



Trends in the Caribbean Netherlands

2020



**Trends in
the Caribbean
Netherlands
2020**

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*	Provisional figure
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x	Publication prohibited (confidential figure)
-	Nil
-	(Between two figures) inclusive
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2019-2020	2018 to 2019 inclusive
2019/2020	Average for 2018 to 2019 inclusive
2019/'20	Crop year, financial year, school year, etc., beginning in 2019 and ending in 2020
2017/'18-2019/'20	Crop year, financial year, school year, etc., 2017/'18 to 2019/'20 inclusive

Due to rounding, some totals may not correspond to the sum of the separate figures.

Colophon

Publisher

Statistics Netherlands
Henri Faasdreef 312, 2492 JP The Hague
www.cbs.nl

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Kralendijk, Bonaire
Telephone: +599 717 8676

Prepress: Textcetera, The Hague and CCN Creatie, The Hague
Design: Edenspiekermann
Printed by: Sumis, Amstelveen
Photography cover: Z.ePhotography

Information

Telephone +31 88 570 70 70
Via contact form: www.cbs.nl/infoservice

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Foreword

Trends in the Caribbean Netherlands 2020 provides updated as well as new information, covering some aspects of life in the Caribbean Netherlands.

The edition before you includes data on all three islands of the Caribbean Netherlands: Bonaire, Saba and St Eustatius, with topics including consumer prices, energy, income, nature and environment and tourism.

This 2020 edition of Trends in the Caribbean Netherlands is a special one, because on October 10 2020 it will be ten years since the three islands became public entities of the Netherlands. This milestone marks a great opportunity to give a compilation of statistics covering the Caribbean Netherlands in the past ten years.

The information can also easily be accessed through our press releases, available on our [website](#). In addition, all our key figures can be found in our online database [StatLine](#), on our [Facebook](#) page and on our [Twitter](#) account.

I hope you find Trends in the Caribbean Netherlands 2020 a useful and enjoyable source of information.

Director General
Angelique Berg

The Hague/Heerlen/Bonaire, October 2020

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1 Bonaire

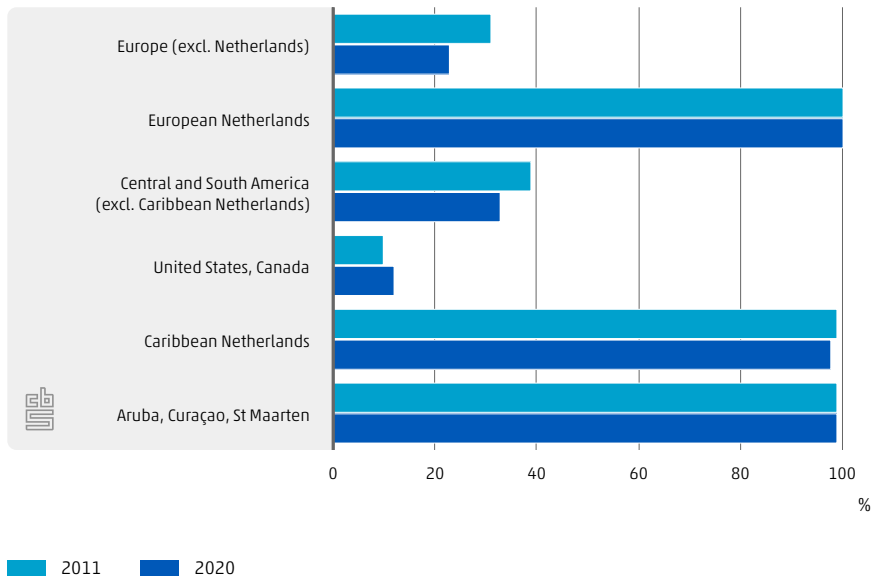
Population

Early 2020 Bonaire had 20.9 thousand residents, 5.4 thousand more than early 2010. Between 2011 and 2013 the number of residents increased by an average of approximately 900 per year. In 2019 the population increased by 811. In 2019 net migration was high: 717 moved to Bonaire finally.

Three times as many Haitians since 2011

Bonaire residents born in Bonaire, Aruba, Curaçao, St Maarten, Saba or St Eustatius (the former Netherlands Antilles) or in the European Netherlands, almost without exception, have Dutch citizenship. Of those born in Europe, nearly one quarter had Dutch citizenship on January 1st, 2020. This proportion declined by eight percentage points relative to 2011. One third of those born in Central and South America had Dutch citizenship. This proportion declined by six percentage points relative to 2011. The number of Haitians tripled between 2011 and 2020. Since newcomers from Haiti considerably less often adopted Dutch citizenship, the proportion of people with Dutch citizenship among born Haitians more than halved. The proportion of people born in the United States and Canada with Dutch citizenship is 12 percent and increased slightly relative to 2011.

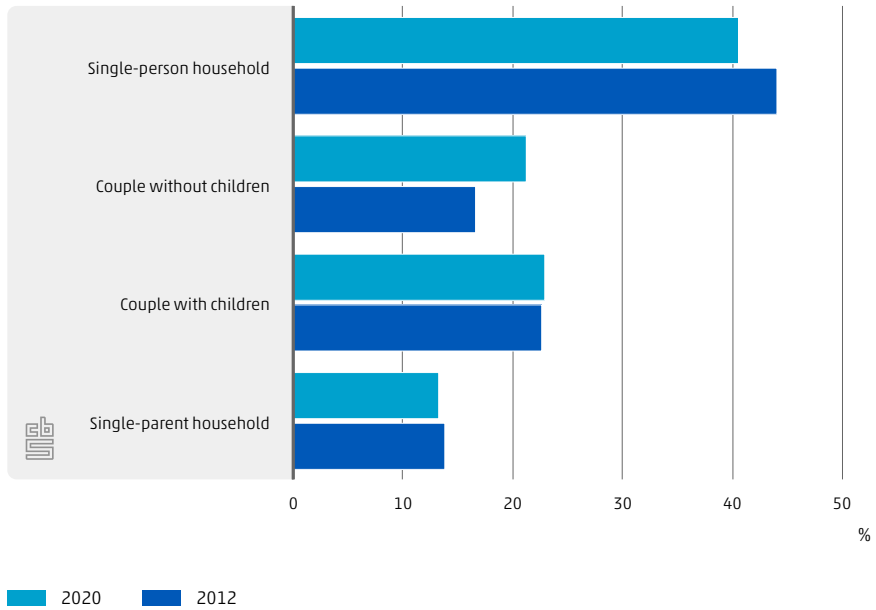
Bonaire residents with Dutch citizenship, native region, 1 of January



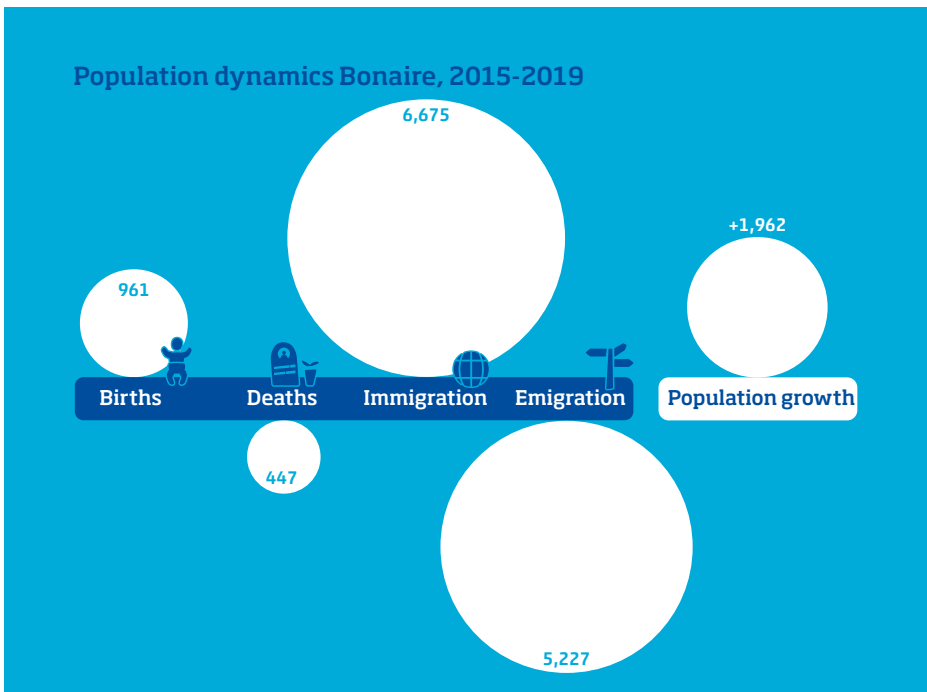
Less single-person households

Early 2020 41 percent of the people in Bonaire lived in a single-person household. This is a decline by three percentage points relative to 2012. The proportion of couples without children increased from 17 percent (2012) to 22 percent (2020). The proportion of couples with children and the proportion of single-parent households was 23 percent and 13 percent respectively and remained more or less unchanged relative to 2012.

Households in Bonaire, 1 of January



Population dynamics Bonaire, 2015-2019



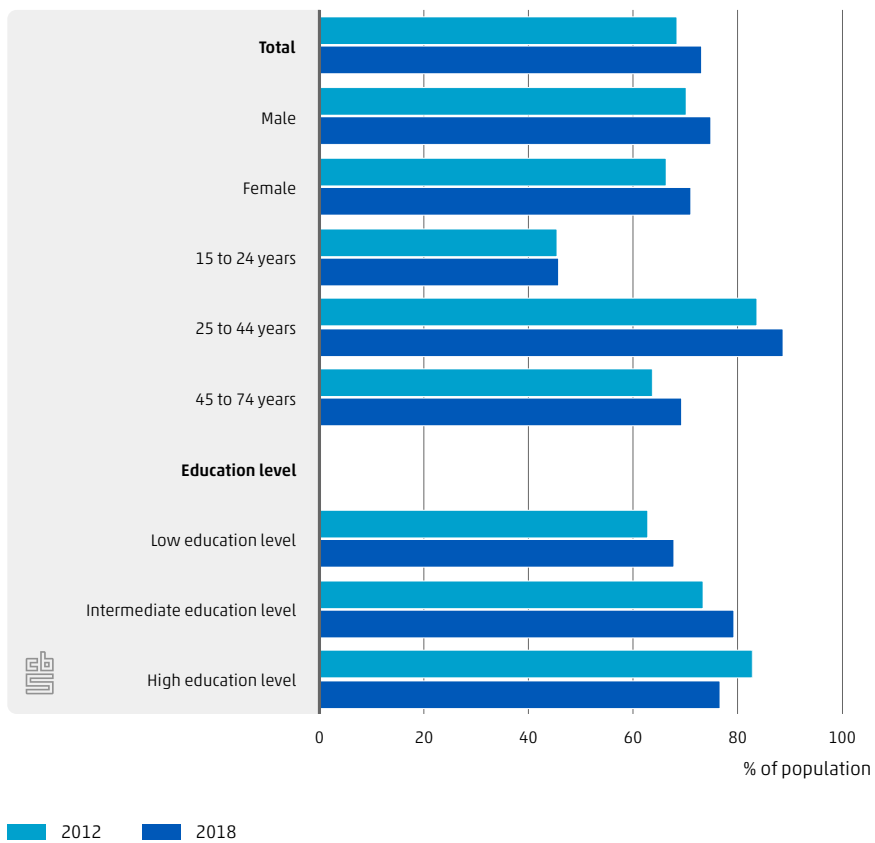
Labour

In 2018 the size of the working age population (15 to 74 years) on Bonaire was 15.4 thousand, with 73.1 percent in employment, 4.6 percentage points more than in 2012. The labour force participation rate in 2018 was in higher than at the beginning of the decade. Of the men, 74.9 percent were employed in 2018 (70.2 percent in 2012) versus 71.1 percent of the women (2018, 66.6 percent in 2012). Participation is relatively low among young people and the lower educated. Nevertheless, the net labour participation of all groups has increased between 2012 and 2018 except that of the higher educated (6 percent decrease). Bonaire's unemployment rate in 2018 was just over 3 percent, versus almost 6 percent in 2012. This is equivalent to almost 370 unemployed persons in 2018 who were actively looking and available for work. In 2012 there were 550 persons unemployed.

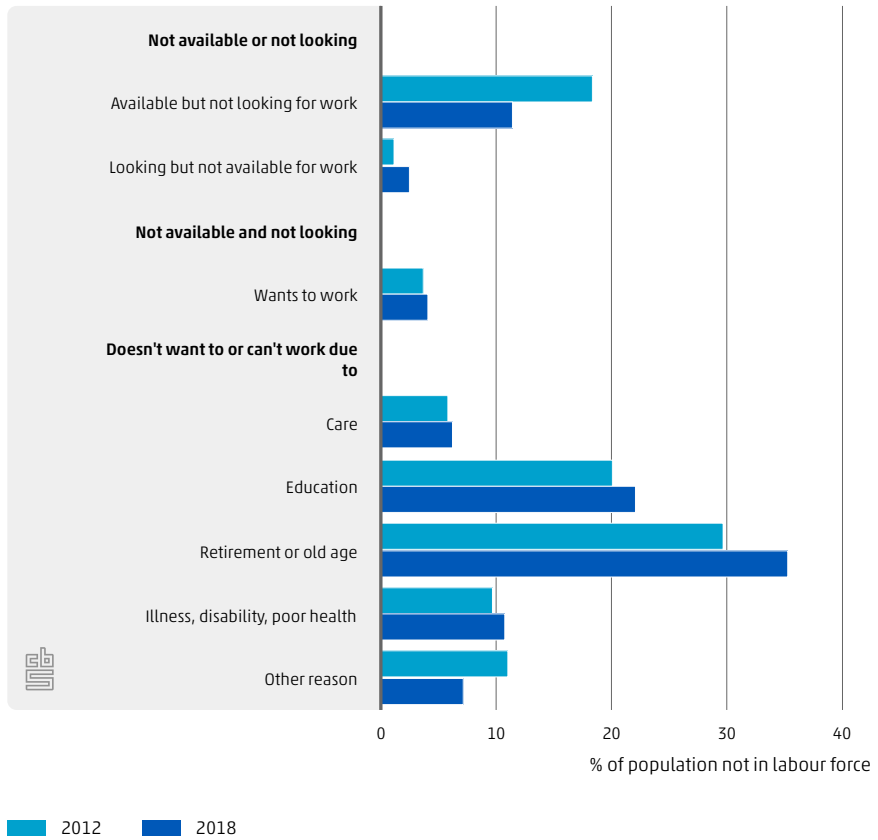
In 2018 almost 3.8 thousand Bonaire residents did not form part of the local labour force. In 2012 this was 3.5 thousand. They were not looking, nor were they available for work, in most cases, a combination of both. The group available but not looking for work decreased in 2018 compared to 2012: from 18 to 11 percent.

A large group (35 percent in 2018, 30 percent in 2012) were people who were unwilling or unable to work due to old age or retirement. For 22 percent of those not in the labour force in 2018 (20 percent in 2012) – young residents in particular – education was the predominant reason why they were unwilling or unavailable for work. Other smaller groups include people who were unable to work due to a disability (11 percent) or because they had to take care of family (6 percent).

Net labour participation



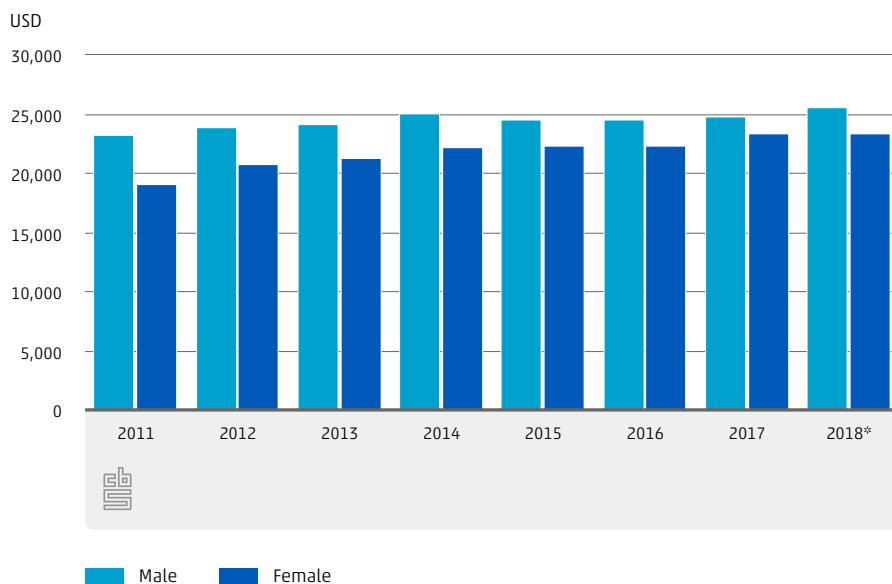
Population not in labour force (15 to 74 years)



Wages and jobs of employees

Wages vary widely depending on characteristics and type of work. In 2018, women's wages were 8 percent lower than men's. This gap is narrowing. In 2011, the difference was 18 percent.

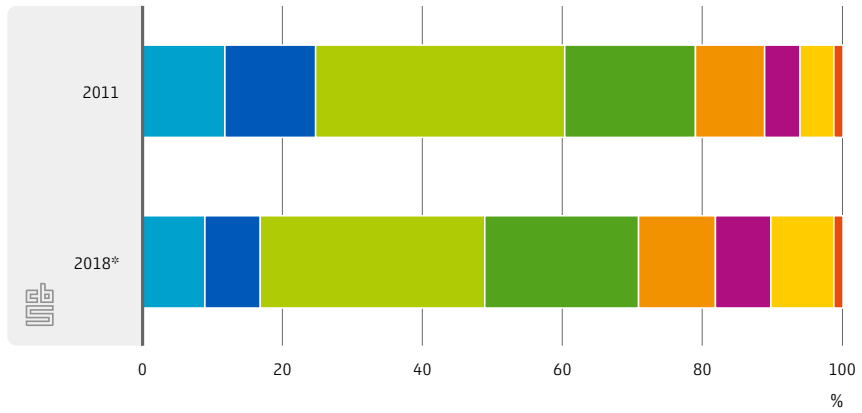
Average annual wage of employee jobs by gender



* provisional figures

The average annual wage of employees on Bonaire was 24.6 thousand US dollars in 2018 and 20.9 thousand in 2011. This is an increase of 18 percent. The part of groups earning less than 20 thousand US dollars decreased from 60 to 50 percent.

Employee jobs by earning group

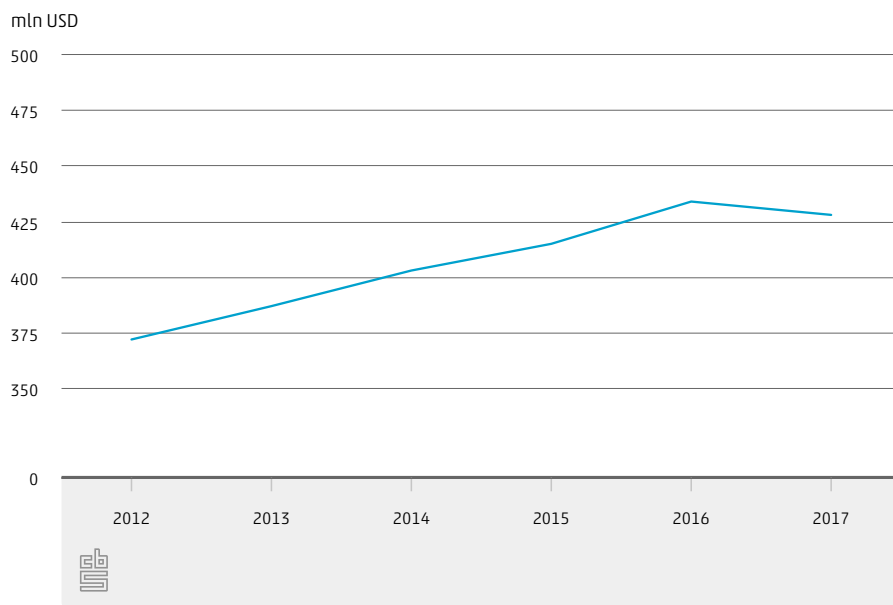


* provisional data

Macroeconomics

The gross domestic product (GDP) of Bonaire increased from 372 million US dollars in 2012 to 428 million US dollars in 2017. That is an average increase of 2.8 percent per year during this period.

