

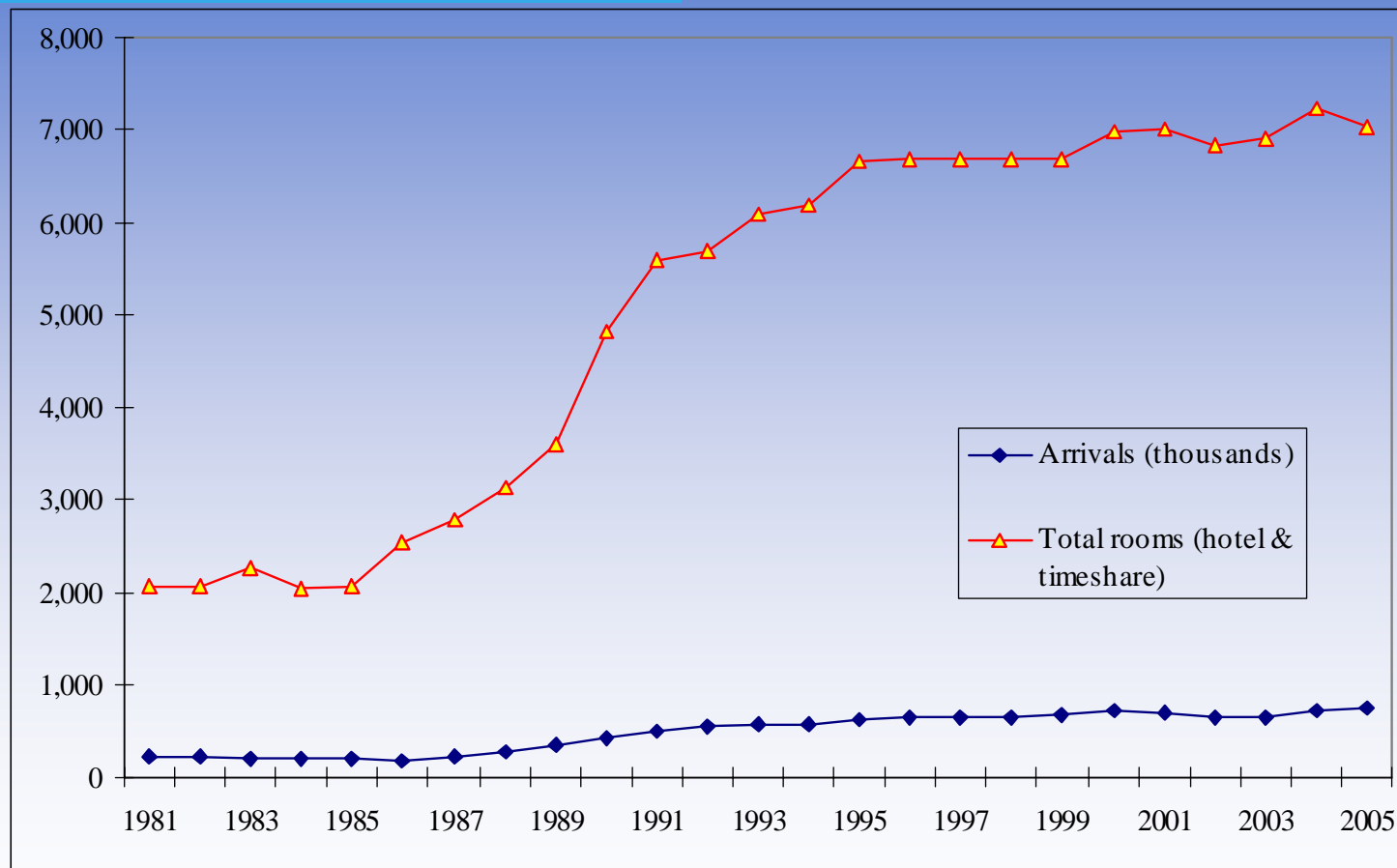
CHANCES & CHALLENGES

DEVELOPMENTS IN THE TOURISM INDUSTRY

Central Bureau of statistics



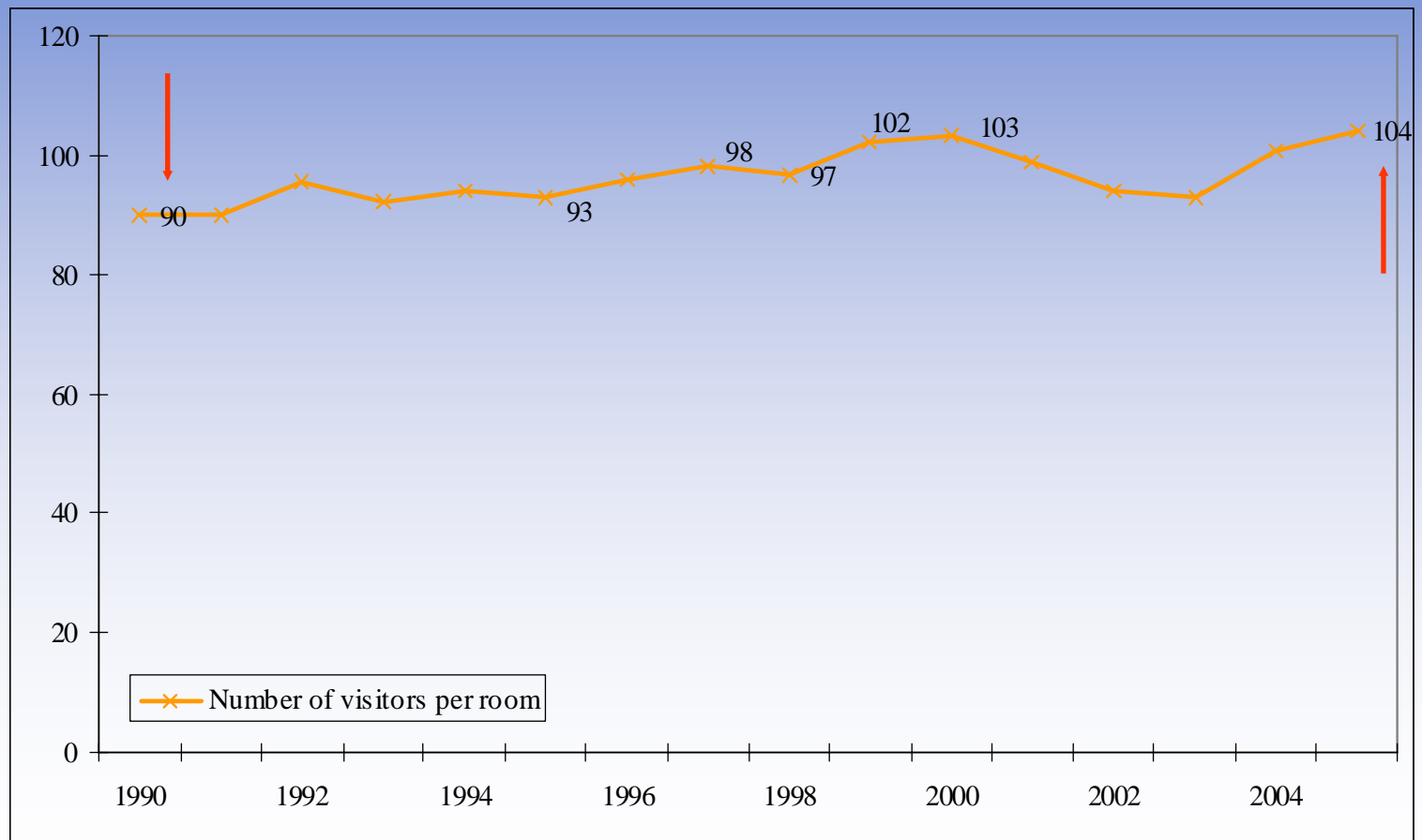
DEVELOPMENT IN THE NUMBER OF ARRIVALS AND TOTAL NUMBER OF ROOMS



Tourism

	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
Arrivals (thousands)	501	542	562	582	619	641	646	647	683	721	691	643	642	728	733
Total rooms (hotel & timeshare)	5,581	5,680	6,089	6,189	6,666	6,687	6,687	6,687	6,687	6,980	7,004	6,831	6,912	7,226	7,039

NUMBER OF VISITORS PER ROOM



PLANNED EXPASION OF TIMESHARE-ROOMS

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

PLANNED EXPANSION OF HOTELS-ROOMS

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

PROJECTED NUMBER OF ARRIVALS

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Tourism											
Arrivals (thousands)	721	691	643	642	728	733	712	908	1,039	1,042	1,151
Hotel rooms						4,046	3,916	4,715	5,335	5,335	6,435
Timeshare rooms /condominiums	2,430	2,452	2,460	2,475	2,808	2,993	3,240	4,406	5,102	5,134	5,134
Total rooms (hotel & timeshare)	6,980	7,004	6,831	6,912	7,226	7,039	7,156	9,121	10,437	10,469	11,569
Number of visitors per room	103	99	94	93	101	104					

EMPLOYEE / ROMM RATIO IN THE CARIBBEAN

Table 57: Employment in Accommodation Establishments.

Country	Number of rooms	Persons employed	Employee/Room ratio
Anguilla	1,067	1,326	1.14
Aruba	6,962	7,995	1.15
Barbados	5,752	5,685	0.99
Bermuda	3,339	3,289	0.99
Curacao	2,941	3,668	1.25
Dominican Republic	51,916	55,937	1.08
Jamaica	23,640	31,080	1.31
St. Eustatius	139	41	0.3
St. Lucia	3,769	5,200	1.38
US Virgin Islands	4,997	3,930	0.79
Total			1.13

Source: CTO

EMPLOYEE / ROOM RATIO IN ARUBA

- Hyatt Regency, Radisson, Wyndham: 1.2 employees per room
- Bucuti, Manchebo, The Mill: 0.9 employees per room

	2000	2001	2002	2003	2004	2005	2006
Total employees in hotels & timshare	5,772	5,723	5,442	5,235	5,395	5,673	5,607
Total employees in tourism industry	15,941	15,584	15,121	15,299	15,662	16,387	16,215
Not tourism related	20,899	20,189	20,158	21,054	21,307	21,884	23,216
	36,840	35,773	35,279	36,353	36,969	38,271	39,431
Total number of hotelrooms	6,980	7,004	6,831	6,912	7,226	7,039	7,156
Employee / Room ratio (working in hotel/timeshare)	0.83	0.82	0.80	0.76	0.75	0.81	0.78
Employee / Room ratio (working in tourism sector)	2.28	2.23	2.21	2.21	2.17	2.33	2.27

