

# FIRST SIX MONTHS TOURISM

PERFORMANCE 2018



TOTAL STAYOVER ARRIVALS

**204,804**

TOTAL CRUISE ARRIVALS

**396,605**

TOTAL VISITOR NIGHTS

**1,823,216**

AVERAGE HOTEL OCCUPANCY

**75.6%**

TOTAL ECONOMIC IMPACT  
(DIRECT + INDIRECT) INCL. CRUISE

**\$535.5 million**

## HOW WAS THE FIRST HALF OF THE YEAR?

Curaçao welcomed altogether in the first six months of the year 2018 a total of **601,409** tourist arrivals. The Curaçao Ports Authority recorded a total of **396,605** cruise arrivals, while the Curaçao Tourist Board registered a total of **204,804** stayover visitors who spent **1,823,216** nights in Curaçao. On average the stayover visitors spent **8.4** nights per person in the first half of the year. Smith Travel Research reported an average occupancy of **75.6%** during this period accompanied by an average daily rate **\$144.58**. Change complete sentence for: The Ministry of Economic Development together with CTB calculated the total economic impact (direct + indirect) including cruise tourism at **535.5 million US \$** during the first six months of 2018 using the Turistika Model.



	JAN	FEB	MAR	APR	MAY	JUNE	SUMMARY
<b>2018</b>	39,512	34,670	36,241	32,310	31,251	30,820	<b>204,804</b>
<b>2017</b>	38,744	35,906	34,550	35,074	29,196	27,958	<b>201,428</b>
<b>% Change</b>	2.0%	-3.4%	4.9%	-7.9%	7.0%	10.2%	<b>1.7%</b>



NORTH AMERICA



SOUTH AMERICA



CARIBBEAN



EUROPE








OTHERS

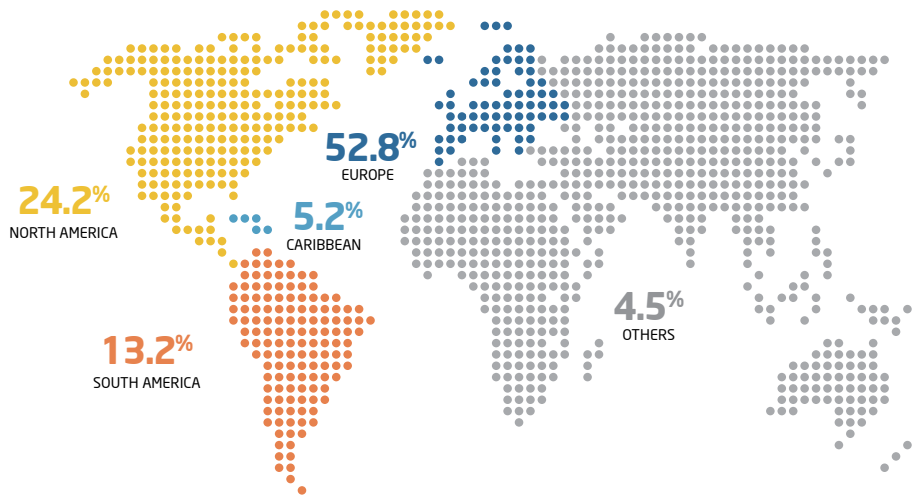
## WHERE DID OUR VISITORS COME FROM?

	JAN	FEB	MAR	APR	MAY	JUN	2018	2017	% CHANGE
	9,087	9,271	9,636	7,082	7,012	7,522	<b>49,610</b>	<b>44,443</b>	<b>11.6%</b>
	5,967	4,029	4,198	3,636	4,055	5,115	<b>27,000</b>	<b>37,230</b>	<b>-27.5%</b>
	1,835	1,203	1,884	2,033	1,799	1,986	<b>10,740</b>	<b>12,826</b>	<b>-16.3%</b>
	20,847	18,591	19,128	18,189	16,675	14,726	<b>108,156</b>	<b>101,820</b>	<b>6.2%</b>
	1,776	1,576	1,395	1,370	1,710	1,471	<b>9,298</b>	<b>5,109</b>	<b>82.0%</b>
<b>SUMMARY</b>	<b>39,512</b>	<b>34,670</b>	<b>36,241</b>	<b>32,310</b>	<b>31,251</b>	<b>30,820</b>	<b>204,804</b>	<b>201,428</b>	<b>1.7%</b>

The year to date arrivals to Curaçao show an increase of 1.7% visitors. In total 204,804 stayover visitors travelled to Curaçao in 2018. In 2017, we welcomed 201,428 stayover visitors.