Gross domestic product

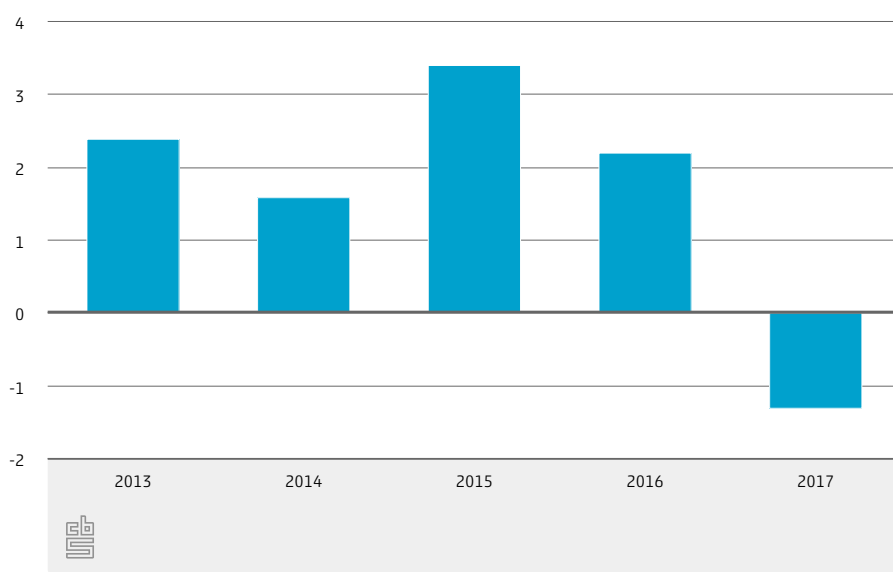


In volume terms GDP increased by 1.7 percent on average per year. GDP volume growth is calculated by adjusting the value growth for inflation on the basis of the consumer price index. The negative GDP growth in 2017 was caused primarily by a substantial reduction of production of the transport, storage and communication sector.

High population growth and an increase in government spending are important factors explaining GDP growth in the years prior to 2017.

GDP volume growth

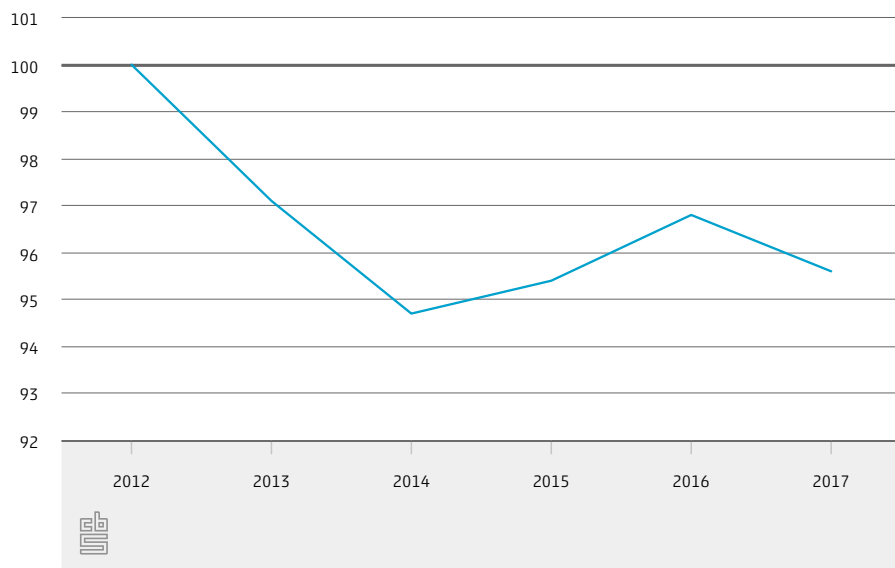
year-on-year % change



GDP per capita increased slightly from 21.9 thousand US dollars in 2012 to 22.1 thousand US dollars in 2017. When corrected for inflation, GDP per capita decreased by 4.4 percent in 2017 compared to 2012.

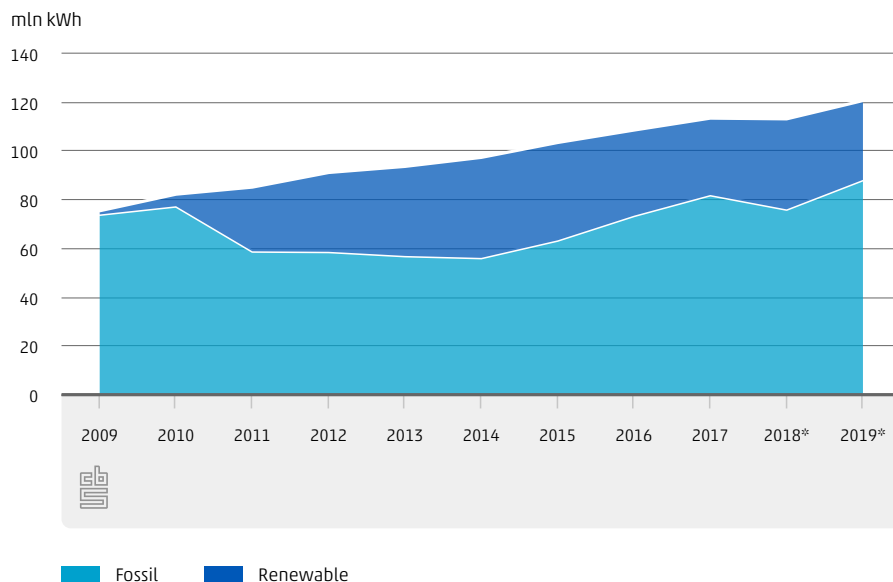
GDP per capita

volume index 2012=100



Energy

Electricity production



* provisional figures

In 2009 Bonaire produced 75.4 mln kWh of electricity and in 2019 this was 120.6 mln kWh, an increase of 60 percent. Of the total electricity production of 120.6 mln kWh in 2019, 32.5 mln kWh (27 percent) was renewable energy.

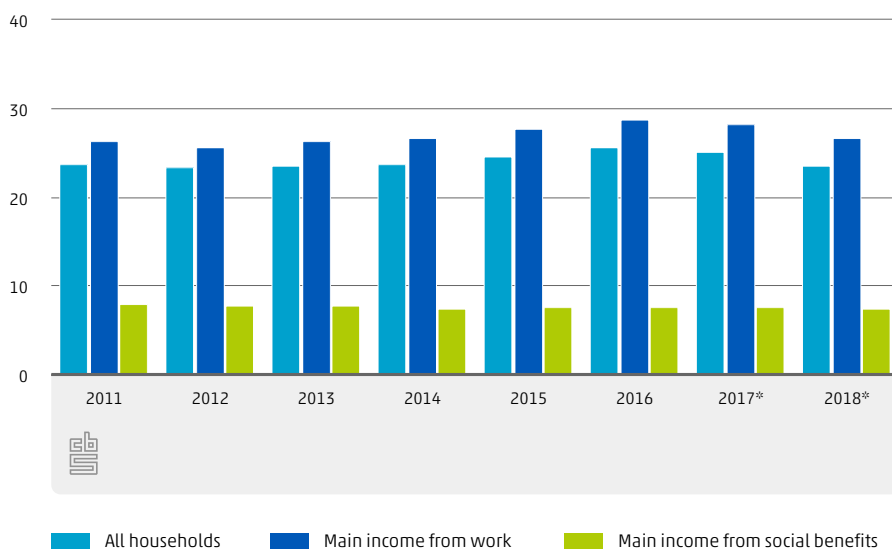
Most of this (99 percent) was produced by wind turbines. Solar panels produced the remaining one percent. Over the past ten years the proportion of renewable energy was highest in 2014: 42.3 percent. Since then that proportion has stabilised around 30 percent.

Income

In 2018, the median disposable income of households on Bonaire was 24.3 thousand US dollars, the same as in 2013. Since then, the income grew to a peak value of 26.4 thousand US dollars in 2016, after which it decreased again. The income in 2018 was 2 thousand US dollars less than in 2016. For households with income primarily from work the same pattern applies. In 2018 they had 27.5 thousand US dollars to spend, nearly 8 percent less than in 2016. The income for social benefit receivers was 7.7 thousand US dollars in 2018 and showed a gradual decline since 2011.

Median disposable household income

1,000 USD (in prices of 2018)



* provisional figures

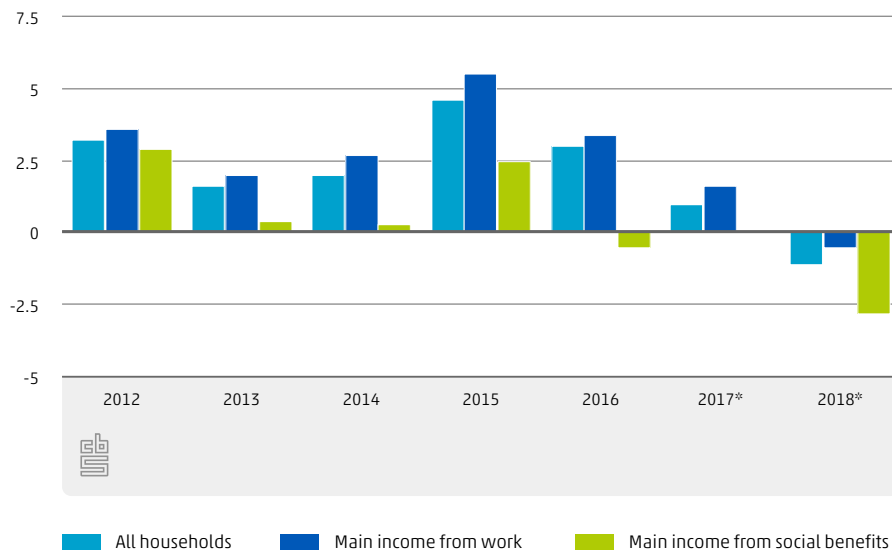
Purchasing power

For Bonaire residents the purchasing power development in 2018 was negative for the first time since 2012. In median, the decline with regards to 2017 was 1.1 percent. Between 2012 and 2017, when the buying power improved, the largest increase was in 2015 (4.6 percent). In the same period the purchasing power for employed people increased slightly more on an annual basis than the population as a whole. In 2018 they faced a minor 0.5 percent decrease in purchasing power.

Households with primary income from social benefits were most negatively affected with a 2.8 percent buying power decline in 2018. Likewise in 2016, they lost some of their purchasing power.

Purchasing power development

year-on-year % change

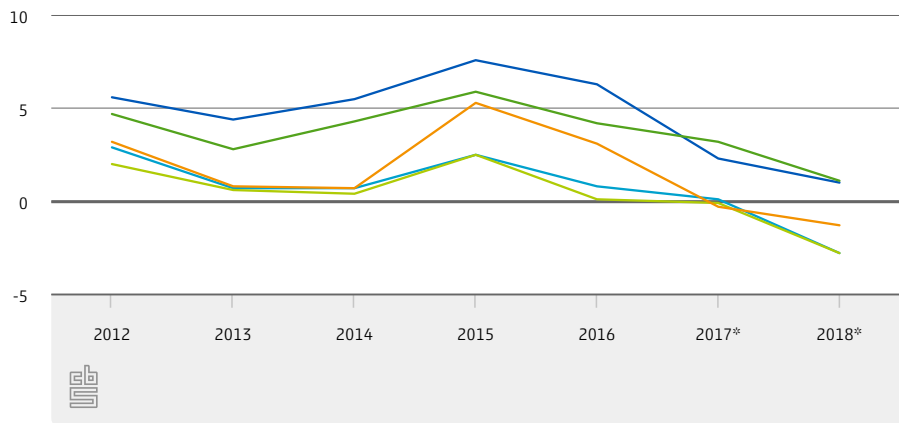


* provisional figures

Since 2012 households with children experienced positive changes in buying power. The peak in 2015 – merely due to deflation – was followed by years of decreasing purchasing power growth. In 2018 the median increase in purchasing power was for both couples with children and one-parent households lowest so far, namely 1 percent. Annually, for households without children the purchasing power changes were less prosperous. Both couples without children and other multi-person households lost purchasing power in 2017 and 2018.

Purchasing power development by household composition

year-on-year % change



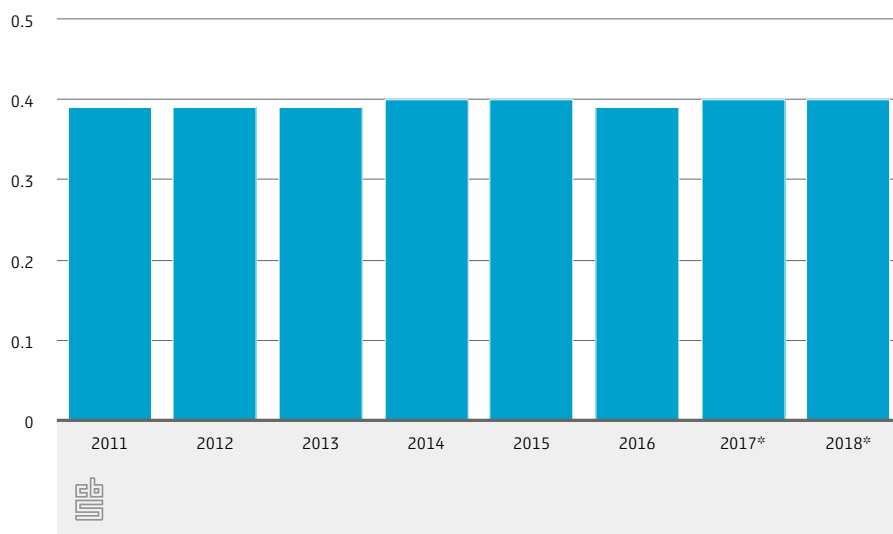
- Single-person households
- One-parent households
- Couples, without child(ren)
- Couples, with child(ren)
- Multi-persons households n.e.c.

* provisional figures

Income inequality

On Bonaire the income inequality is the most stable among the islands of the Caribbean Netherlands. Its Gini coefficient had a value of 0.40 in 2018. The disparities in standardized disposable income have remained unchanged on Bonaire since 2011. Expressed in terms of the Gini coefficient 0 means total equality: everyone has the same income, and 1 means total inequality: one person has all the income, the rest has none.

Gini coefficient



* provisional figures

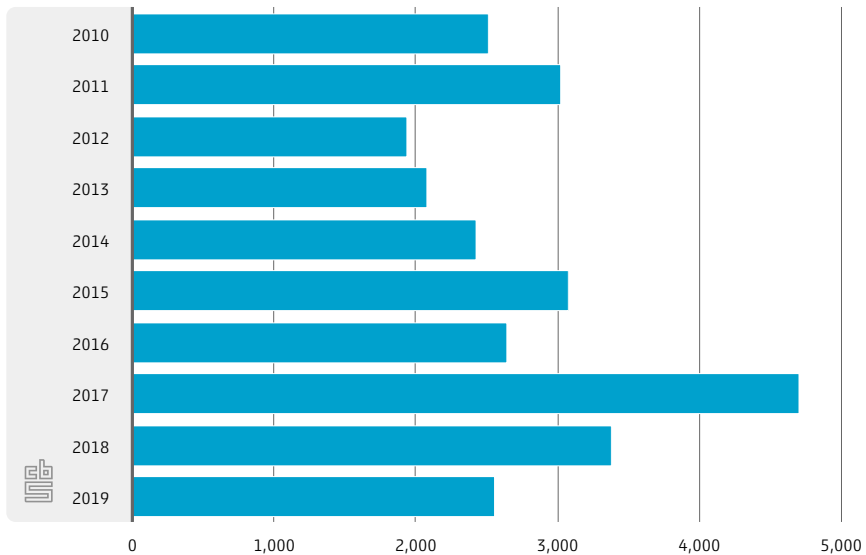
Nature

In comparison to economic and social developments, ecological processes can only become apparent and be understood in the context of long timespans.

Flamingo

The annual average number of flamingos is an indicator for the health of salt lakes and wetlands. Bonaire has a relatively small, but regionally important, population of these migratory birds. Since the early 1980's the population has been stable.

Flamingo abundance (yearly average)



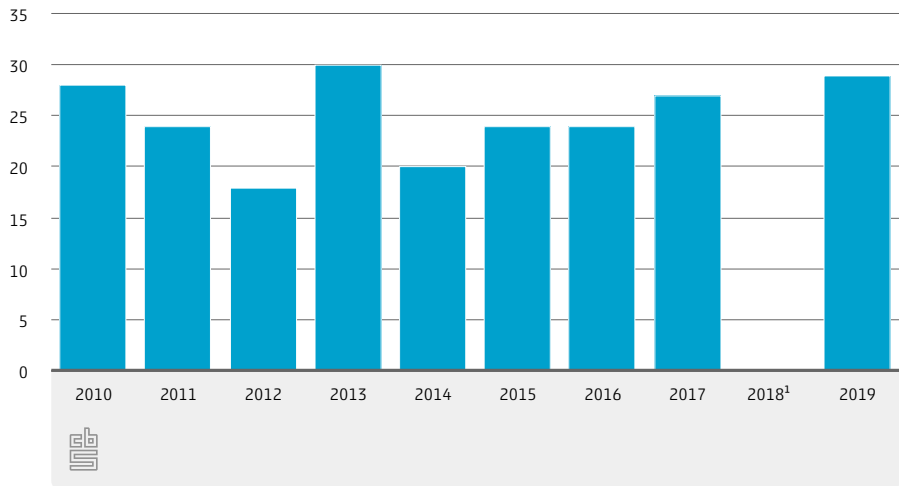
Source: Dutch Caribbean Biodiversity Database

Coral cover

Coral reefs are of great value to Bonaire. These attract dive and snorkel tourists, protect against storms and support local fisheries. Since the early 1970's the seabed cover by living coral has decreased. Even on the healthiest locations living coral cover went down from around 70 percent to below 30 percent.

Seabed cover by living coral

% coverage of the shallow seabed



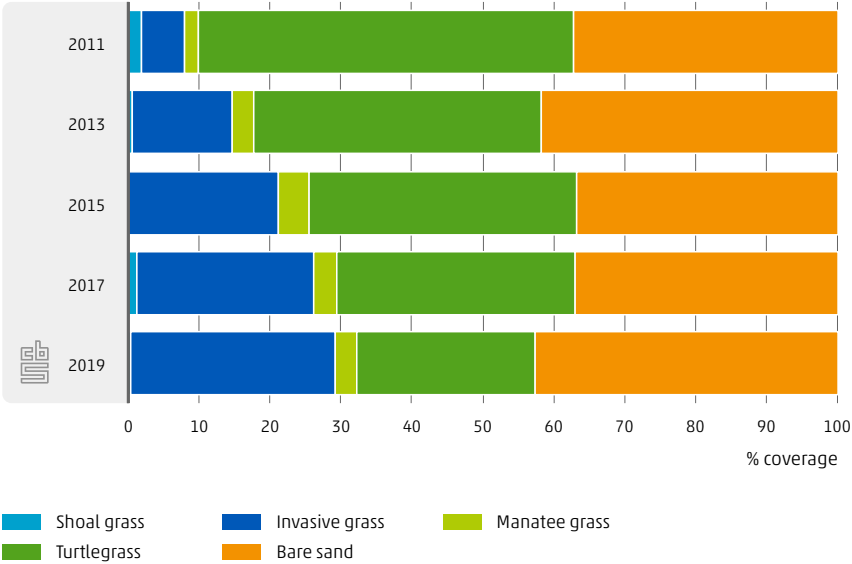
Source: E. Meesters, Wageningen Research, Dutch Caribbean Biodiversity Database

¹⁾ missing data

Seagrass

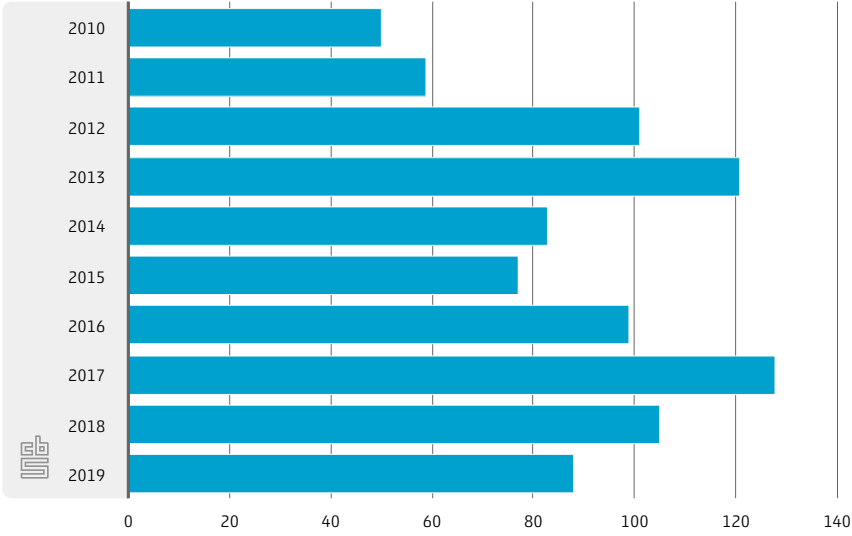
Seagrass beds capture CO₂, trap sediments and protect beaches. They are a nursery ground for numerous fish species, foraging grounds for turtles and conch, and are capable of filtering human pathogens from the water. In recent years, invasive seagrasses have taken over living space from endemic seagrasses. Current sargassum influxes are a threat to the seagrass beds and already some area has been lost resulting in beach erosion in some areas.

