

# 1<sup>ST</sup> QUARTER TOURISM

PERFORMANCE 2018



TOTAL STAYOVER ARRIVALS

**110,421**

TOTAL CRUISE ARRIVALS

**264,313**

TOTAL VISITOR NIGHTS

**1,005,891**

AVERAGE HOTEL OCCUPANCY

**79.1 %**

ECONOMIC IMPACT

**\$182.3 million**

## HOW WAS OUR FIRST QUARTER?

Curaçao welcomed altogether in the first quarter of the year 2018 a total of **374,734** tourist arrivals. The Curaçao Ports Authority recorded a total of **264,313** cruise arrivals, while the Curaçao Tourist Board registered a total of **110,421** stayover visitors who spent **1,005,891** nights in Curaçao. On average the stayover visitors spent **8.5** nights per person in the first quarter. Smith Travel Research reported an average occupancy of **79.1%** during this period accompanied by an average daily rate **\$188.56**. The Ministry of Economic Development together with CTB calculated a direct economic impact from tourism at **182.3** million US\$ during the first quarter of 2018 using the Turistika model.



## STAYOVER ARRIVALS Q1 2018

	JAN	FEB	MAR	SUMMARY
<b>2018</b>	39,510	34,670	36,241	<b>110,421</b>
<b>2017</b>	38,744	35,906	34,550	<b>109,200</b>
<b>% Change</b>	2.0%	-3.4%	4.9%	<b>1.1%</b>



NORTH AMERICA



SOUTH AMERICA



CARIBBEAN



EUROPE








OTHERS

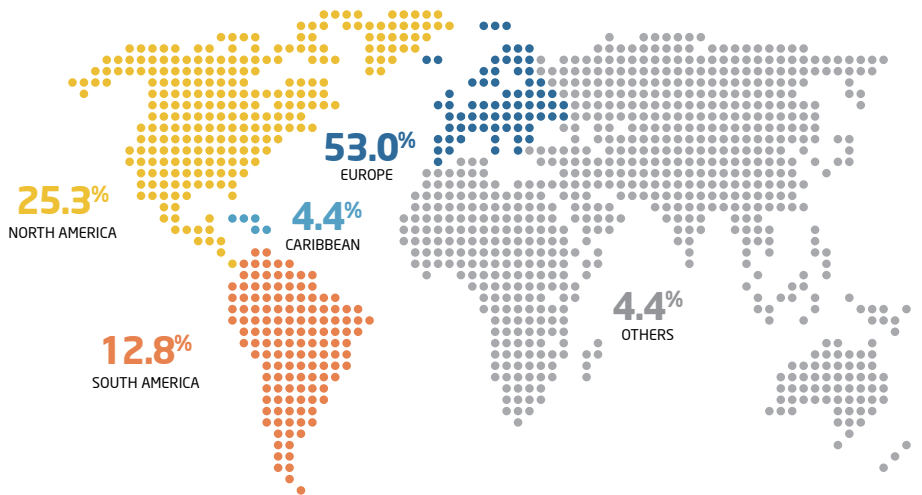
## WHERE DID OUR VISITORS COME FROM?

	JAN	FEB	MAR	2018	2017	% CHANGE
	9,087	9,261	9,635	<b>27,983</b>	<b>26,195</b>	<b>6.8%</b>
	5,967	4,016	4,188	<b>14,171</b>	<b>18,981</b>	<b>-25.4%</b>
	1,834	1,183	1,875	<b>4,892</b>	<b>6,174</b>	<b>-20.8%</b>
	20,847	18,556	19,119	<b>58,522</b>	<b>55,119</b>	<b>6.2%</b>
	1,776	1,654	1,424	<b>4,854</b>	<b>2,731</b>	<b>77.8%</b>
<b>SUMMARY</b>	<b>39,511</b>	<b>34,670</b>	<b>36,241</b>	<b>110,422</b>	<b>109,200</b>	<b>1.1%</b>

The year to date arrivals to Curaçao show an increase of 1% visitors. In total 110,421 stayover visitors travelled to Curaçao in the first quarter of 2018. In Q1 2017, we welcomed 109,200 stayover visitors.

