

# Sustainable Tourism

**Program 6**



**NOS PLAN, NOS FUTURO®**



NSP 2020-2022

By 2030, Aruba will have a High Value –  
Low Impact Tourism Growth Model



Program 6 Report  
December 2019

# Sustainable Tourism



# By 2030, Aruba will....

SDG Target  
8.1, localized

Sustain per capita economic growth in accordance with national circumstances and, in particular, at least 2 per cent gross domestic product growth per annum

SDG Target  
8.5

Achieve full and productive employment and decent work for all women and men, including for young people and persons with disabilities, and equal pay for work of equal value

SDG Target  
8.9

Devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products

SDG Target  
11.3, localized

Enhance inclusive and sustainable urbanization and capacity for participatory, integrated and sustainable human settlement planning and management

SDG Target  
11.6, localized

Reduce the adverse per capita environmental impact including by paying special attention to air quality and other waste management

SDG Target  
14.5

Conserve at least 10 per cent of coastal and marine areas, consistent with national and international law and based on the best available scientific information

## ***SDG targets addressed by NSP Program with target period other than 2030***

*SDG target 14.5*, By 2020, conserve at least 10 per cent of coastal and marine areas, consistent with national and international law and based on the best available scientific information

*SDG target 15.1, localized* By 2022, ensure the conservation, restoration and sustainable use of terrestrial and dry river beds ecosystems and their services, in particular tropical dry forest and xeric shrub land, wetlands, hills and drylands, in line with obligations under international agreements

# Strategic objectives

## Drive consistent high value arrivals

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Aruba will sustain and cultivate a constant and consistent source of visitor arrivals

## Grow visitor spending

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Aruba will increase and improve opportunities for visitor spending on Aruba

## Increase engagement of the Aruban community with tourism

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Aruba will enhance awareness and understanding within the community of the value of sustainable tourism

## Ensure preparedness for effective response to emergencies

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Aruba will enhance its tourism industry's capability to prepare, respond and recover from serious and precarious incidents

## Safeguard sustainable tourism, balancing the needs of community, visitors and destination

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Aruba will strategically manage its tourism industry in a sustainable manner consistent with economic goals, cultural values, preservation of natural resources, community desires, and visitor needs

## Drive preference for Aruba as a sustainable destination

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Aruba will conduct innovative and inspiring marketing through the right channels with the right content to the right consumers at the right time to motivate visitation

## Enhance visitor on-island experience and engagement

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Aruba will continue to evolve its product offerings to remain fresh and innovative, offer quality and value for money

## Stimulate innovation and efficiencies in the tourism industry

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Aruba will leverage product and experience development with visitor servicing innovation

# Introduction

The global travel and tourism industry is dynamic! It is one of the world’s largest economic sectors accounting for 10% of the global Gross Domestic Product (GDP). The employment opportunity the sector is generating is equally impressive. One in every ten jobs are in the travel and tourism sector, and if we look at the employment opportunities created worldwide in the last

five years, one in five jobs have been created in the tourism sector. By 2028, this is expected to increase to a quarter of all jobs coming from the travel and tourism sector. It is forecasted that in the next decade, over 500 million new international traveler departures will take place<sup>1</sup>.

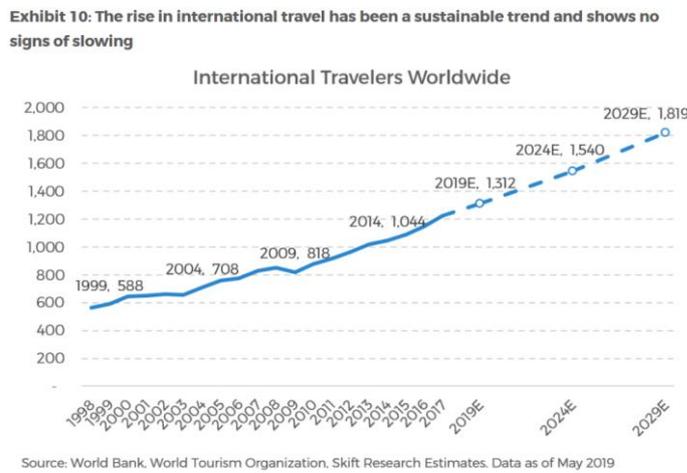


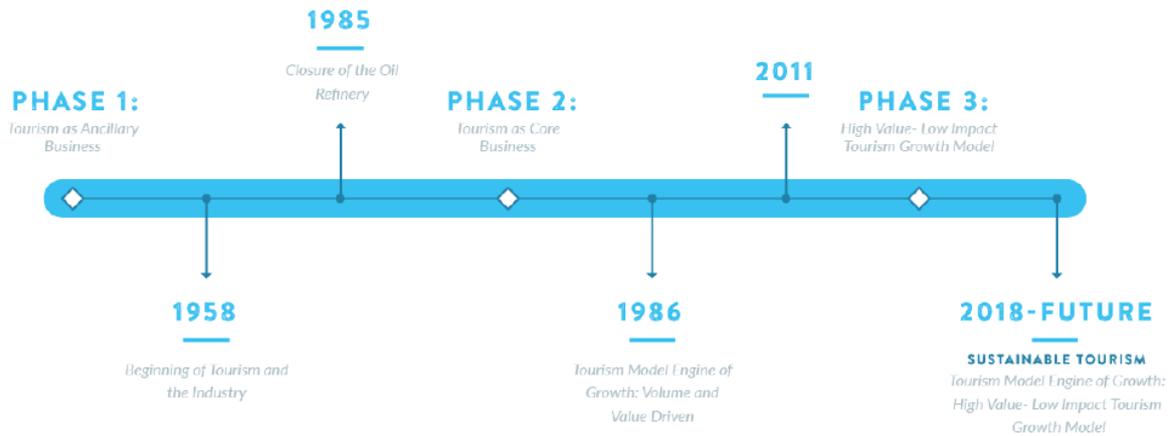
Figure 1. International Travelers Worldwide - The rise in international travel has been a sustainable trend and shows no signs of slowing

## A brief history

Aruba has developed and positioned its tourism sector as one of the premier destinations in the Caribbean. The tourism sector has experienced two distinct phases. The first phase is characterized by the inauguration of the Aruba Caribbean Hotel in 1958 and the closure of the oil refinery in 1985. During these 27-years, tourism played a secondary role to the oil industry. The second phase was propelled by the closure of the oil refinery and the transition of Aruba from an industry-based to a service-based economy. Tourism became the engine of growth for jobs and income.

The strategy primarily focused on volume (more tourists, more expansion, and more migrant workers). However, by the end of the first decade of the 21st century, issues in the Tourism ‘Engine of Growth’ model came to appear in the political, economic, social and environmental dimensions of the tourism sector. This led to a new phase and the development of a new tourism model that increased focus on spending through the attraction of the affluent traveler, product enhancement, and destination development.