Seagrass species density in Lac Bay



Source: M.S. Engel, Stichting Nationale Parken Bonaire (STINAPA), Dutch Caribbean Biodiversity Database

Turtle nests



Source: Dutch Caribbean Biodiversity Database

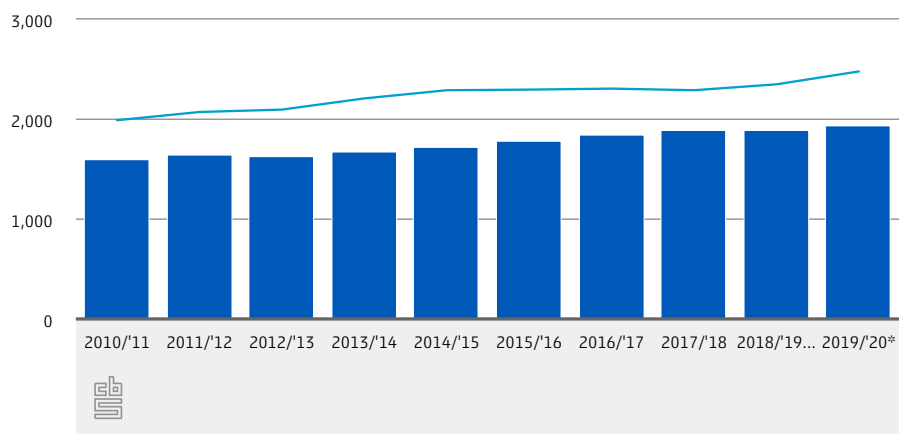
Education

Education on Bonaire is similar to the European part of the Netherlands and Dutch and Papiamentu are the languages of instruction. Bonaire has eight government-funded schools, seven primary schools and a secondary school that offers both general and vocational education.

There is no government-funded higher education. Between 2013 and 2017, 306 young adults born in the former Netherlands Antilles or Aruba traded Bonaire for the European Netherlands. Two-thirds did so for educational purposes.

The enrolment of pupils in primary education increased from 1 597 in 2010/'11 to 1 946 in 2019/'20. This is in line with the increase of the population of the relevant ages. The average number of pupils per school in 2019/'20 was 278.

Enrolment in primary education

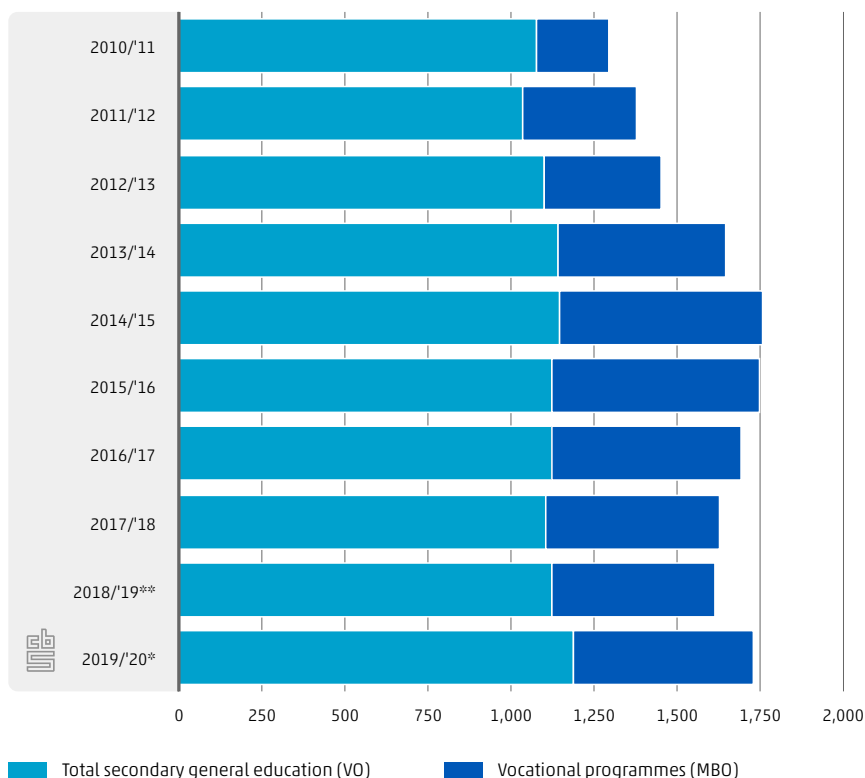


— Population on January 1st: 5 to 14 years
■ Enrolment in primary education on 1 October

** revised provisional figures
* provisional figures

The enrolment of students in secondary education increased from 1 294 in 2010/'11 to 1 730 in 2019/'20. Most of these students followed general education. In 2019/'20 31 percent followed vocational education (MBO).

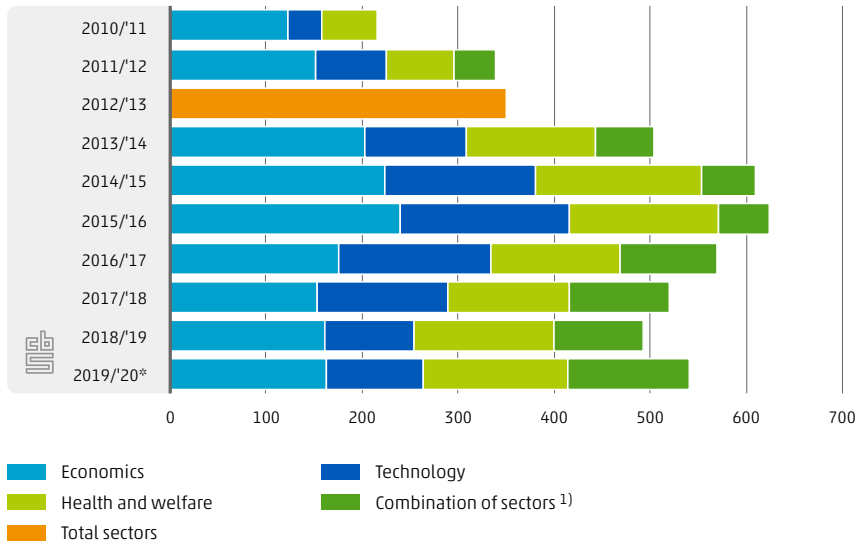
Enrolment in secondary education



** revised provisional figures
 * provisional figures

On Bonaire students can choose from all four levels of MBO, like the European part of the Netherlands. Together with the Council of Education and Labour Market Caribbean Netherlands (ROA CN), the school determines which courses should be offered in order to meet future demand on the labour market.

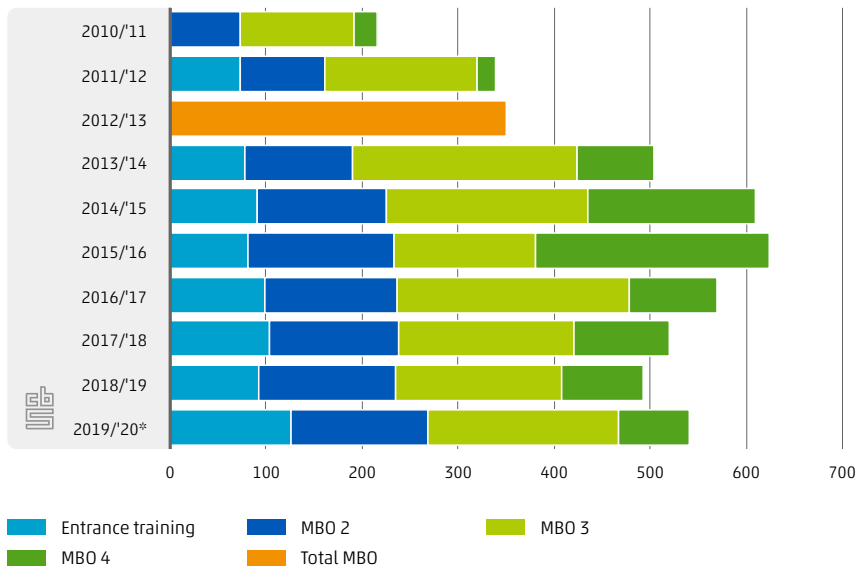
Enrolment in MBO by field of education



* provisional data

1) The courses in 'Combination of sectors' are all on the level of entrance training.

Enrolment in MBO by level of education



* provisional figures

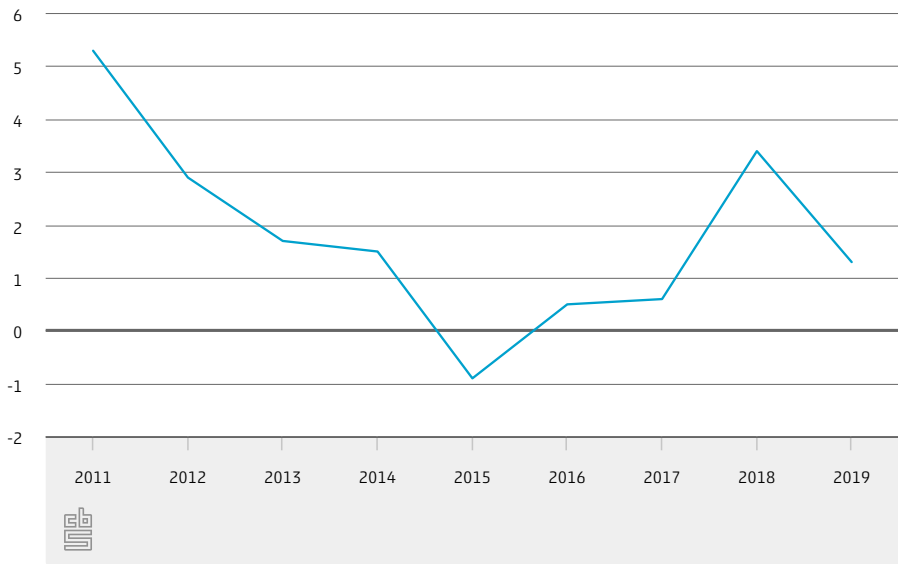
Consumer prices

Between 2010 and 2019 prices on Bonaire increased by 17.4 percent. The average increase was 1.8 percent per year. In the first half of 2020 prices have decreased mainly due to allowances for electricity, drinking water and internet provided by the government to support the population during the corona crisis.

During 2011 and 2012 prices rose sharply on Bonaire, on average with 4.1 percent per year. In 2013 and 2014 prices rose more gradually at a rate of 1.6 percent per year. From 2014 onwards the overall price levels remained relatively stable until 2017, after which the general price level increased. In 2018 prices rose by 3.4 percent.

CPI

year-on-year % change

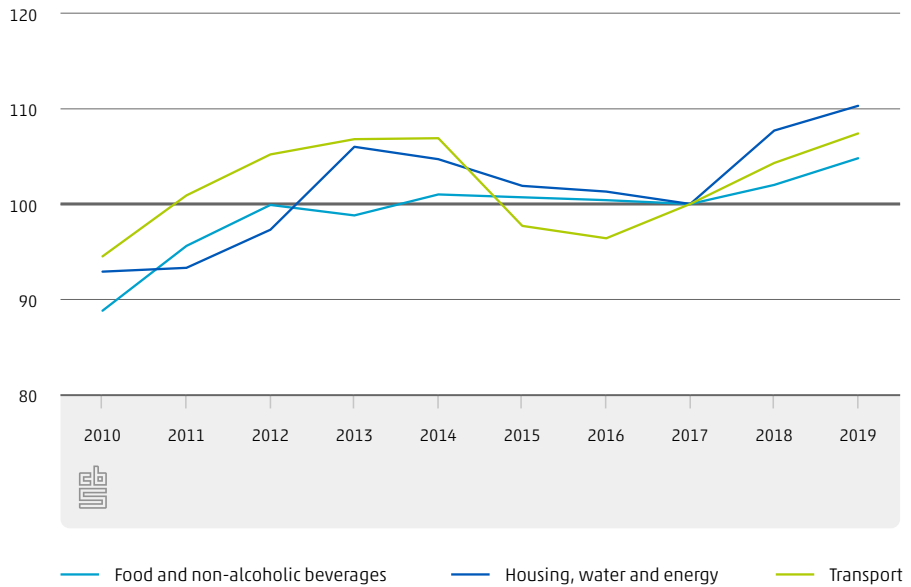


On Bonaire prices for food and non-alcoholic beverages as well as transport increased between 2010 and 2012 with roughly 6 percent. Prices for food and beverages remained stable from 2013 until 2017 after which they started to increase. In 2015 prices for transport dropped by almost 9 percent mainly due to drop in petrol prices. Prices for air travel increased from 2016 onwards.

Prices for housing, water and energy increased by 18.6 percent between 2010 and 2019. Prices rose between 2010 and 2013 and then slowly dropped until 2017 after which they increased again. The main causes here are the price developments of electricity and water.

CPI Food, Housing and Transport

2017=100

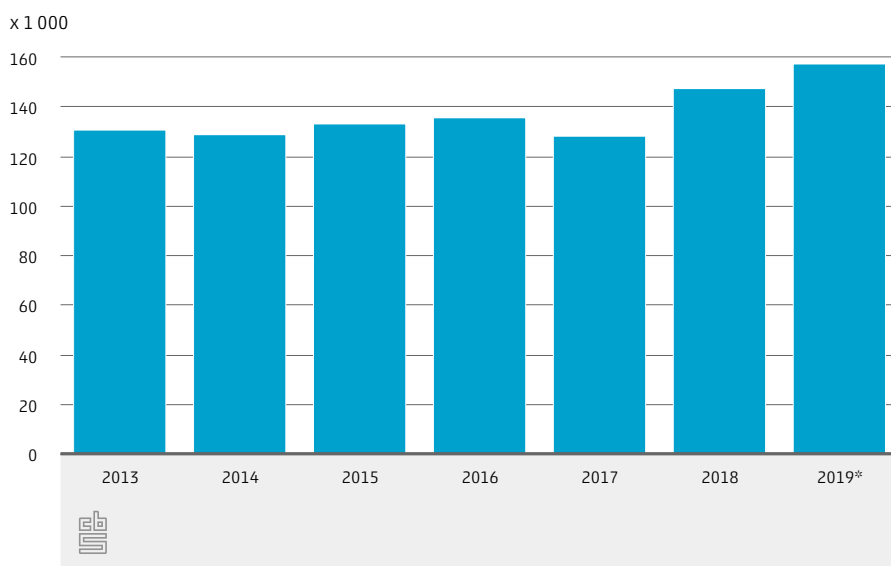


Tourism

In 2019, the number of visitors arriving in Bonaire by air was nearly 160 thousand. This is a growth of 21 percent relative to 2013. The largest growth in the period 2013–2019 occurred in the last two years when the number of flight movements to Bonaire increased as well. The period 2013–2016 saw only minor growth, followed by a small dip in 2017 due to problems with a local airline company, among others.

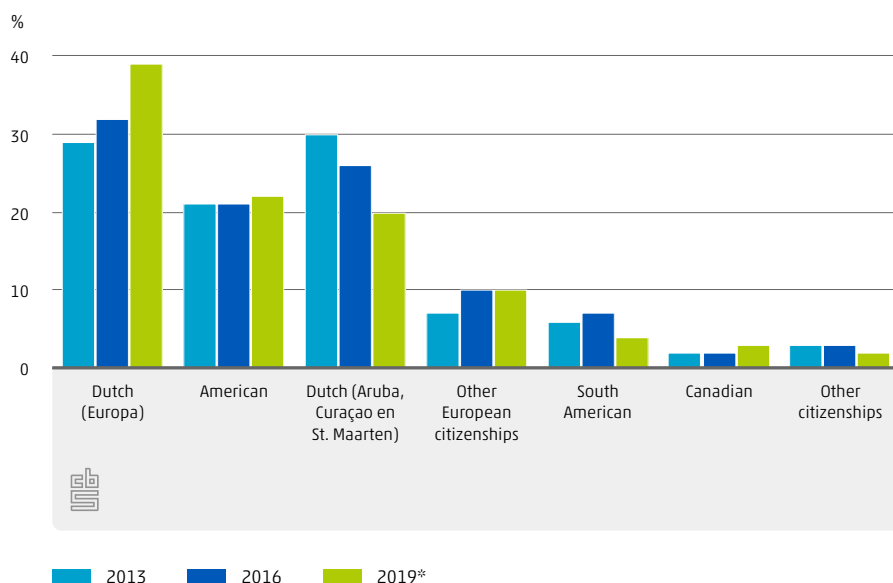
Most visitors originated from the European Netherlands, the United States, Aruba, Curaçao and St Maarten. The market of the European Netherlands became more important since 2013, while the market of Aruba, Curaçao and St Maarten, on the contrary, became less important.

Number of visitor arrivals by air



* preliminary data

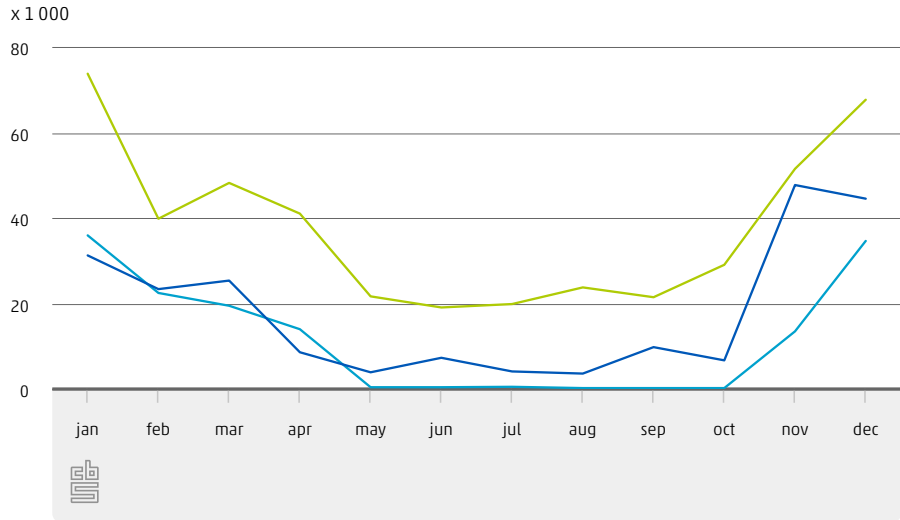
Visitor arrivals by air, by citizenship



* preliminary data

Tourism in Bonaire is not only driven by visitor arrivals by air. Cruise tourism is also important. Cruises accounted for 458 thousand passengers in 2019. This is a growth of 322 percent relative to 2013. Due to the island's extra efforts to attract more cruises to Bonaire, the number of passengers particularly increased from 2017 onwards. It has not been measured what proportion of the cruise passengers has actually disembarked.

