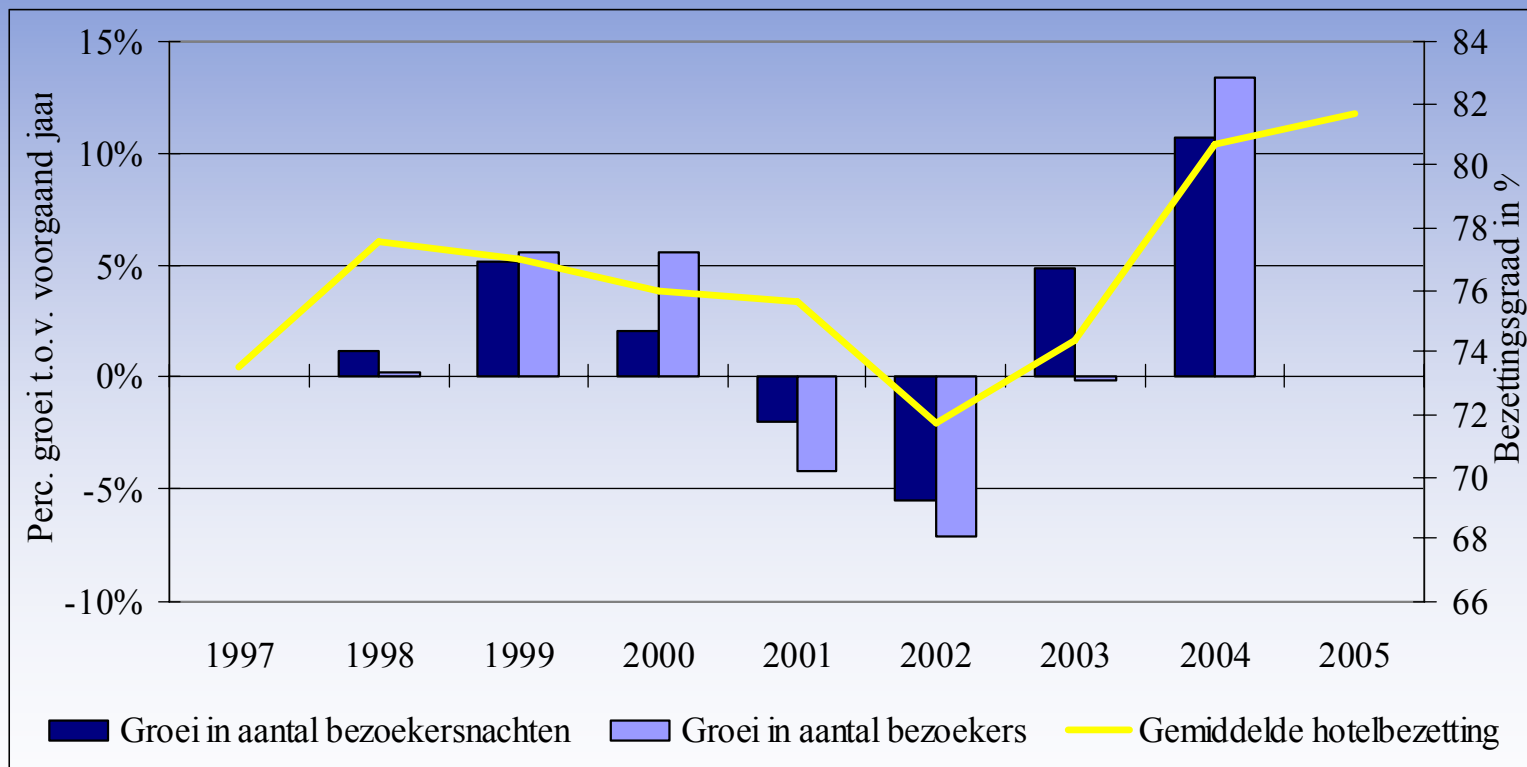


FUTURE CHALLENGES

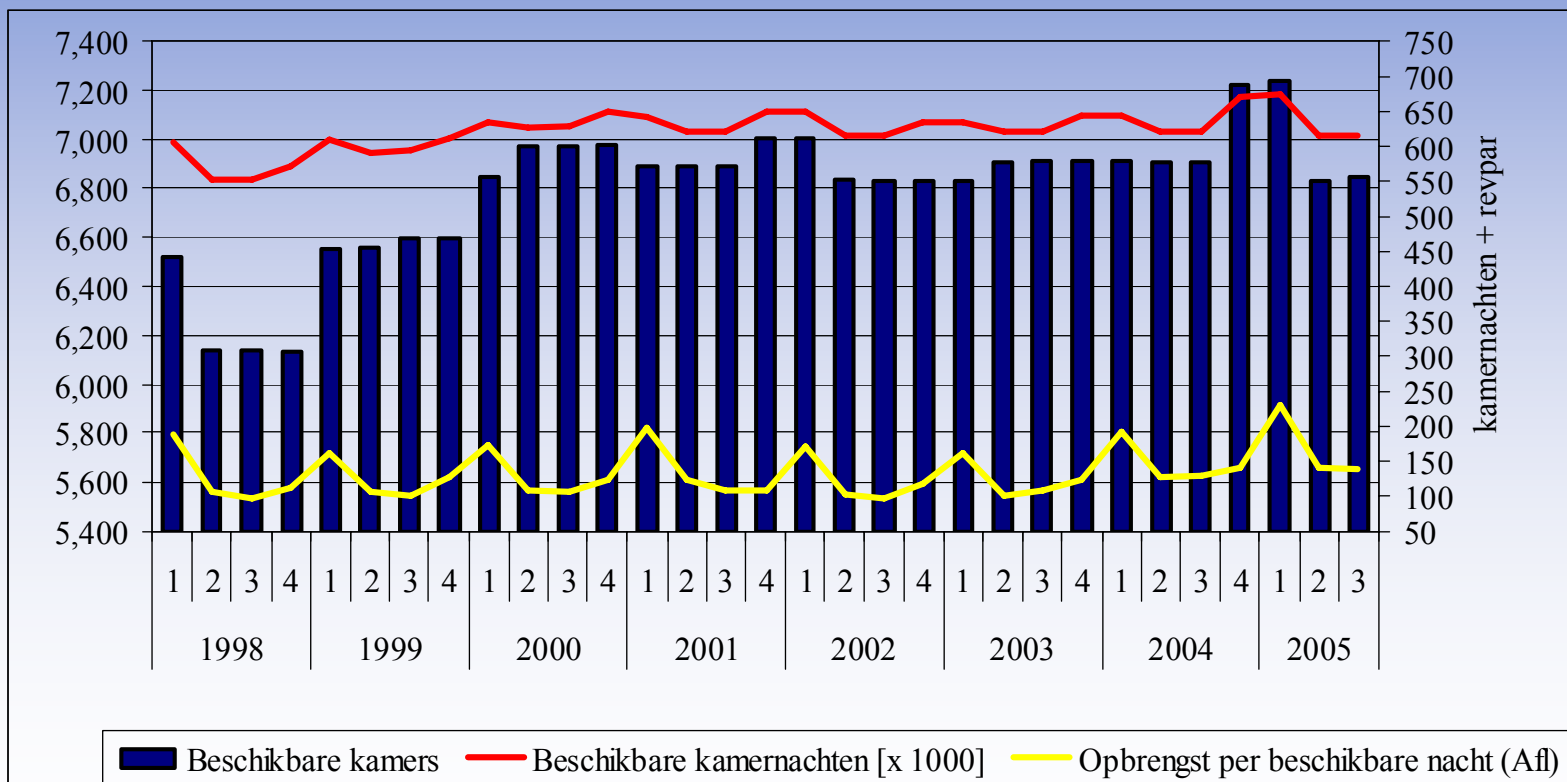
SOCIAL-ECONOMIC DEVELOPMENTS

Central Bureau of statistics

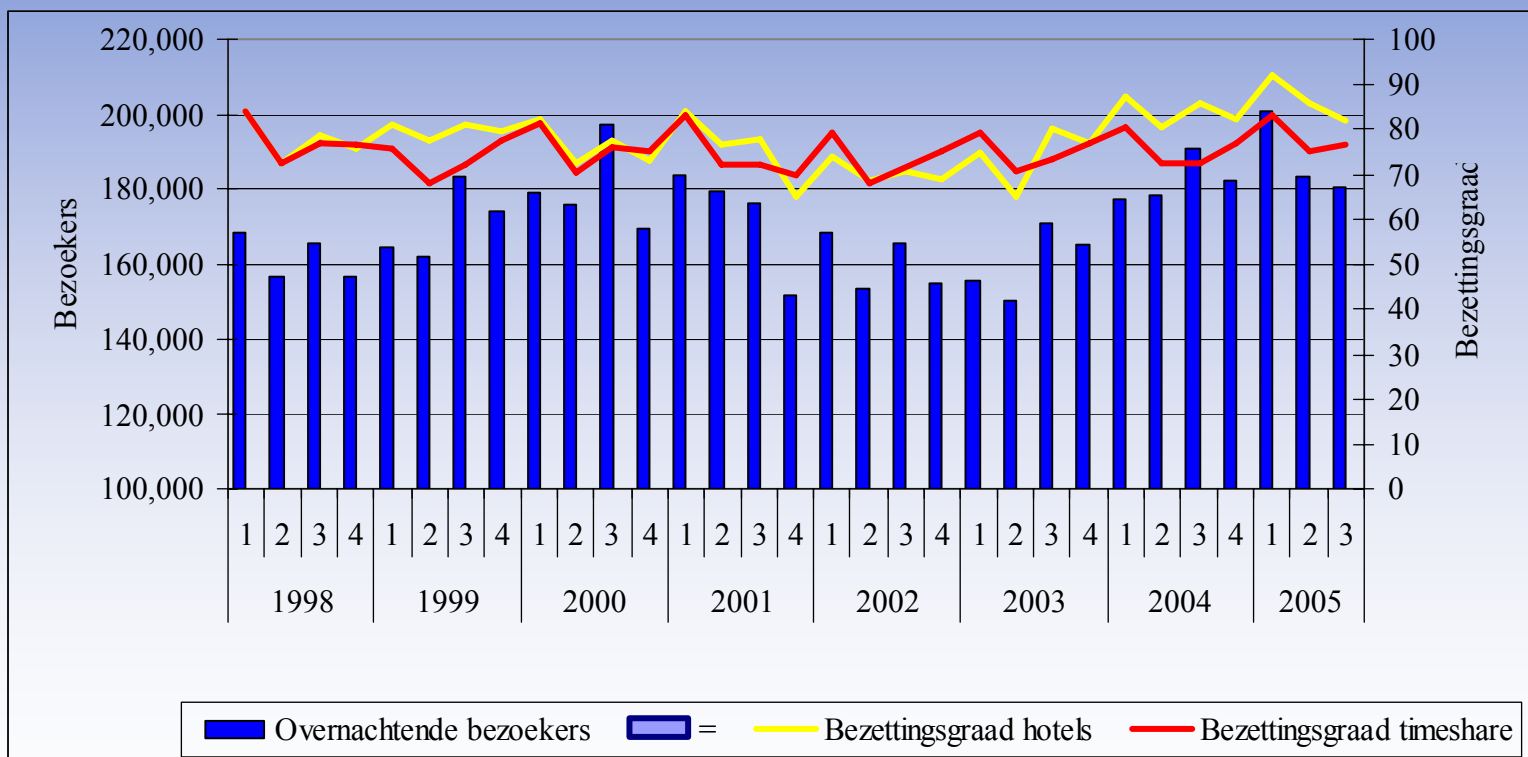
ONTWIKKELING VERBLIJFSTOERISME



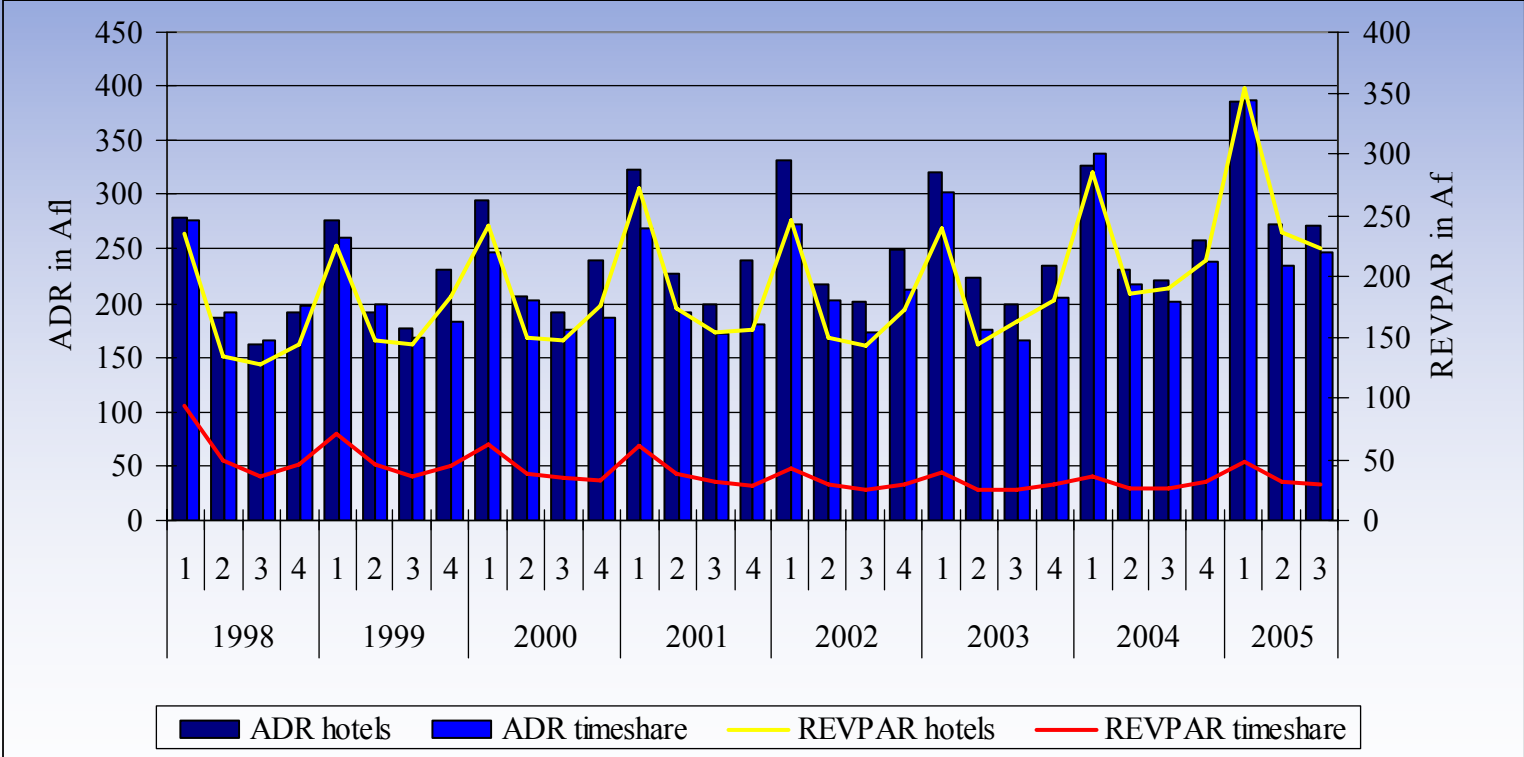
KWARTAALCIJFERS HOTELCAPACITEIT EN - OPBRENGST



KWARTAALCIJFERS OVERNACHTENDE BEZOEKERS EN BEZETTINGSGRAAD



KWARTAALCIJFERS ADR EN RevPar (Afl.)