<sup>1</sup> Skift Research, Global Travel Economics 2019-2029



Source: *Winning the future (2011) & Carrying capacity (2018)*

Figure 2. The Evolution of Tourism in Aruba over the past 60 years

The Aruba Tourism Authority (ATA), as the Destination Marketing and Management Organization for Aruba, guided the development of a strategic framework for sustainable destination development: a DDP for 2017 - 2021, aptly named “Cu Mira Pa Futuro”. Along with an extensive group of tourism stakeholders who contributed their knowledge and expertise during various sessions, the Aruban community provided valuable insights and recommendations that shaped and informed the DDP action plan, which contains pragmatic items for different (tourism) stakeholders and is a living document, always shifting under the effects of time and priorities.

As part of the action plans set forth in the DDP, ATA initiated at the end of 2017/ beginning of 2018, a tourism carrying capacity study for the Island of Aruba, with the purpose to develop a pragmatic High-Value, Low-Impact Tourism growth model that will guide sustainable tourism growth, which is economically viable, environmentally friendly and socially equitable. The study mainly focused on the economic dimension; however, sociological and psychological dimensions were considered as well.

The study’s conclusions indicate that Aruba has reached its carrying capacity, over-

stretching its resources beyond sustainable levels. Imperative for the future is the implementation of a new tourism growth model based on a High Value-Low Impact framework with benefits for the community, the visitors, and the environment.

The aforementioned action plans form an integral part of ATA’s Multi-Annual Corporate Strategy 2018-2021 (MACS), based on the reports mentioned on page 11.

## Key themes

### 1. Value innovation and sustainability

#### **Innovate and Create Value in Tourism**

Ensure tourism’s substantial economic benefits by growing the value of the visitor economy at a faster pace than volume and drive innovation to enhance the attractiveness and international competitiveness.

#### **Grow in a Sustainable Manner**

Promote controlled growth in ways that will contribute to our community’s economic, social, and environmental wellbeing, with a balance between the needs of the visitors, community, and industry.



Figure 3. High-Value, Low-Impact Tourism model. Source: ATA

These themes translate into two overarching goals, each with a set of strategic objectives, which are further outlined in this program.

## 2. Carrying capacity & high value, low impact tourism model

The purpose of the carrying capacity study is to define a sustainable tourism growth model for Aruba that is economically viable, environmentally bearable, and socially equitable.

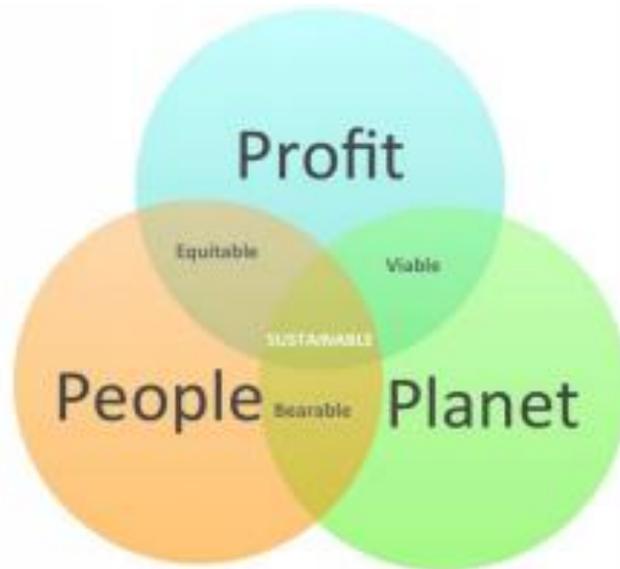
The desired outcome is to define a ‘high-value, low-impact’ tourism model that balances 1) quality of the visitor experience; 2) economic contribution of the tourism sector (guaranteeing quality jobs, increasing visitor exports, reducing economic leakage, distributing wealth in the economy); 3) quality of life for

residents and 4) environmental protection and conservation.

Through stakeholder consultation and ATA analysis, the carrying capacity study determines the right mix and growth strategy to achieve this balance.

The outputs of the study provide Aruba with guidance on how to strategically balance tourism growth to reach its desired outcome. The specific outputs include the desired tourism model that maximizes economic benefits from the industry while defining a visitor flow management model and carrying capacity framework designed to help reduce the negative impacts and take corrective actions proactively.

The resulting output from this study provides Aruba with practical tools that complement Aruba’s increased efforts to develop a sustainable destination.



Central to the Tourism Carrying Capacity Assessment is the key performance indicators that are to be measured since Aruba has committed to meeting the targets of the SDGs by developing a pilot impact indicator framework to be a model for all SIDS. Ten of seventeen priority indicators from Aruba tourism carrying capacity priority indicators align with the SDG Indicator Framework.

The Tourism Carrying Capacity Indicators Framework serves as a guide to identify and monitor the impact that tourism has on the destination’s physical-ecological, political-economic, and sociodemographic situations. It helps identify the ideal conditions to aspire to and bring attention to those areas not being met. If used as an on-going monitoring tool, the framework will help Aruba make informed decisions in terms of policy-making, visitor experience, and resource management.

The report contains detail data related to the baseline, desired condition, and thresholds for the socioeconomic and environmental tourism carrying capacity indicators.

### **Our Global Market Focus**

Equally important to making the right decisions on a destination development front are the decisions that we make on a

global destination marketing and promotions front.

Increasing the share of affluent visitors to the destination continues to be one of ATA’s priorities.

With an enhanced Market Portfolio model complemented by robust spend data, ATA will target those high-value geographic markets and niche segments through a *Multi-channeled Always-on* strategy.

The main aim is to achieve a more balanced portfolio in the next four years to maintain sustainable growth or Aruba. Balancing the competing demands of these groupings is an essential challenge for ATA’s global marketing strategy.

Also, the shift from volume to value requires an altered approach. While factors such as the economic health of the country, spending power, demographic trends, travel trends, access, and seasonality continue to be taken into consideration, the on-island spending trends will be an additional element of consideration.

The ATA identified five strategies to determine the market portfolio mix for 2018-2021. The strategies are a mix of growth potential in value and the current presence of Aruba in terms of investments in the market.

 MAINTAIN	<i>Markets/Segments of <b>high value</b>, where Aruba will maintain current level of investment.</i>
 GROW	<i>Markets/Segments with <b>(high) growth potential</b>, where Aruba already invests.</i>
 BUILD	<i>Markets/Segments with <b>(high) growth potential</b>, where Aruba doesn't currently invest.</i>
 EXIT	<i>Markets/Segments where Aruba currently invests, but that are no longer of interest to Aruba.</i>
 INVESTIGATE	<i>Markets/Segments where Aruba <b>doesn't currently invest</b>, but worth investigating potential for Aruba.</i>

Figure 4: The five strategies

## ATA's Corporate Strategic Direction: Goals

The Tourism 2025 Aspiration is translated into two overarching goals for these four years:

1. Increase Economic Value of Tourism

2. Position Aruba as Desirable and Sensible Destination

**GOAL 1**

**INCREASE ECONOMIC VALUE OF TOURISM**

One of our key responsibilities is to foster the growth of tourism's substantial economic benefits.