## MARKETS BY REGION

	North America	24.2%
	South America	13.2%
	Caribbean	5.2%
	Europe	52.8%
	Others	4.5%
		<b>100.0%</b>



NORTH AMERICA



SOUTH AMERICA



CARIBBEAN








EUROPE








OTHERS

## HOW MANY NIGHTS DID THEY STAY?

	JAN	FEB	MAR	APR	MAY	JUN	2018	2017	% CHANGE
	73,319	69,809	65,967	47,859	44,773	48,695	350,422	301,122	16.4%
	44,014	31,677	34,771	26,897	30,851	36,745	204,955	266,420	-23.1%
	10,291	7,883	10,329	11,746	10,851	11,675	62,775	74,507	-15.7%
	243,196	188,335	210,988	190,690	176,727	162,918	1,172,854	1,111,057	5.6%
	6,295	4,482	6,187	4,833	5,783	4,630	32,210	24,722	30.3%
<b>SUMMARY</b>	<b>377,115</b>	<b>302,186</b>	<b>328,242</b>	<b>282,025</b>	<b>268,985</b>	<b>264,663</b>	<b>1,823,216</b>	<b>1,777,828</b>	<b>2.6%</b>

## WHAT IS THE AVERAGE NIGHT SPENT PER PERSON?

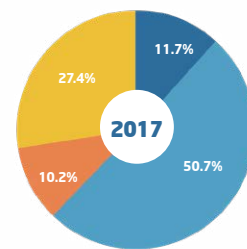
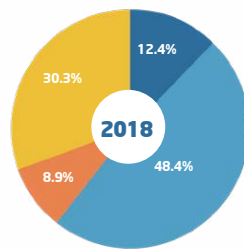
	JAN	FEB	MAR	APR	MAY	JUN	2018	2017	% CHANGE
	7.6	7.0	6.8	6.7	6.3	6.4	6.8	6.7	0.9%
	7.4	7.9	8.3	7.4	7.6	7.2	7.6	7.2	6.0%
	5.6	6.6	5.5	5.8	6.0	5.9	5.9	5.8	1.3%
	10.6	8.5	10.6	10.1	10.1	10.4	10.0	10.9	-7.9%
	3.5	2.8	4.4	3.5	3.4	3.1	3.5	4.9	-28.6%
<b>SUMMARY</b>	<b>8.9</b>	<b>7.7</b>	<b>8.8</b>	<b>8.5</b>	<b>8.3</b>	<b>8.2</b>	<b>8.4</b>	<b>8.8</b>	<b>-4.5%</b>

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

## WHERE DID OUR VISITORS STAY?



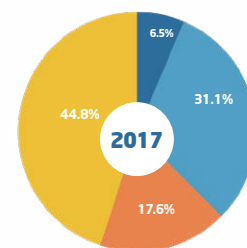
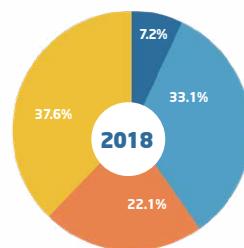
North America	2018	2017
Bungalows	12.4%	11.7%
Large Hotels	48.4%	50.7%
Small Hotels	8.9%	10.2%
Alternative Accommodations	30.3%	27.4%
<b>Summary</b>	<b>100.0%</b>	<b>100.0%</b>



■ Bungalows ■ Large Hotels ■ Small Hotels ■ Alternative Accommodations



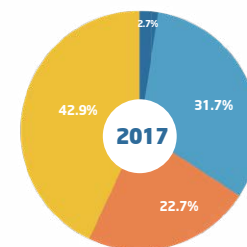
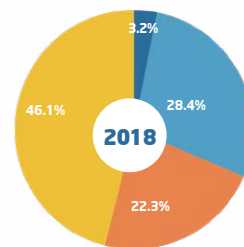
South America	2018	2017
Bungalows	7.2%	6.5%
Large Hotels	33.1%	31.1%
Small Hotels	22.1%	17.6%
Alternative Accommodations	37.6%	44.8%
<b>Summary</b>	<b>100.0%</b>	<b>100.0%</b>