Number of cruise passengers



— 2013 — 2016 — 2019*

* preliminary data

2 Saba

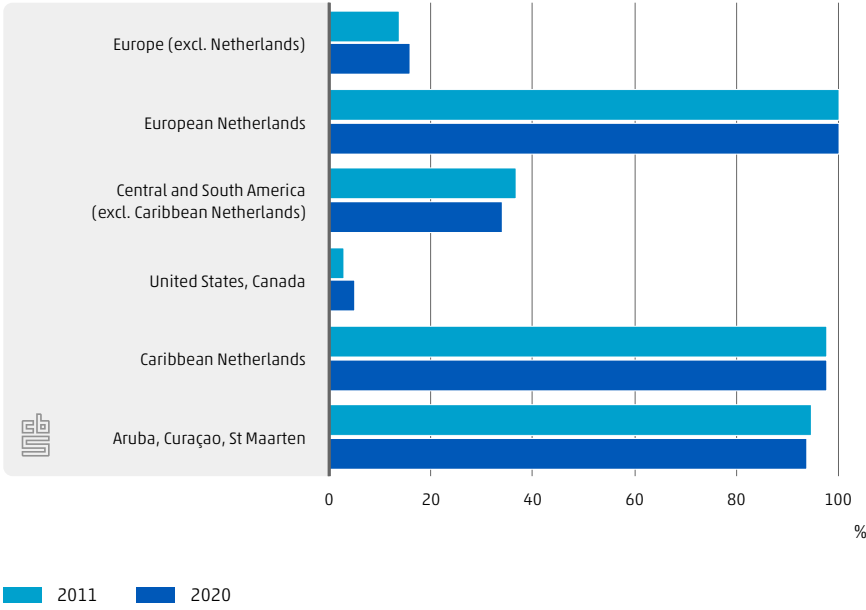
Population

Early 2020 Saba had 1.9 thousand residents. This is 152 more than early 2010. The net migration figure was 18 in 2019 and 48 in 2010.

Native-born North Americans and Europeans more often have Dutch citizenship

Nearly all people born in the former Netherlands Antilles, Aruba or the European Netherlands have Dutch citizenship. In 2020 native-born North Americans and Europeans had Dutch citizenship slightly more often than in 2012. Native-born Central and South Americans, on the contrary, had Dutch citizenship slightly less often than before.

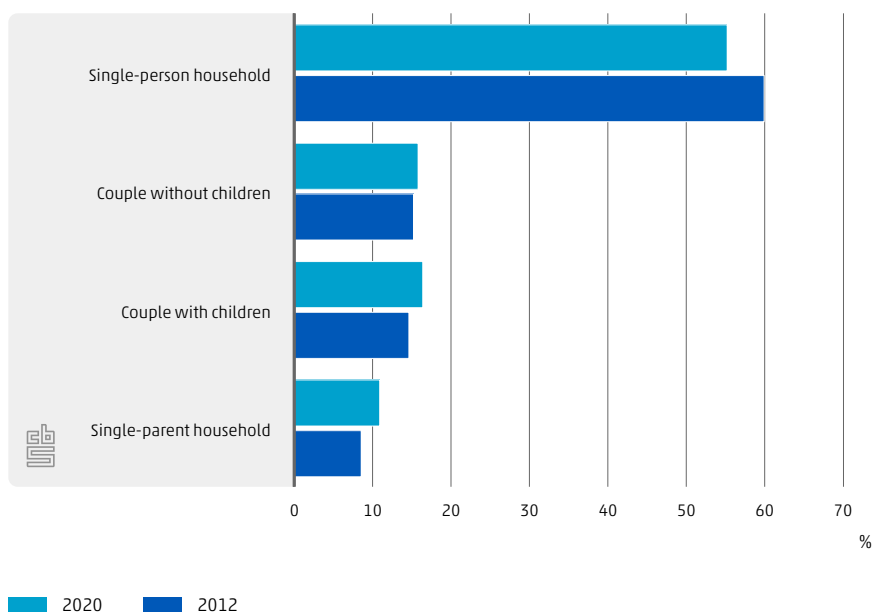
Saba residents with Dutch citizenship, native region, 1 of January



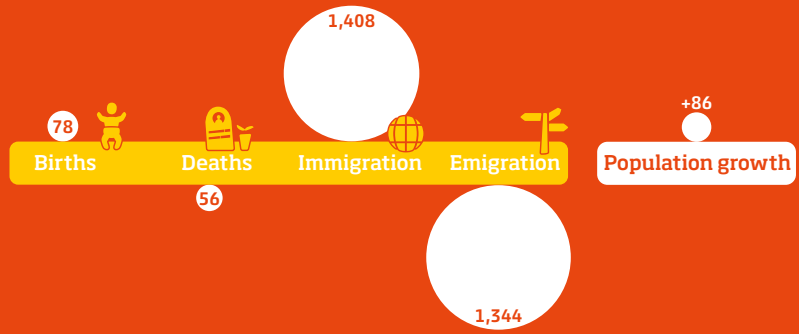
Less single-person households

The proportion of single-person households declined from 60 percent in 2012 to 55 percent in 2020. This lower percentage of single-person households is related to the clean-ups of the population register. During these clean-ups students from North America who were temporarily living in Saba because of their (medical) studies and who had not been removed from the population register after leaving Saba were removed after all. The proportion of couples, with and without children, and the proportion of single-parent households saw a minor increase.

Households in Saba, 1 of January



Population dynamics Saba, 2015-2019



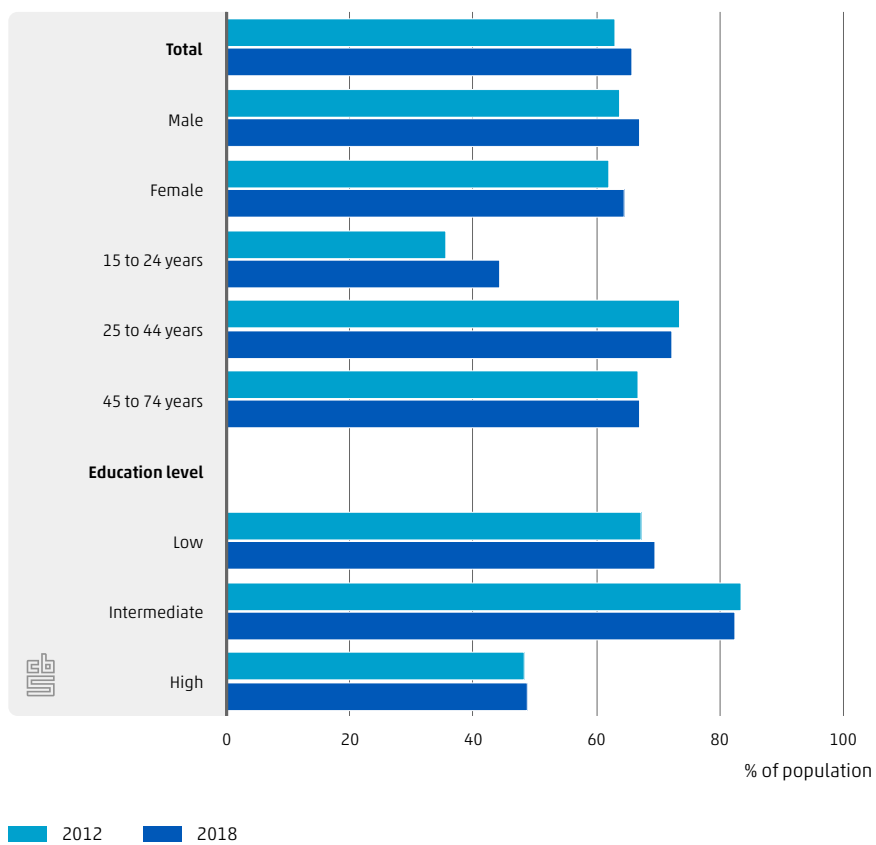
Labour

The size of the working age population (15 to 74 years) on Saba was slightly under 1.8 thousand in 2018, with 65.8 percent in employment. This was 2.7 percent point more than in 2012. The labour force participation rate in 2018 as well as in 2012 was slightly higher among men than among women and lower among young people than among middle and older age groups. The labour participation of the youngest group however, increased significantly between 2012 (35.7 percent) and 2018 (44.5 percent).

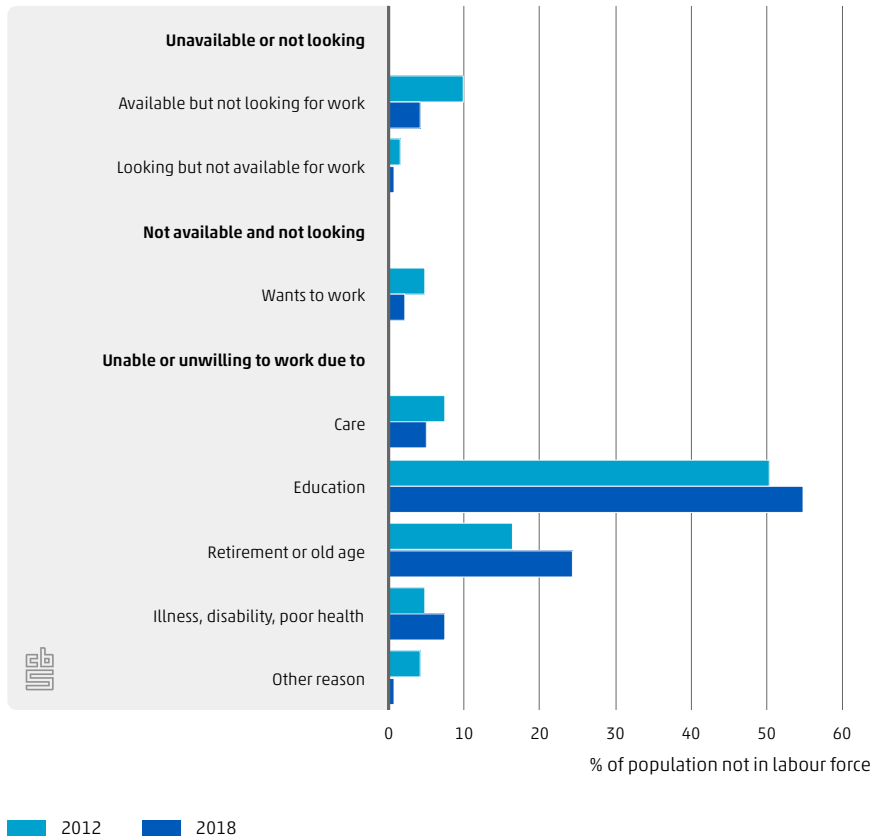
Participation rates were the lowest among the highly educated. A relatively large group of medical students living on the island did not combine their studies with work. Among people with low educational attainment, 69.7 percent were in employment in 2018 (67.4 percent in 2012) versus 82.5 percent of those with an intermediate education level (83.5 percent in 2012) and 49.0 percent of the highly educated (48.4 percent in 2012). In 2018 Saba's unemployment rate was low at 2.4 percent in 2018 (3.9 percent in 2012).

In 2018 580 residents did not form part of the local labour force on Saba, 10 more than in 2012. They were not looking, nor were they available for work, in most cases a combination of both. A large group (24 percent in 2018, 17 percent in 2012) were people who were unwilling or unable to work due to old age or retirement. However, education was still the main reason why people on the island were unwilling or unable to work (55 percent in 2018 versus 50 percent in 2012). This is primarily the effect of a relatively large group of young people who are enrolled in the medical university. Other smaller groups included people who were unable to work due to a disability (7 percent in 2018, 5 percent in 2012) or because they had to take care of family (5 percent in 2018, 7 percent in 2012).

Net labour participation



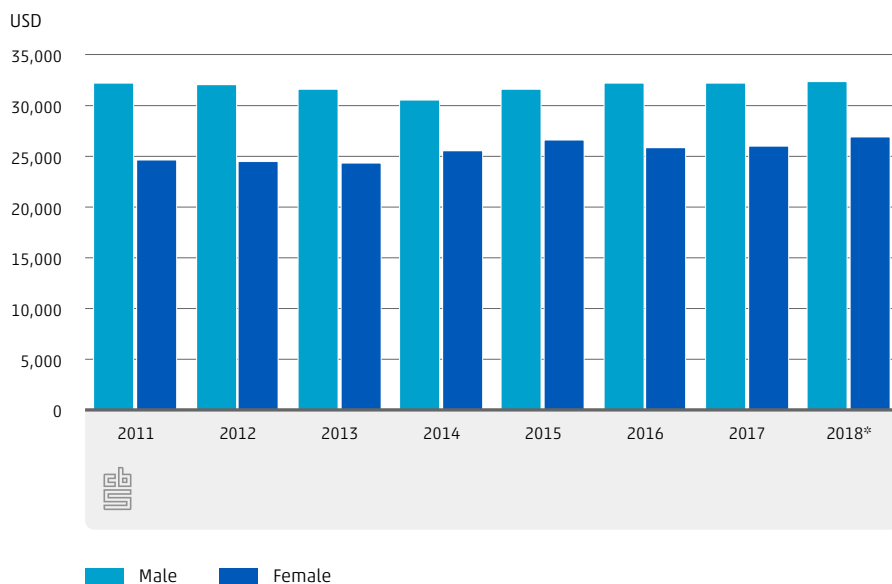
Population not in labour force (15 to 74 years)



Wages and jobs of employees

Wages vary widely depending on different characteristics and types of work. In 2018, wages for women were 17 percent lower than for men. This gap is becoming smaller. In 2011, the difference was 23 percent.

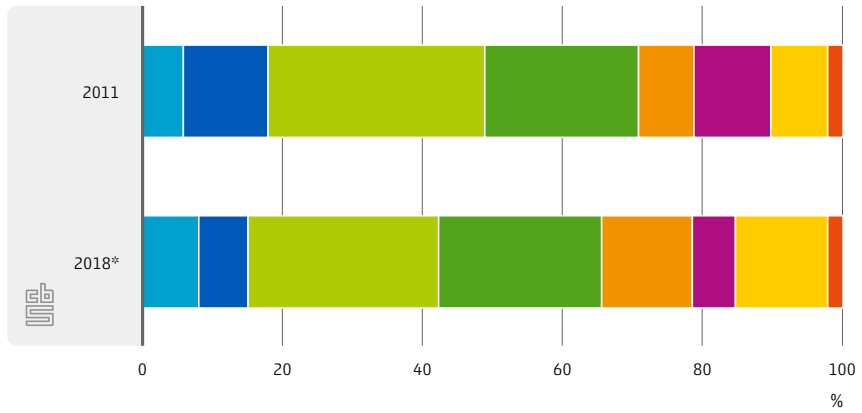
Average annual wage of employee jobs by gender



* provisional figures

The average annual wage of employees on Saba was 29.3 thousand US dollars in 2018 and 26.6 thousand in 2011. There was a small increase of 10 percent. The part of groups earning less than 30 thousand US dollars decreased from 71 to 65 percent.

Employee jobs by earning group (US dollar)

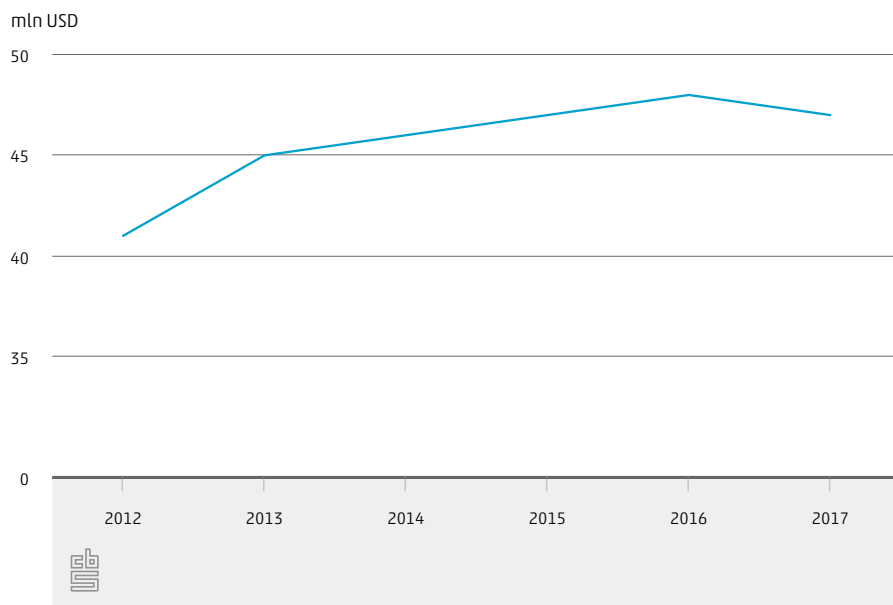


* provisional data

Macroeconomics

The gross domestic product (GDP) of Saba increased from 42 million US dollars in 2012 to 47 million US dollars in 2017. That is an increase of 2.3 percent per year during this period.

Gross domestic product

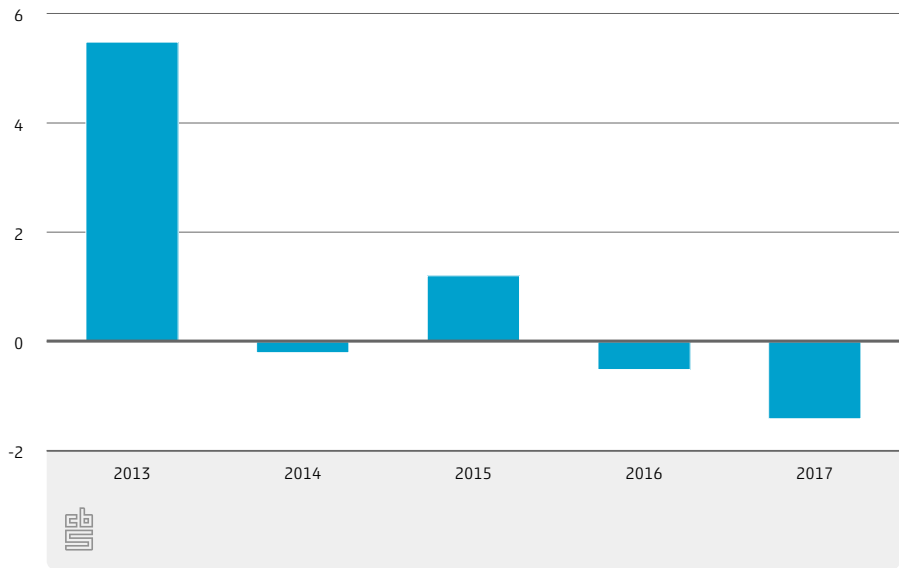


In volume terms GDP increased by 0.9 percent on average per year, mainly due to high GDP growth in 2013 of 5.5 percent. GDP volume growth is calculated by adjusting the value growth for inflation on the basis of the consumer price index. Saba is a small economy that is very dependent on the public sector, the tourism industry and the medical university. In 2017 Saba's economy was negatively affected by hurricane Irma and Maria.

GDP per capita increased from 21.4 thousand US dollars in 2012 to 22.6 thousand US dollars in 2017. When corrected for inflation, GDP per capita increased by 4.6 percent in 2017 compared to 2012.