TOURISM INDICATORS 2002 -2006

	2002	2003	2004	2005				2006		
	Year	Year	Year	Q1	Q2	Q3	Q4	Year	Q1	Q2
Tourism										
Arrivals (thousands)	642.6	641.9	728.2	200.9	183.0	180.9	167.7	732.5	170.3	173.8
o/w from US (%)	68	72	74	77	77	66	70	73	75	74
Cruise passengers (thousands)	582	542	576	191	112	56	194	553	209	208
Occupancy, <i>hotel</i> (%)	70.5	74.3	83.8	91.2	85.6	81.7	76.3	83.9	82.2	77.6
Average Daily Rate, <i>hotel</i> (US\$)	140.40	135.58	145.27	207.14	152.98	149.87	188.08	175.89	242.21	210.71
Revenue per available room, <i>hotel</i> (US\$)	99.00	100.52	121.78	190.13	131.00	122.67	143.15	147.53	198.91	163.43
Occupancy, <i>timeshare</i> (%)	73.4	74.9	75.5	83.6	74.3	76.5	78.9	78.2	87.1	81.6
Average Daily Rate, <i>timeshare</i> (US\$)	121.31	117.09	137.21	215.91	128.94	138.02	143.94	157.63	168.77	155.31
Revenue per available room, <i>timeshare</i> (US\$)	17.61	16.42	16.78	26.90	17.08	16.70	15.26	18.66	21.87	18.39
Total rooms	6,831	6,912	7,226	7,320	6,906	6,923	6,944	6,944		
Occupied Room Nights, <i>total</i>	1,725,310	1,785,043	1,925,961	546,702	476,248	475,856	444,551	1,943,357	503,451	451,105
Occupancy, <i>total</i> (%)	71.9	74.4	80.7	88.3	80.4	79.5	77.8	81.7	84.4	79.4
Average Daily Rate, <i>total</i> (US\$)	138.09	133.69	144.78	215.81	150.09	148.66	184.17	174.19	122.86	120.90
Revenue per available room, <i>total</i> (US\$)	68.78	68.89	81.94	128.36	77.64	76.68	90.61	93.46	119.94	97.84
Total room revenue (In 000 US\$)	165,077	165,231	195,658	77,854	46,806	45,834	51,735	222,229	71,654	44,986
Tourism receipts (US\$mIn)	824.64	853.07	1,042.79	303.80	260.67	249.00	263.50	1,076.97	314.8	n.a.
Estimated total tourism expenditure (In 000 US\$)	654,071	647,486	812,409	246,519	193,610	198,843	182,093	821,064	213,808	186,679
% Δ Revenue per available room, <i>total</i> (US\$)	-8.61	0.16	18.94	20.01	11.06	6.72	14.93	14.06	-6.56	26.02
% Δ Total room revenue (In 000 US\$)	-9.63	0.09	18.42	21.69	11.97	9.13	8.06	13.58	-7.96	-3.89
% Δ Tourism receipts (%)	-8.0	3.4	22.2	-0.5	10.3	7.0	-1.9	3.3	3.6	n.a.
% Δ Estimated total tourism expenditure (%)	-11.5	-1.0	25.5	5.1	6.1	7.2	-13.3	1.1	-13.3	-3.6

GEPLANDE UITBREIDING TIMESHARE

Deelgebied	Timeshare begin 2006	Geplande uitbreiding					Totale geplande uitbreiding	Totaal bestaand & gepland
		2006	2007	2008	2009	2010 +		
<i>HIGH RISE gebied</i>	1179	69	764	54	0	0	887	2066
<i>EAGLE BEACH gebied</i>	880	120	350	0	0	0	470	1350
<i>LOW RISE gebied</i>	591	52	52	52	32	0	188	779
<i>Oranjestad en elders</i>	343	6	0	590	0	0	596	939
Timeshare en condo's	2993	247	1166	696	32	0	2141	5134
Totaal verblijfseenheden	7039	117	1965	1316	32	1100	4530	11569

GEPLANDE UITBREIDING HOTELS

Deelgebied	begin 2006 Hotelkamers	Geplande uitbreiding					Totale geplande uitbreiding	Totaal bestaand & gepland
		2006	2007	2008	2009	2010 +		
<i>HIGH RISE gebied</i>	2794	-130	300	540	0	0	710	3504
<i>EAGLE BEACH gebied</i>	147	0	50	0	0	0	50	197
<i>LOW RISE gebied</i>	612	0	115	0	0	0	115	727
<i>Oranjestad en elders</i>	493	0	334	80	0	1100	1514	2007
Hotels	4046	-130	799	620	0	1100	2389	6435

POPULATION INFLOW AND OUTFLOW

Economic Growth
GDP 3.4 billion in 2002 to 9.2 B. in 2023

Type of economy:
tourism oriented,
Financial; Knowledge,...
tourism expenditures;
Investment-
climate; stability

Volume Labor Force

New Entrance
Immigration: 2.723
Participation-rates
Labor productivity
Pension age

Labor Force in 2005
48.300

Shortage near future:
12.000-17.000 persons

Elderly persons with pension

Labor outflow migration: 1.096

Volume education

Immigration: 1.035
Enrollment-rates
Internal efficiency
Drop-outs
Duration of study
Natural growth

Tertiary

secondary

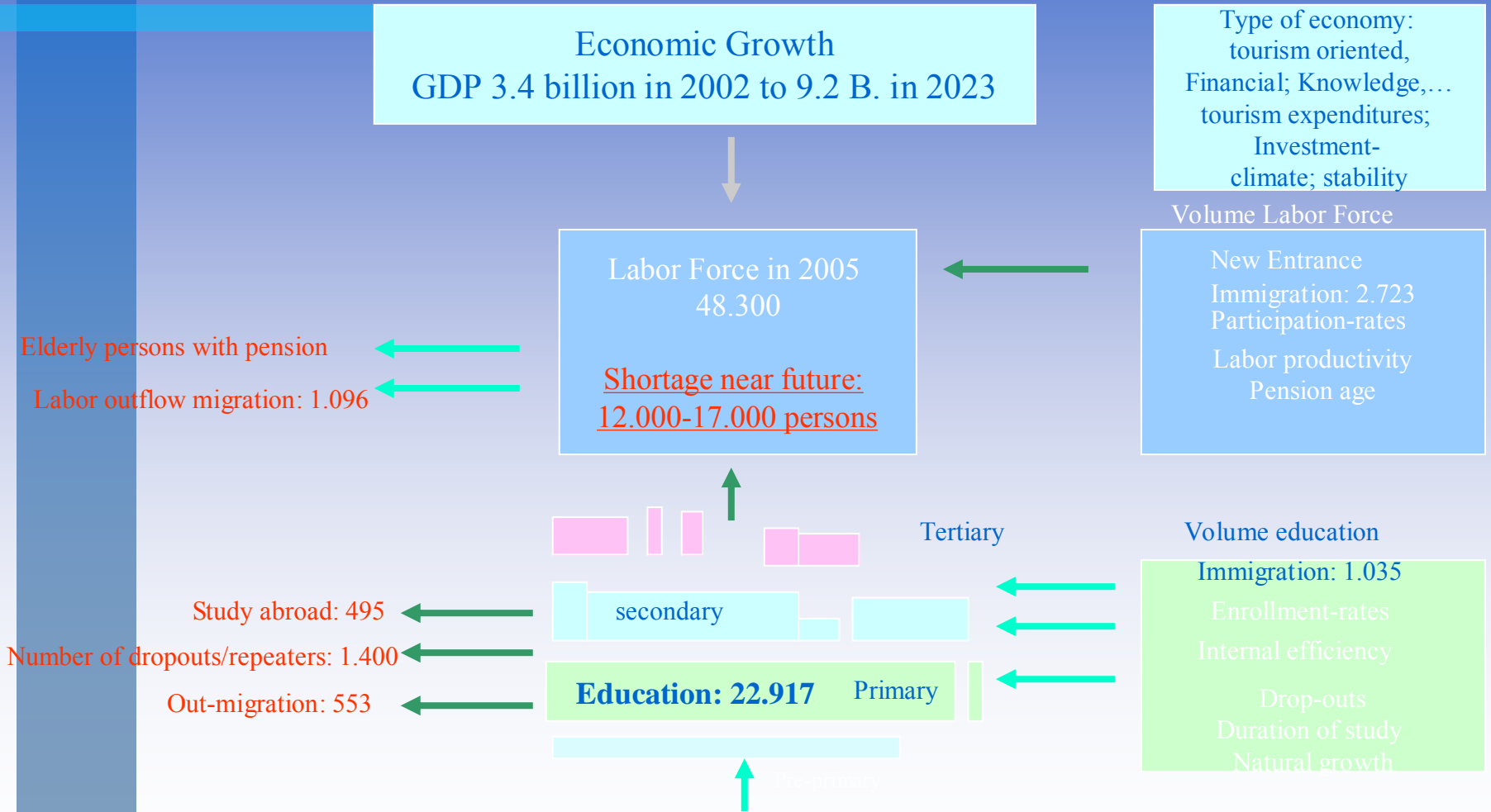
Education: 22.917 Primary

Pre-primary

Study abroad: 495

Number of dropouts/repeaters: 1.400

Out-migration: 553



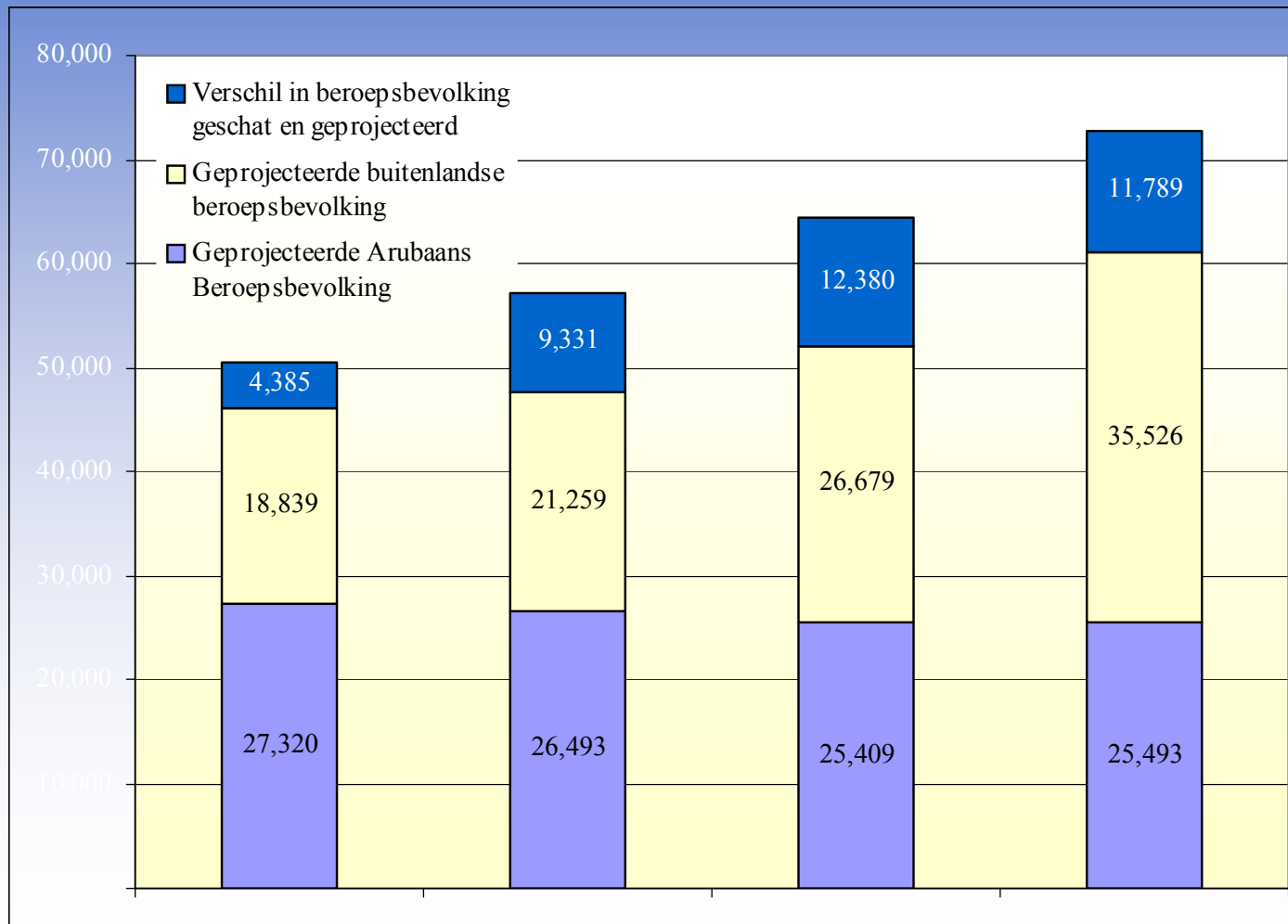
ASSUMPTIES BEVOLKINGSPROJECTIES

	2000-2003				
	Groei BBP		Groei Arbeids- Productiviteit	Werkloosheid	
Procentuele groei	1,000		1,015	1,070	
			1,5	7	
Year	2000	2001	2002	2003	2004
BNP	3,326,900,000	3,398,700,000	3,421,200,000	3,472,518,000	3,646,143,900
Arbeidsproductiviteit	79,395	80,586	81,795	83,022	84,267
Benodigde arbeid	41,903	42,175	41,827	41,827	43,269
Beroepsbevolking	44,836	45,127	44,754	44,754	46,298
Percent vrouwen in de beroepsbevolking	46.6	46.6	46.6	46.6	46.6
Mannelijke beroepsbevolking	24,061	24,110	23,911	23,911	24,735
Vrouwelijke beroepsbevolking	20,975	21,017	20,844	20,844	21,563