This requires that industry success can be shared by everyone.

Our goal is to grow the value of the visitor economy at a faster pace than volume by sustaining and cultivating a consistent source of visitor arrivals and expenditures over periods of varying economic cycles and/or unforeseen events.

With this goal we recognize that long term value is the product of a set of distinguishing factors including visitor spend and return, demand in off peak periods, market portfolio diversity and resilience to risks.

GOAL 2  
POSITION ARUBA AS DESIRABLE AND  
SUSTAINABLE DESTINATION

In our efforts to nurture economic value we must continuously balance the needs of our community, our visitors and our destination.

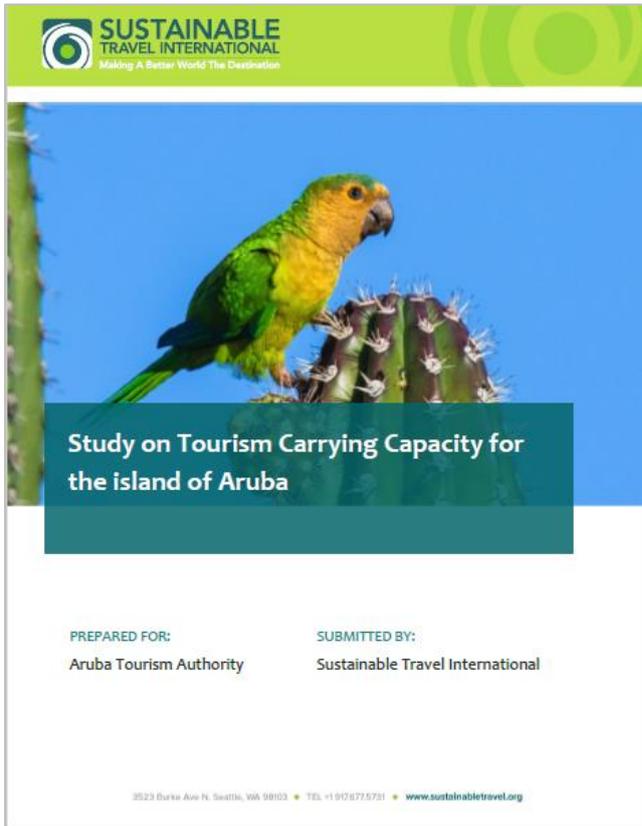
From the visitor perspective, our goal is to continue to increase the desire to visit and continuously improve our visitors' experience throughout the customer journey.

From the community and destination perspective, we must further increase our focus on community and industry relations and by safeguarding our core assets and preserving our cultural heritage and natural resources.

To continuously increase the value created by tourism, we encourage and stimulate innovation in the tourism industry.

**Supporting  
documentation/research**



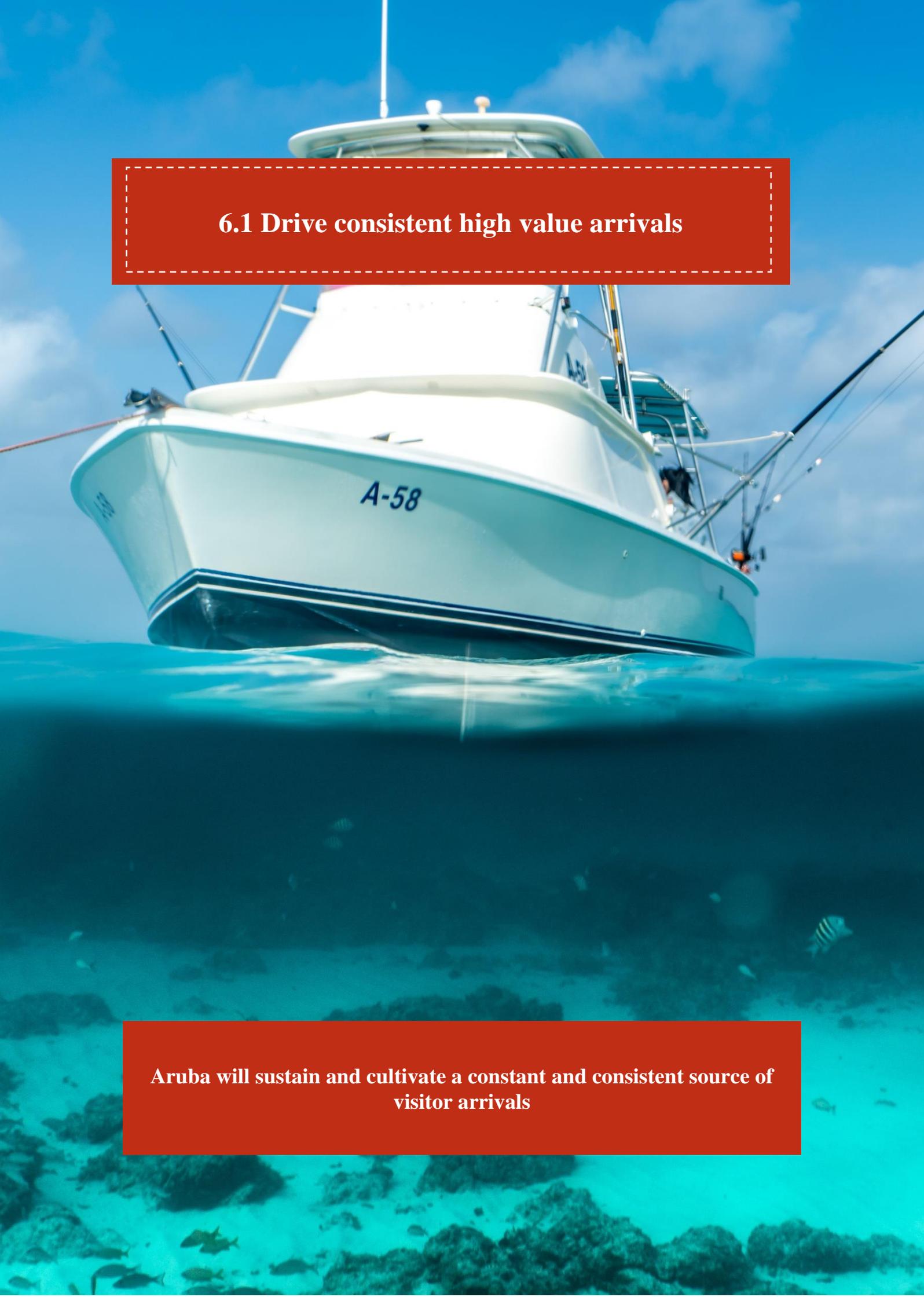


This program report is based on the findings of the above shown documents. These documents contains the targets, strategies and actions. These reports are available online. Visit [www.cumirapafuturo.com](http://www.cumirapafuturo.com)



Aruba adopted the SDGs to achieve a better and more sustainable all-embracing future for our citizens. With the NSP we demonstrate that we have strengthened our efforts to achieve our goals. By achieving sustainable tourism, we support the goals as shown on the left.