■ Bungalows ■ Large Hotels ■ Small Hotels ■ Alternative Accommodations



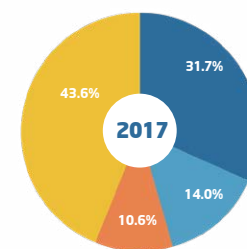
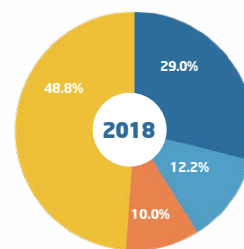
Caribbean	2018	2017
Bungalows	3.2%	2.7%
Large Hotels	28.4%	31.7%
Small Hotels	22.3%	22.7%
Alternative Accommodations	46.1%	42.9%
<b>Summary</b>	<b>100.0%</b>	<b>100.0%</b>



■ Bungalows ■ Large Hotels ■ Small Hotels ■ Alternative Accommodations



Europe	2018	2017
Bungalows	29.0%	31.7%
Large Hotels	12.2%	14.0%
Small Hotels	10.0%	10.6%
Alternative Accommodations	48.8%	43.6%
<b>Summary</b>	<b>100.0%</b>	<b>100.0%</b>



■ Bungalows ■ Large Hotels ■ Small Hotels ■ Alternative Accommodations

## CURAÇAO HOTEL PERFORMANCE FIRST SIX MONTHS

JUNE	2017	2018	% Change
% Occupancy	62.8%	75.6%	<b>12.8% (points)</b>
ADR	\$122.90	\$144.58	<b>17.6%</b>
RevPAR	\$77.21	\$109.27	<b>41.5%</b>



**BASED ON**

**10 properties & 1409 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:

The month of June saw an overall increase in hotel performance. Occupancy increased by 12.8% points compared to June 2017. Both Average Daily Rates (ADR) increased by 17.6% compared to 2017, while Revenue Per Available Room (RevPAR) increased by 41.5% compared to 2017.

### 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>APR</b>	74.9%	81.4%	6.5%	\$ 143.29	\$ 155.15	8.3%	\$ 107.29	\$ 126.22	17.6%
<b>MAY</b>	63.8%	72.0%	8.2%	\$ 129.12	\$ 148.81	15.2%	\$ 82.44	\$ 107.16	30.0%
<b>JUN</b>	62.8%	75.6%	12.8%	\$ 122.90	\$ 144.58	17.6%	\$ 77.21	\$ 109.27	41.5%
<b>YTD</b>	<b>74.3%</b>	<b>78.4%</b>	<b>4.1%</b>	<b>\$145.28</b>	<b>\$169.55</b>	<b>16.7%</b>	<b>\$109.13</b>	<b>\$134.67</b>	<b>23.4%</b>



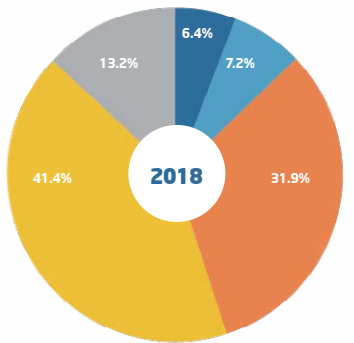
As can be seen in the above figures, there was an overall increase in hotel performance for Q2 2018 compared to 2017. Occupancy, ADR and RevPAR all saw an increase compared to 2017 for all 6 months.

## WHAT AGE ARE OUR VISITORS?



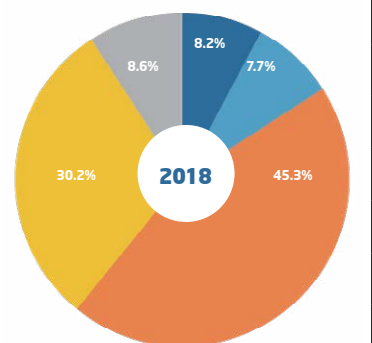
### North America

0-14	6.4%
15-24	7.2%
25-44	31.9%
45-64	41.4%
65+	13.2%
<b>Summary</b>	<b>100.0%</b>



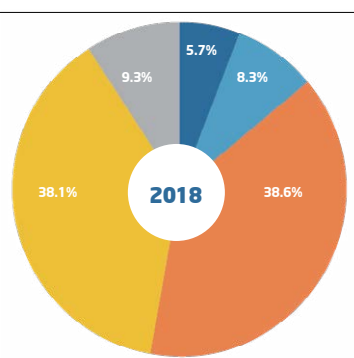
### South America

0-14	8.2%
15-24	7.7%
25-44	45.3%
45-64	30.2%
65+	8.6%
<b>Summary</b>	<b>100.0%</b>