PROJECTED NUMBER OF ARRIVALS

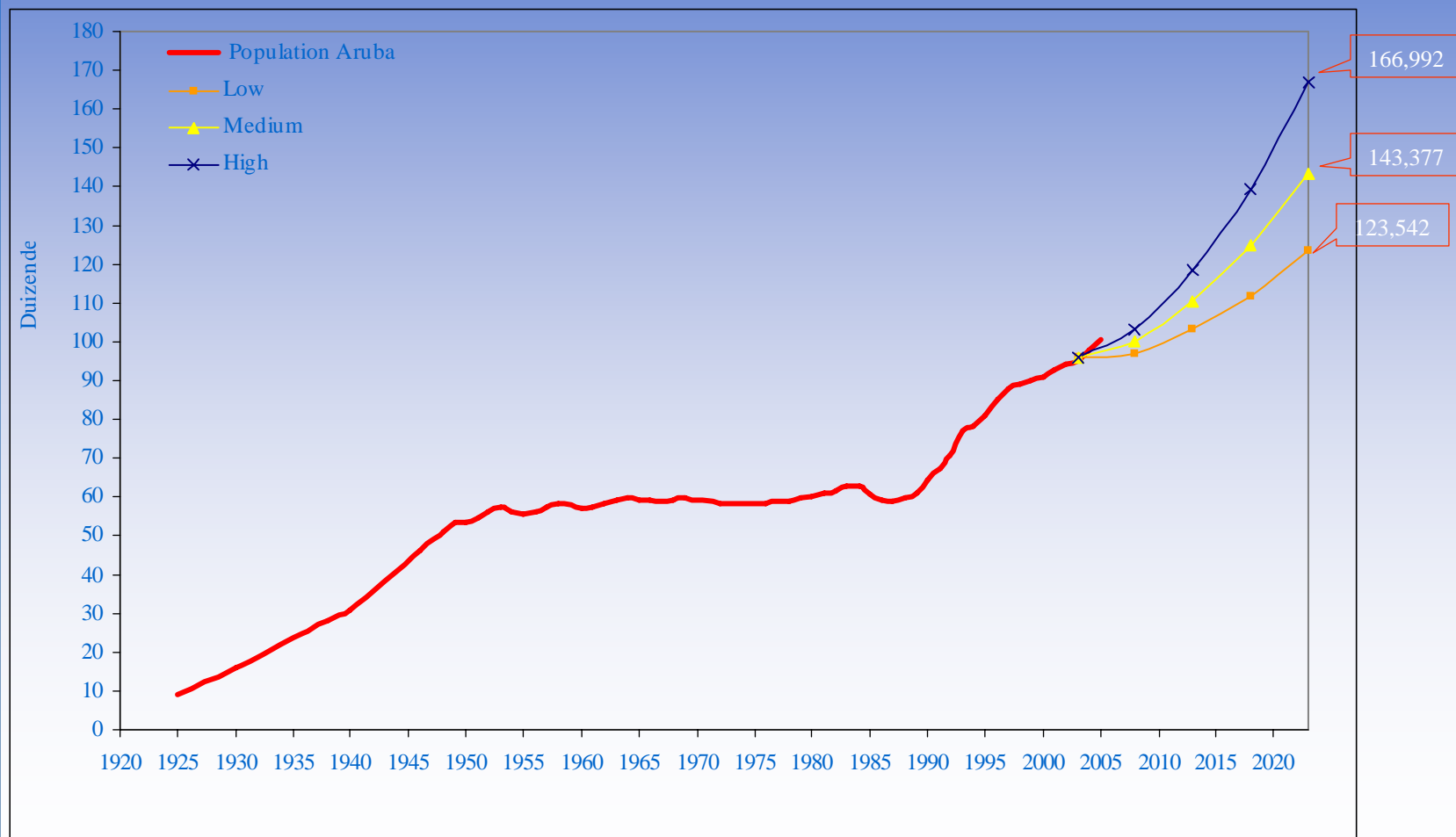
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Employed population											
Employed in hotel & timeshare (factor 0.82)	5,772	5,723	5,442	5,235	5,395	5,673	5,868	7,479	8,558	8,585	9,487
Employed in hotelindustry (factor 2.28)	15,941	15,584	15,121	15,299	15,662	16,387	16,316	20,796	23,796	23,869	26,377
Not tourism related	20,899	20,189	20,158	21,054	21,307	21,884	23,216	23,843	24,487	25,148	25,827
Total number of persons on payroll	36,840	35,773	35,279	36,353	36,969	38,271	39,532	44,639	48,283	49,017	52,204