**6.1 Drive consistent high value arrivals**

**Aruba will sustain and cultivate a constant and consistent source of  
visitor arrivals**

## Overview

Ensure tourism's substantial economic benefits by growing the value of the visitor economy at a faster pace than volume and drive innovation to enhance the attractiveness and international competitiveness.

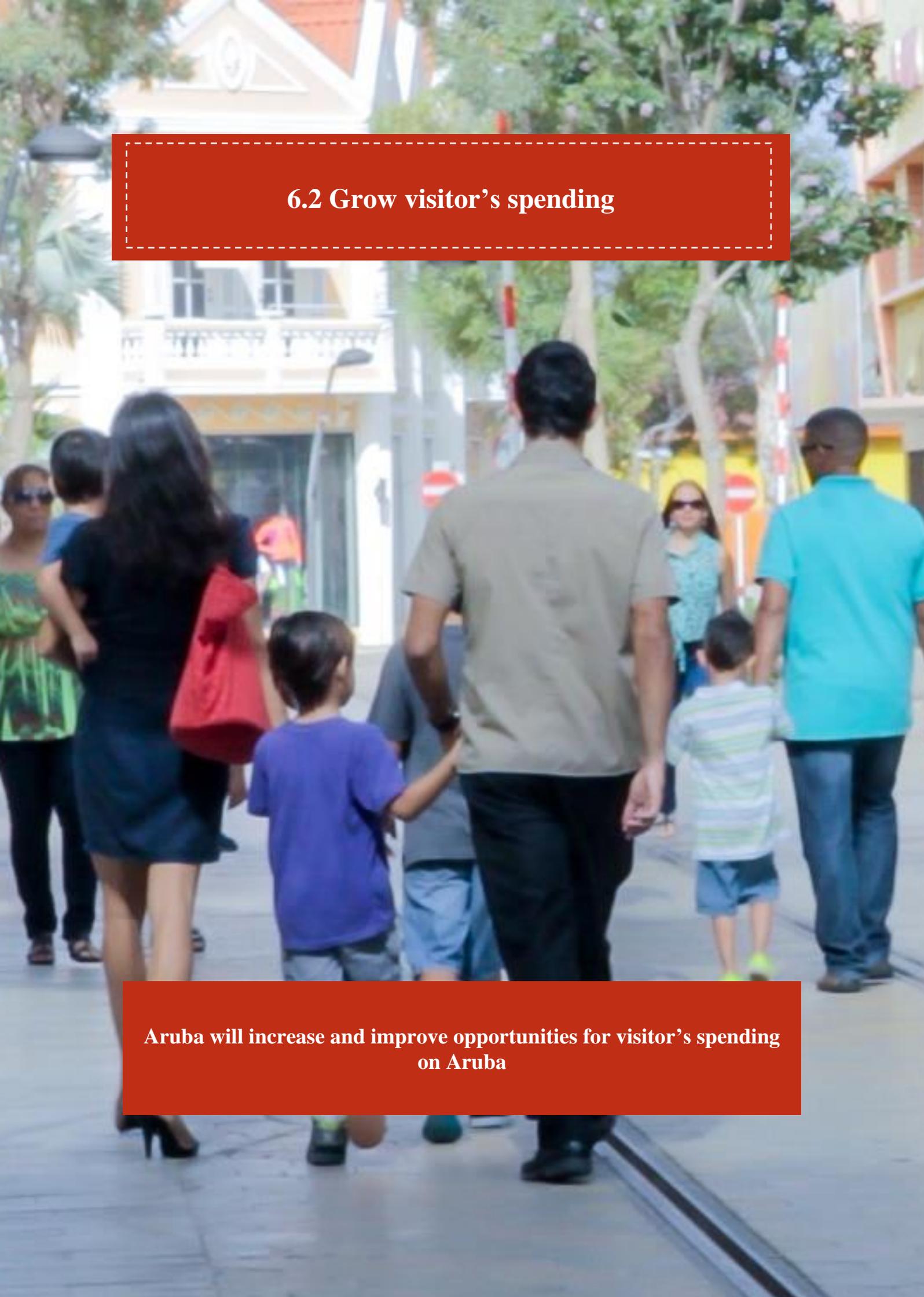
The long term value is the product of a set of distinguishing factors including visitor's spending and return, demand in off-peak periods, market portfolio diversity and resilience to risks, and requires that industry success can be shared by everyone.

### Desired outcome 1

**Ensured tourism's (substantial) economic benefits through the growth of the visitor economy at a faster pace than volume**

#### Actions

- A. A continued strong positioning as a premier destination
- B. A continued strong relationships with trade, air, and cruise partners to secure demand, air connectivity, seat capacity, and cruise calls.
- C. Realization of expansion of airport capacity (Beatrix 2030)
- D. Development and enforcement of legislation and policies concerning amongst other beach policy, balanced accommodation mix, zoning laws, labor policies, and others, hospitality education, quality assurance, safety and security, innovation and entrepreneurship on products, programming, and services
- E. Deployment of Economic Contribution Model (Tourism Satellite Account)



## 6.2 Grow visitor's spending

**Aruba will increase and improve opportunities for visitor's spending on Aruba**

## Overview

To ensure long-term benefits of the Aruba tourism industry, the ATA drives the demand of the desired high spending visitor and orchestrates destination development to increase tourism revenues and enhance the quality of visitor experience.

In 2018, the ATA conducted a niche roadmap study, which takes carrying capacity findings into account and how to best increase the economic value of tourism through niche development. This development will cater to high-value visitor markets, drive entrepreneurship and innovation, and create opportunities for local SMEs as well as new hospitality jobs with the ultimate goal to enhance the quality of the visitor experience and increase visitor spending.