PROJECTIE ARBEIDSBEHOEFTE MEDIUM SCENARIO 2003 -2023

	2008	2013	2018	2023
Geschatte benodigde beroepsbevolking	50,544	57,083	64,468	72,808
Geprojecteerde Arubaans Beroepsbevolking	27,320	26,493	25,409	25,493
Geprojecteerde buitenlandse beroepsbevolking	18,839	21,259	26,679	35,526
Totale geprojecteerde beroeps	46,159	47,752	52,088	61,019
Verschil in beroepsbevolking geschat en geprojecteerd	4,385	9,331	12,380	11,789
Totaal aantal buitenlanders rekening houdend met dependants.	5,846	12,439	16,502	15,715

PROJECTION LABOR SHORTAGE, MEDIUM SCENARIO 2003 -2023



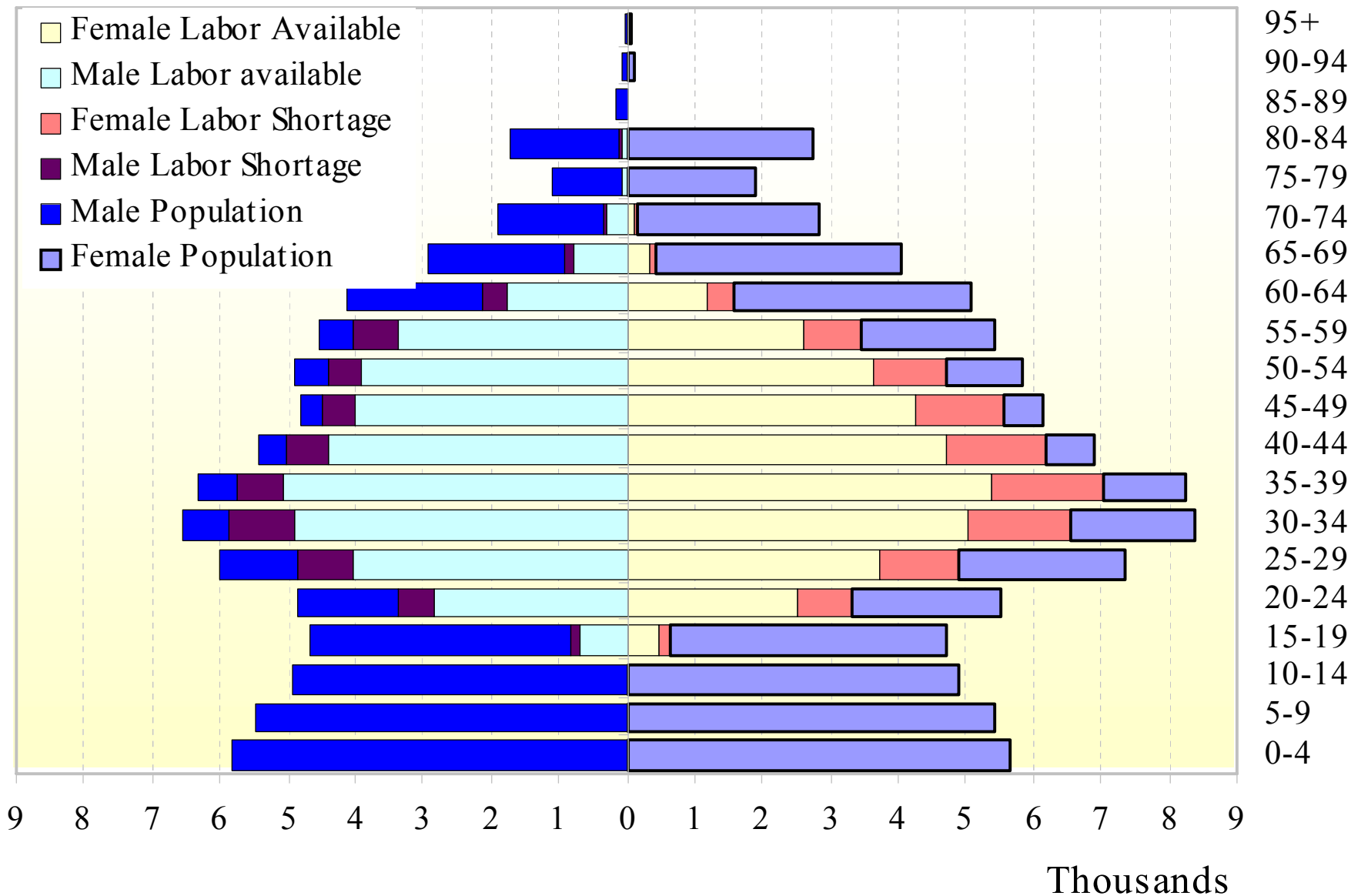
PROJECTIE ARBEIDSBEHOEFTE HIGH SCENARIO

2003 -2023

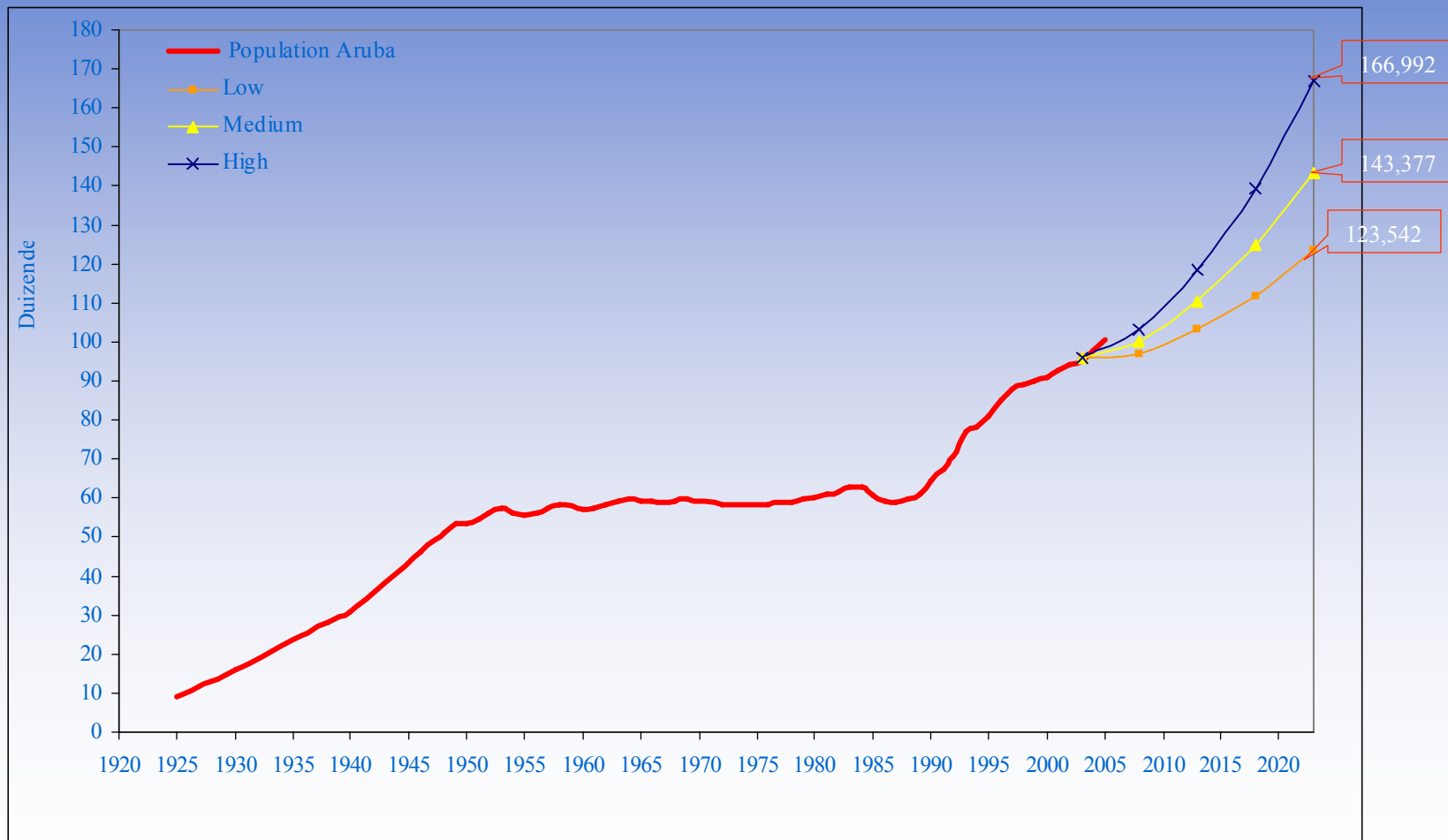
	2008			2013		
	Male	Female	Total	Male	Female	Total
Estimated Labor Force	27,783	25,238	53,021	32,287	30,528	62,816
Local Labor Force	15,285	12,035	27,320	14,702	11,791	26,493
Foreign Labor Force	9,261	9,577	18,839	11,541	11,652	23,193
Total Labor Force	24,547	21,612	46,159	26,243	23,443	49,686
Shortage on the Labor Force	3,236	3,626	6,863	6,044	7,086	13,130
Total foreigners (dependants included)	4,314	4,834	9,148	8,057	9,445	17,502

	2018			2023		
	Male	Female	Total	Male	Female	Total
Estimated Labor Force	37,507	36,912	74,419	43554	44612	88166
Local Labor Force	14,062	11,347	25,409	14,072	11,421	25,493
Foreign Labor Force	15,806	15,671	31,477	22,352	22,670	45,022
Total Labor Force	29,868	27,018	56,886	36,424	34,091	70,515
Shortage on the Labor Force	7,640	9,894	17,533	7,130	10,521	17,651
Total foreigners (dependants included)	10,184	13,188	23,372	9,504	14,024	23,529