## MARKETS BY REGION

	North America	25.3%
	South America	12.8%
	Caribbean	4.4%
	Europe	53.0%
	Others	4.4%
		100.0%



NORTH AMERICA



SOUTH AMERICA



CARIBBEAN








EUROPE








OTHERS

## HOW MANY NIGHTS DID THEY STAY?

	JAN	FEB	MAR	2018	JAN	FEB	MAR	2017	% CHANGE
	73,318	69,445	65,866	208,629	62,393	62,083	59,324	183,800	13.5%
	44,014	31,377	34,670	110,061	50,270	46,442	35,311	132,023	-17%
	10,290	7,780	10,190	28,260	12,060	13,676	10,199	35,935	-21.4%
	243,190	187,936	210,913	642,039	229,599	197,514	188,031	615,144	4.4%
	6,295	4,477	6,169	16,941	4,229	3,208	4,091	11,528	46.9%
<b>SUMMARY</b>	<b>377,107</b>	<b>301,015</b>	<b>327,808</b>	<b>1,005,930</b>	<b>358,551</b>	<b>322,923</b>	<b>296,956</b>	<b>978,430</b>	<b>2.8%</b>

## WHAT IS THE AVERAGE NIGHT SPENT PER PERSON?

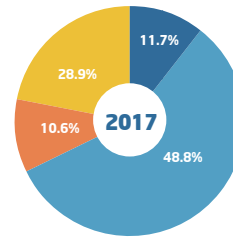
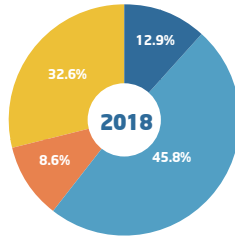
	JAN	FEB	MAR	2018	JAN	FEB	MAR	2017	% CHANGE
	7.6	7.0	6.7	7.1	7.4	7.2	6.5	7.0	1.2%
	7.4	7.8	8.3	7.8	6.4	7.6	7.0	7.0	11.6%
	5.6	6.6	5.4	5.9	5.3	6.2	6.0	5.8	0.6%
	10.6	8.5	10.6	9.9	11.9	10.9	10.6	11.1	-11.4%
	3.5	2.7	4.3	3.5	4.6	3.7	4.4	4.2	-16.3%
<b>SUMMARY</b>	<b>8.9</b>	<b>7.7</b>	<b>8.8</b>	<b>8.5</b>	<b>9.3</b>	<b>9.0</b>	<b>8.6</b>	<b>9.0</b>	<b>-5.6%</b>

Note: The 'nights' and 'average night spent per person' figures are subject to change.

# WHERE DID OUR VISITORS STAY?



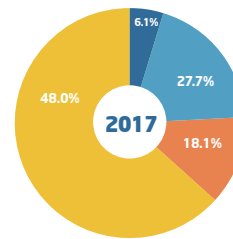
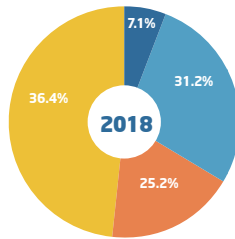
North America	2018	2017
Bungalows	12.9%	11.7%
Large Hotels	45.8%	48.8%
Small Hotels	8.6%	10.6%
Alternative Accommodations	32.6%	28.9%
<b>Summary</b>	<b>100.0%</b>	<b>100.0%</b>



■ Bungalows ■ Large Hotels ■ Small Hotels ■ Alternative Accommodations



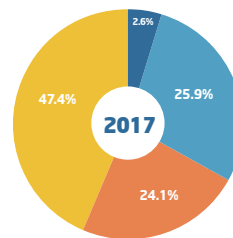
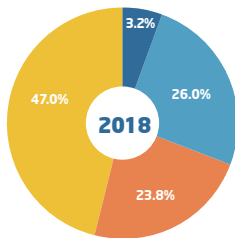
South America	2018	2017
Bungalows	7.1%	6.1%
Large Hotels	31.2%	27.7%
Small Hotels	25.2%	18.1%
Alternative Accommodations	36.4%	48.0%
<b>Summary</b>	<b>100.0%</b>	<b>100.0%</b>



■ Bungalows ■ Large Hotels ■ Small Hotels ■ Alternative Accommodations



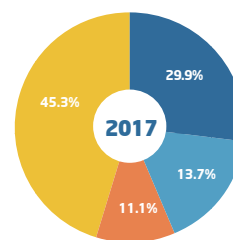
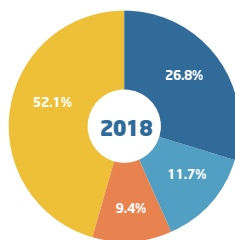
Caribbean	2018	2017
Bungalows	3.2%	2.6%
Large Hotels	26.0%	25.9%
Small Hotels	23.8%	24.1%
Alternative Accommodations	47.0%	47.4%
<b>Summary</b>	<b>100.0%</b>	<b>100.0%</b>