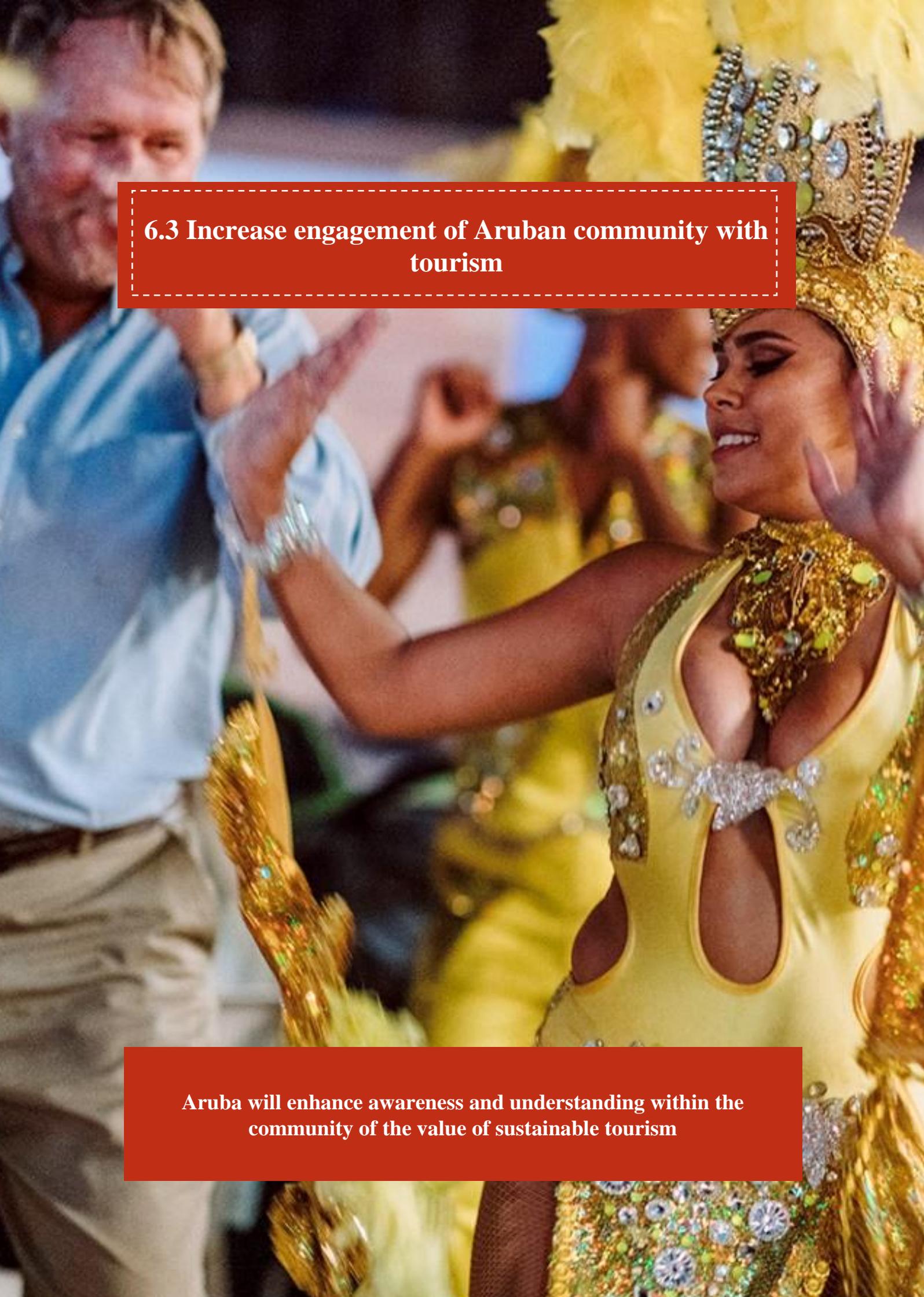
On the supply side, it is imperative to have a balanced accommodation portfolio with suitable offerings in accordance with the expectations of the high spending visitor.

### **Desired outcome 1**

**Ensured tourism's (substantial) economic benefits through increased visitor spending**

#### **Actions**

- A. Drive demand for the desired high spending visitor
- B. Execution of the Niche Roadmap
- C. Research, advisory, and advocacy on carrying capacity
- D. Digital payment system
- E. Adoption of a national innovation policy
- F. Deployment of Economic Contribution Model (Tourism Satellite Account)
- G. Development and enforcement of legislation and policies concerning amongst other beach policy, balanced accommodation mix, spatial zoning laws (with terrestrial and maritime regulations), labor policies and others, hospitality education, quality assurance, safety and security, innovation and entrepreneurship on products, programming, and services



### **6.3 Increase engagement of Aruban community with tourism**

**Aruba will enhance awareness and understanding within the community of the value of sustainable tourism**

## Overview

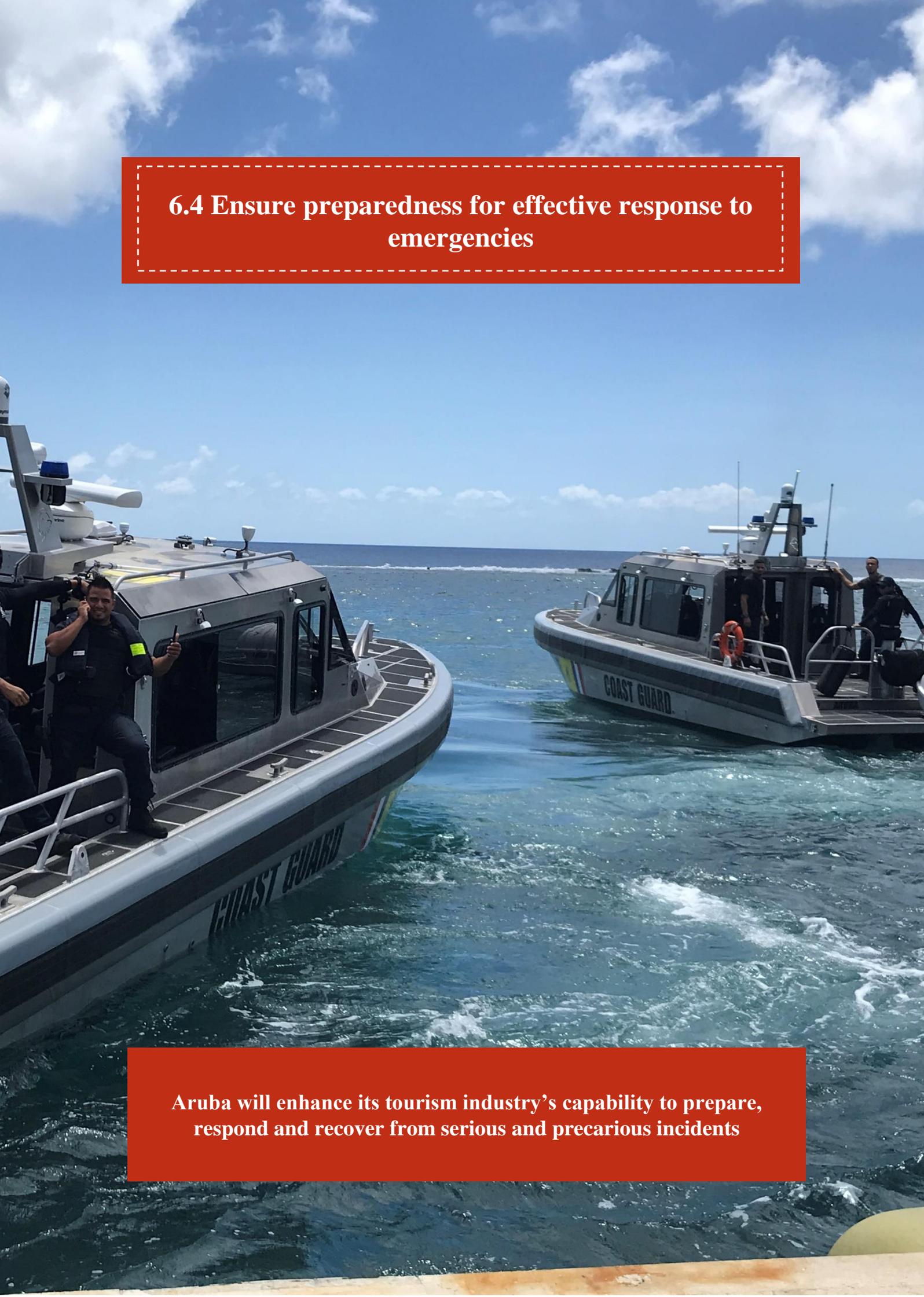
Humanity will remain at the center of the travel experience, driving the need for connections and belonging. Imperative in this regard is to actively engage the community with tourism. The creation of a sustainability mindset will lead to a community that is aware of the value of its environment, their surroundings, and its benefits. Special attention will be provided to our youth on cultivating the right mindset and skills for the future and promoting career pathways to inspire future tourism professionals and leaders.