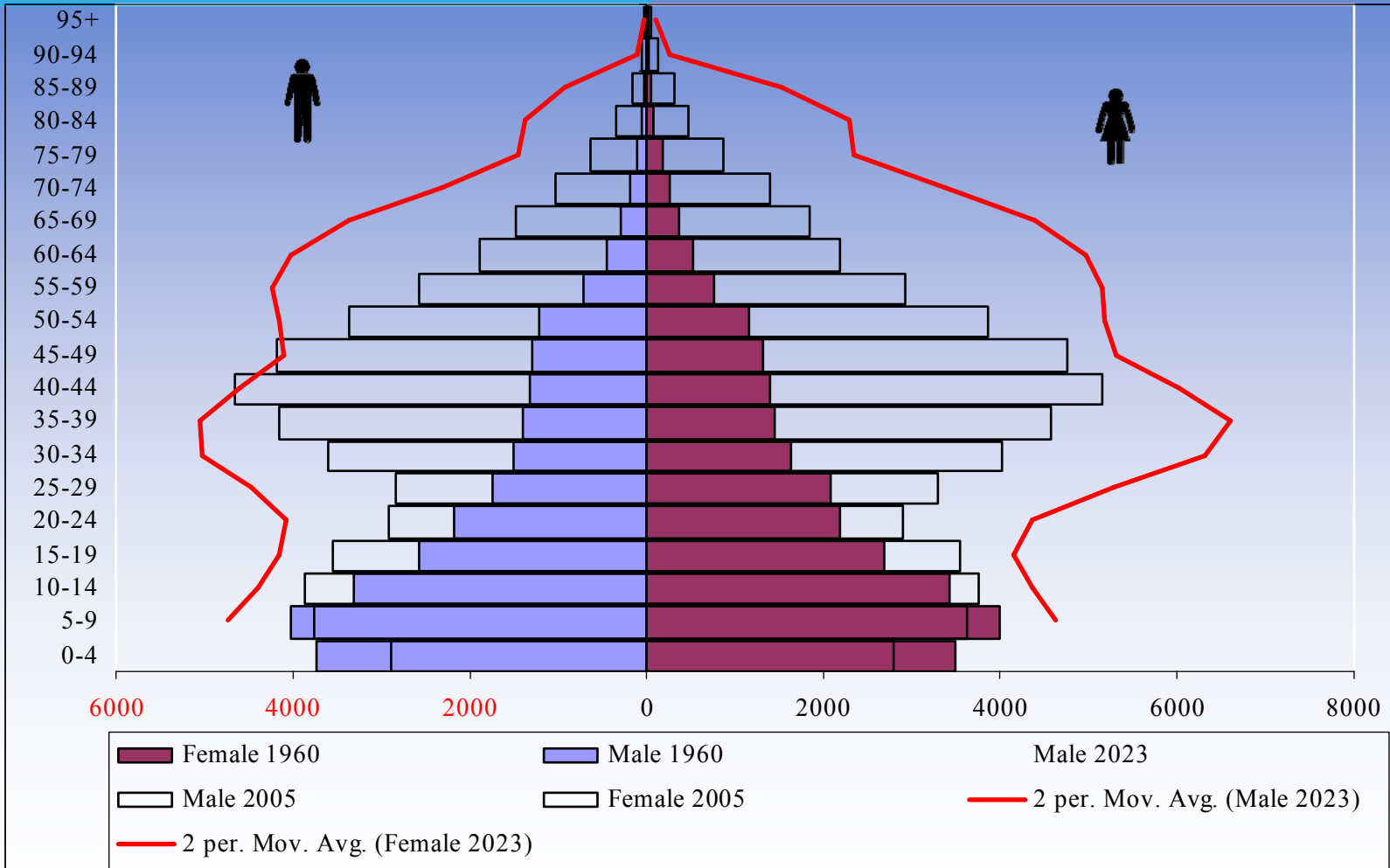
Population and Labor Projections 2023



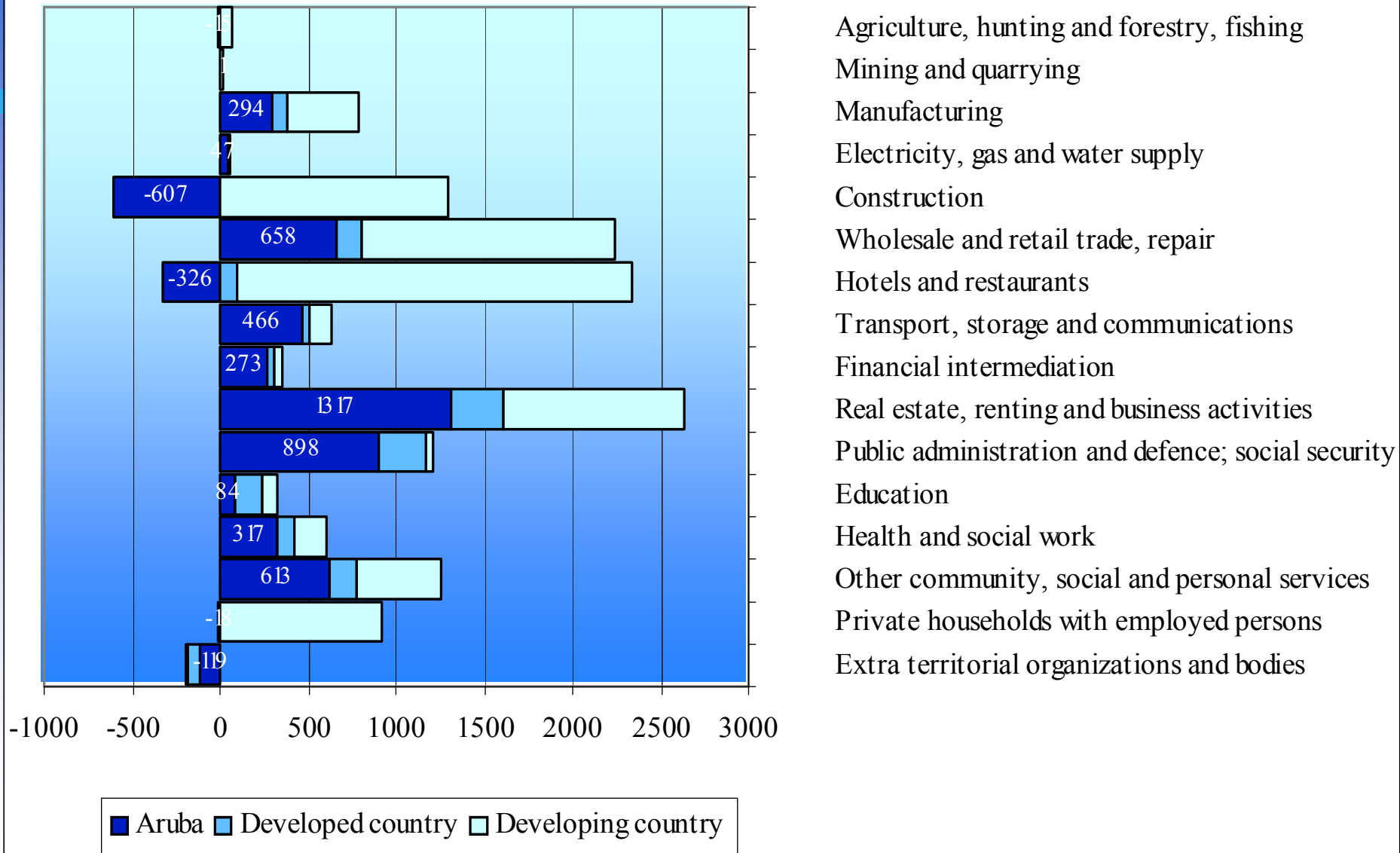
POPULATION DEVELOPMENTS 1920-2023



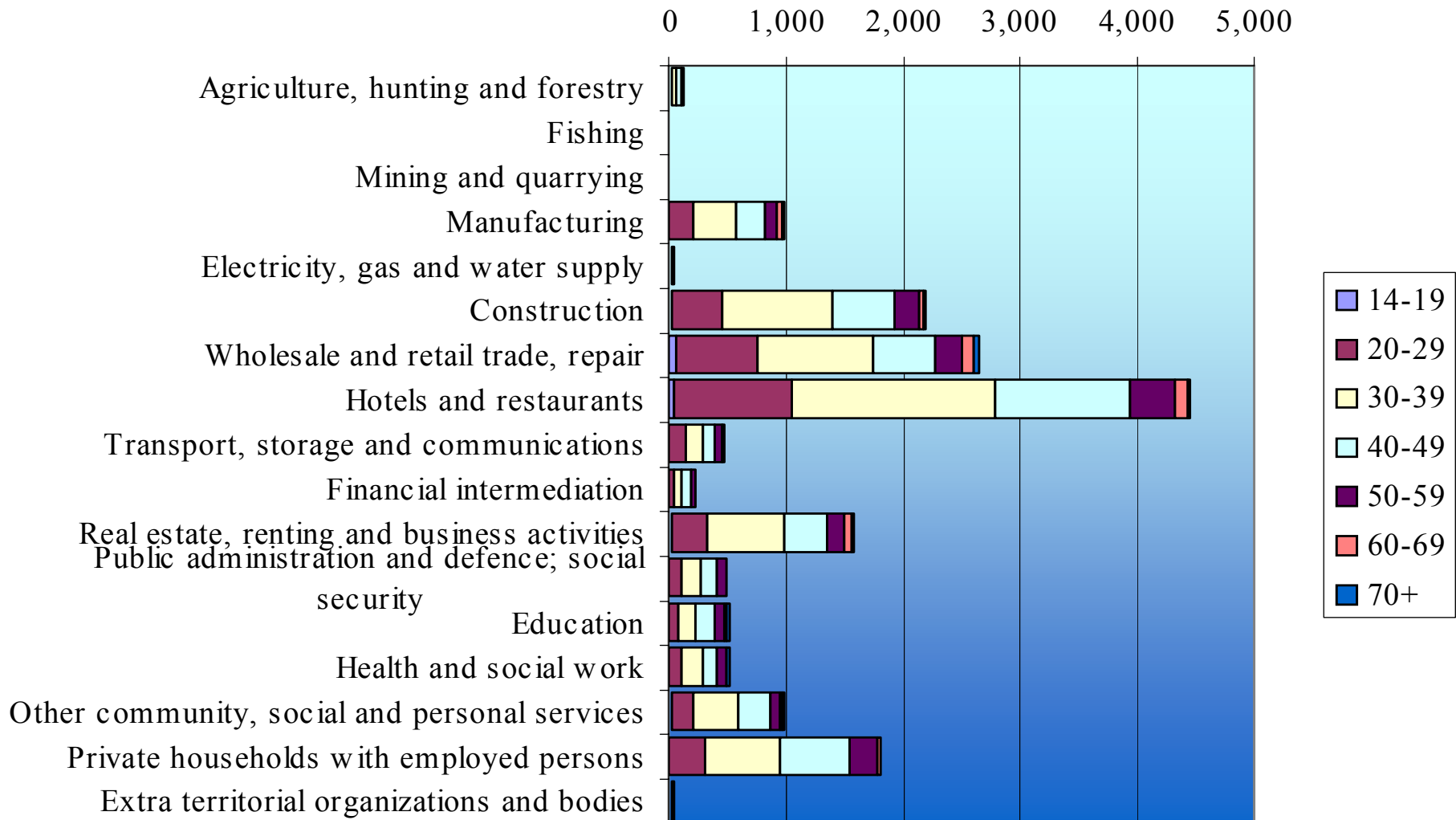
Dejuvenation en ageing



Arbeidsmarktontwikkelingen per sector '91 - '00



FOREIGN LABOR FORCE BY AGE-CATEGORY AND ECONOMIC BRANCH



WORKING POPULATION BY AGE-GROUP AND PROFESSION

<i>Major Occupational group</i>	Male			Female		
	15-24	25-64	65+	15-24	25-64	65+
0 Armed forces	0.9	0.6	0.0	0.0	0.0	0.0
1 Legislators, senior officials, and managers	2.6	11.3	19.0	2.7	7.3	14.8
2 Professionals	1.5	6.9	6.7	2.2	6.0	7.0
3 Technicians and associate professionals	7.6	11.7	9.3	9.1	11.0	10.6
4 Clerks	14.9	10.1	8.3	40.3	26.3	15.5
5 Service workers and shop and market sales workers	22.5	15.2	15.0	33.4	22.6	22.5
6 Skilled agricultural and fishery workers	1.4	1.3	1.7	0.1	0.2	0.0
7 Craft and related trades workers	19.8	21.7	13.8	1.2	1.7	1.4
8 Plant and machines operators and assemblers	7.5	8.7	16.9	0.3	0.7	0.0
9 Elementary occupations	21.0	12.1	9.0	10.4	23.9	27.5
99 Unknown	0.3	0.4	0.5	0.2	0.3	0.7
10 Total	100	100	100	100	100	100

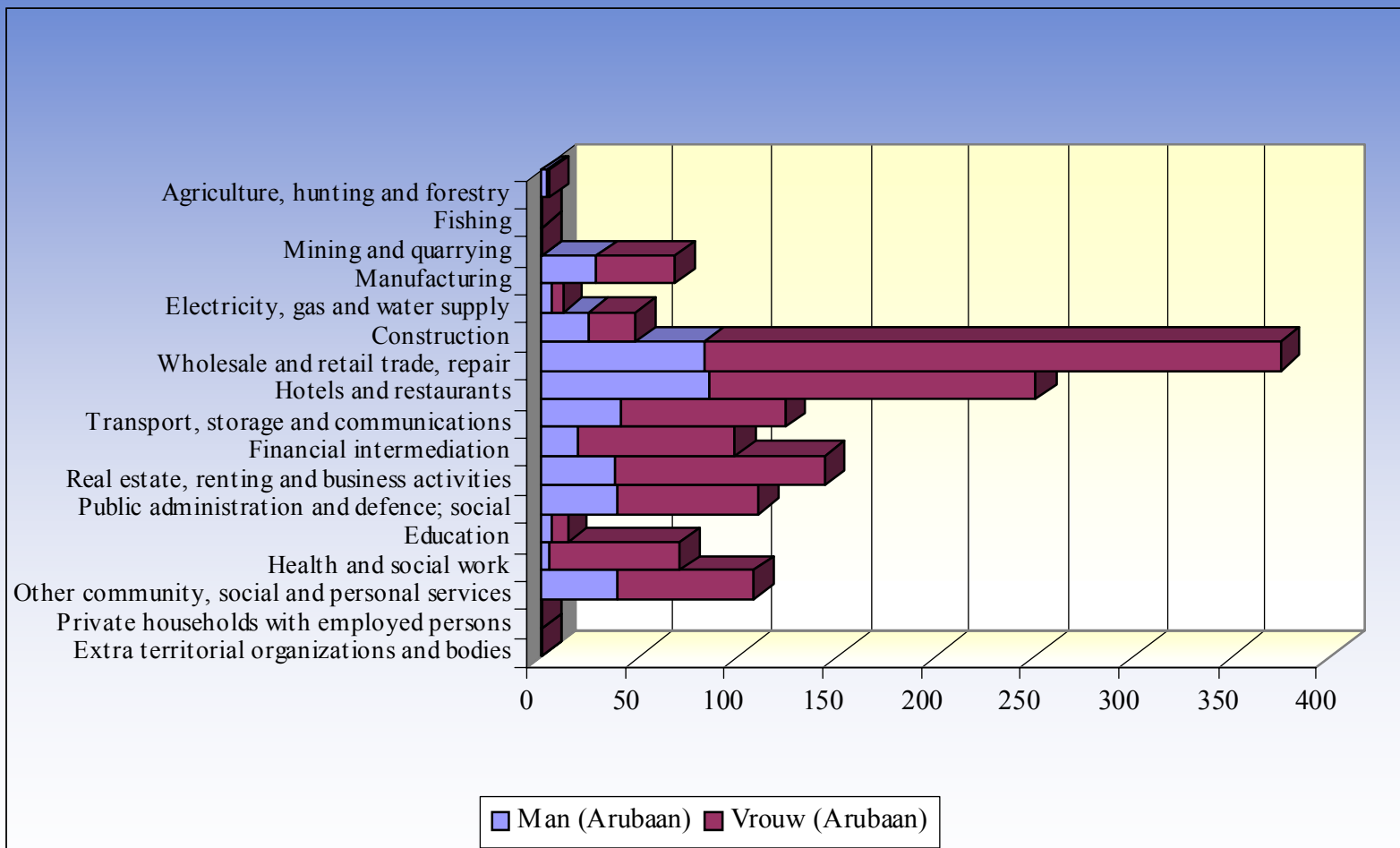
Source: Central Bureau of Statistics, Census 2000