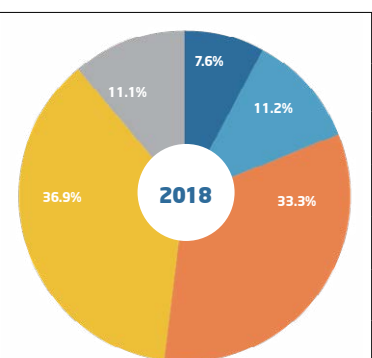
### Caribbean

0-14	5.7%
15-24	8.3%
25-44	38.6%
45-64	38.1%
65+	9.3%
<b>Summary</b>	<b>100.0%</b>



### Europe

0-14	7.6%
15-24	11.2%
25-44	33.3%
45-64	36.9%
65+	11.1%
<b>Summary</b>	<b>100.0%</b>



## WHAT GENDER ARE OUR VISITORS?

# 2018



**50.9%**

FEMALE VISITORS



**49.1%**

MALE VISITORS

# 2017



**50.4%**

FEMALE VISITORS



**49.5%**

MALE VISITORS

# DIGITAL



## WEB SESSION BREAKDOWN FIRST SIX MONTHS

Item	2018	2017	% Change
Total Users	692,815	827,869	-16.3%
New Users	669,514	805,806	-16.9%

## WEB VISIT BY FOCUS MARKETS FIRST SIX MONTHS

Country	2018	2017	% CHANGE
United States	189,290	231,436	-18.2%
Netherlands	97,428	129,967	-25.0%
Colombia	91,132	99,041	-8.0%
Canada	41,471	36,103	14.9%
Germany	41,211	95,545	-56.8%
Brazil	30,143	23,133	30.3%
Venezuela	6,672	15,065	-55.7%
Suriname	3,631	4,013	-9.5%
Aruba	3,378	3,365	0.4%

## SOCIAL MEDIA FIRST SIX MONTHS



**226K**  
FOLLOWERS

**25,064,071**  
Social media impressions on Facebook.



**46K**  
FOLLOWERS

**5,425,000**  
Social media impressions on Instagram.

## HOW DID THE CRUISE INDUSTRY PERFORM IN THE FIRST SIX MONTHS?



### CRUISE CALLS



	JAN	FEB	MAR	APR	MAY	JUN	SUMMARY
2018	42	35	32	27	11	10	<b>157</b>
2017	33	29	33	15	15	11	<b>136</b>
Difference	27.3%	20.7%	-3.0%	80.0%	-26.7%	-9.1%	<b>15.4%</b>