PROJECTIE ARBEIDSBEHOEFTE MEDIUM SCENARIO

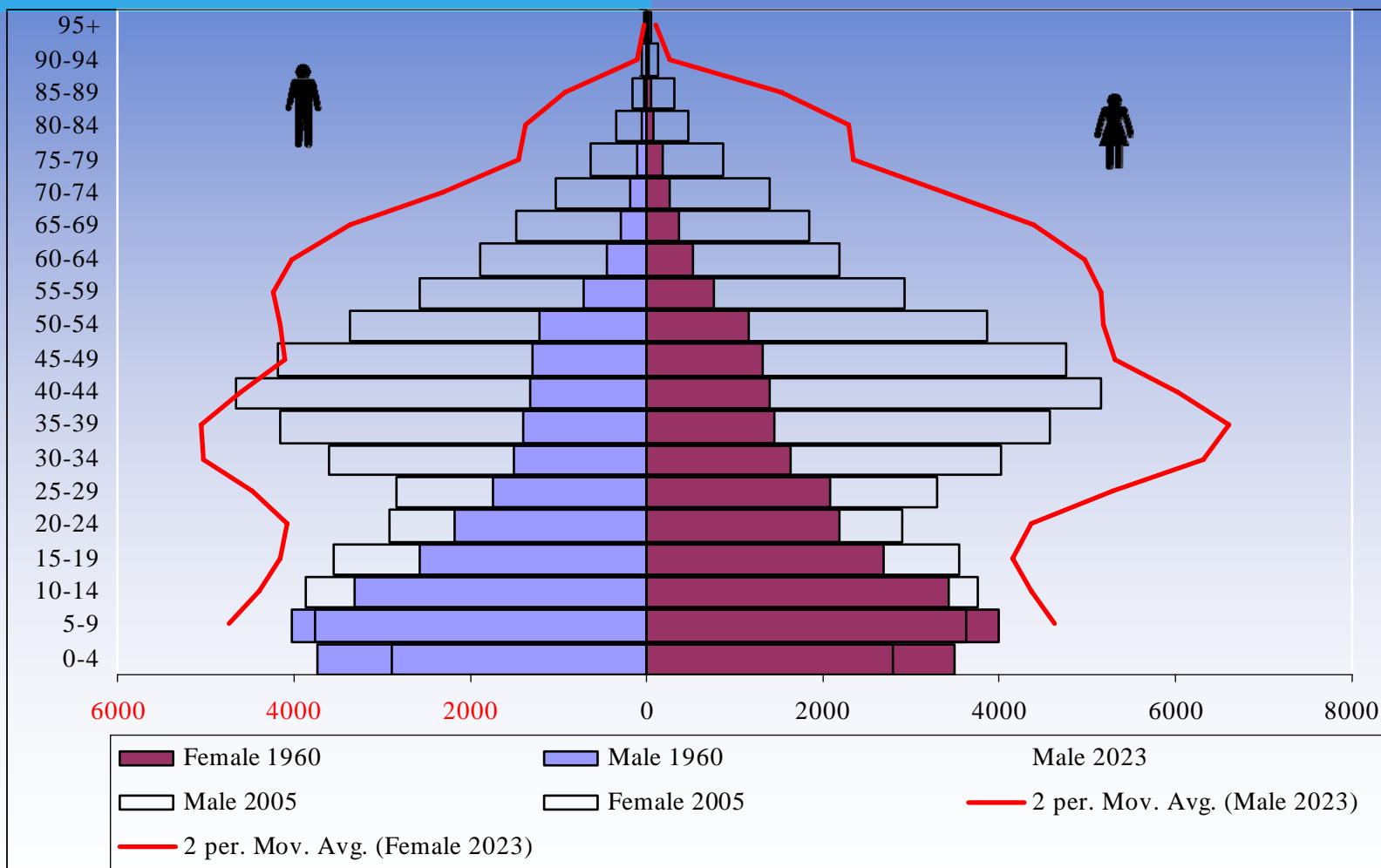
2003 -2023

	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