GROWTH OF OCCUPATIONAL GROUPS

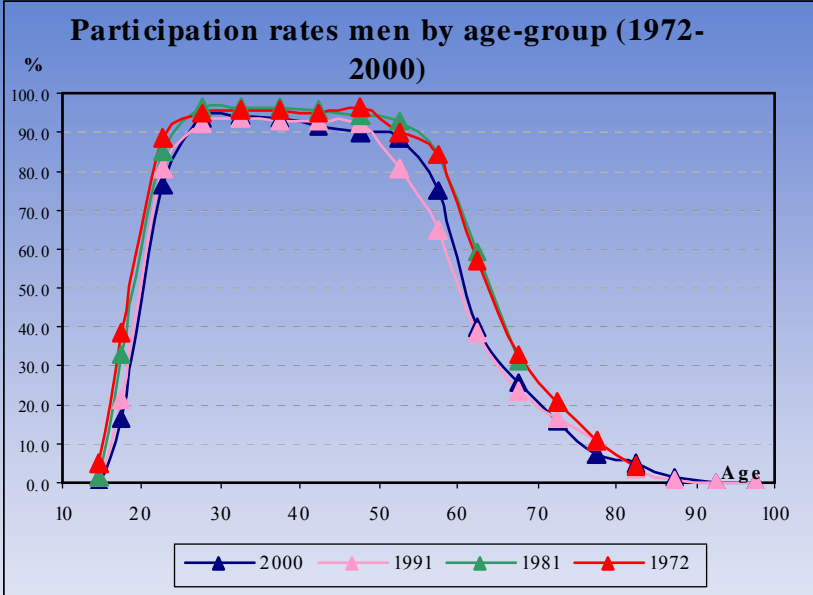
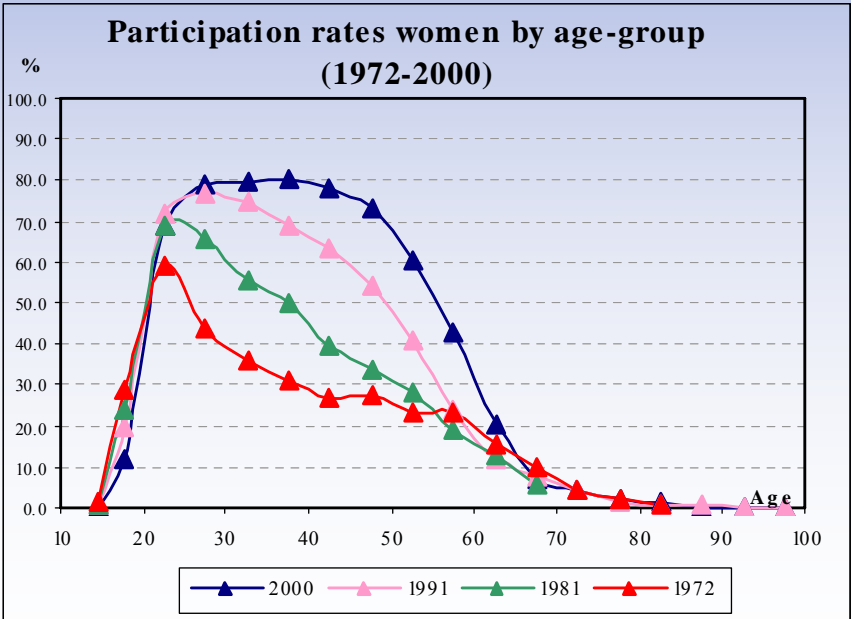
<i>Major Occupational group</i>	Male		Female		Total	
	Abs.	Growth %	Abs.	Growth %	Abs.	Growth %
Armed forces	10	8.4	0	0.0	10	8.4
Legislators, senior officials, and managers	776	47.4	675	100.2	1451	62.8
Professionals	594	70.1	625	130.1	1218	91.8
Technicians and associate professionals	982	63.1	935	79.9	1917	70.3
Clerks	295	14.3	1523	40.0	1819	30.9
Service workers and shop and market sales workers	986	38.1	1562	51.8	2548	45.5
Skilled agricultural and fishery workers	63	27.5	15	85.3	77	31.5
Craft and related trades workers	1004	26.4	132	70.7	1136	28.5
Plant and machines operators and assemblers	489	32.9	85	212.4	574	37.6
Elementary occupations	494	20.7	1473	50.1	1968	36.9
Unknown	-28	-25.2	9	18.4	-19	-11.9
Total	5665	33.7	7034	56.8	12699	43.5

Source: Central Bureau of Statistics, Census 2000

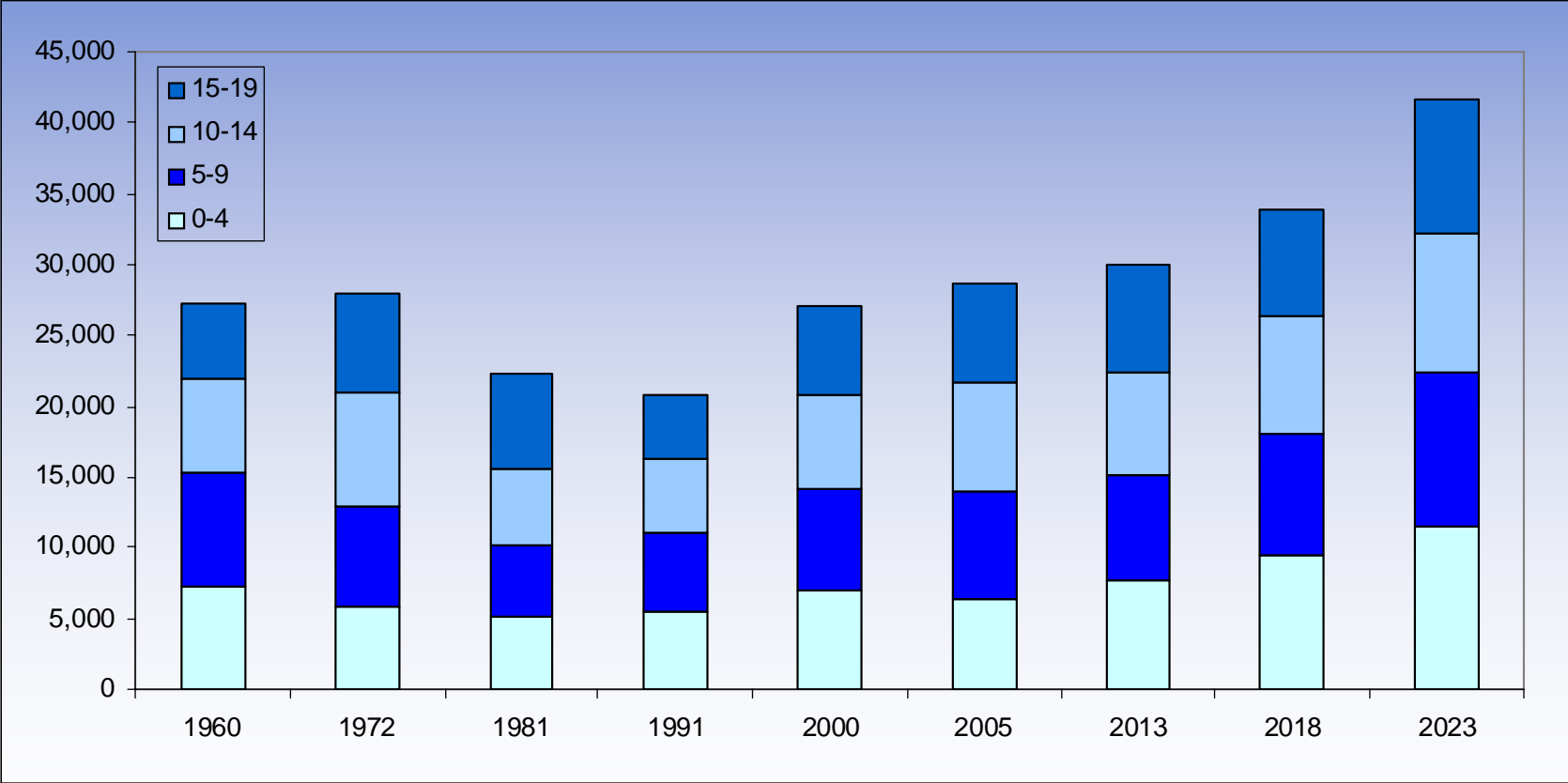
Working population, born on Aruba, with tourism oriented education, by industrial branch



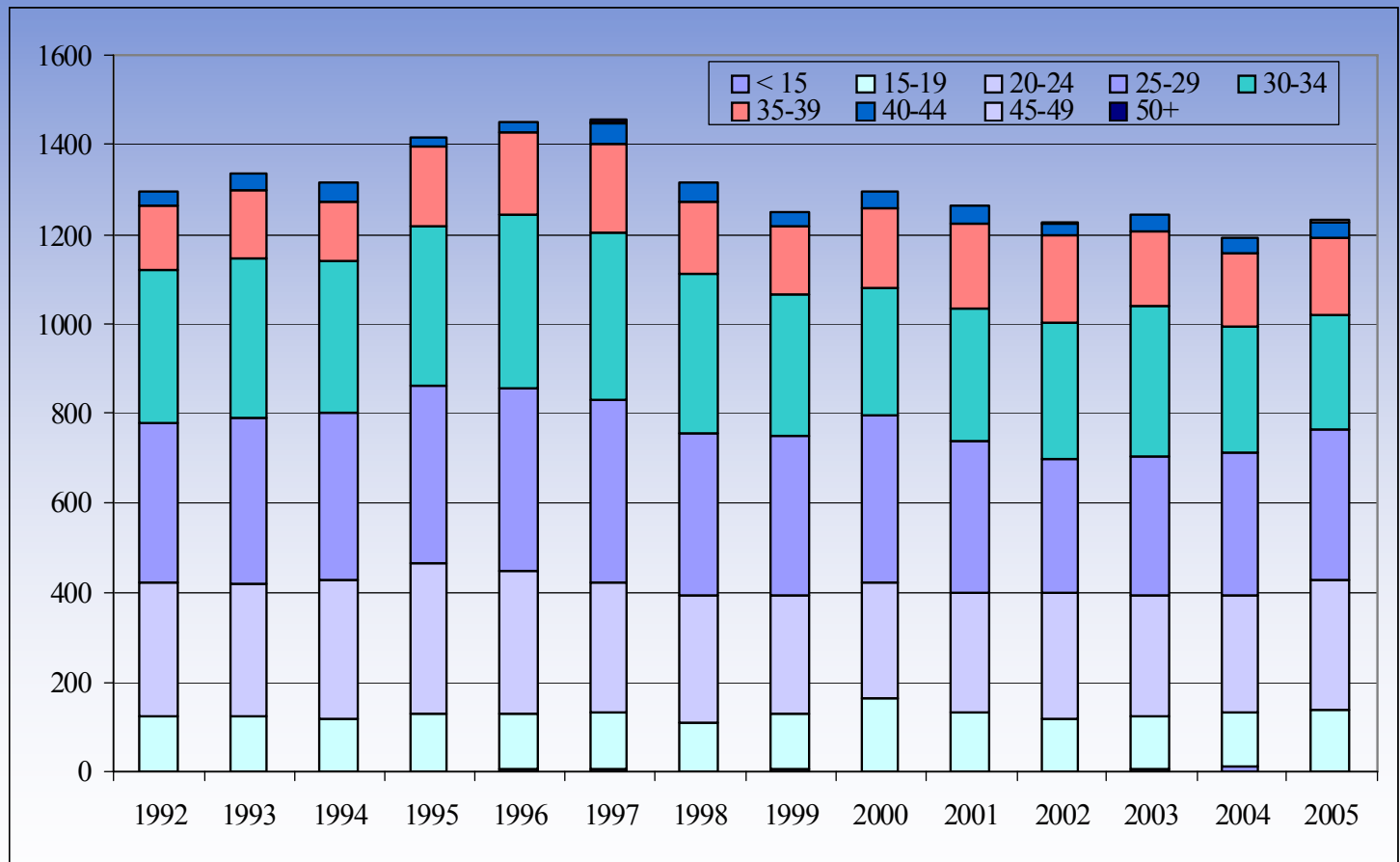
PARTICIPATION RATES WOMEN AND MEN, '72-'00



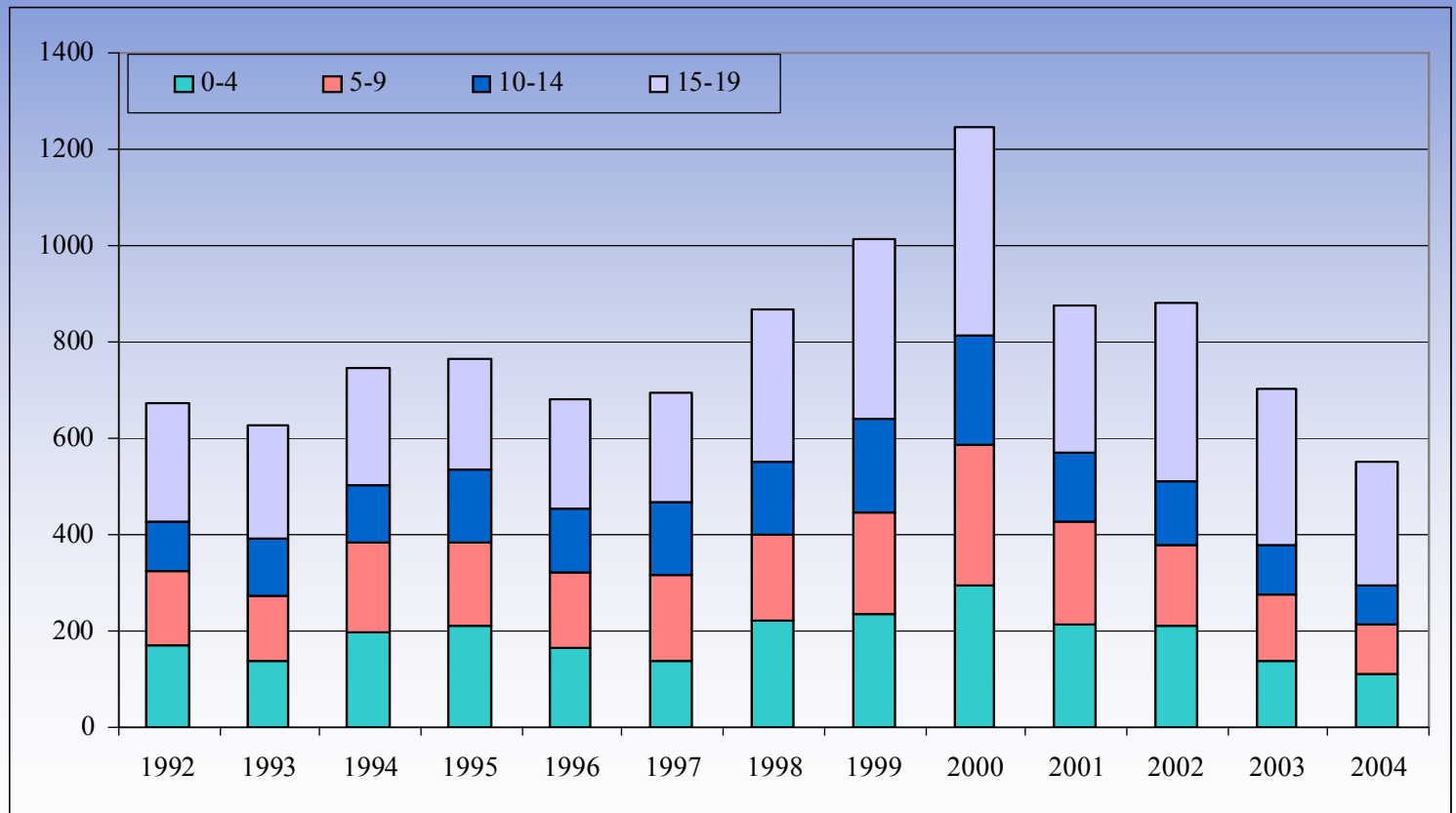
POPULATION TILL 19 YEARS OF AGE, 1960-2023



