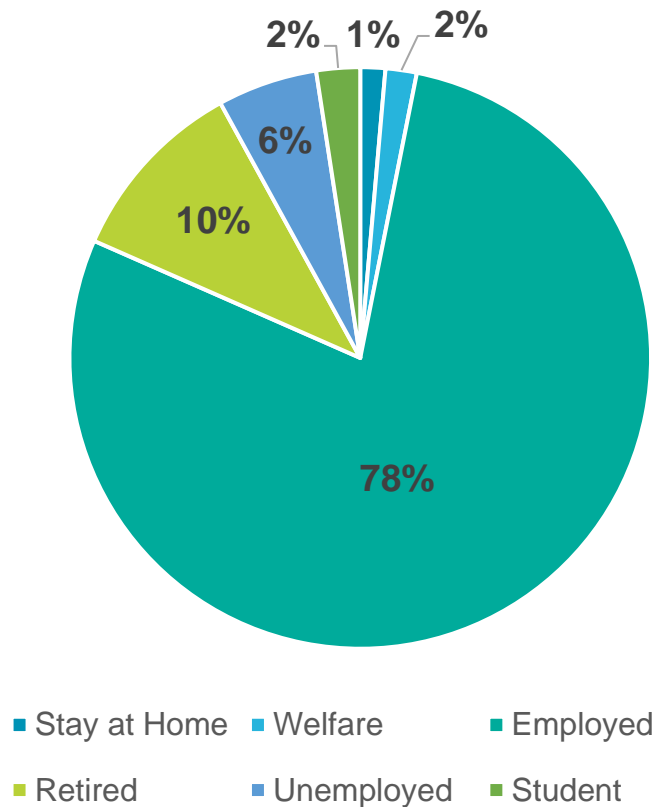


## Marital Status

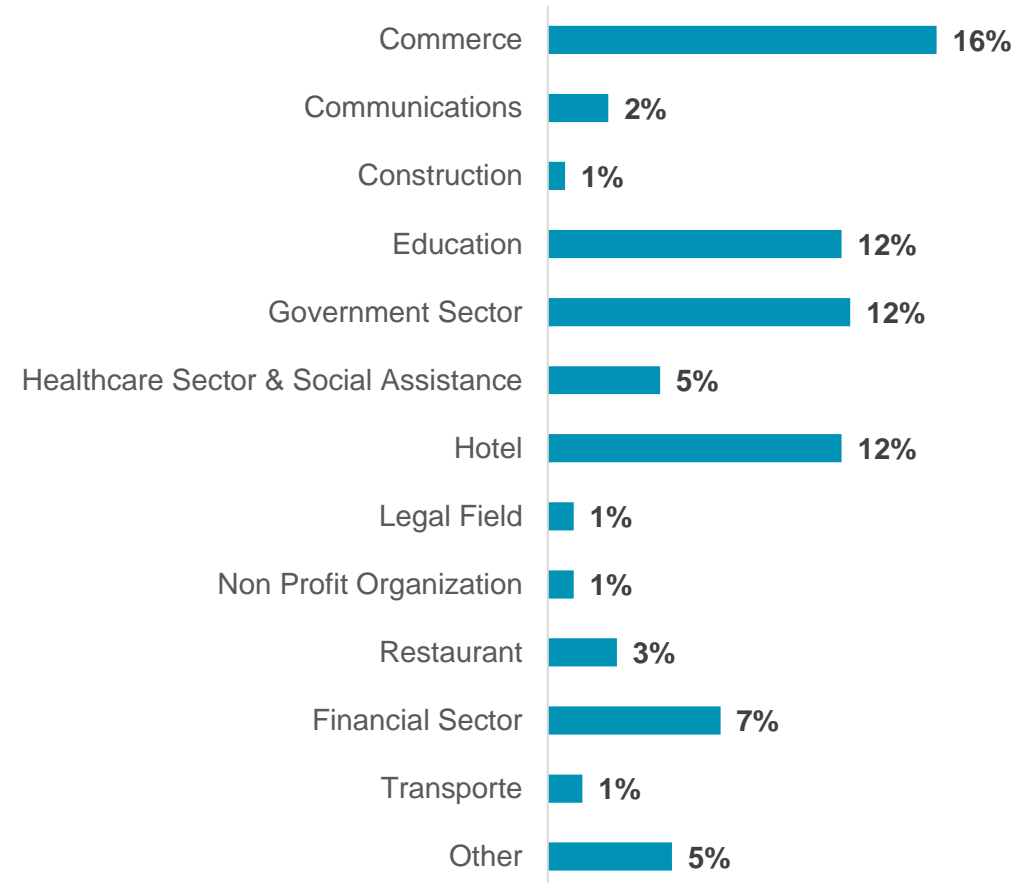


# Demographics Single Female

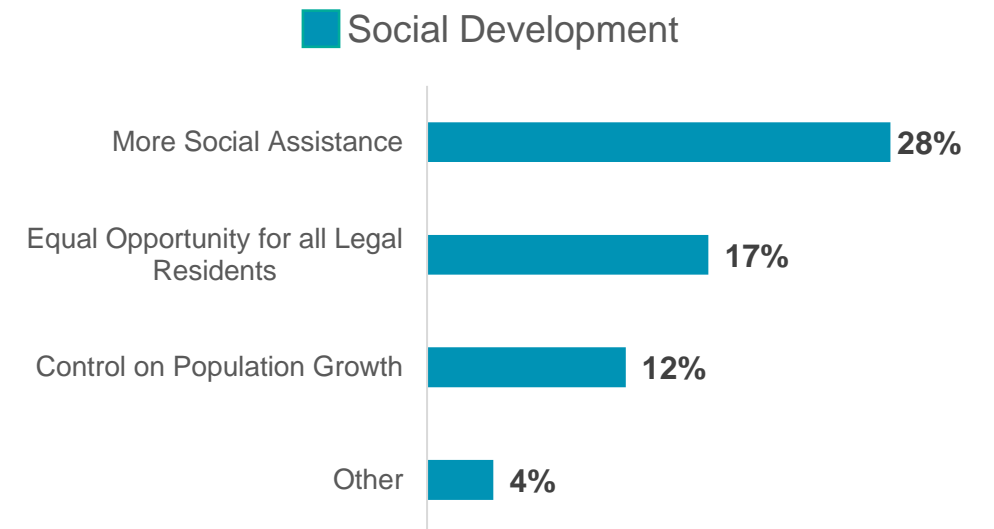
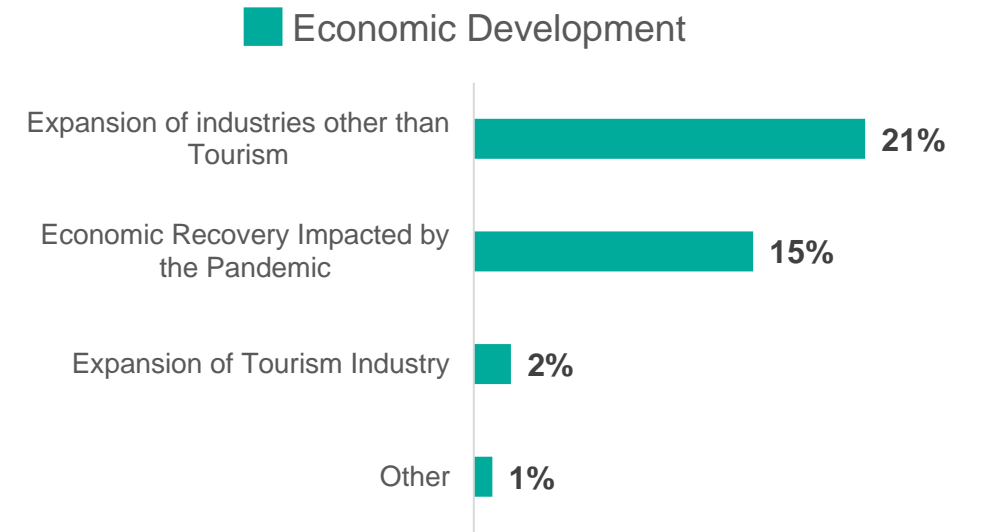
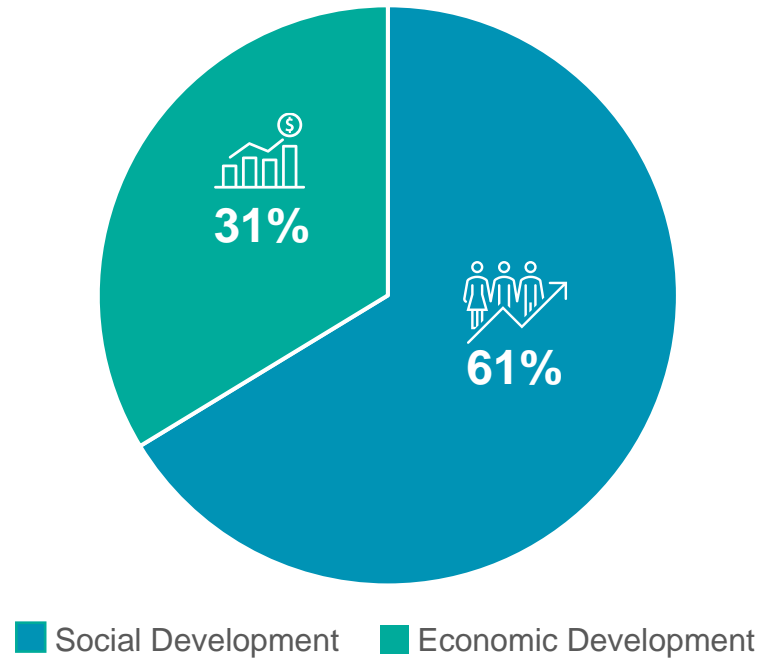
## Employment Status



## Employment Sector



# Economic vs. Social



# Tourism Impact – Single Females



How would you rate the overall impact tourism has on Aruba?



How would you rate the impact on your buying power for the following 12 months compared to before the pandemic?



How would you rate the overall impact tourism has on you and your family?

## Tourism Concerns:

1. Higher price/cost of living 76%
2. Damage to Nature & Environment 46%
3. High Housing Costs for Locals 35%

# Thank you!