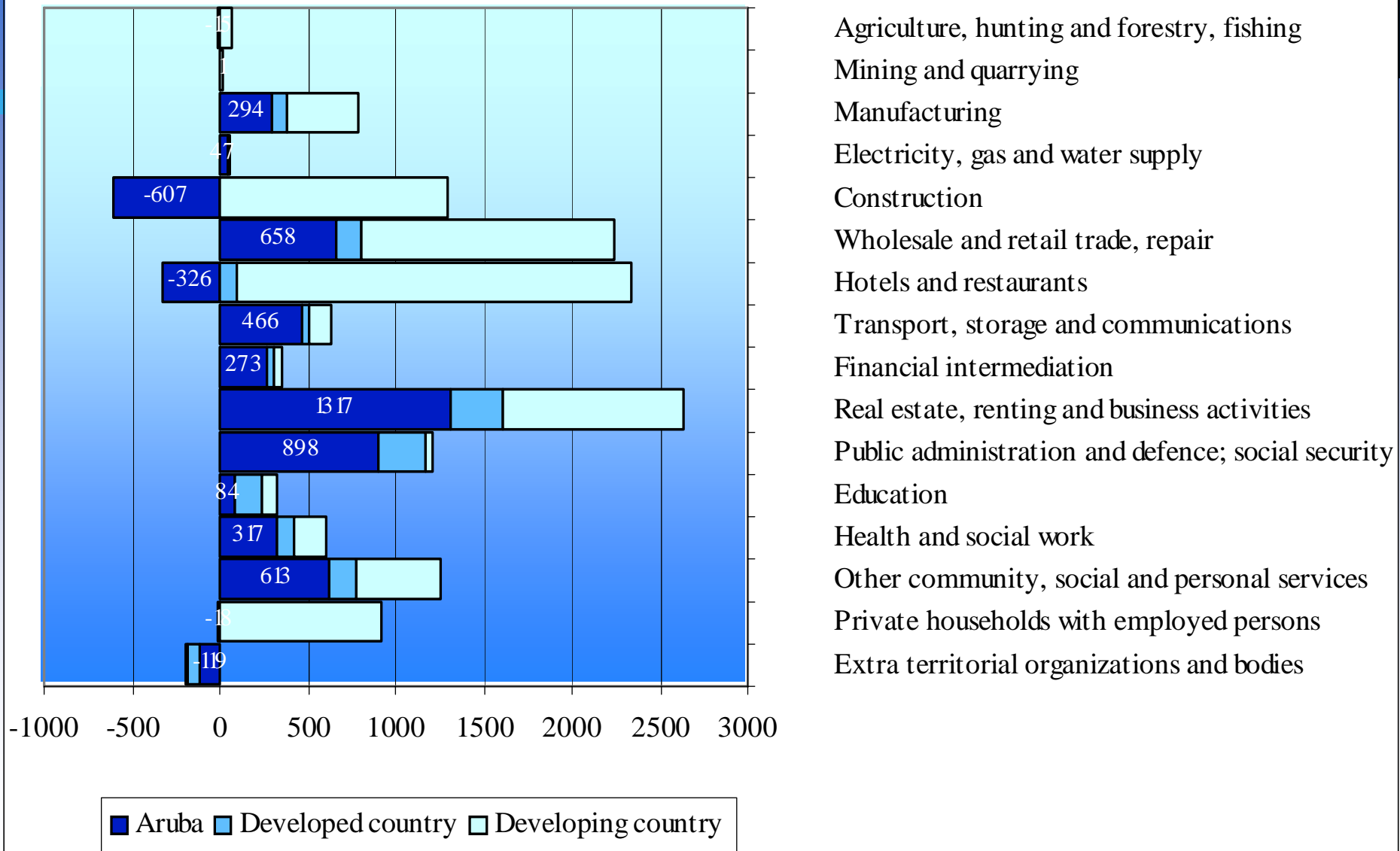
POPULATION DEVELOPMENTS 1920-2023



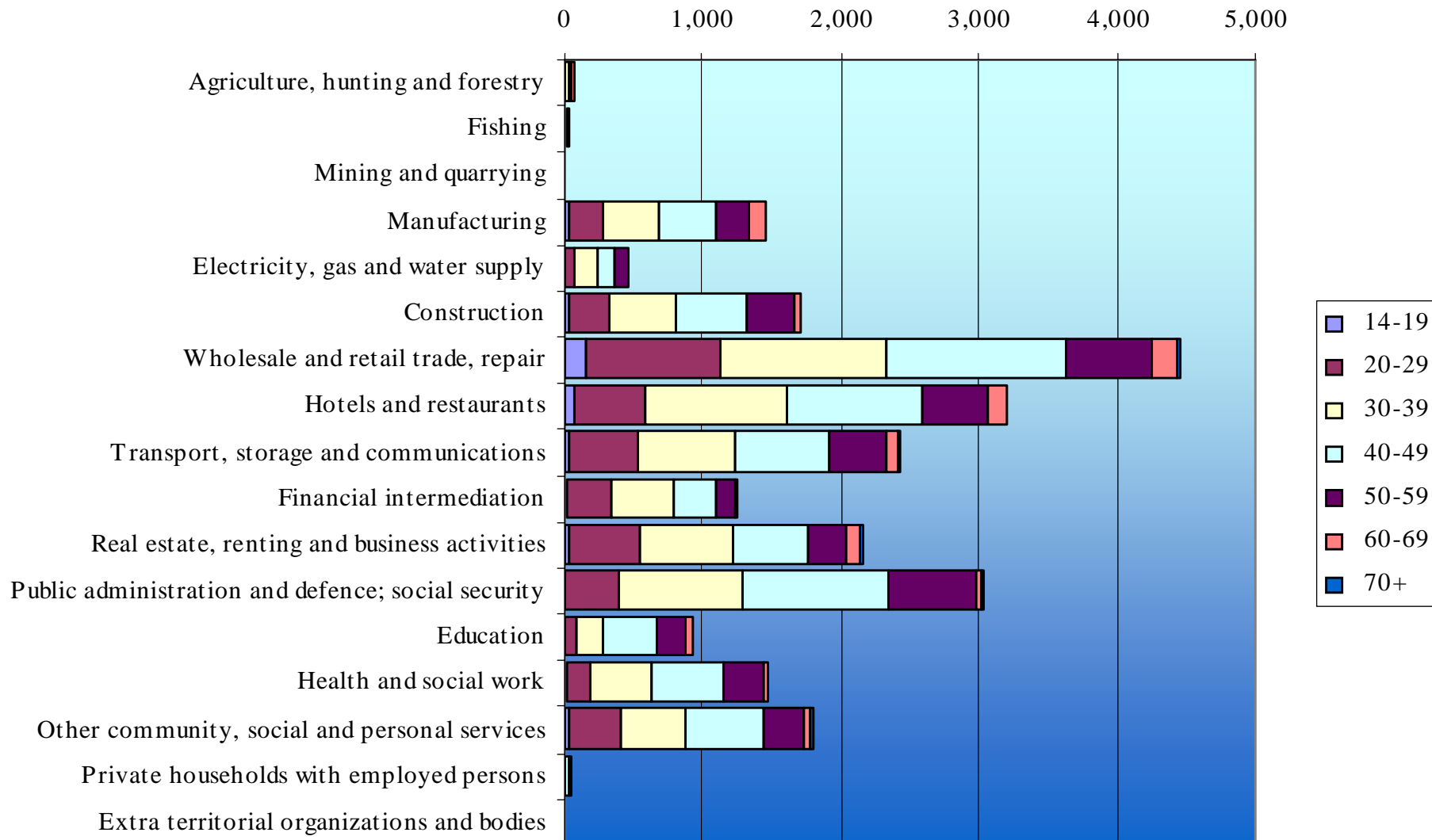
DEJUVENATION AND AGEING OF THE POPULATION