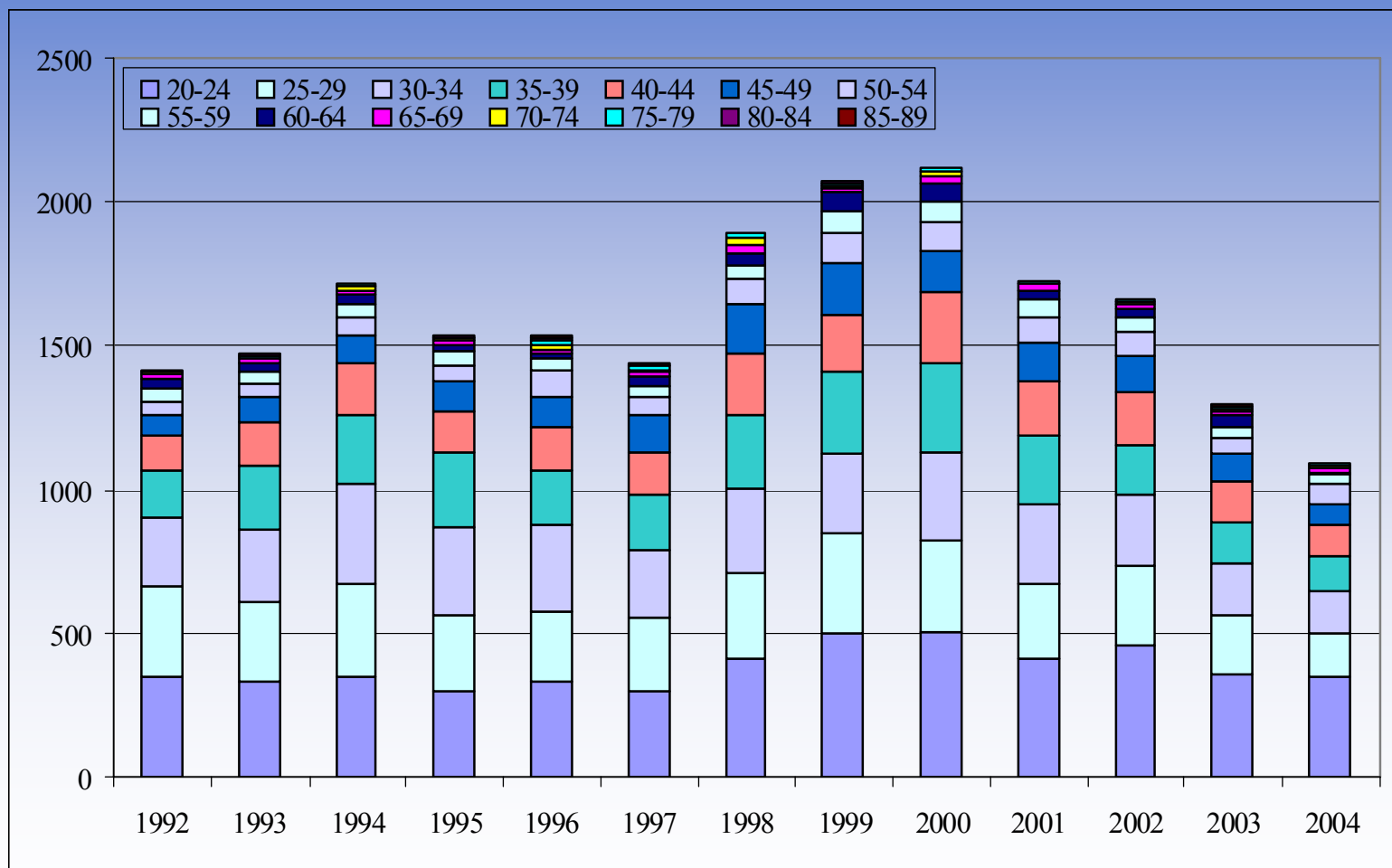
BIRTHS BY AGE OF THE MOTHER, '92-'05



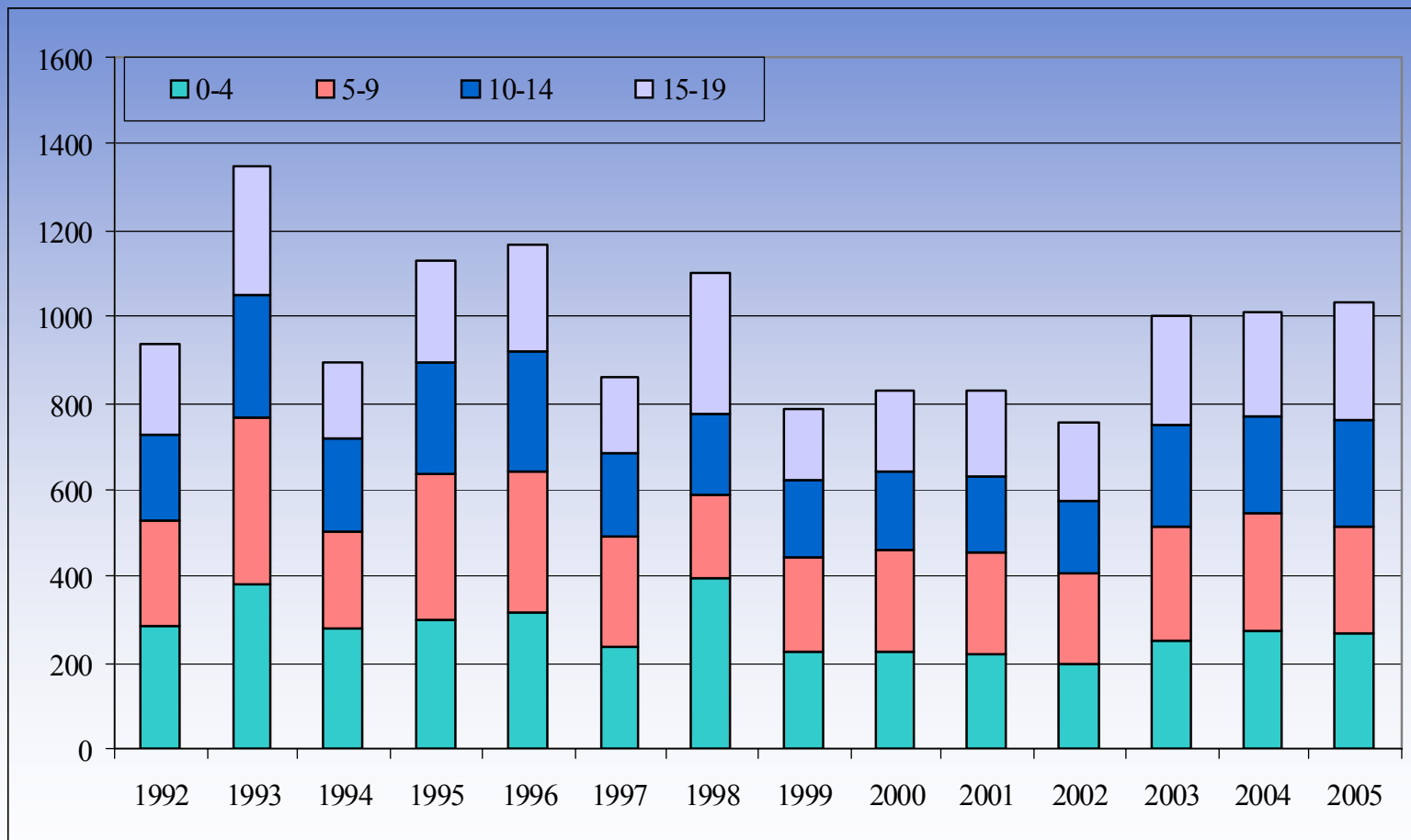
Emigration of young persons to other countries, 1992 – 2004



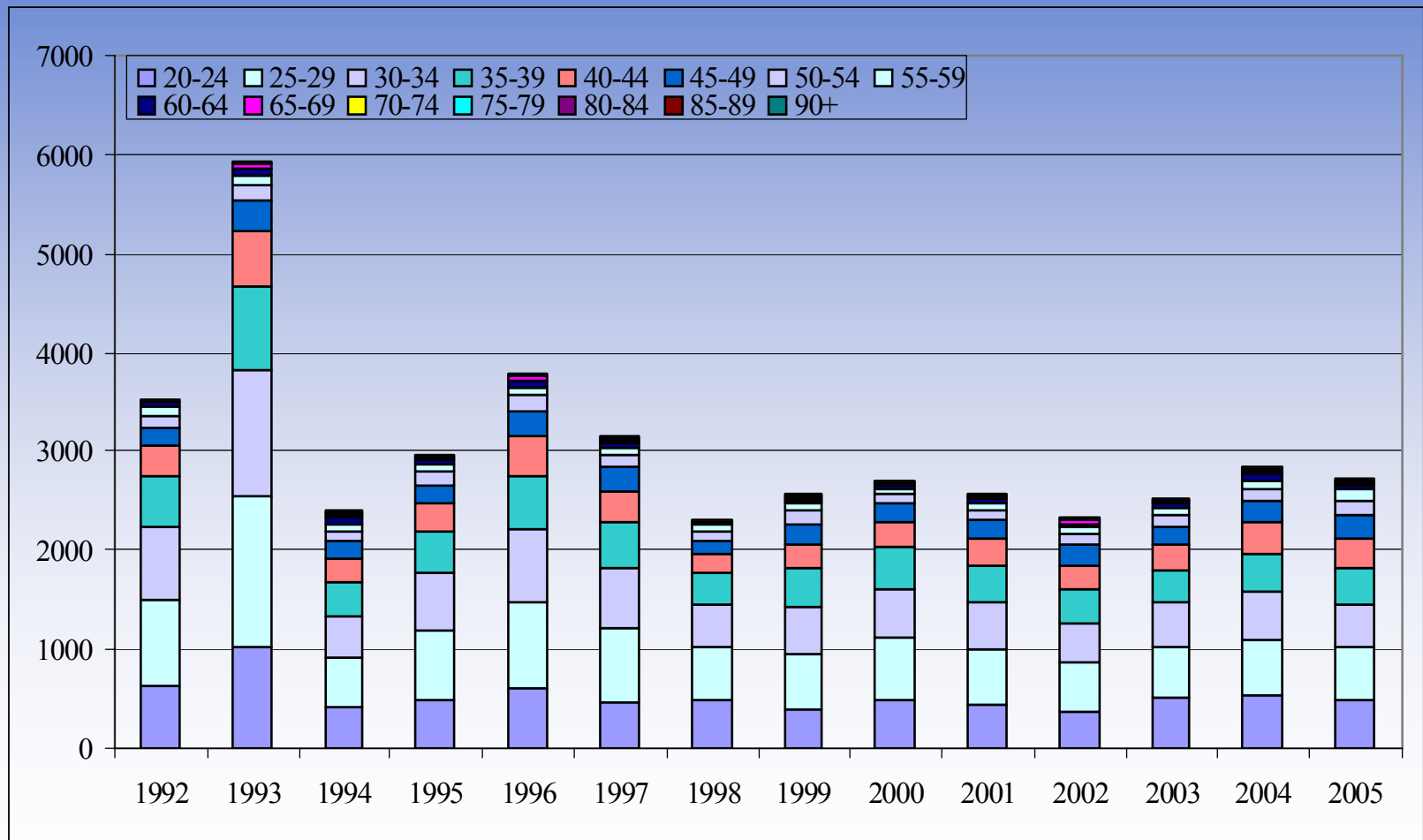
Emigration to other countries, persons of age 20+, 1992-2004



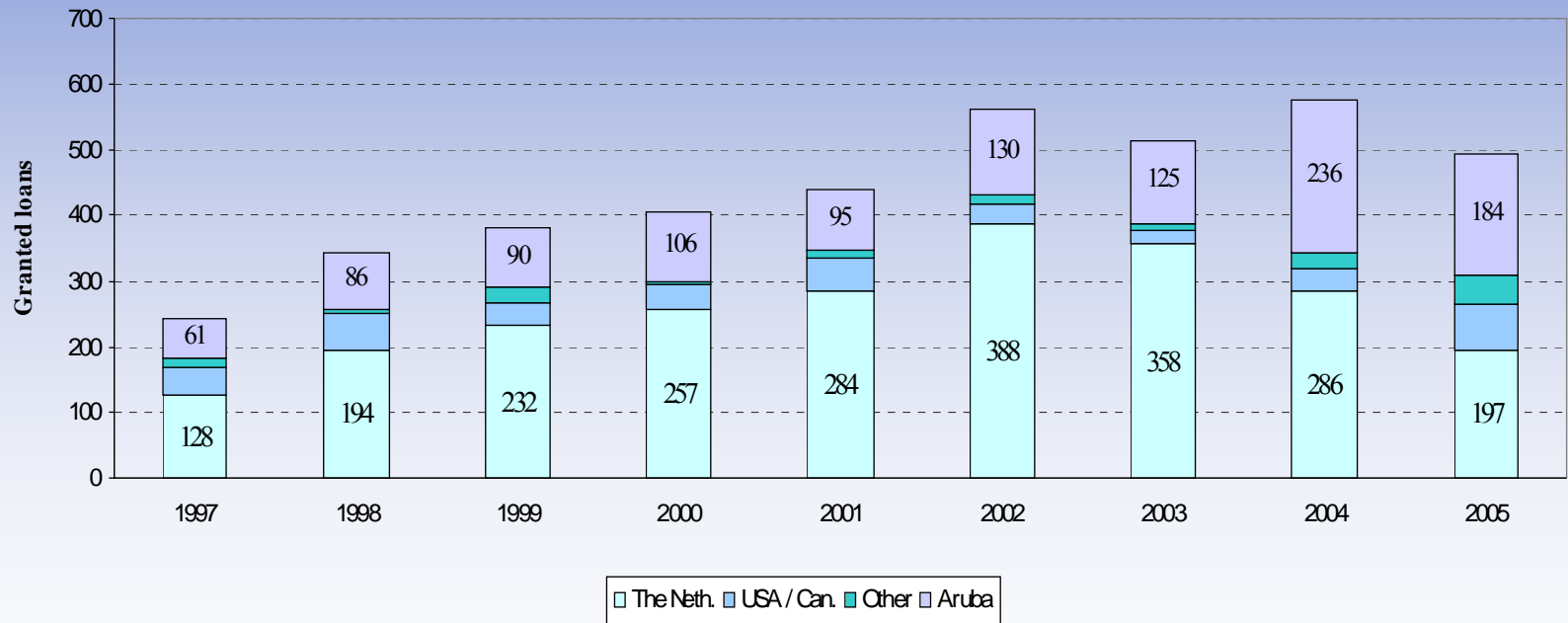
Immigration of young persons to Aruba, 1992 – 2005