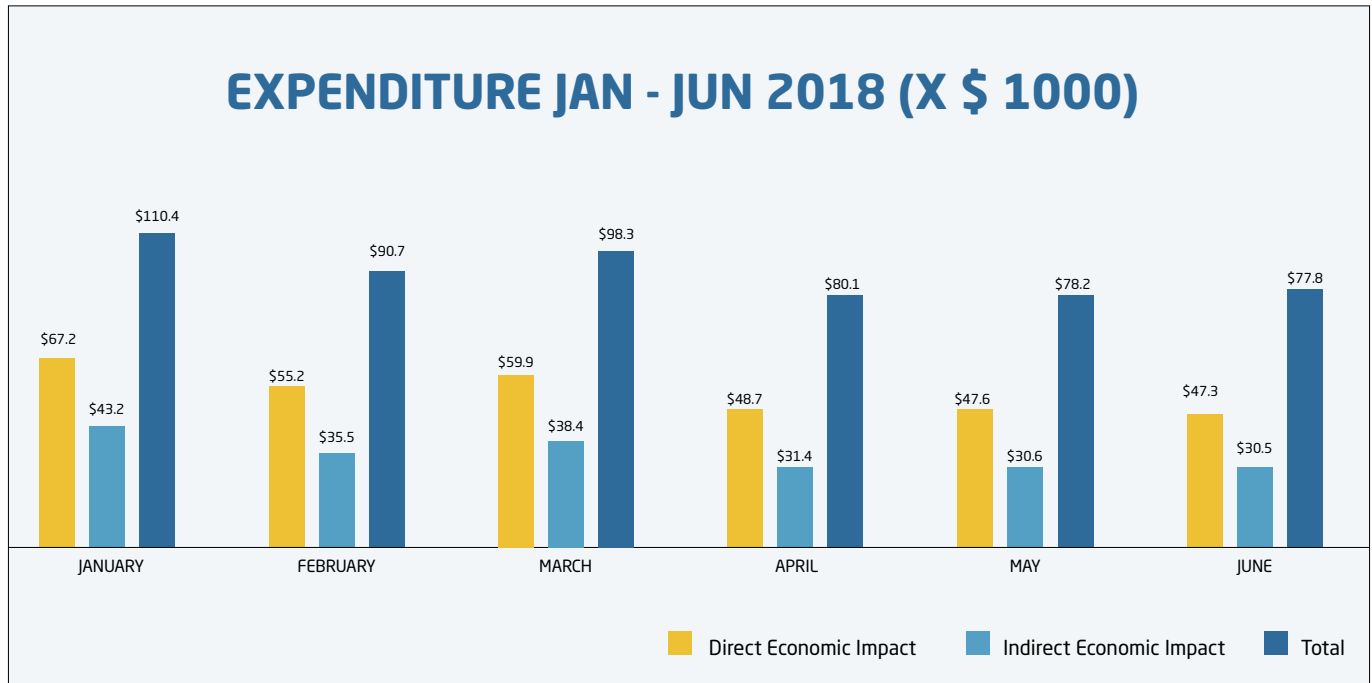
### CRUISE PASSENGERS



	JAN	FEB	MAR	APR	MAY	JUN	SUMMARY
2018	97,651	85,687	80,975	62,073	37,126	33,093	<b>396,605</b>
2017	68,581	62,229	71,293	33,809	42,809	31,518	<b>310,239</b>
Difference	42.4%	37.7%	13.6%	83.6%	-13.3%	5.0%	<b>27.8%</b>



**CURAÇAO PORTS**  
AUTHORITY



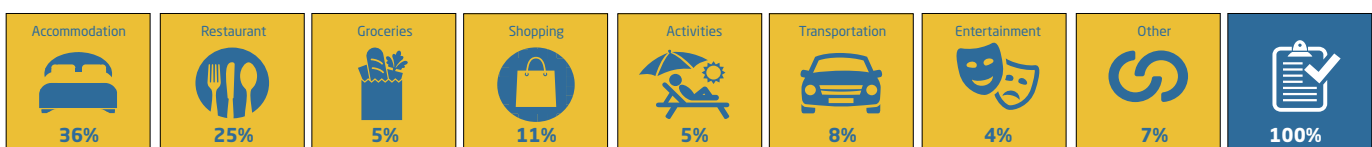
## HOW DID OUR STAYOVER VISITORS SPEND THEIR MONEY? (DIRECT ECONOMIC IMPACT)

Source: Turistika Model

### EXPENDITURE (X \$1000)

	JAN - JUN 2018	JAN - JUN 2017	% Change	% Total
<b>Accommodation</b>	116.8	84.6	38%	<b>36%</b>
<b>Restaurant</b>	80	64.2	25%	<b>25%</b>
<b>Groceries</b>	14.9	9.9	51%	<b>5%</b>
<b>Shopping</b>	35	43.3	-19%	<b>11%</b>
<b>Activities</b>	16.6	17.1	-3%	<b>5%</b>
<b>Transportation</b>	25.9	29.5	-12%	<b>8%</b>
<b>Entertainment</b>	12.4	7.6	63%	<b>4%</b>
<b>Other</b>	24.4	16.6	47%	<b>7%</b>
<b>Total Direct Economic Impact</b>	<b>326</b>	<b>272.8</b>	<b>21%</b>	<b>100%</b>

### EXPENDITURE IN PERCENTAGES





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



\$236.05



\$166.93



\$211.76



\$217.59



\$227.08



\$168.69



\$132.78



\$250.24



MINISTRY OF  
ECONOMIC DEVELOPMENT

### FIRST 6 MONTHS IN REVIEW 2018

	2018	2017	% CHANGES
STAY OVER ARRIVALS	204,804	201,428	1.7%
CRUISE ARRIVALS	396,605	310,239	27.8%
TOTAL ARRIVALS	601,409	511,667	17.5%
TOTAL TOURIST NIGHTS	1,823,216	1,777,828	2.6%
AVERAGE NIGHTS	8.4	8.8	-4.5%
AVERAGE OCCUPANCY RATE	78.4%	74.3%	4.1%
AVERAGE DAILY RATE	\$169.55	\$145.28	16.7%
AVERAGE REVENUE PER AVAILABLE ROOM	\$134.67	\$109.13	23.4%
Total economic impact ( direct + indirect) incl cruise	535.5 million US \$	467.5 million US \$	14.5%