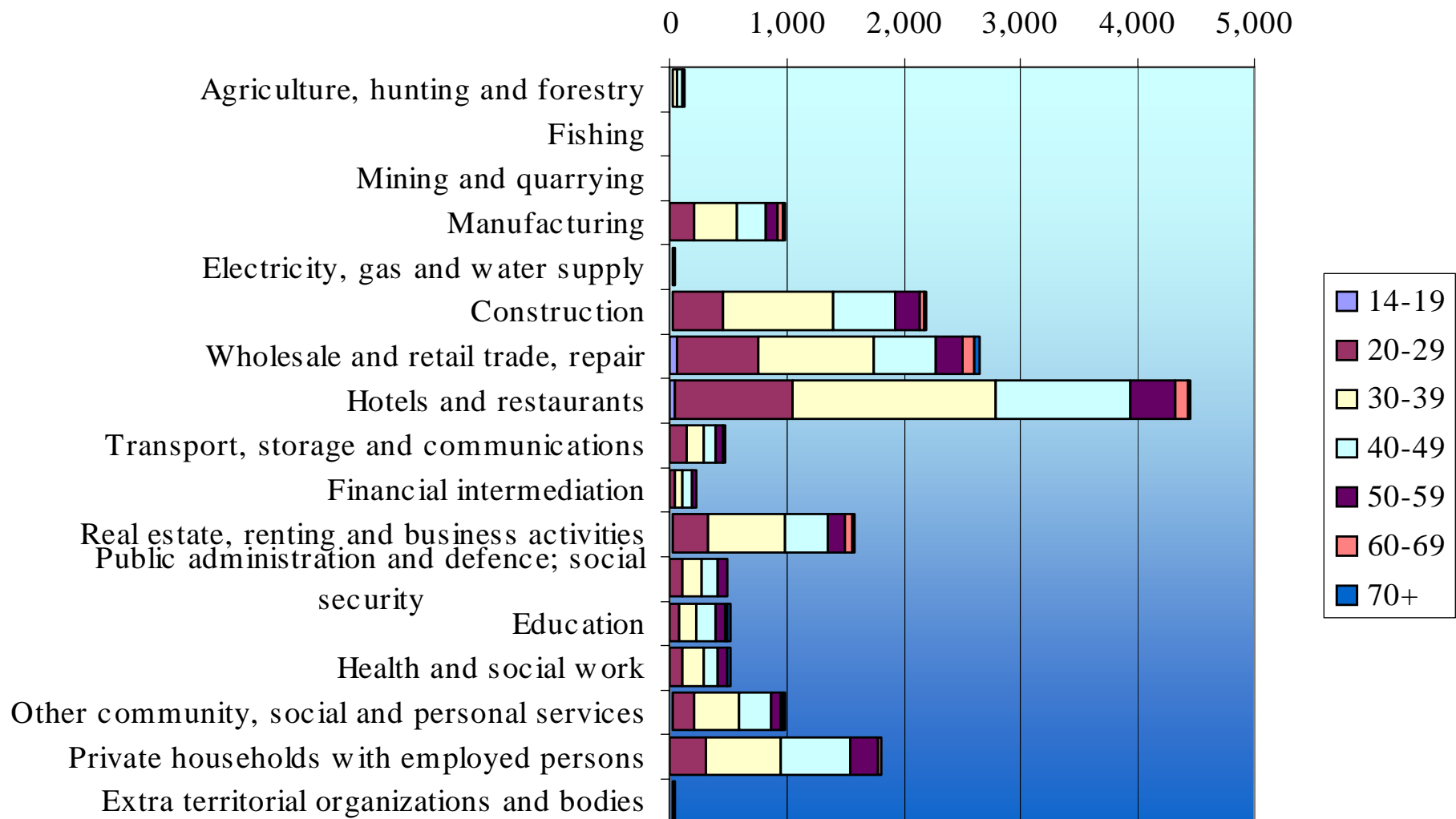
Arbeidsmarktontwikkelingen per sector '91 - '00