Immigration of persons of age 20+ to other Aruba, 1992 – 2005



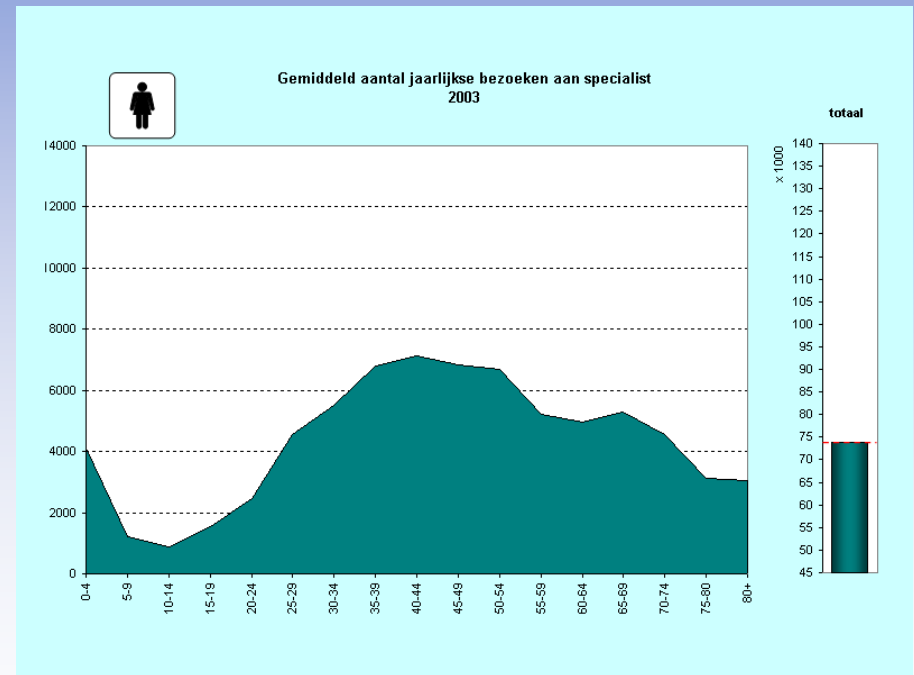
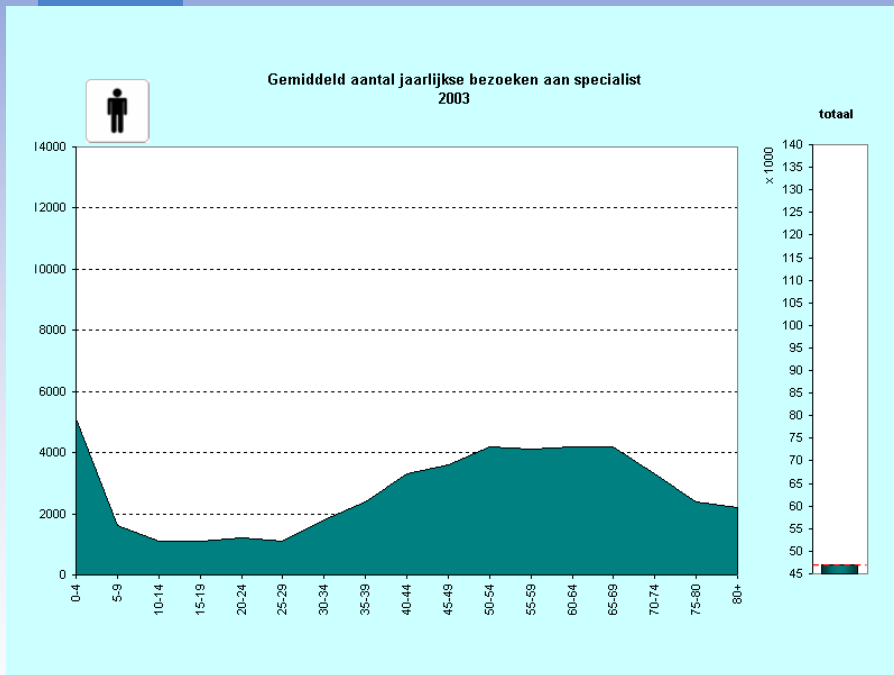
Granted loans for study, by year and country of study



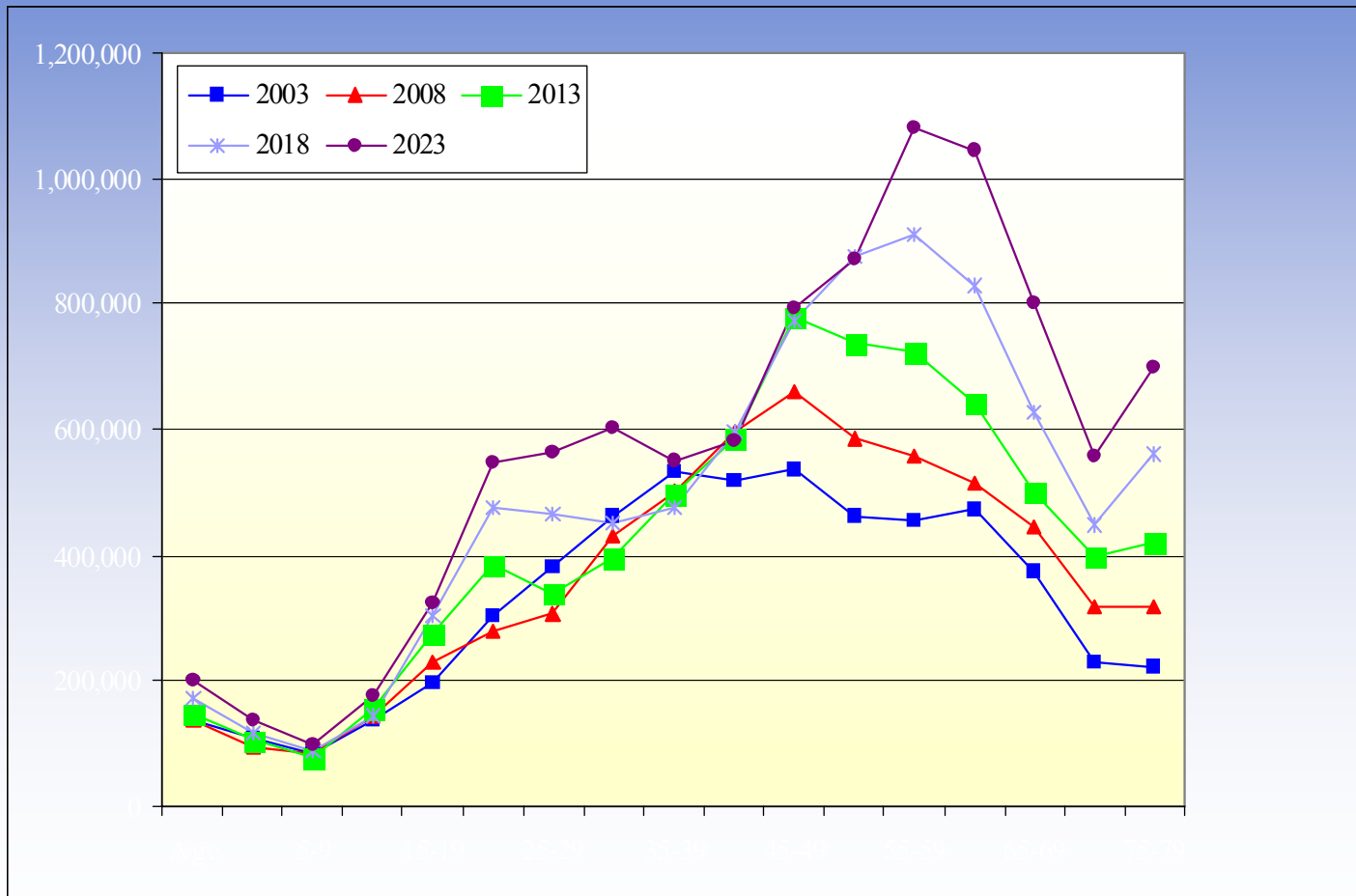
STRATEGIC PLANNING

- **STIMULATE LABOR PRODUCTIVITY**
- **TARGET HIGH INCOME VISITORS**
- **ANTICIPATE AGEING PROCES**
- **INVOLVE TOURISM SECTOR IN CURRICULUM DEVELOPMENT**
- **HEADHUNTING / INCENTIVES TO STIMULATE LOCALS TO WORK IN TOURISM SECTOR**
- **INVESTIGATE RELATION BETWEEN EDUCATION AND LABOR FORCE**

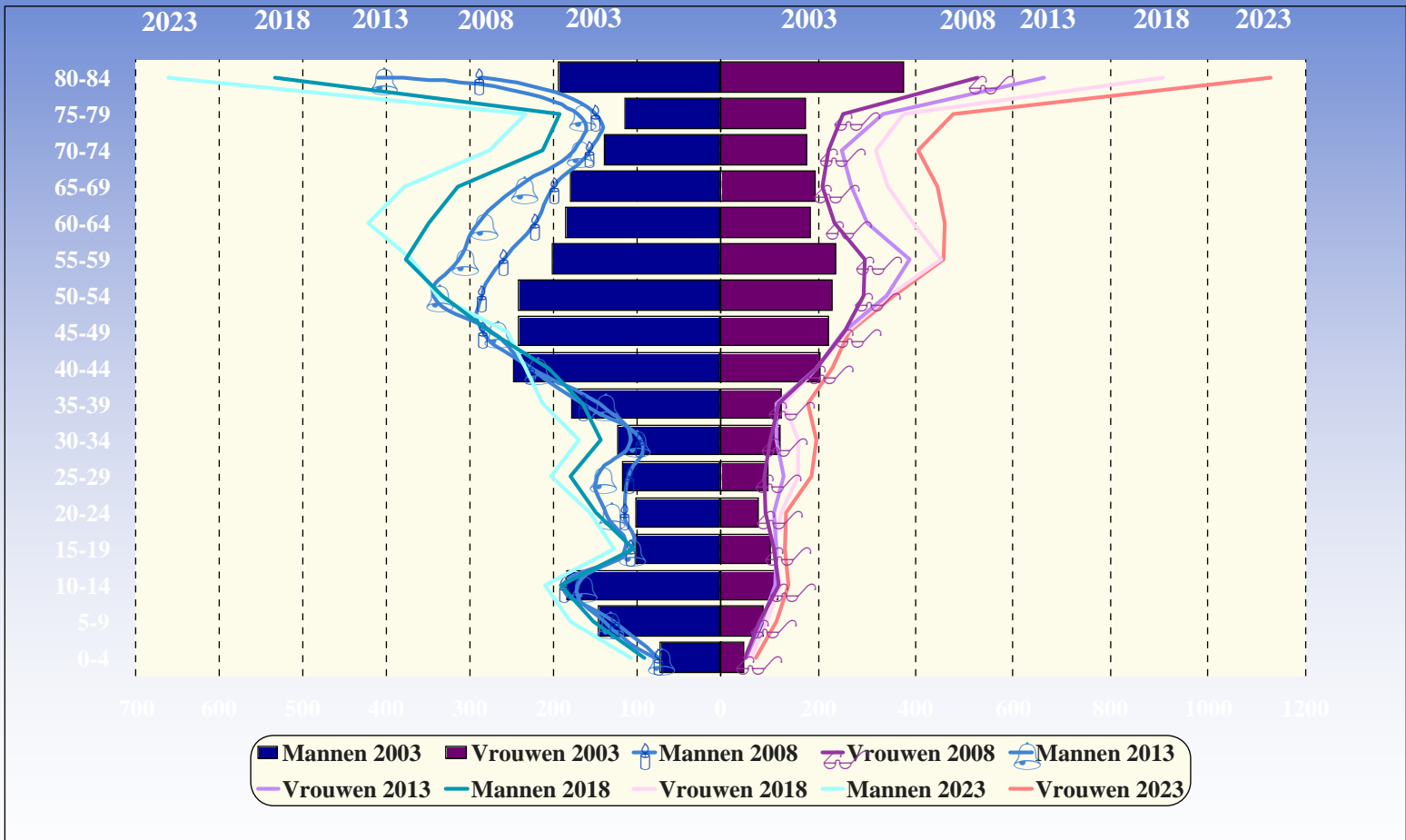
Toename gemiddeld aantal jaarlijkse bezoeken aan de specialist



Totale kosten consults specialisten per leeftijdscategorie (2003-2023)