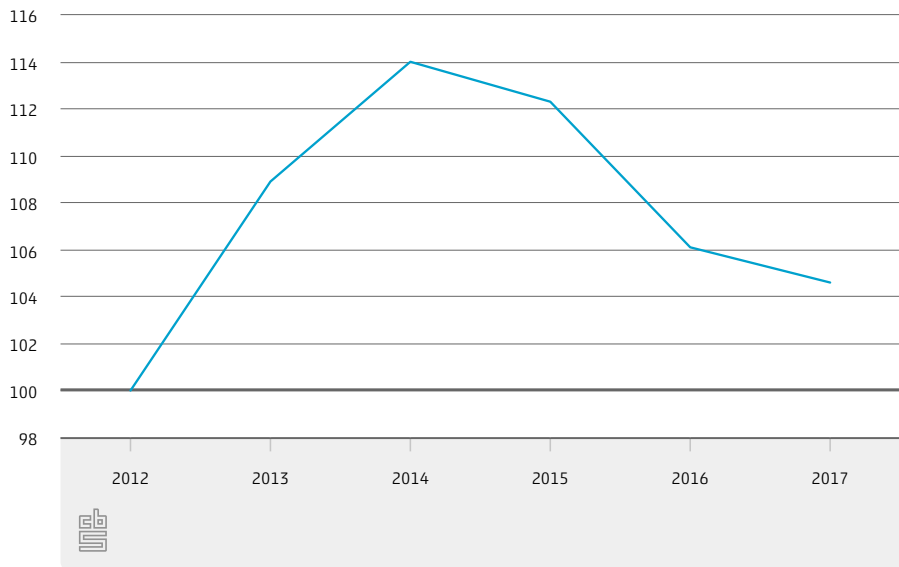
GDP volume growth

year-on-year % change



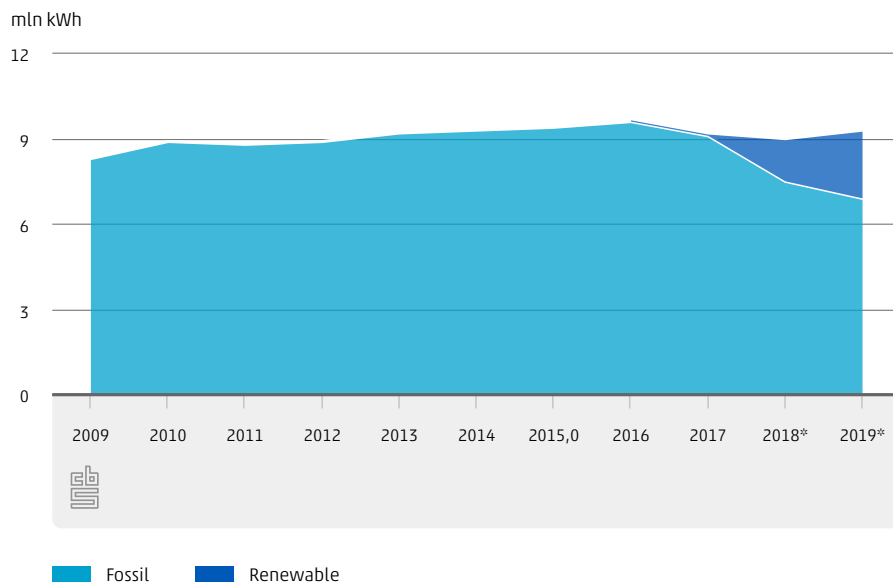
GDP per capita

volume index 2012=100



Energy

Electricity production



* provisional figures

In 2019 the electricity production was 9.3 mln kWh, as it was in the past ten years. 2.4 mln kWh (25.7 percent) of this production was renewable energy. In 2018 this was still 1.5 mln kWh (16.7 percent).

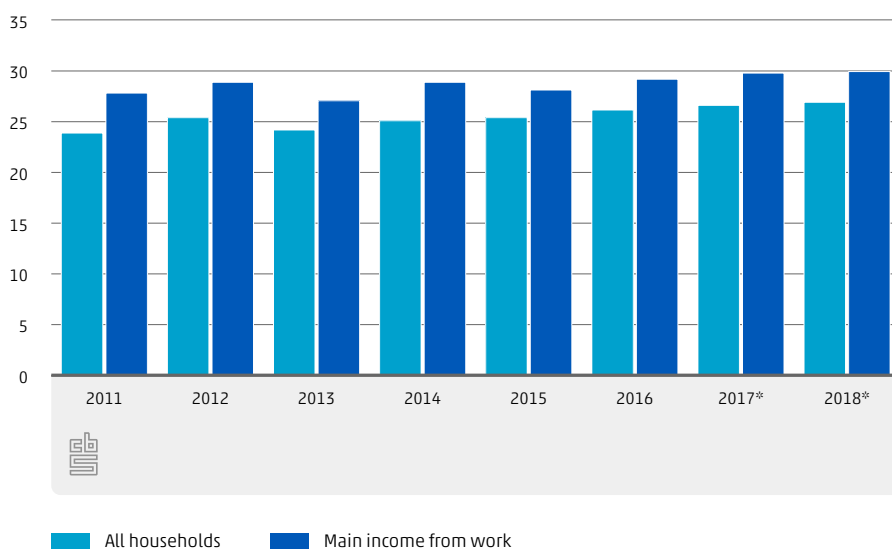
Saba now has two solar parks. The first park started production in February 2018, followed exactly one year later by the second park.

Income

In 2018 the median disposable income of households in Saba was 27.7 thousand US dollars. This was over 3 thousand US dollars more than in 2011 when people had 24.5 thousand US dollars to spend. Since 2013, when the income was 25 thousand US dollars, there was a gradual year-on-year increase. For households with primarily income from work the disposable income fluctuated more. However, in the longer run it grew from 28.7 thousand US dollars in 2011 to 30.8 thousand US dollars in 2018.

Median disposable household income

1,000 USD (in prices of 2018)



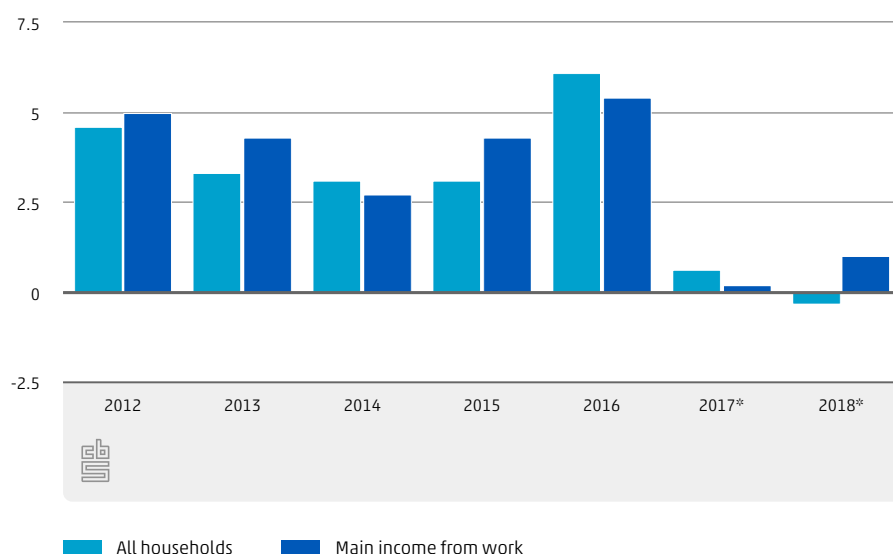
* provisional figures

Purchasing power

On Saba, the purchasing power increased between 2012 and 2017. However, the 6.1 percent peak in 2016 dropped to a minor 0.6 percent increase in 2017. In 2018 the population lost purchasing power for the first time since 2012: the median decrease as compared to 2017 amounted to 0.3 percent. Exactly half of the population than experienced a negative buying power. In contrast, among the working people the median buying power in 2018 improved with 1 percent.

Purchasing power development

year-on-year % change

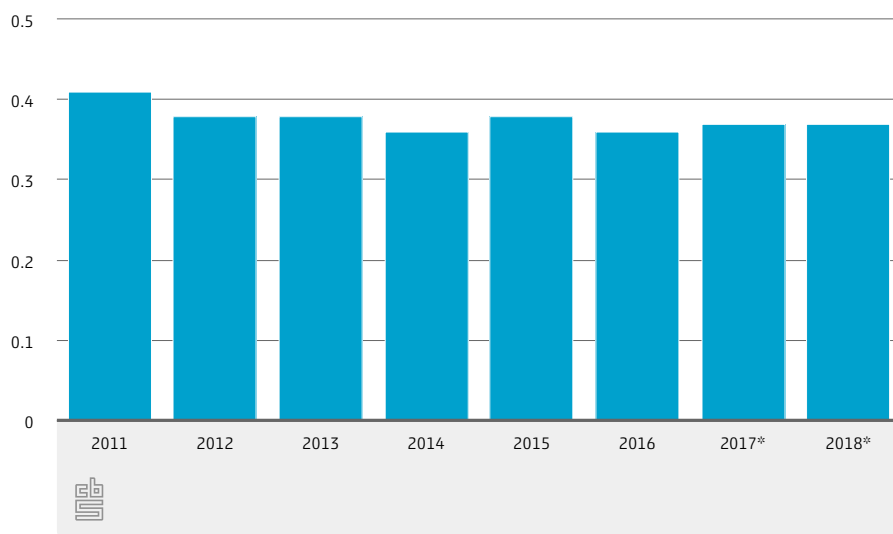


* provisional figures

Income inequality

Since 2012, Saba has the lowest income inequality on the islands of the Caribbean Netherlands. The value of the Gini coefficient was 0.37 in 2017 and 2018. In terms of the Gini coefficient 0 means total equality: everyone has the same income, and 1 means total inequality: one person has all the income, the rest has none. In 2011 the Gini coefficient was 0.41. In the period from 2012 to 2018 the Gini value balanced between 0.36 and 0.38.

Gini coefficient



* provisional figures

Nature

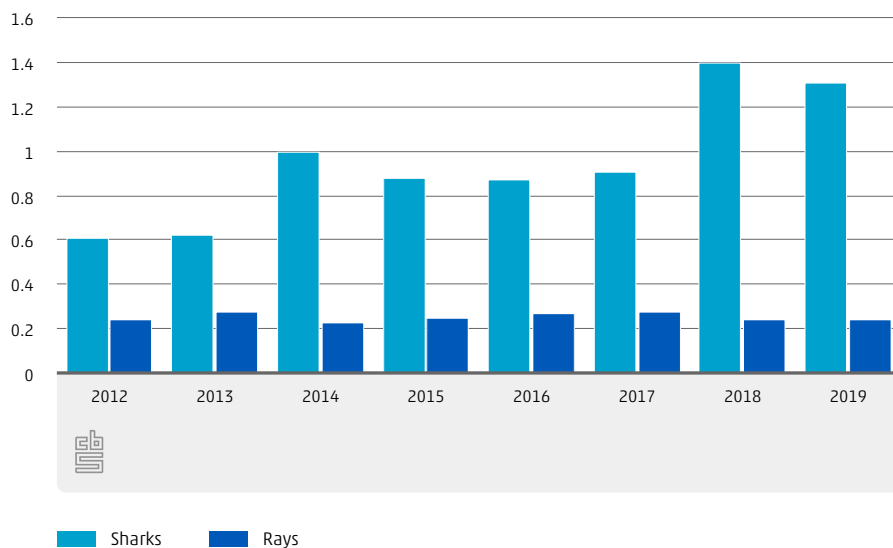
Coral cover

Over the last three decades seabed cover by living coral has decreased rapidly. In comparison with the coral cover in the mid 1990's less than one-fifth is left.

Sharks and rays

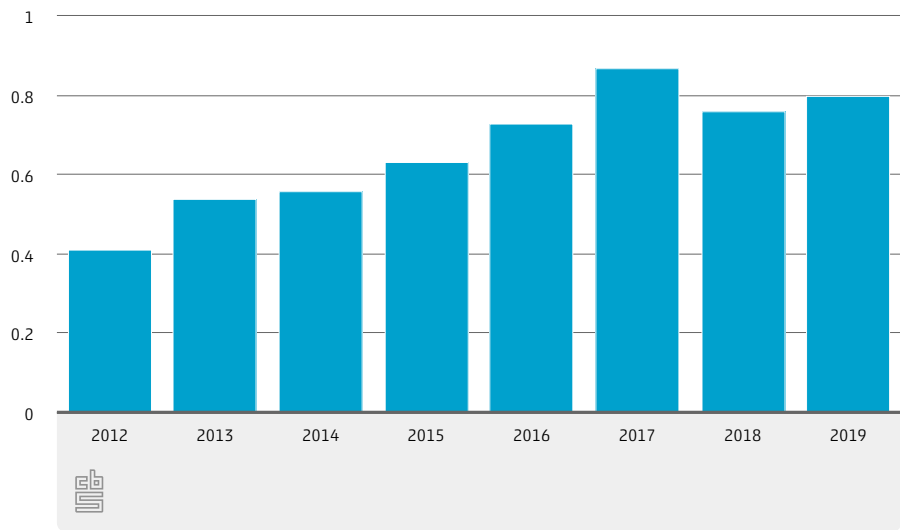
Shark and ray populations are in sharp decline worldwide. They are top predators that control the natural balance in fish populations and are thus important for fisheries. Sharks and rays are also a key attractor for dive tourism.

Average number of sharks and rays sighted per dive



Source: CBS, Dutch Caribbean Biodiversity Database and SeaSaba.

Average number of turtles sighted per dive



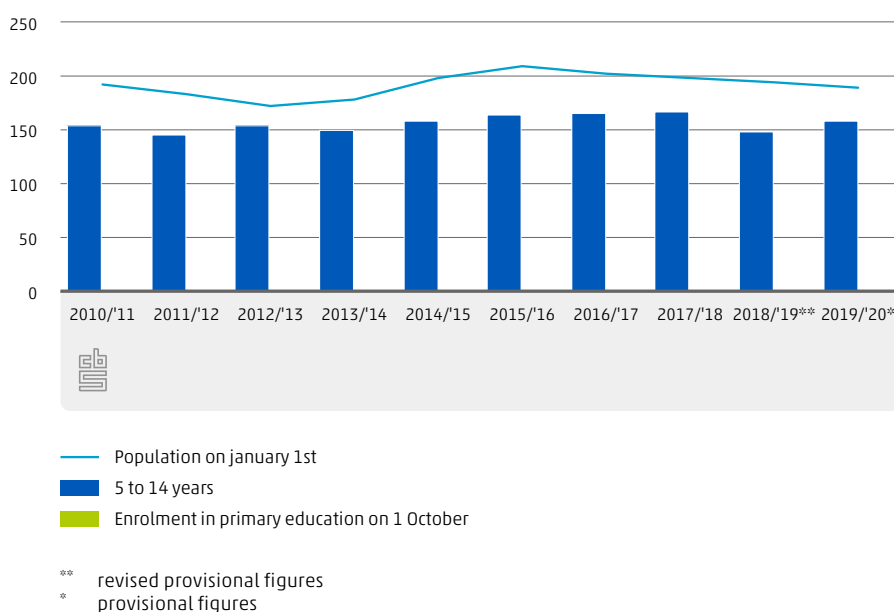
Source: Dutch Caribbean Biodiversity Database and SeaSaba

Education

Saba has two government-funded schools, one primary school and a secondary school that offers both general and vocational education. There is no government-funded higher education. Between 2013 and 2017, 21 young adults born in the former Netherlands Antilles or Aruba traded Saba for the European Netherlands. More than half did so for educational purposes.

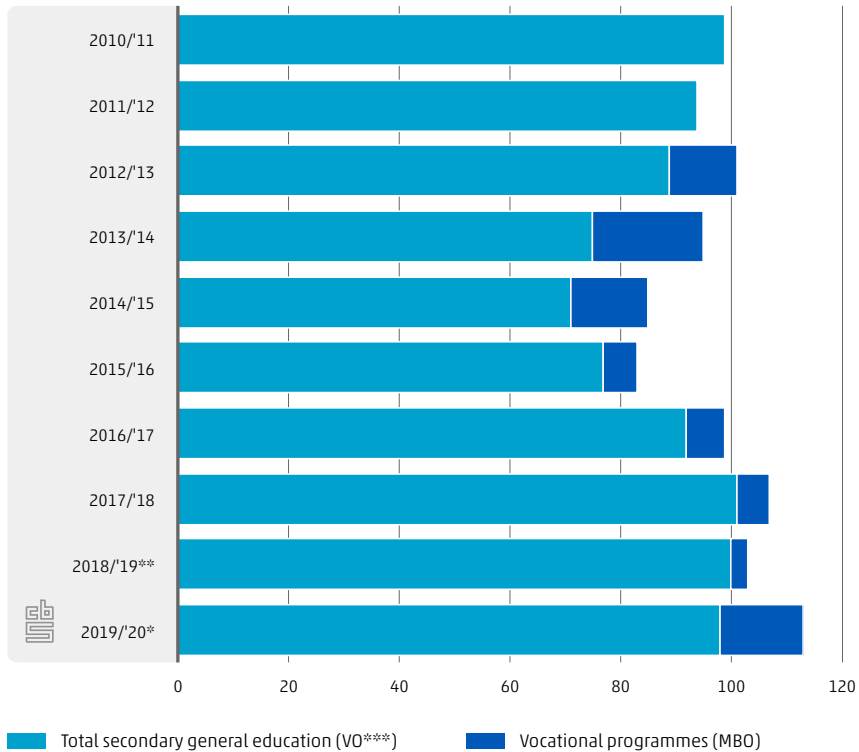
The enrolment of pupils in primary education slightly increased from 155 in 2010/'11 to 158 in 2019/'20, about in line with the population curve of the relevant ages.

Enrolment in primary education



The enrolment of students in secondary education increased from 99 in 2010/'11 to 113 in 2019/'20. Most of these students followed general education. Secondary general education on Saba follows a Caribbean education system, with English as the language of instruction. As of 2019/'20 Saba has switched to a – different Caribbean – system for both secondary general and vocational education. In that way education is more in line with regional further education and the regional labour market. In the next years the courses of the Dutch MBO (vocational education) will therefore be replaced by the Caribbean Vocational Qualification (CVQ).

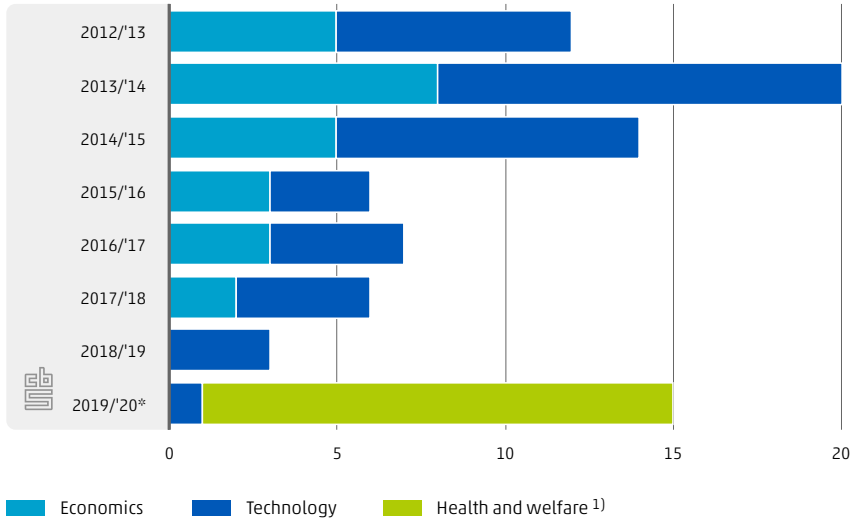
Enrolment in secondary education



*** Total secondary general education (VO) includes CVQ in 2019/'20*
 ** revised provisional figures
 * provisional figures

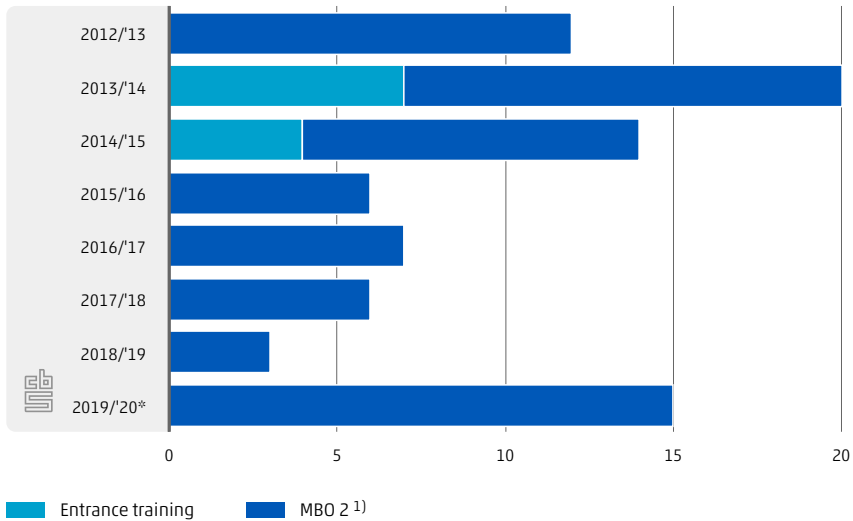
On Saba MBO started in 2012/'13. MBO-students can choose from two levels of education: the entrance training and the second level. Together with the Council of Education and Labour Market Caribbean Netherlands (ROA CN), the school determines which courses should be offered in order to meet demand on the labour market. With the introduction of CVQ in 2019/'20 the MBO-courses will gradually fade out. On the other hand, in 2019/'20 a level 2 course for pedagogical staff members in the childcare was started, for employees who already work in childcare as well.