■ Bungalows ■ Large Hotels ■ Small Hotels ■ Alternative Accommodations



Europe	2018	2017
Bungalows	26.8%	29.9%
Large Hotels	11.7%	13.7%
Small Hotels	9.4%	11.1%
Alternative Accommodations	52.1%	45.3%
<b>Summary</b>	<b>100.0%</b>	<b>100.0%</b>



■ Bungalows ■ Large Hotels ■ Small Hotels ■ Alternative Accommodations

## CURAÇAO HOTEL PERFORMANCE Q1

MARCH	2017	2018	% Change
% Occupancy	80.8%	76.8%	<b>-4.0% (points)</b>
ADR	\$148.85	\$180.29	<b>21.1%</b>
RevPAR	\$120.31	\$138.46	<b>15.1%</b>



**BASED ON**

**12 properties & 1689 Rooms**

POWERED BY 

\* Smith Travel Research (STR) is the leading global provider of competitive benchmarking, information services and research to the hotel industry.

The following figures have been reported by the Curaçao Hospitality & Tourism Association:

Occupancy decreased by 4.0% compared to March 2017. While Occupancy dropped, both Average Daily Rate (ADR) and Revenue Per Available Room (RevPAR) increased compared to March 2017. ADR increased by 21.1% from \$148.85 in 2017 to \$180.29 in 2018. RevPAR increased by 15.1% from \$120.31 in 2017 to \$138.46 in 2018.

### YTD HOTEL PERFORMANCE CURAÇAO

	Occupancy			ADR			RevPar		
	2017	2018	Difference	2017	2018	Change	2017	2018	Change
<b>JAN</b>	81.3%	81.2%	-0.1%	\$ 167.08	\$ 196.33	17.5%	\$ 135.79	\$ 167.08	23.0%
<b>FEB</b>	82.1%	83.1%	1.0%	\$ 160.46	\$ 192.16	19.8%	\$ 131.75	\$ 159.84	21.3%
<b>MAR</b>	80.8%	76.8%	-4.0%	\$ 148.85	\$ 180.29	21.1%	\$ 120.31	\$ 138.46	15.1%
<b>YTD</b>	<b>81.4%</b>	<b>80.4%</b>	<b>-1.0%</b>	<b>\$ 158.80</b>	<b>\$ 189.59</b>	<b>19.4%</b>	<b>\$ 129.28</b>	<b>\$ 155.13</b>	<b>20%</b>

As can be seen in the above figures, there was an overall increase in hotel performance for Q1 2018 compared to 2017. Occupancy stayed consistent to 2017 in January and February, while March reported a decrease. Both ADR and RevPAR increased significantly compared to 2017.



Meanwhile in the Caribbean

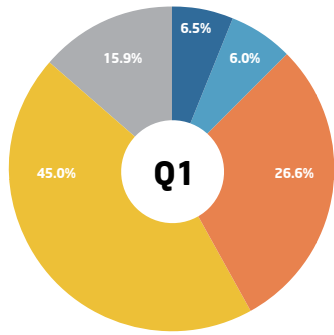
In Quarter 1 of 2018, Occupancy decreased by 1.3% from 73.2% in 2017 to 71.9% in 2018. ADR stayed consistent to 2017, only increasing by \$0.20. RevPAR decreased slightly from \$179.28 in 2017 to 176.16 in 2018.

## WHAT AGE ARE OUR VISITORS?



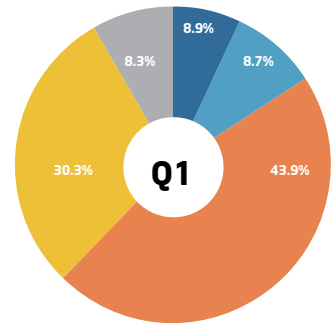
### North America

0-14	6.5%
15-24	6.0%
25-44	26.6%
45-64	45.0%
65+	15.9%
<b>Summary</b>	<b>100.0%</b>