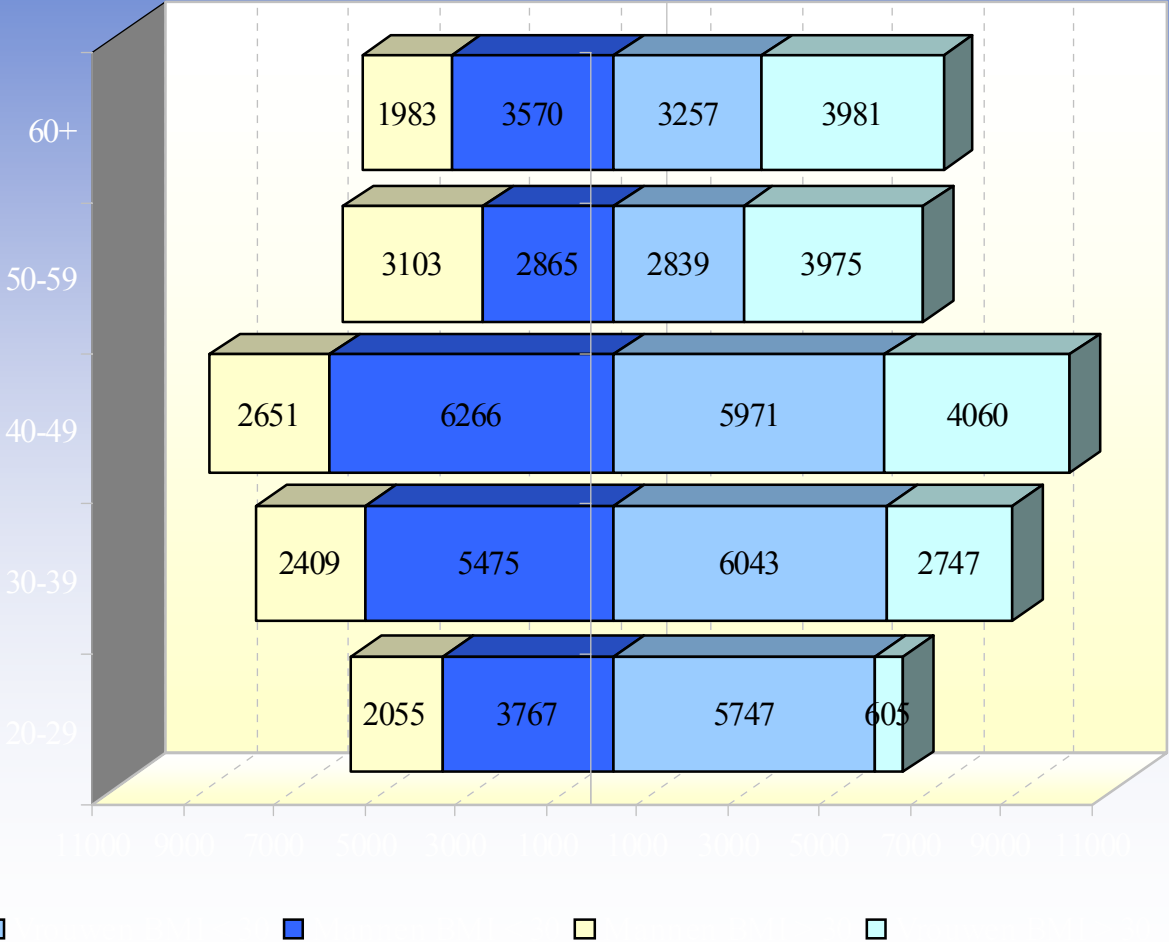


Toename van het aantal gehandicapten 2003 -2023

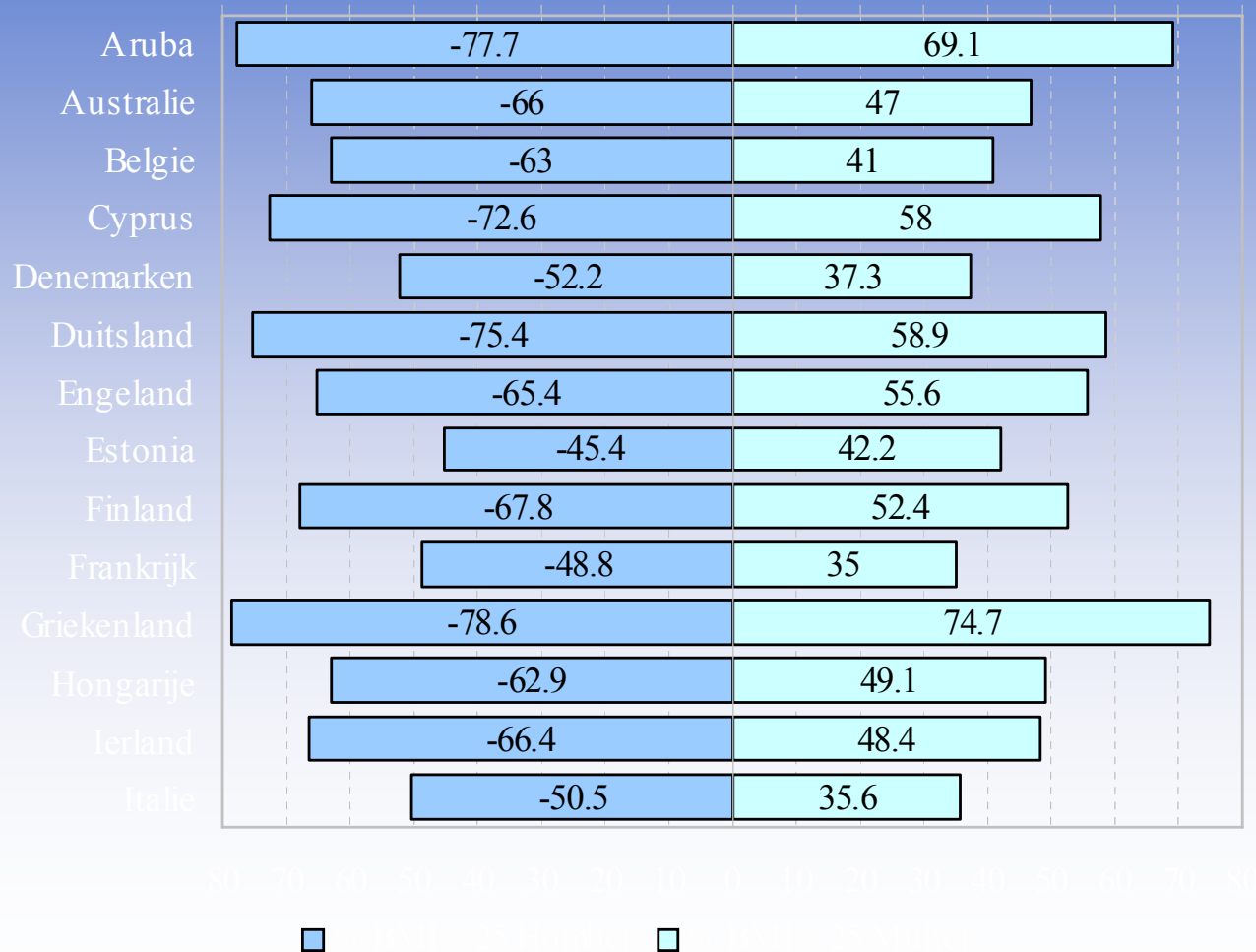


Bron: Volkstelling 2000, bevolkingsprojecties

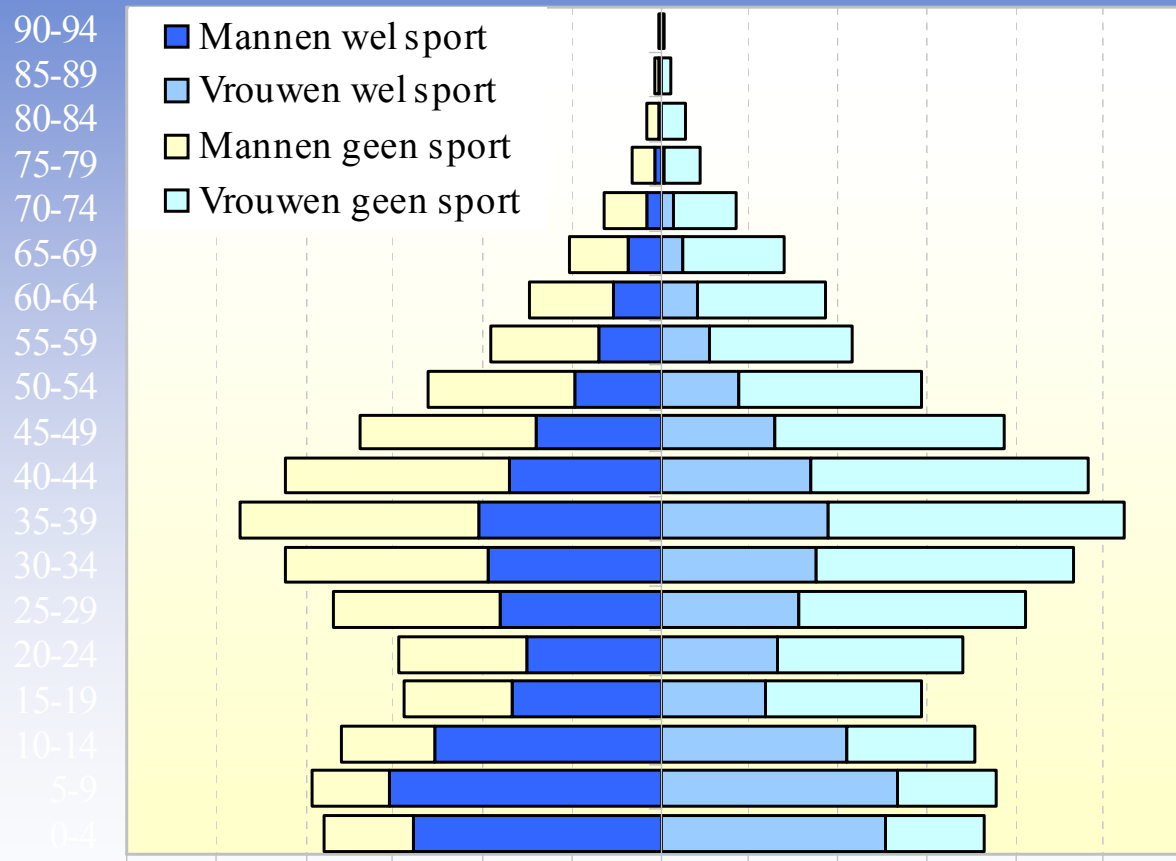
Proportie van de populatie met overgewicht (BMI > 30)



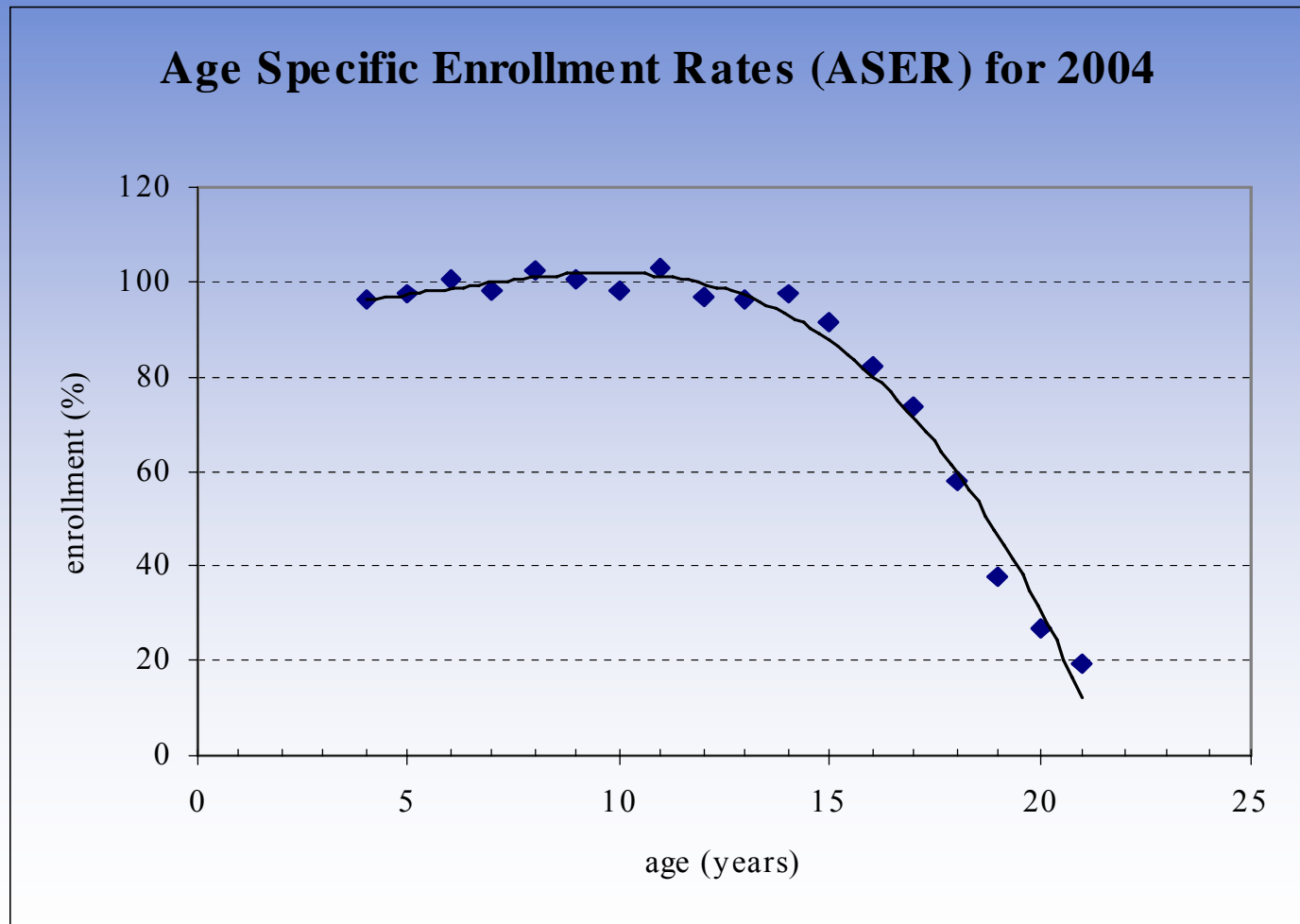
Internationale vergelijking zwaarlijvigheid



Beoefenen van sport bij leeftijd en geslacht



Age Specific Enrollment Rates



Sex ratio of school attending population by ISCED category

- ISCED 2
 - *MAVO, HAVO 1-3, VWO 1-3*
78.9 boys per 100 girls
 - *EPB*
167.1 boys per 100 girls
- ISCED 3
 - *HAVO 4-5, VWO 4-6*
63.4 boys per 100 girls
- ISCED 5
 - *EPI*
90.8 boys per 100 girls
- ISCED 6
 - *IPA, University of Aruba (candidate law)*
28.7 boys per 100 girls
- ISCED 7
 - *University of Aruba (doctoral law)*
36.0 boys per 100 girls