### **Desired outcome 1**

**Awareness and understanding of the value of sustainable tourism and product are increased**

#### **Actions**

- A. Through outreach programs, inform and educate the community at large on the importance of sustainable tourism industry, promote the unique and authentic aspects of the Aruban culture, community and natural resources
- B. Residents as ambassadors (including socialization between visitors and residents)
- C. Cultivate a collaborative and learning culture
- D. Develop and equip human capital
- E. Incorporate tourism in the education curriculum of primary and secondary schools
- F. Maintenance and growth of the Aruba Certification Program
- G. Education on and communication with stakeholders on product development

The image shows two grey and white Aruban Coast Guard patrol boats on a blue sea under a bright blue sky with scattered white clouds. The boat in the foreground is on the left, with a crew member in a dark uniform and life vest looking towards the camera. The boat in the background is on the right, with several crew members visible. Both boats have 'COAST GUARD' written on their sides. The water is choppy with white foam from the boats' wakes.

## 6.4 Ensure preparedness for effective response to emergencies

**Aruba will enhance its tourism industry's capability to prepare, respond and recover from serious and precarious incidents**

## Overview

We recognize that the reputation and sustainability of our tourism industry are inextricably linked to how we manage the planning for response to and mitigation of hazards and emergencies in the sector.

As a destination that is so dependent on tourism, Aruba needs to be prepared for a prompt and effective response to - and recovery from - crisis events and related emerging opportunities stemming from terrorist attacks, political instability, health pandemics, and natural disasters. Further diversification in our market portfolio remains a key effort.

With a robust Tourism Emergency Marketing Plan (TEMP) in place, the ATA seeks to safeguard continuity in visitation through periods of crisis by effectively responding to markets when adversity strikes. In addition, the International Tourism Crisis Communication Plan, as well as the on-island tourism response plan for crisis and disaster, are key tools to be able to execute the necessary activities effectively.

### **Desired outcome 1**

#### **Preparedness for an effective response to emergencies**

##### **Actions**

- A. Up to date TEMP
- B. Up to date International Tourism Crisis Communication Plan and the on-island tourism response plan for crisis and disaster
- C. Education, training, and alignment of the tourism sector and other relevant stakeholders for readiness
- D. Diversification of primary source markets

An underwater photograph showing two divers in clear turquoise water. The diver on the left is a man wearing blue shorts and black fins, while the diver on the right is a woman wearing a pink bikini and yellow fins. They are both holding hands and looking towards the camera. The background shows a sandy seabed with some coral and small fish.

**6.5 Safeguard sustainable tourism, balancing the needs of community, visitors and destination**

**Aruba will strategically manage its tourism industry in a sustainable manner consistent with economic goals, cultural values, preservation of natural resources, community desires, and visitor needs**

## Overview

Promoting controlled growth in ways that will contribute to our community's economic, social, and environmental wellbeing, with a balance between the needs of the visitors, community, and industry.

Nurturing economic value requires venturing a continuous balance between the needs of the community, visitors, and the destination. Also, from the visitor perspective, the destination is to continue to increase the desire to visit and continuously improve visitors' experience throughout the customer journey, encouraging and stimulating innovation in the tourism industry. Furthermore, a continued increase of focus on community and industry relations is critical, by safeguarding core assets and preserving cultural heritage and natural resources, in line with the High-Value, Low-Impact Tourism model as referred to in the introduction.

### **Desired outcome 1**

**Sustainable tourism is safeguarded, and needs are in balance**

#### **Actions**

- A. Implementation of the High-Value, Low-Impact Tourism model
- B. Economic diversification agenda
- C. Actions resulting from Destination Development Plan 'Cu Mira Pa Futuro' as well as from the Tourism Carrying Capacity study, commitment from different stakeholders
- D. Development and enforcement of legislation and policies concerning amongst other beach policy, balanced accommodation mix, zoning laws, labor policies, and others, hospitality education, quality assurance, safety and security, innovation and entrepreneurship on products, programming, and services
- E. Safeguard a sound Tourism Business Model



## **6.6 Drive preference for Aruba as a sustainable destination**

**Aruba will conduct innovative and inspiring marketing through the right channels with the right content to the right consumers at the right time to motivate visitation**

## Overview

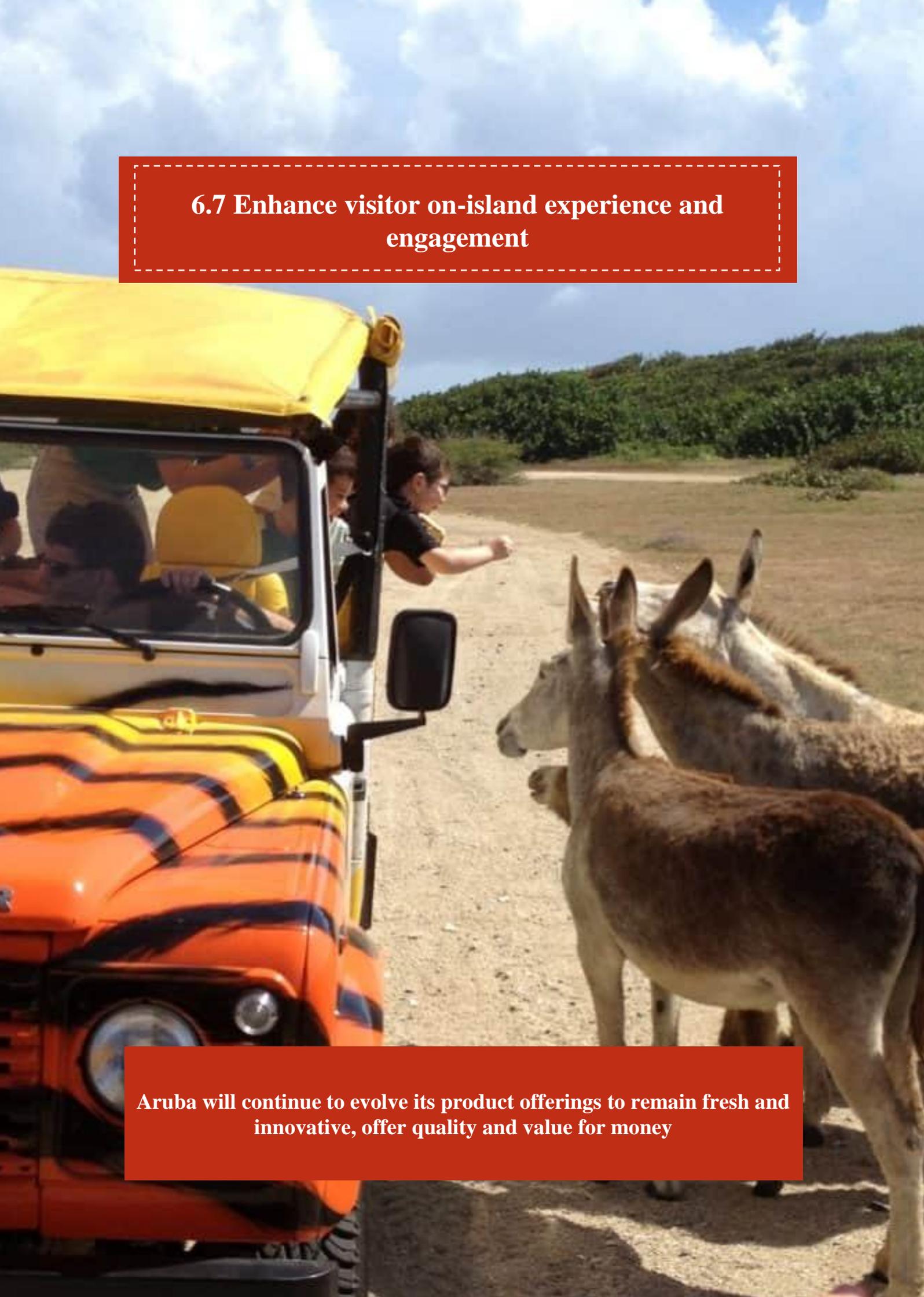
The ATA, as the Destination Marketing and Management Organization (DMMO) addresses the need of the consumers throughout their journey. The loyalty of our visitors will be fostered by the sum of experiences and sustainable practices throughout the journey and will be a shared responsibility amongst all stakeholders, including the community.