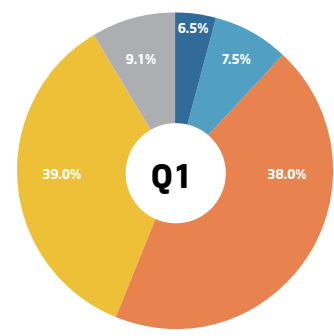
### South America

0-14	8.9%
15-24	8.7%
25-44	43.9%
45-64	30.3%
65+	8.3%
<b>Summary</b>	<b>100.0%</b>



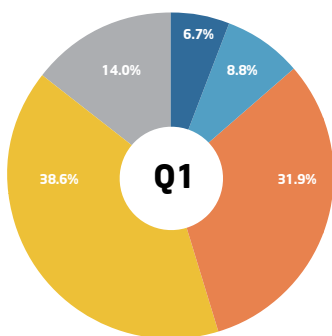
### Caribbean

0-14	6.5%
15-24	7.5%
25-44	38.0%
45-64	39.0%
65+	9.1%
<b>Summary</b>	<b>100.0%</b>



### Europe

0-14	6.7%
15-24	8.8%
25-44	31.9%
45-64	38.6%
65+	14.0%
<b>Summary</b>	<b>100.0%</b>



## WHAT GENDER ARE OUR VISITORS?

# 2018



**50.6%**

FEMALE VISITORS



**49.4%**

MALE VISITORS

# 2017



**49.9%**

FEMALE VISITORS



**50.1%**

MALE VISITORS

# DIGITAL



## WEB SESSION BREAKDOWN Q1

Item	2018	2017	% Change
Total Users	392,463	423,221	-7.3%
New Users	373,290	405,497	-7.9%

## WEB VISIT BY FOCUS MARKETS Q1

Country	2018	2017	% Change
United States	108,046	102,681	5.2%
Netherlands	61,959	51,745	19.5%
Colombia	45,143	46,227	-2.3%
Canada	30,649	25,241	21.4%
Germany	25,597	72,841	-64.9%
Brazil	15,899	11,551	37.6%
Venezuela	3,862	8,089	-52.3%
Suriname	2,248	2,166	3.8%
Aruba	1,889	1,978	-4.5%

## SOCIAL MEDIA



**223K**  
FOLLOWERS



**43.5K**  
FOLLOWERS

**9,349,486**  
SOCIAL MEDIA IMPRESSIONS

## HOW DID THE CRUISE INDUSTRY PERFORM?



### CRUISE CALLS Q1 2018/2017

	JAN	FEB	MAR	SUMMARY
2018	42	35	32	<b>109</b>
2017	33	29	33	<b>95</b>
Difference	27.3%	20.7%	-3.0%	<b>14.7%</b>