Enrolment in MBO by field of education



1) In 2019/20 a level 2 course for pedagogical staff members in the childcare was started, for employees who already work in childcare as well.
* provisional data

Enrolment in MBO by level of education



1) In 2019/20 a level 2 course for pedagogical staff members in the childcare was started, for employees who already work in childcare as well.
* provisional data

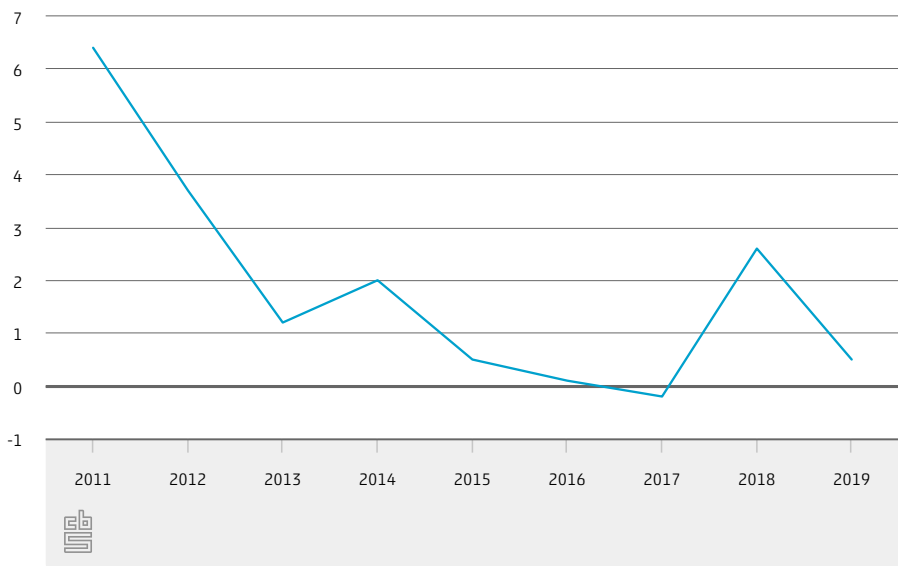
Consumer prices

Between 2010 and 2019 the general price level on Saba rose by 17.9 percent. This is 1.8 percent per year. In the first half of 2020 prices have decreased mainly due to allowances for electricity and internet provided by the government to support the population during the corona crisis.

During 2011 and 2012 prices rose sharply and then more gradually until 2014. From 2014 onwards the overall price levels remained relatively stable until 2017 after which the general price level increased.

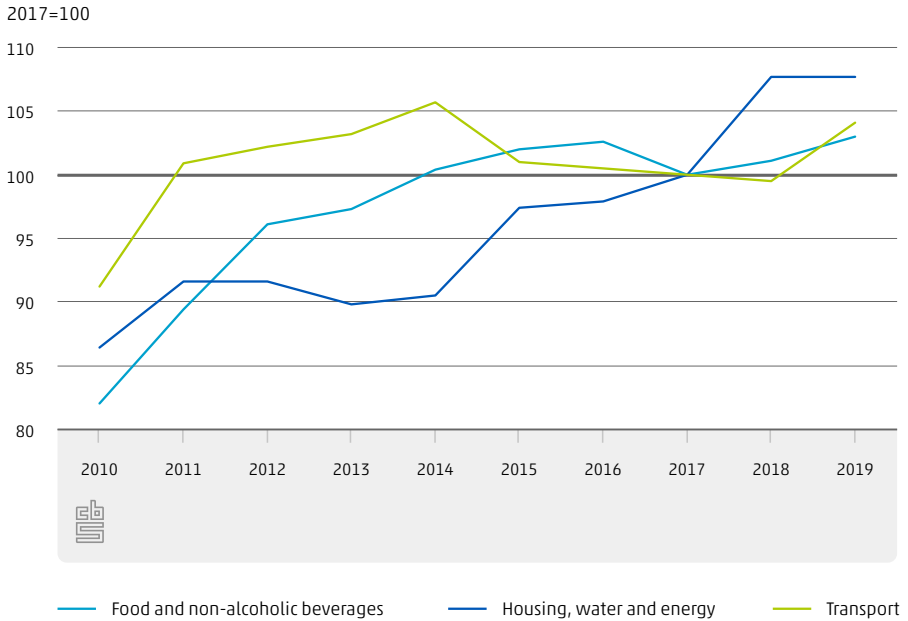
CPI

year-on-year % change



Prices for food and non-alcoholic beverages increased by more than 8 percent per year in 2011 and 2012. The increases in the period after 2012 were more limited, on average 1.6 percent. The exception was 2017 when prices dropped by 2.5 percent. Prices for housing and energy changed in 2011 by 6 percent, in 2015 by 7.6 percent and in 2018 by 7.7 percent. These changes were mainly due to increases in prices for electricity.

CPI Food, Housing and Transport



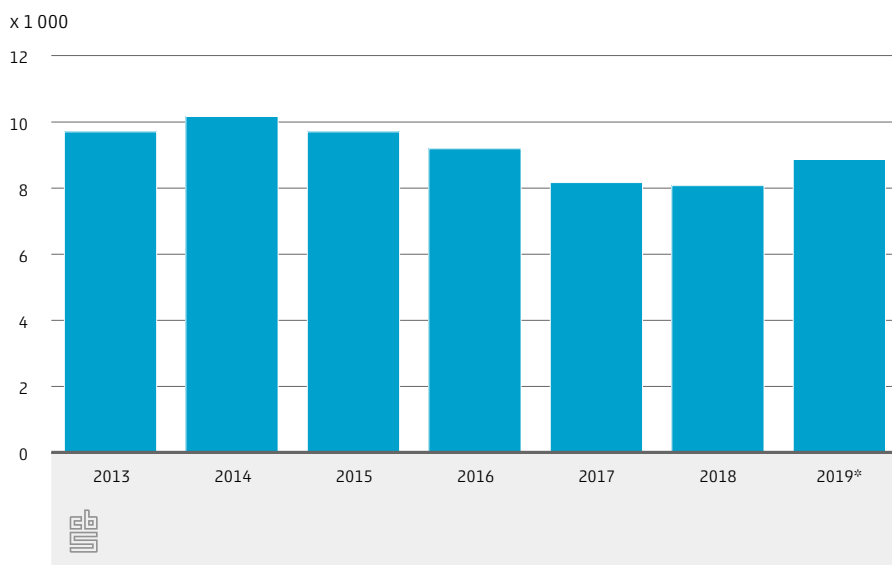
The price development for transport is mainly influenced by the prices for petrol and flights. In 2011 prices for transport increased by 10 percent due to price increases for both petrol and flights. The gradual decrease in prices between 2015 and 2018 was due mainly to petrol prices.

Tourism

In the period 2013–2019 the number of visitor arrivals by air in Saba remained virtually unchanged. In 2013 the number of visitor arrivals was 9.7 thousand and in 2019 8.9 thousand. After several years of minor decline, the upward trend seems to have resumed in 2019. Saba has an airport where only small airplanes can land. Like St Eustatius, the island has to depend on St Maarten for international connections. Here too hurricane Irma caused a considerable amount of damage in 2017 and it took some time before flight connections with St Maarten were restored.

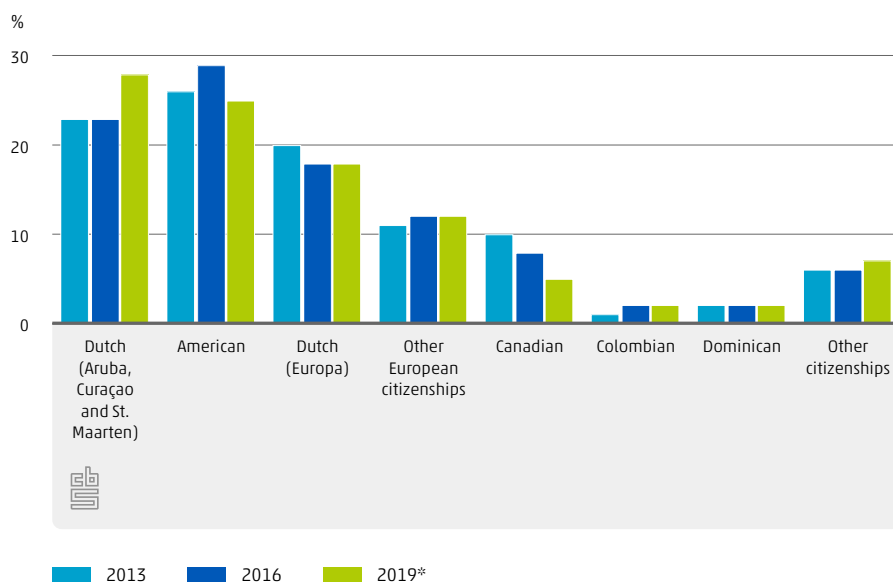
Most visitor arrivals originated from the Caribbean islands Aruba, Curaçao and St Maarten, the United States and the Netherlands. No major shifts occurred in the Saba tourism market in the period 2013–2019. Only the proportion of Canadians seems to have declined slightly.

Number of visitor arrivals by air



* preliminary data

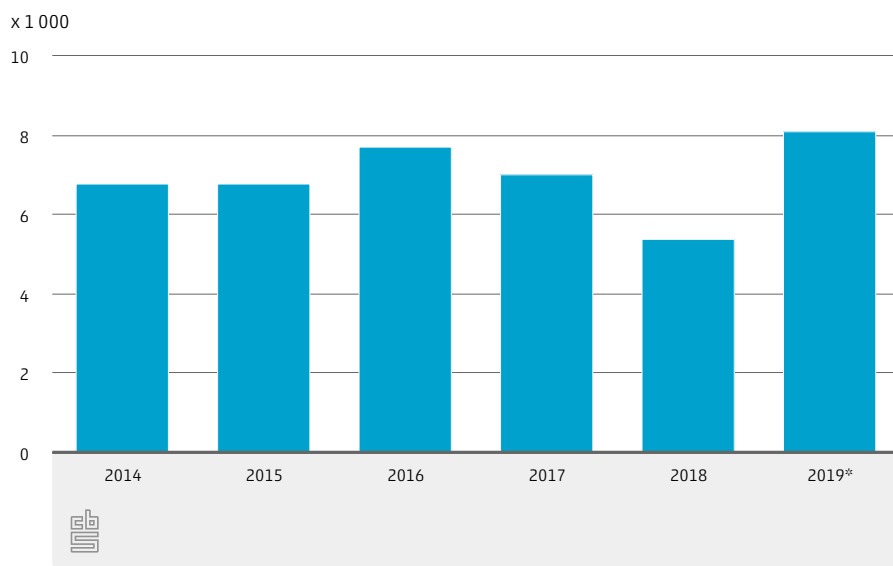
Visitor arrivals by air, by citizenship



* preliminary data

The two ferries in operation between Saba and St Maarten annually carried approximately 7 thousand passengers. In 2018 this number was lower, in 2019 it was higher. Saba residents also use these ferries.

Number of ferry passengers



* preliminary data

3 St Eustatius

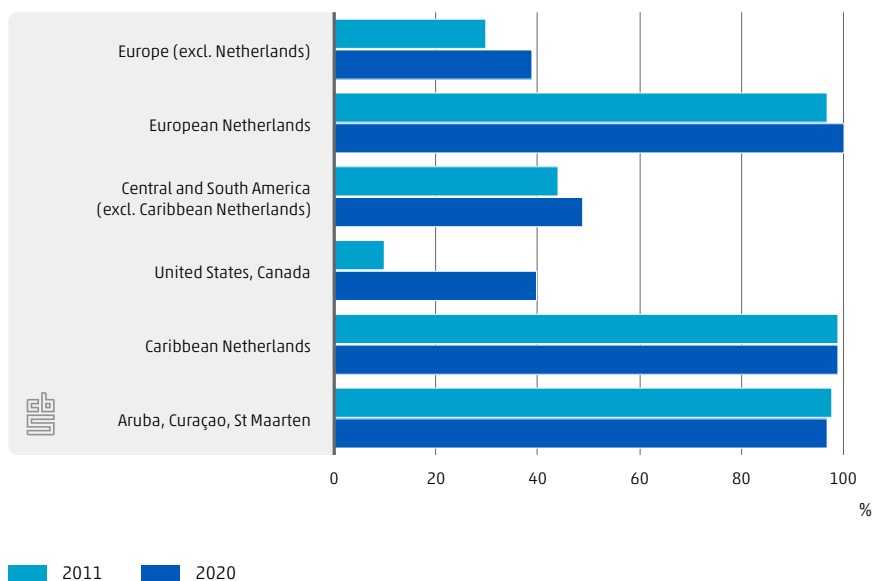
Population

On January 1st, 2020, St Eustatius had 3.1 thousand residents, 444 less than early 2010. This decline in population is largely related to clean-ups of the population register, as a result of which, on balance, primarily the number of migrants living in St Eustatius has decreased. In 2019 less immigrants moved to St Eustatius and more residents moved abroad than in 2010.

Native-born North Americans and Europeans more often have Dutch citizenship

People born in the former Netherlands Antilles, Aruba or the European Netherlands nearly all have Dutch citizenship. Of those born in United States and Canada (North America), the proportion with Dutch citizenship has shown a strong increase. Many native-born North Americans have left St Eustatius over the past years. Relatively often this concerned people without Dutch citizenship. Among native-born Europeans, and Central and South Americans, the proportion of people with Dutch citizenship increased as well. Moreover, among native-born Americans and Europeans in St Eustatius, the proportion of people with Dutch citizenship was significantly higher than on Saba and Bonaire.

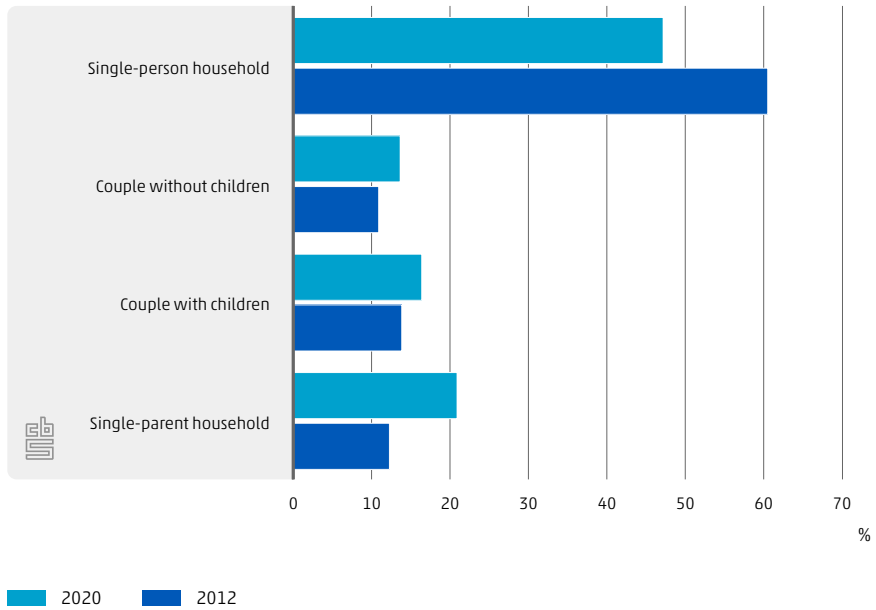
St Eustatius residents with Dutch citizenship, native region,1 of January



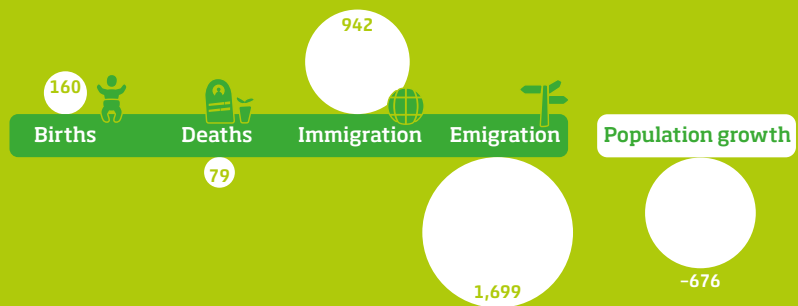
Less single-person households

The proportion of single-person households decreased, from 61 percent in 2020 to 47 percent in 2020. This is still higher than in Bonaire, where this number is 41 percent. The proportion of single-parent households increased by 9 percent to 21 percent. The proportion of couples, both with and without children, increased as well.

Households in St Eustatius, 1 of January



Population dynamics St Eustatius, 2015-2019



Labour

In 2018 the size of the working age population (15 to 74 years) on St Eustatius was 2.6 thousand, with 71.5 percent in employment. This was 70.1 percent in 2012. The male labour force participation was higher in both years. In 2018 74.1 percent of the men were employed and 68.6 percent of the women. In 2012 this was 74.5 percent of the men and 64.7 percent of the women.

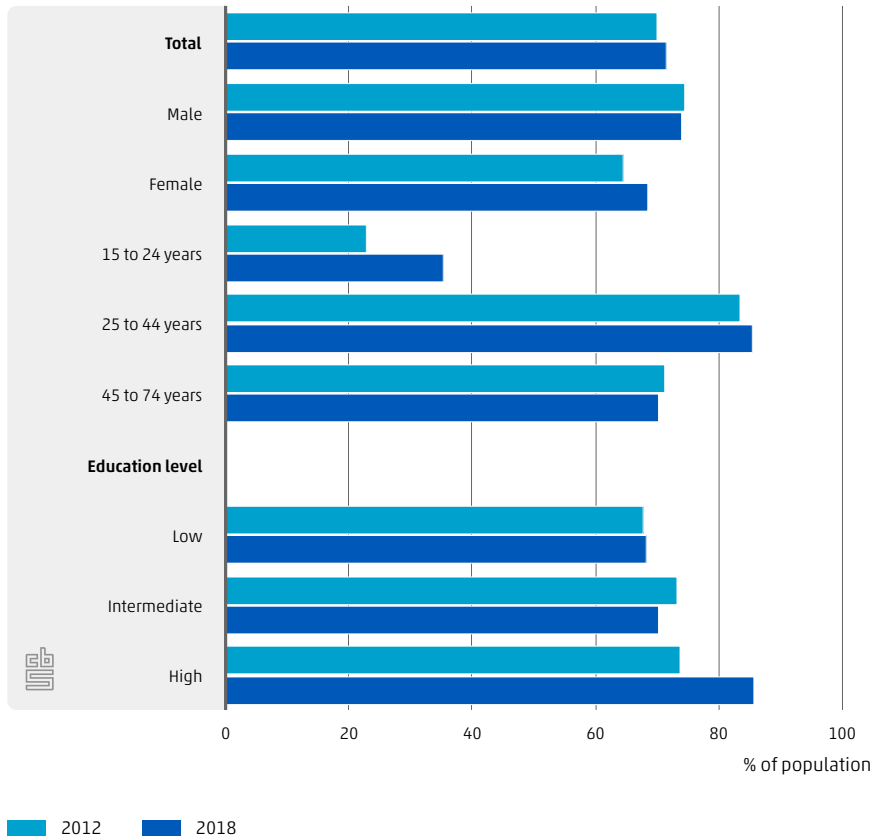
The participation was relatively low among young people, although it had increased most among the youngest group: 22.9 percent in 2012 versus 35.4 percent in 2018. Labour force participation also increased with the level of educational attainment. Of the lower educated people 68.3 percent were in employment (67.8 percent in 2012) versus 70.4 percent of those with an intermediate education level (73.2 percent in 2012). Of the highly educated 85.8 percent was employed in 2018, a larger share than the 73.9 percent in 2012.