### Desired outcome 1

#### Position Aruba as a desirable and sustainable destination

##### Actions

- A. Ensure the implementation of A.T.A.'s marketing and communications strategies throughout the customer journey.
- B. Embrace the changing tourism landscape through intelligence and promote a leadership position
- C. Growth potential within the US, EU, and LATAM high-value markets
- D. Engage in pre, during and after trip direct marketing initiatives
- E. Digitization of marketing funnel (increased touchpoints and exposure)
- F. Safeguard a sound Tourism Business Model



**6.7 Enhance visitor on-island experience and engagement**

**Aruba will continue to evolve its product offerings to remain fresh and innovative, offer quality and value for money**

## Overview

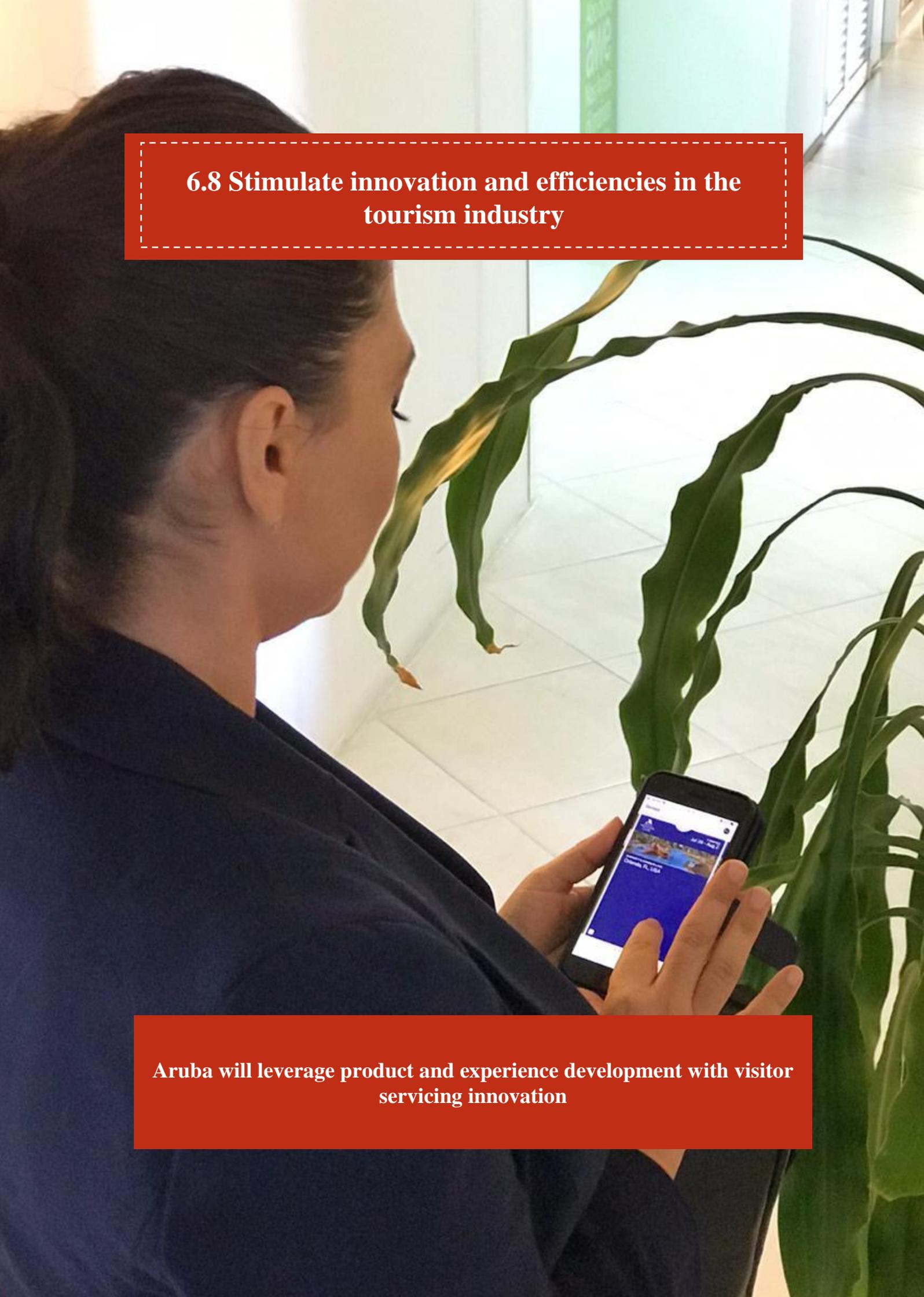
Improving our market readiness as destination by revamping and innovating our Place Product (infrastructure, accommodations, products, programming, and services), build on a well-defined authentic Place DNA along with promoting compelling reasons to visit and revisit Aruba to the right markets, are indispensable for our destination to remain relevant and continue to create economic value.