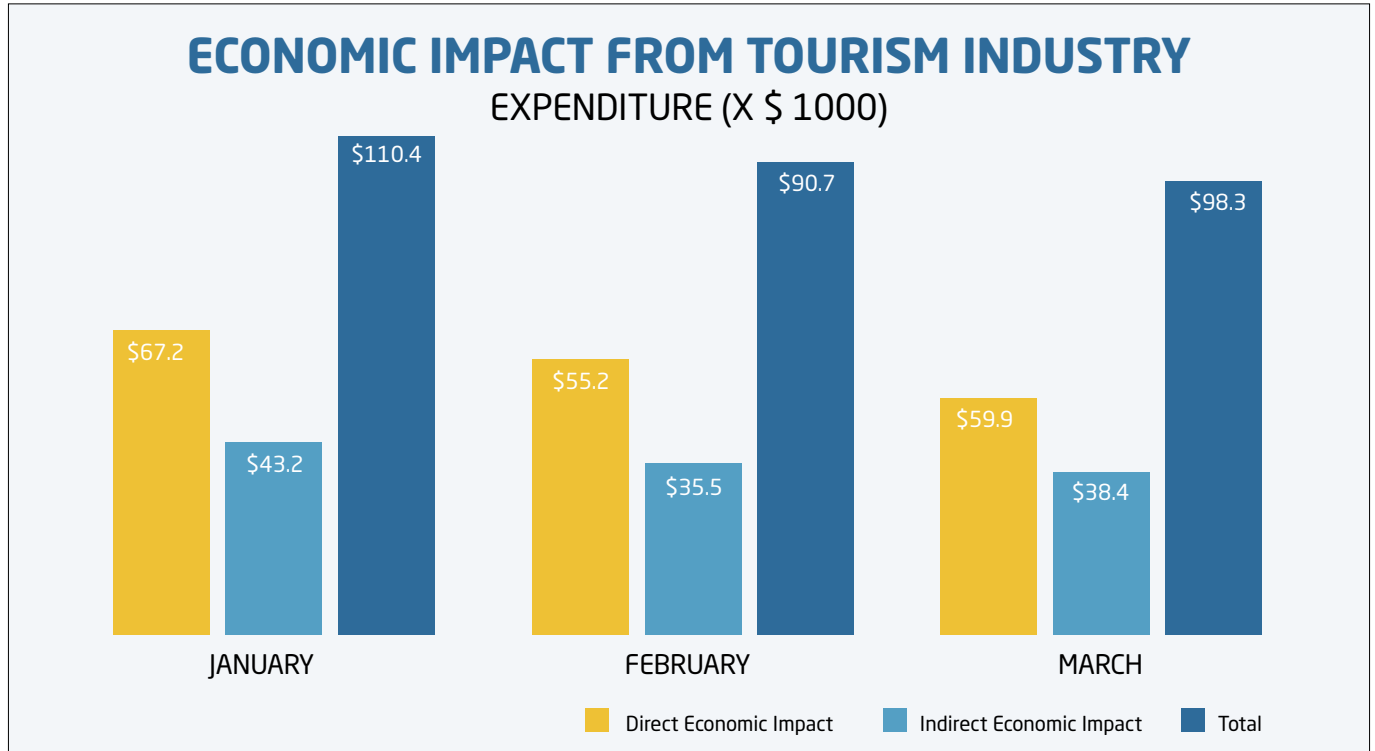


### CRUISE PASSENGERS Q1 2018/2017

	JAN	FEB	MAR	SUMMARY
2018	97,651	85,687	80,975	<b>264,313</b>
2017	68,581	62,229	71,293	<b>202,103</b>
Difference	42.4%	37.7%	13.6%	<b>30.8%</b>



**CURAÇAO PORTS**  
AUTHORITY



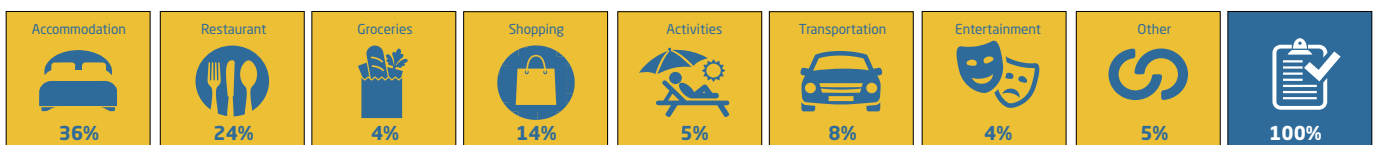
## HOW DID OUR STAYOVER VISITORS SPEND THEIR MONEY?

Source: Turistika Model

### EXPENDITURE (X \$1000)

	2018 Q1	2017 Q1	% Change	% Total 2018 Q1
Accommodation	64.8	48.4	34%	36%
Restaurant	44.3	35.8	24%	24%
Groceries	8.2	5.6	46%	4%
Shopping	24.9	23.2	7%	14%
Activities	9.5	10.1	-6%	5%
Transportation	14.5	16.3	-11%	8%
Entertainment	6.8	4.1	66%	4%
Other	9.3	7.7	21%	5%
<b>Total Economic Impact</b>	<b>182.3</b>	<b>151.2</b>	<b>21%</b>	<b>100%</b>

### EXPENDITURE IN PERCENTAGES





## WHAT IS THE AVERAGE SPENDING PER DAY PER PERSON?



\$236.05



\$217.59



\$132.78



\$166.93



\$227.08



\$250.24



\$211.76



\$168.69



MINISTRY OF  
ECONOMIC DEVELOPMENT

QUARTER 1 IN REVIEW	2018	2017	% CHANGES
STAY OVER ARRIVALS	110,421	109,200	1.1%
CRUISE ARRIVALS	264,313	202,103	30.8%
TOTAL ARRIVALS	374,734	311,303	20.4%
TOTAL TOURIST NIGHTS	1,005,891	978,430	2.9%
AVERAGE NIGHTS	8.5	9	-5.6%
AVERAGE OCCUPANCY RATE	79.1	81.4	-2.3%
AVERAGE REVENUE PER AVAILABLE ROOM	\$ 149.11	\$ 129.20	15.4%
TOTAL ECONOMIC IMPACT	182.3 million US\$	151.2 million US\$	20.6%