In 2018, St Eustatius unemployment rate was 4.3 percent, equivalent to 80 unemployed. In 2012 70 were unemployed (3.2 percent).

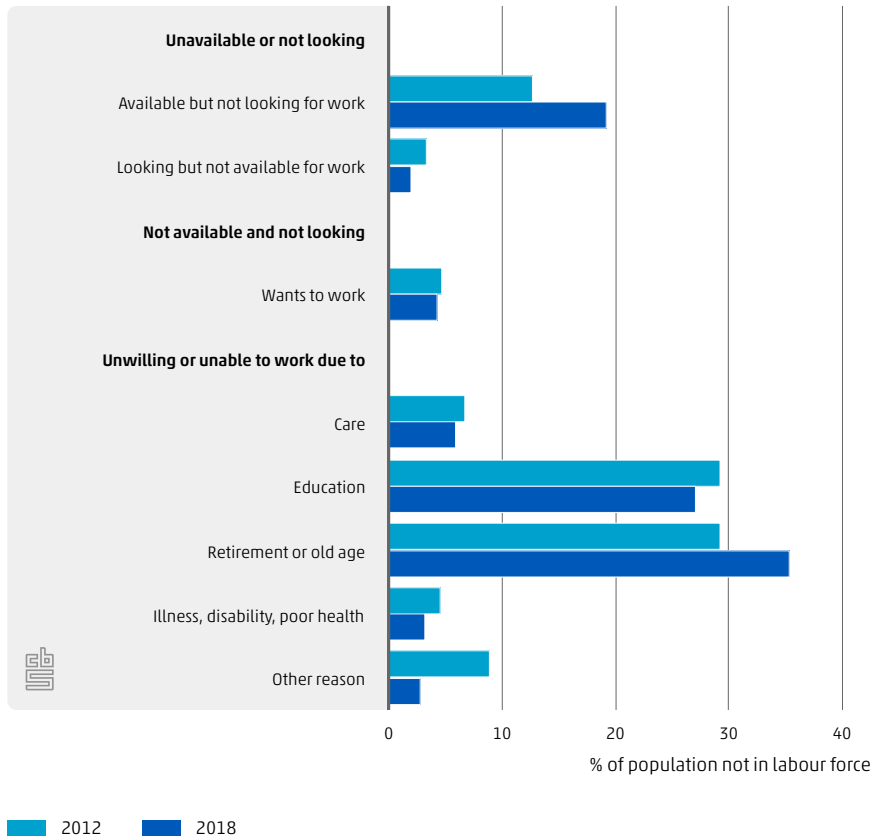
Of the St Eustatius residents 660 in 2018 and 820 in 2012 did not form part of the local labour force. They were not looking, nor were they available for work. In most cases, it was a combination of both. A large group (35 percent in 2018, 29 percent in 2012) were people who were unwilling or unable to work due to old age or retirement. At 27 percent in 2018 and 29 percent in 2012 education is also an important reason why local – in particular young – residents were unwilling or unavailable for work.

Other smaller groups include people who are unable to work due to a disability (3 percent in 2018, 5 percent in 2012) or because they had to take care of family (6 percent in 2018, 7 percent in 2012).

Net labour participation



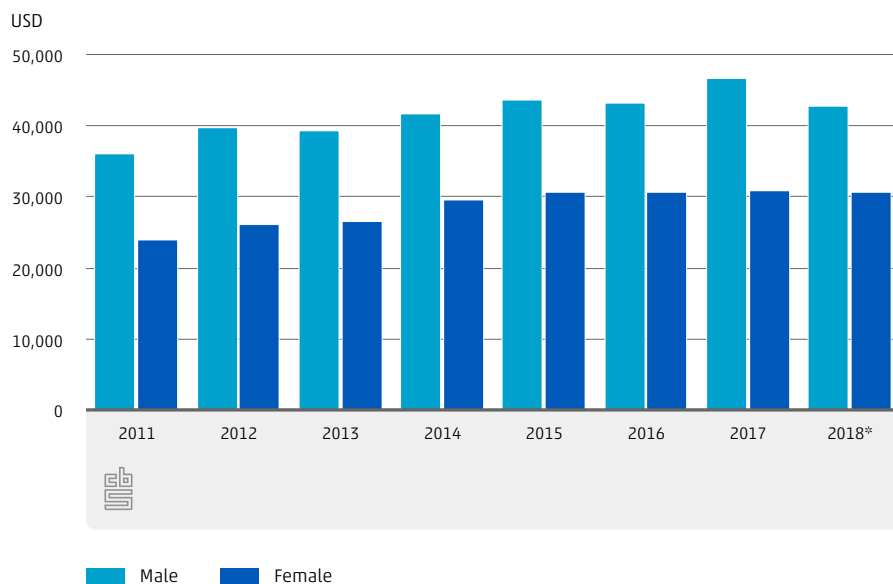
Population not in labour force (15 to 74 years)



Wages and jobs of employees

Wages vary widely depending on different characteristics and types of work. In 2018, women earned 29 percent less than men. This is almost the same wage gap as in 2011 (33 percent).

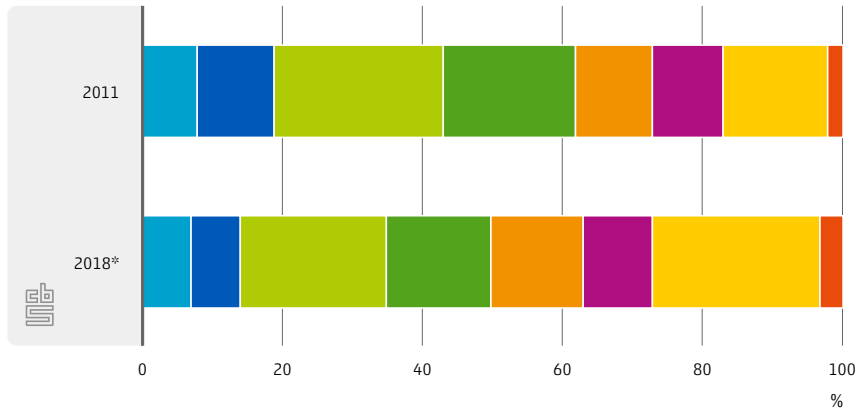
Average annual wage of employee jobs by gender



* provisional figures

The average annual wage of employees on St Eustatius was 36.3 thousand US dollars in 2018 and 29.6 thousand in 2011. This is an increase of 23 percent. The part of groups earning less than 30 thousand US dollars decreased from 62 to 50 percent.

Employee jobs by earning group

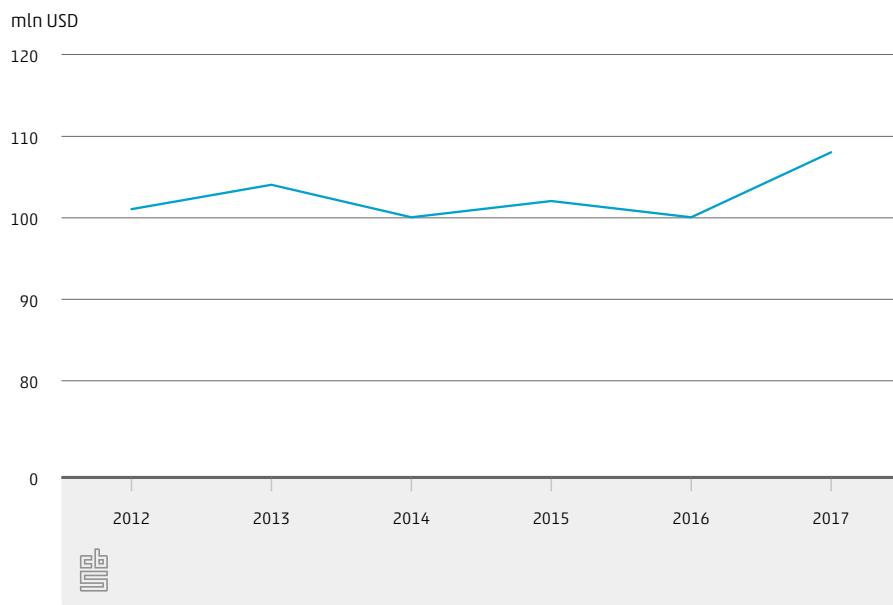


* provisional data

Macroeconomics

The gross domestic product (GDP) of St Eustatius increased from 101 million US dollars in 2012 to 108 million US dollars in 2017. That is an average increase of 1.3 percent per year during this period.

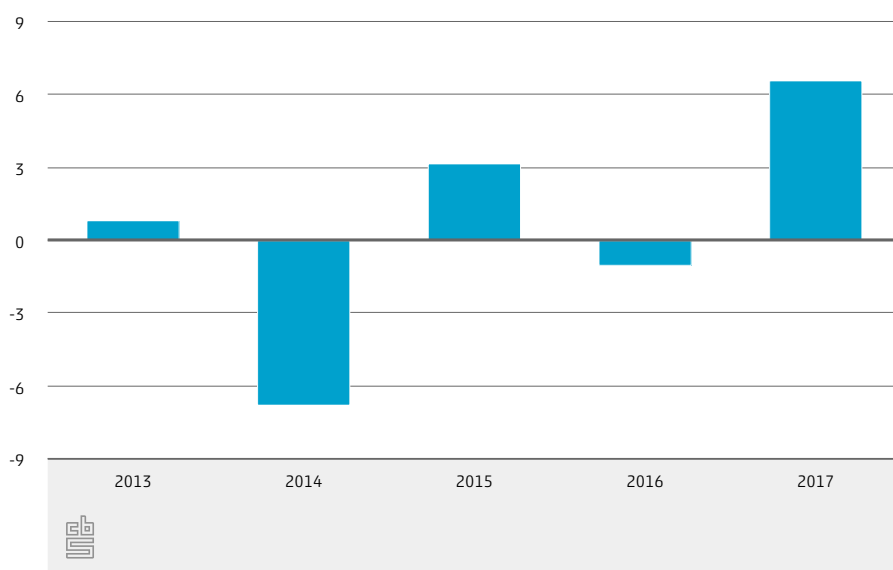
Gross domestic product



In volume terms GDP increased by 0.6 percent on average per year. GDP volume growth is calculated by adjusting the value growth for inflation on the basis of the consumer price index. The economy of St Eustatius is very dependent on just a few companies on the island which explains the relative volatile nature of the economy. It also explains the high growth rate of GDP in 2017, the year that the island was hit by hurricane Irma and Maria. The negative contribution to GDP of the tourism industry in 2017 was more than compensated by the high growth rate of value added of just a few large companies outside the tourism industry.

GDP volume growth

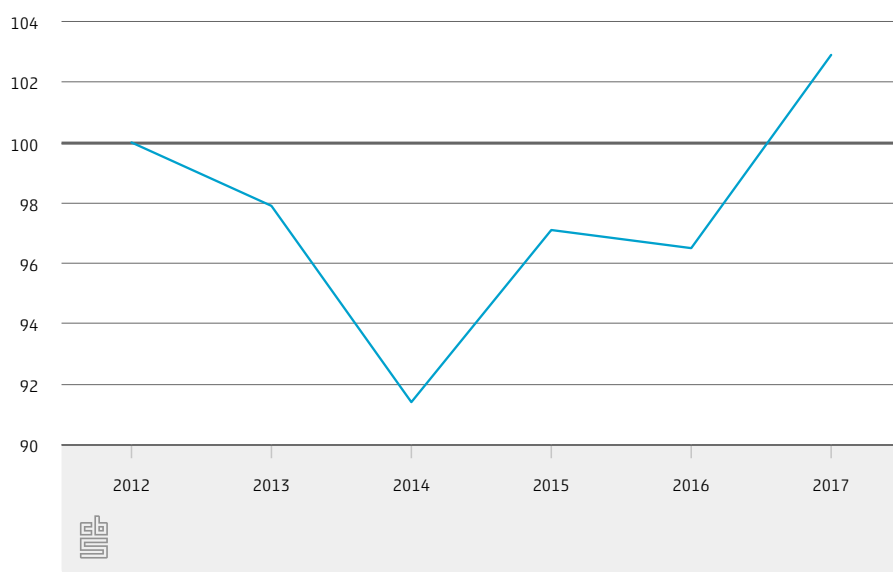
year-on-year % change



GDP per capita increased from 26.3 thousand US dollars in 2012 to 27.8 thousand US dollars in 2017. When corrected for inflation, GDP per capita increased by 2.9 percent in 2017 compared to 2012.

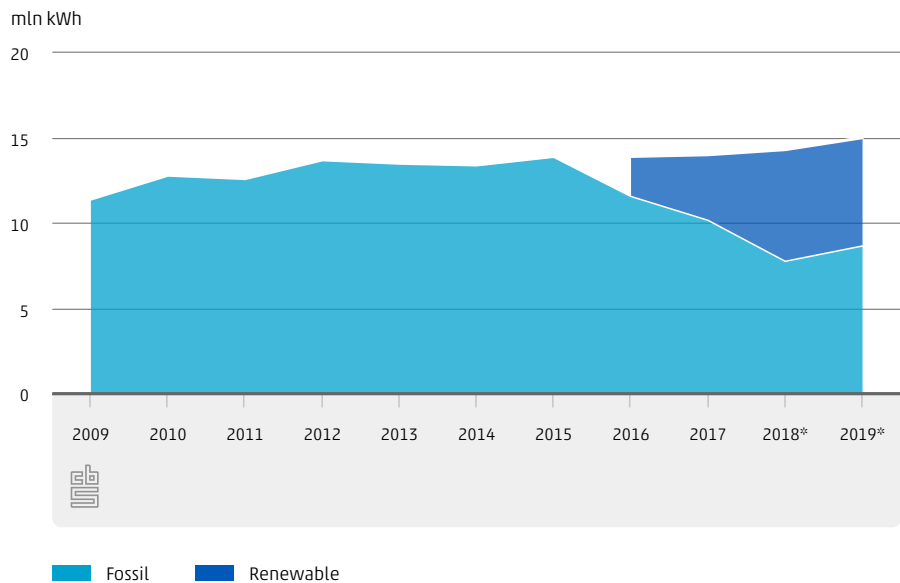
GDP per capita

volume index 2012=100



Energy

Electricity production



* provisional figures

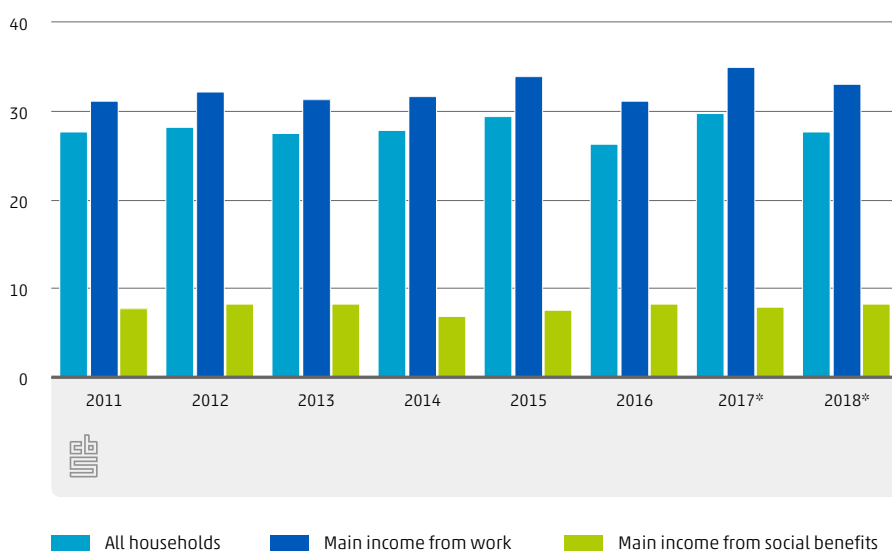
The electricity production of St Eustatius increased by 30 percent from 11.4 mln kWh in 2009 to 15 mln kWh in 2019 in ten years' time. Of this 15 mln kWh of electricity produced in 2019, 6.3 mln kWh (41.9 percent) was renewable energy. This latter proportion was produced by solar panels. The generation of sustainable energy started in 2016 with the construction of the first solar panel park. In November 2017 this park was expanded, doubling the electricity production from solar energy.

Income

Households on St Eustatius have the highest disposable income of the Caribbean Netherlands. In 2018, they had in median 27.7 thousand US dollars to spend. Since 2015 the income is fluctuating, peaking at 29.8 thousand US dollars in 2017. Households with income mainly from work show the same pattern. In 2017 their highest median income of 34.9 thousand US dollars dropped to 33 thousand US dollars in 2018. The income for social benefit receiving households yearly balances around 8 thousand US dollars.

Median disposable household income

1,000 USD (in prices of 2018)



* provisional figures

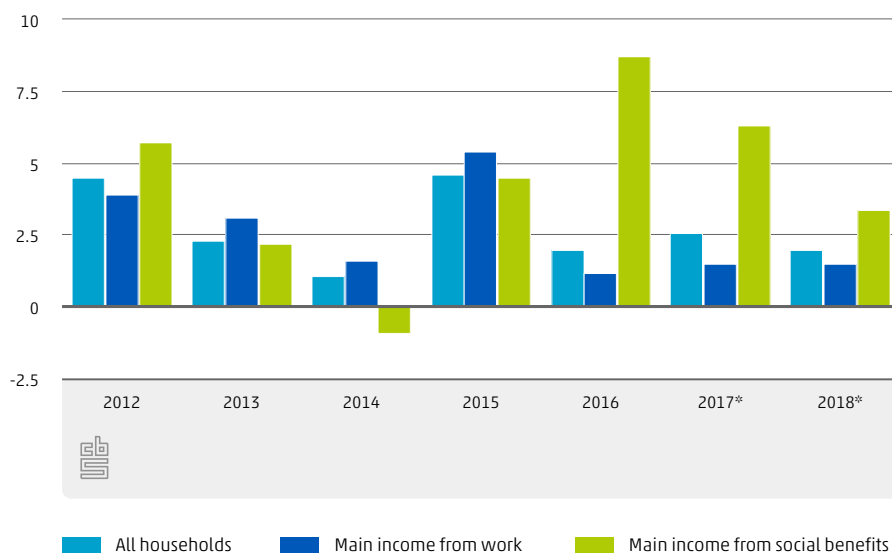
Purchasing power

The purchasing power on St Eustatius has been growing each year since 2012. In 2018 the median growth was 2 percent as compared to 2017. For working people the purchasing power increased by 1.5 percent in 2018. Households on social benefits benefited most. In 2018 their median buying power rose by 3.4 percent, mainly as a result of the extra indexation of social benefits. Only 21 percent of this group was negatively affected. In 2014, the purchasing power of this group declined

0.9 percent. Since then, the purchasing power increased each year, peaking at 8.7 percent in 2016.

Purchasing power development

year-on-year % change

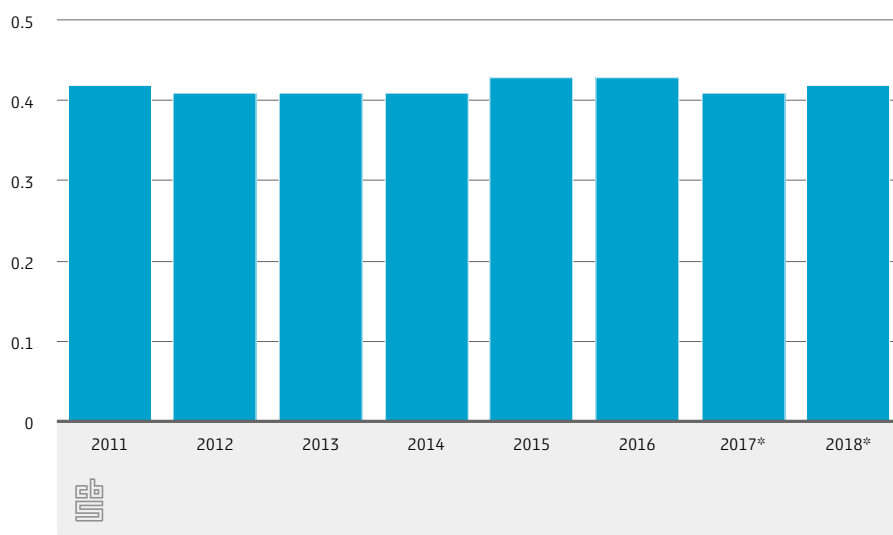


* provisional figures

Income inequality

St Eustatius has the largest income inequality of the three Caribbean islands. In 2018 the Gini coefficient had a value of 0.42. In terms of the Gini coefficient 0 means total equality: everyone has the same income, and 1 means total inequality: one person has all the income, the rest has none. In both 2015 and 2016 the Gini peaked by a value of 0.43, indicating more income inequality than in other years.