### **Desired outcome**

#### **Enhanced visitor on-island experience and engagement**

##### **Actions**

- A. Implementation of a Visitor Flow Management Plan for Aruba
- B. Implementation of Aruba Quality Seal
- C. Growing sharing economy offers with potential for more varied product offering and market diversification
- D. Synergy between sectors
- E. Increase on demand economy (new platforms and technologies) to increase entrepreneurship and the on-island experience
- F. Digital transformation to amongst other enhance visitor intelligence
- G. Digitization of marketing funnel (increased touch points and exposure)
- H. Healthy lifestyle trend with potential for niche offering
- I. Creation of opportunities for a higher spend (new niche markets: including cultural, sports, adventure and medical tourism)

A woman with dark hair tied back, wearing a dark blue blazer, is shown in profile from the side, looking at a smartphone. She is holding the phone with both hands. The phone screen displays a blue interface with a map and some text. The background is a bright, modern office space with large green plants and a white tiled floor. A red dashed-line box is overlaid on the top part of the image, containing the section header.

**6.8 Stimulate innovation and efficiencies in the tourism industry**

**Aruba will leverage product and experience development with visitor servicing innovation**

## Overview

Travel is where the largest consumer and tech trends first meet, and much of it is in play already or currently being tested, such as connected rooms, butler service by voice recognition, keyless entry (and therefore no check-in), facial recognition, etc. The tourism industry's existence depends on innovation, and it is our task to ensure we meet the demand of the ever-evolving traveler.

As intelligent and efficient as these technologies are, they will not replace the human element. Humanity will once more be at the center of the travel experience, driving the need for connections and belonging.

### Desired outcome 1

**Position Aruba as a desirable and innovative destination**

#### Actions

- A. Access to transformative technologies and platforms plus data intelligence capabilities to be able to tap into the vast opportunities these offer
- B. Stimulation of innovative product development
- C. Digital transformation to amongst other enhance visitor intelligence
- D. Increase on demand economy (new platforms and technologies) to increase entrepreneurship and the on-island experience
- E. Digitization of marketing funnel (increased touch points and exposure)

## Acronyms

### A

ATA Aruba Tourism Authority

### D

DDP Destination Development Plan

DMMO Destination Marketing and Management Organization

DNA Deoxyribonucleic acid, the molecule that carries the genetic information

### E

EU European Union

### G

GDP Gross Domestic Product

### L

LATAM Latin American

### N

NSP National Strategic Plan

### M

MACS Multi Annual Corporate Strategy 2018-2021

### S

SDG UN Sustainable Development Goal

SIDS Small Island Developing Stated

SMEs Small and Medium Enterprises

### U

UN United Nations

US United States

## APPENDIX

### Aruba Tourism Carrying Capacity Indicators Framework

#### SOCIO-ECONOMIC:

Carrying Capacity Socio-Economic Indicator Analysis
<b>Real GDP per capita:</b> it reflects on the performance of the country per inhabitant. The tourism model as the main economic driver and source of jobs for the country should strategically aim to increase GDP without increasing the population disproportionately.
<b>GINI coefficient:</b> shows the income or wealth distribution of a nation's residents, as a measurement of inequality. Increasing opportunities for higher productivity jobs in the country is key to help bridge this gap.
<b>% Total tourism contribution to GDP:</b> Aruba's economy relies heavily on tourism income. It is crucial to foster the diversification of the economy. As the country continues to work towards this direction, other areas such as entrepreneurship, smart technologies and innovation are being explored.
<b>Number of international tourist arrivals:</b> this indicator tracks number of stay-over visitors. The desired condition and threshold should evolve overtime as the tourism model changes and visitor flow is better mitigated. Tourism growth should be limited at Palm beach, as it has already exacerbated environmental thresholds and reaching congestion thresholds.
<b>Average stay-over visitor spend:</b> The purpose of the tourism growth model focused on 'high-value, low-impact' is to increase quality rather than quantity of visitors. Hence, increasing stay-over visitor spending is crucial for this.
<b>Rooms in the pipeline + current rooms:</b> Rooms in the pipeline have not been officially confirmed and there could be changes in the coming months, as permits are granted or rejected, but it is crucial to keep a balance growth of room supply. The recommendation is to create a hotel development process that takes into account the tourism development strategy defined by the destination. This strategic approach would take into consideration the spread of hotels along the island, in particular in areas in the south around San Nicolas, and in plots already impacted. As well as development of hotel concepts that cater to a high-value niche market segments and create higher value employment opportunities. Growth should be restricted in the Palm Beach area until mitigation measures are taken to reduce the environmental and congestion pressure.
<b>Total population (Aruban-born / Foreign-born):</b> The current tourism model in Aruba relies heavily on foreign labor. Population growth should be moderate and be accompanied by better infrastructure and social services, both for Aruba-born as well as to accommodate the needs of migrants.
<b>% Total tourism contribution to employment:</b> % of travel and tourism contribution to employment is very high in Aruba. Along the same lines of reducing the overreliance of economy in the tourism industry, the objective will be to reduce the % of tourism related jobs.
<b>% Unemployment:</b> While this rate is relatively low, it is understood that with potential tourism developments, workforce would need to be imported; it is crucial to support local employment and create quality jobs for locals, in particular the youth and women, in order to avoid 'brain drain', support the welfare system and economic growth

Carrying Capacity Socio-Economic Indicator Analysis

**Number of tourism licenses (tour operators, water sports activities):** Tourism Operator inventory requires update and monitoring, the latest available data obtained is from 2013 and figures might have increased. The number of operators and categories should be aligned with the tourism development strategy. Additionally, the relationship between the quantity of water sports activities and environmental indicators should be analyzed and corrective actions taken (i.e. beach sludge, coral cover and turtle nests).

**ENVIRONMENTAL:**

Carrying Capacity Environmental Impact Indicator Analysis

**Beach sludge:** Beach sludge is an issue in Palm Beach. Although it appears in historical data given the coast and beach dynamics of the area, the lack of sea grass due to the presence of more tourism developments and water sports activities has increased the sludge area and thickness. Mitigation measures are needed immediately.

**% land protected area:** Protection of terrestrial areas is crucial for biodiversity conservation, which is also one of the main assets for tourism, therefore further protection is desired.

**% marine protected area:** Aruba does not have any marine protected area, even though discussions to establish a marine park have been undergoing over the last years. It is crucial to establish a marine protected area to conserve marine biodiversity.

**% built and undeveloped land:** land scarcity is an issue in Aruba, given the limited area of the island. Under the current conditions, it is recommended that the current balance of urban/rural/undeveloped land is maintained, and no further impact is caused to undeveloped land.

**Landfill capacity:** Solid waste management has been a major issue over the last years in Aruba, due to the limited capacity of its landfill. With increased hotel development, that foresees increased overnights; annual waste tons produced will also increase. Before any new hotel development is realized immediate consideration to increase the capacity of the waste management facility as well as its environmental standards is critical.

**Annual tonnage of waste and %-recycled waste:** alternative waste processing methods, including an increase in the percentage of recycled waste need to be put in place.





**L e a v e   a   m a r k**

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# **ARUBA DEPENDS ON YOU**

Sustainable Tourism

**NSP 2020-2022**