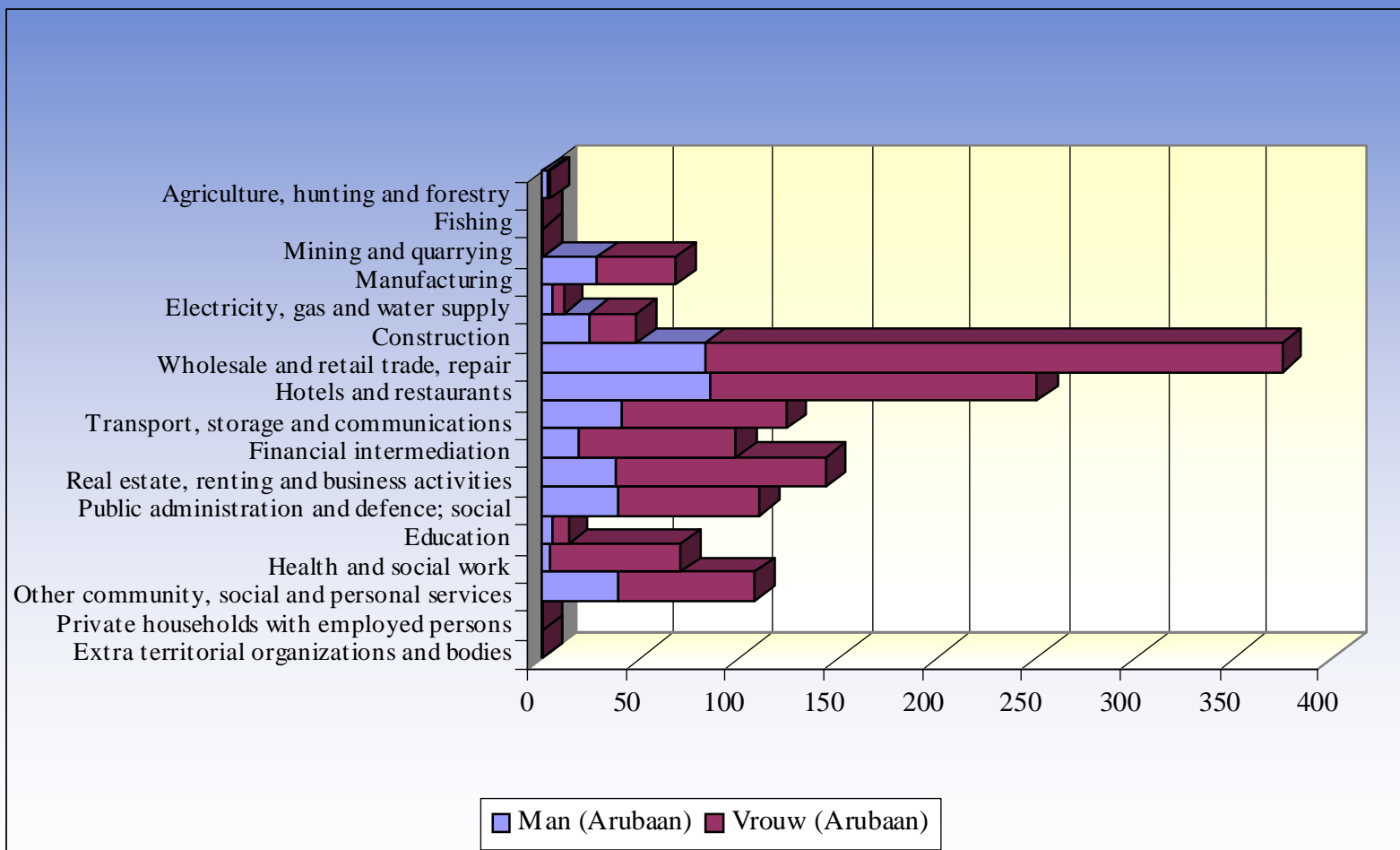
LOCAL LABOR FORCE BY AGE CATEGORY AND ECONOMIC BRANCH



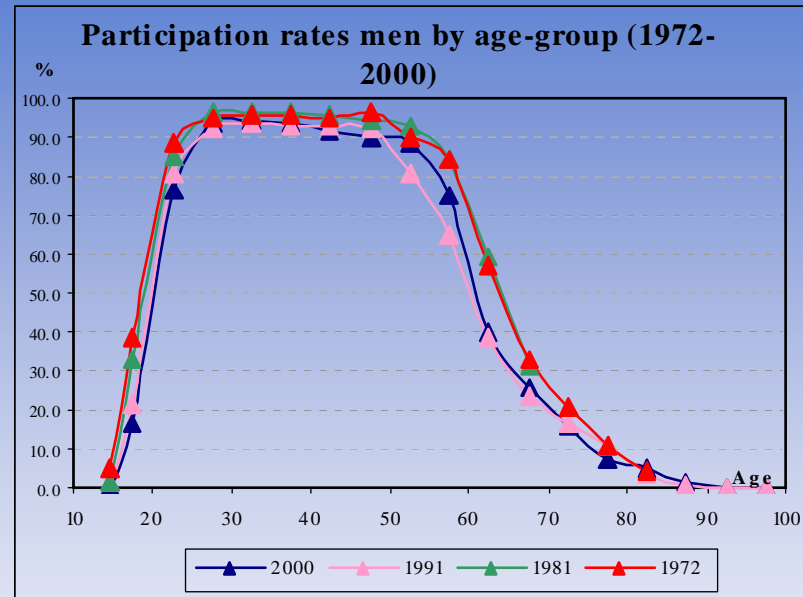
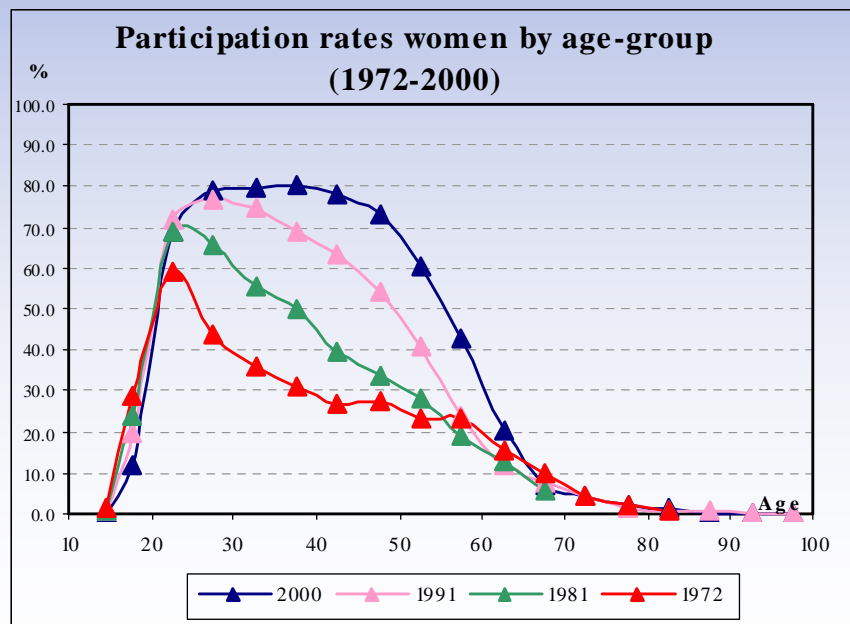