Gini coefficient



* provisional figures

Nature

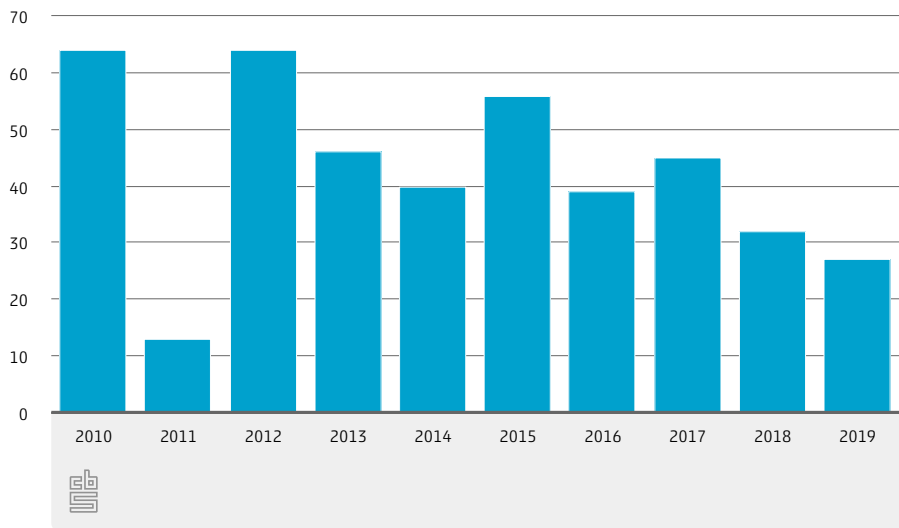
Coral cover

Over the last two decades coral cover (amount of coral on the seabed) on St Eustatius shallow coastal reefs has decreased rapidly. In comparison with the coral cover in 2000 less than one-fifth is left.

Sea turtle nests

Sea turtles have existed for around 150 million years and are vitally important for healthy beaches, seagrass beds and coral reefs. While globally threatened with extinction, sea turtles are protected on St Eustatius. The total number of turtle nests have been fluctuating over the past two decades. The leatherback has become an infrequent visitor in the last 5 years.

Turtle nests



Source: J. Berkel, St Eustatius National Parks Foundation (STENAPA), Dutch Caribbean Biodiversity Database

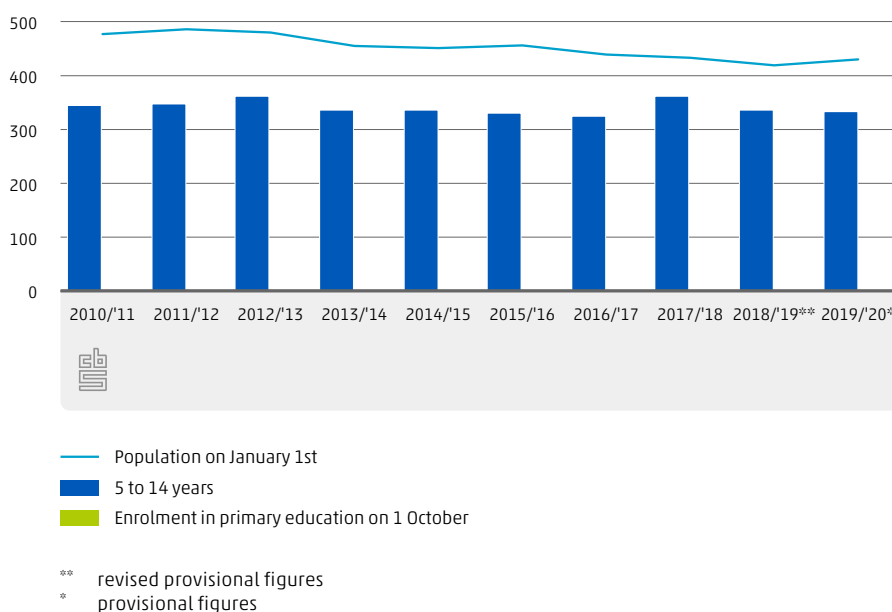
Education

St Eustatius has five government-funded schools, four primary school and a secondary school that offers both general and vocational education. There is no government-funded higher education.

Between 2013 and 2017, 65 young adults born in the former Netherlands Antilles or Aruba traded St Eustatius for the European Netherlands. More than two thirds did so for educational purposes.

The enrolment of pupils in primary education slightly decreased from 345 in 2010/'11 to 333 in 2019/'20, about in line with the population curve of the relevant ages.

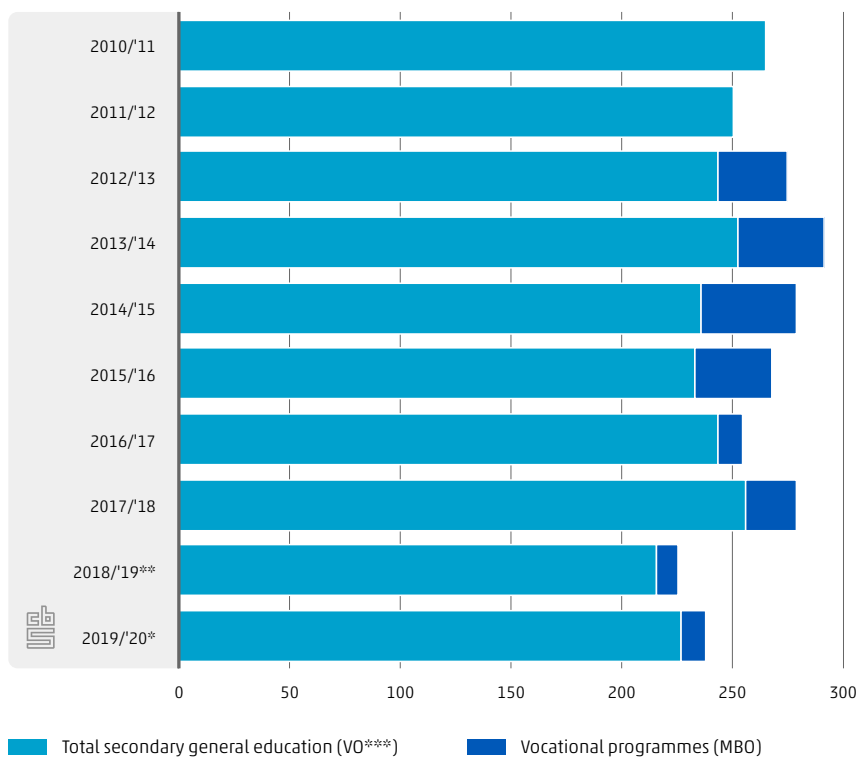
Enrolment in primary education



The enrolment of students in secondary education decreased from 265 in 2010/'11 to 238 in 2019/'20. Most of these students followed general education. Secondary general education on St Eustatius used to be in line with the system in the European part of the Netherlands. As of 2015/'16 a Caribbean system was gradually adapted. St Eustatius switched in 2019/'20 to yet another Caribbean system for both secondary general and vocational education. Education is now more in line with regional further education and the regional labour market. In the next years the courses of the

Dutch MBO (vocational education) will therefore be replaced by the Caribbean Vocational Qualification (CVQ).

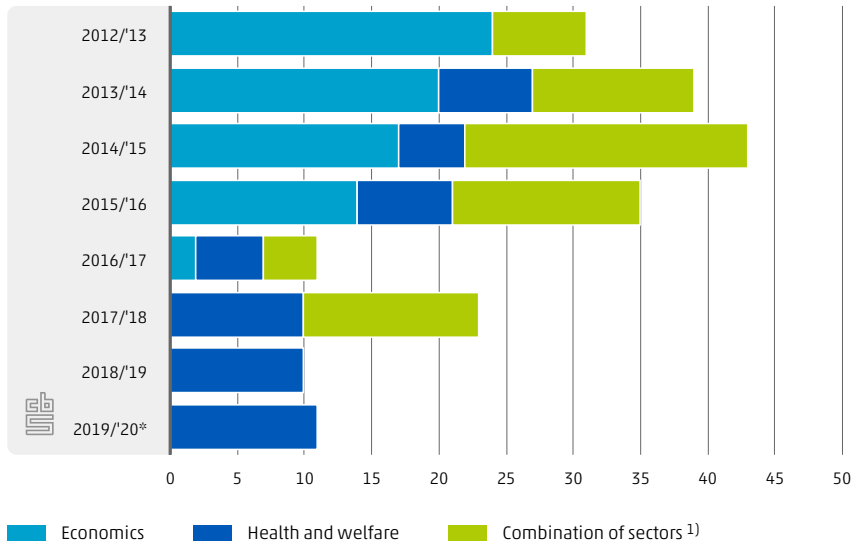
Enrolment in secondary education



*** Total secondary general education (VO) includes CVQ in 2019/'20*
 ** revised provisional figures
 * provisional figures

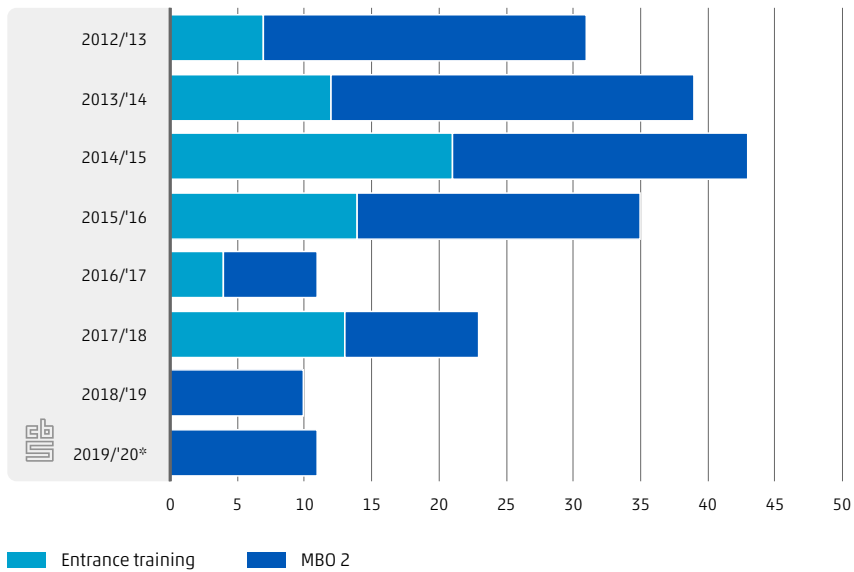
On St Eustatius MBO started in 2012/'13. MBO-students can choose from two levels of education, the entrance training and the second level. Together with the Council of Education and Labour Market Caribbean Netherlands (ROA CN), the school determines which courses should be offered in order to meet future demand on the labour market. With the introduction of CVQ in 2019/'20 the MBO-courses will gradually fade out.

Enrolment in MBO by field of education



1) The courses in 'Combination of sectors' are all on the level of entrance training.
 * provisional figures

Enrolment in MBO by level of education



* provisional figures

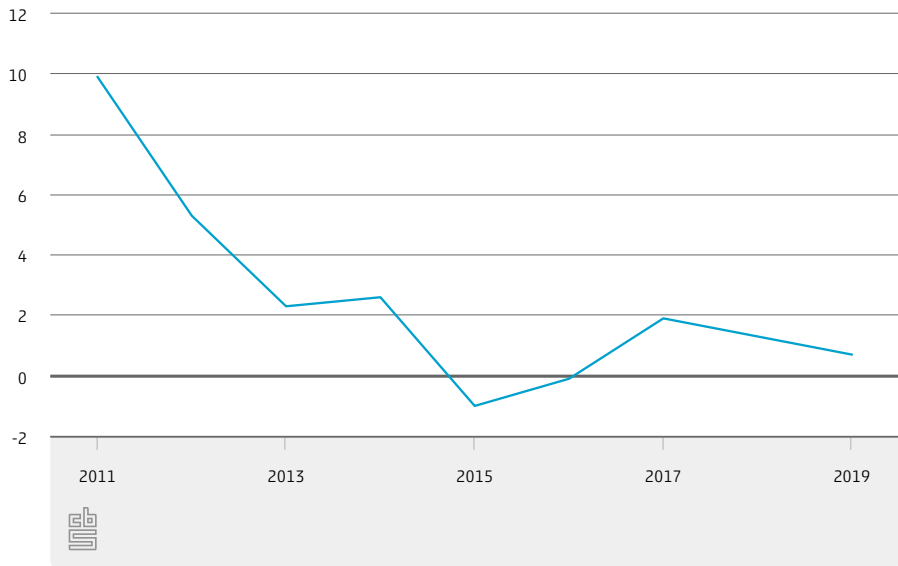
Consumer prices

Between 2010 and 2019 prices on St Eustatius increased by 25.1 percent. On average the increase was 2.5 percent per year. In the first half of 2020 prices have decreased mainly due to allowances for electricity, drinking water and internet provided by the government to support the population during the corona crisis.

During 2011 and 2012 prices rose sharply, on average by 7.6 percent per year. In 2013 and 2014 the increases were more gradually, 2.5 percent per year. From 2014 onwards the overall price levels remained relatively stable until 2017 after which the general price level increased.

CPI

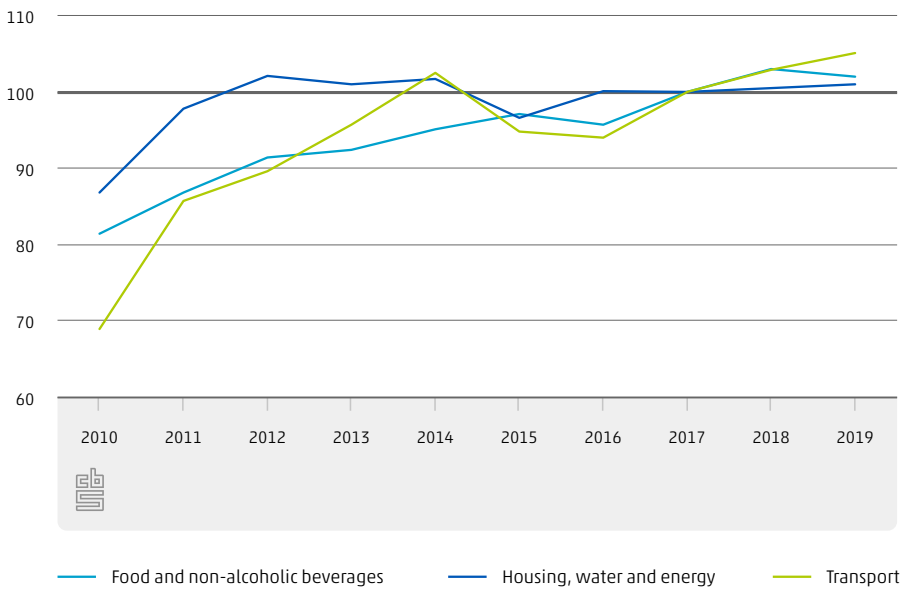
year-on-year % change



The prices for food and non-alcoholic beverages increased in 2011 and 2012 by 6 percent per year, after which the increases were more gradual, roughly 2 percent per year. In 2016 prices decreased slightly. The rise in prices for housing, water, and energy in 2011 and 2012 was on average 8.5 percent per year and is mainly due to increases in the prices for electricity. This is also the case for the drop in prices during 2015.

CPI Food, Housing and Transport

2017=100



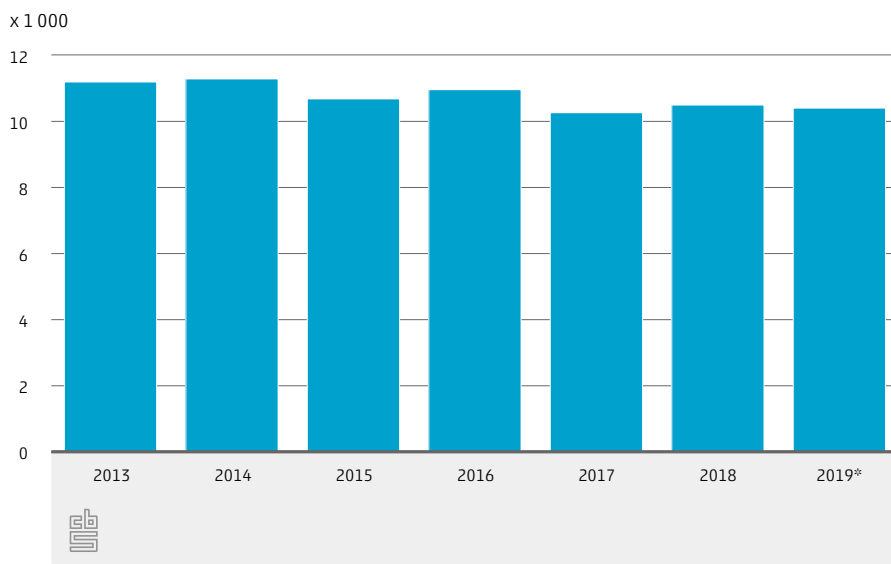
Prices for transport increased sharply until 2014 by almost 50 percent. This was mainly due to increases in the prices for petrol and air travel. The drop in prices in 2015 and 2016 is due to the drop in prices for petrol.

Tourism

In 2019 the number of visitor arrivals by air in St Eustatius was slightly over 10 thousand. This is comparable with the number in 2013. St Eustatius did not benefit from the worldwide growth in tourism and the growth in the Caribbean region in particular.

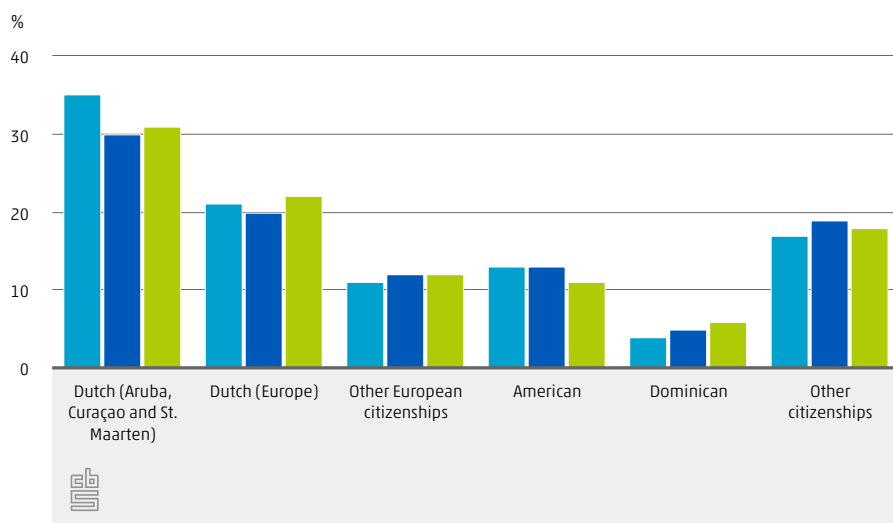
An important factor is that St Eustatius has a relative small airport with F.D. Roosevelt Airport. For international connections St Eustatius depends on St Maarten. Moreover, the harbour of St Eustatius is not suitable for large cruise ships. As a result, only a small number of cruise passengers visit St Eustatius. Additionally, St Eustatius does not have a regular ferry connection with for instance St Maarten. The relatively low number of visitors in 2017 is also related to the consequences of hurricane Irma. The main markets of origin of the visitors of St Eustatius are Aruba, Curaçao, St Maarten, the Netherlands and the United States. Only minor shifts have occurred herein since 2013.

Number of visitor arrivals by air



* preliminary data

Visitor arrivals by air, by citizenship



2013 2016 2019*

* preliminary data