FOREIGN LABOR FORCE BY AGE-CATEGORY AND ECONOMIC BRANCH



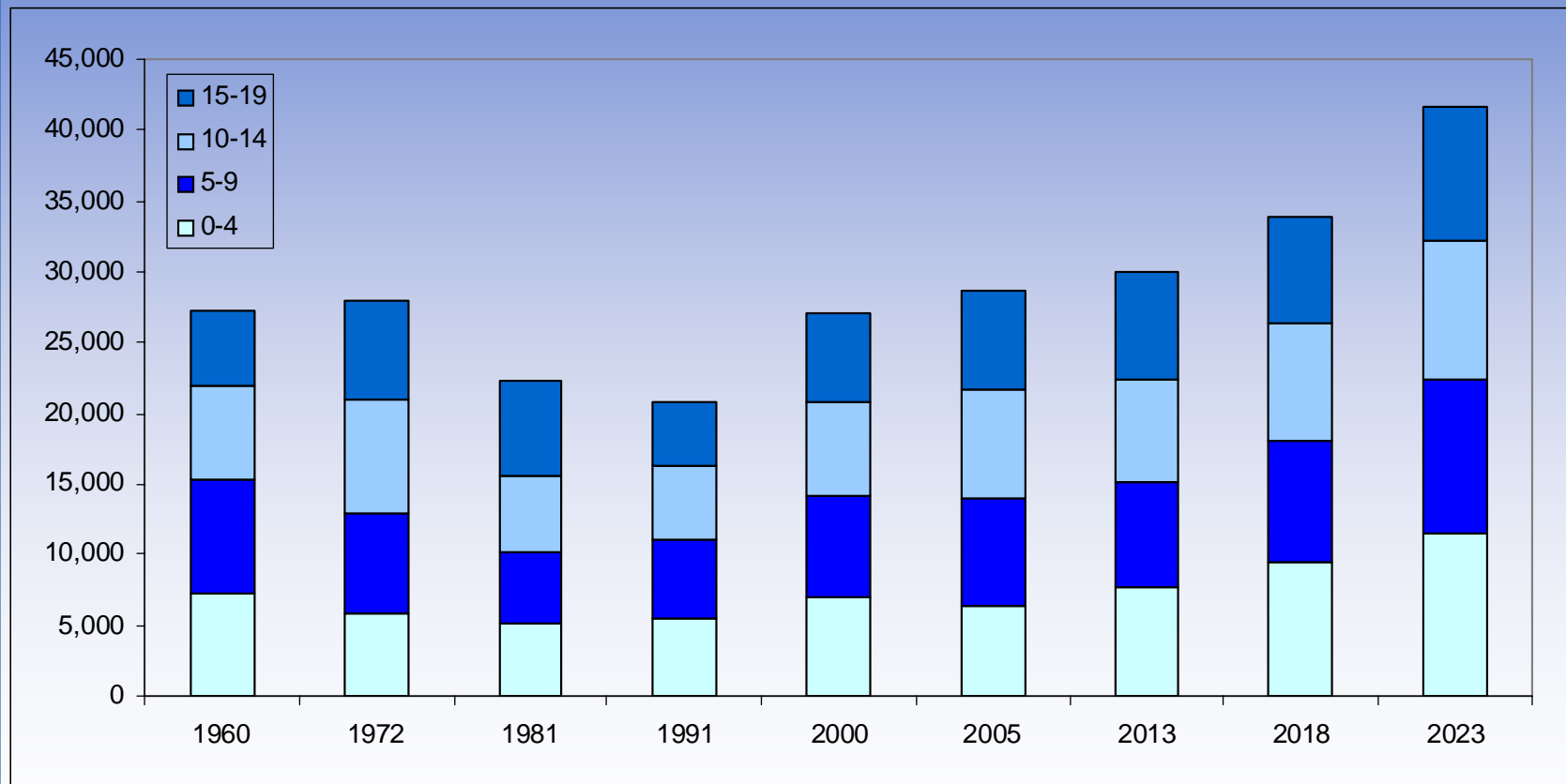
Working population, born on Aruba, with tourism oriented education, by industrial branch



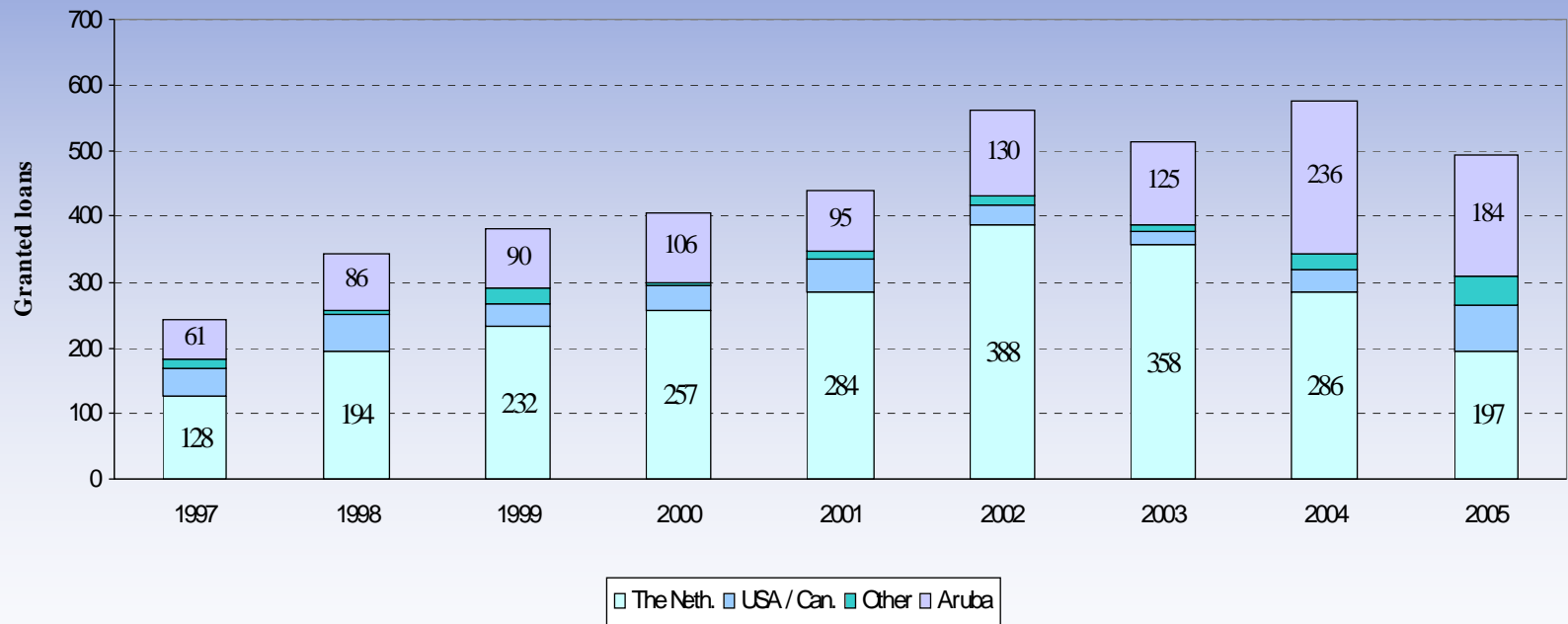
PARTICIPATION RATES WOMEN AND MEN, '72-'00



POPULATION TILL 19 YEARS OF AGE, 1960-2023



GRANTED LOANS FOR STUDY, BY YEAR AND COUNTRY OF STUDY



CONCLUSIONS

- The planned expansion will put the labor force under stress (between 3.6 and 10 thousand new vacancies till 2010)
- Gradually (instead of simultaneously) raise the number of rooms
- **Raise participation rates of the population currently living on Aruba**
- **Contact and attract locals (studying abroad)**
- **Streamline logistics of permits**
- **Integrate foreigners in our community**