

# TOURISM PERFORMANCE Q1 2019

TOTAL STAYOVER  
ARRIVALS

127,156

TOTAL CRUISE  
ARRIVALS

278,105

TOTAL VISITOR  
NIGHTS

1.1 million

AVERAGE HOTEL  
OCCUPANCY

84.1%

ECONOMIC  
IMPACT

343.1 mln. US\$

## HOW WAS THE FIRST QUARTER OF 2019?

Curaçao welcomed altogether during the first quarter of 2019 **410,185** tourist arrivals. The Curaçao Ports Authority recorded **278,105** cruise arrivals, while the Curaçao Tourist Board registered **127,156** stayover visitors who spent **1.1 million** nights in Curaçao. On average the stayover visitors spent **7.5** nights per person in the first quarter of 2019. Smith Travel Research reported an average occupancy of **84.1%** during this period accompanied by an average daily rate of **\$ 197.94**. The Ministry of Economic Development together with CTB calculated the total economic impact (direct + indirect) including cruise tourism at **343.1 million US \$** in quarter 1 of 2019 using the Turistika Model.



## VISITOR ARRIVALS

ARRIVAL COUNT	JAN	FEB	MAR	SUMMARY
2019	44,150	41,145	41,861	127,156
2018	39,735	34,773	36,358	110,866
% change	11%	18%	15%	15%



## WHERE DID OUR VISITORS COME FROM?



The first quarter stayover arrivals show an increase of 15% visitors. In total 127,156 stayover visitors travelled to Curaçao. In 2018, we welcomed 110,866 stayover visitors during this same period.

	JAN	FEB	MAR	2019	2018	CHANGE
<b>CANADA</b>	3,768	3,757	4,029	11,554	9,738	19%
<b>USA</b>	6,767	7,136	8,424	22,327	18,570	20%
<b>TOTAL NORTH AMERICA</b>	10,535	10,893	12,453	33,881	28,308	20%
<b>BRAZIL</b>	1,446	922	1,293	3,661	3,114	18%
<b>COLOMBIA</b>	2,824	1,609	1,614	6,047	4,925	23%
<b>OTHER SOUTH AMERICA</b>	3,250	2,905	1,768	7,923	6,378	23%
<b>TOTAL SOUTH AMERICA</b>	7,520	5,436	4,675	17,631	14,417	22%
<b>GERMANY</b>	1,753	1,709	2,717	6,179	5,428	14%
<b>THE NETHERLANDS</b>	18,297	17,286	16,161	51,744	45,718	13%
<b>OTHERS EUROPE</b>	2,772	2,770	2,214	7,756	8,221	-6%
<b>TOTAL EUROPE</b>	22,822	21,765	21,092	65,679	59,367	11%
<b>CARIBBEAN</b>	2,127	2,134	2,474	6,735	6,656	1%
<b>OTHERS</b>	1,146	917	1,167	3,230	2,118	56%
<b>SUMMARY</b>	44,150	41,145	41,861	127,156	110,866	15%

## MARKETS BY REGION



### HOW MANY NIGHTS DID THEY STAY?

	JAN	FEB	MAR	2019	2018	CHANGE
<b>NORTH AMERICA</b>	80,804	80,628	84,446	245,878	213,907	15%
<b>SOUTH AMERICA</b>	53,798	39,355	32,392	125,545	112,466	11%
<b>CARIBBEAN</b>	13,182	13,062	15,226	41,470	40,482	2%
<b>EUROPE</b>	261,451	236,971	225,125	723,546	670,663	8%
<b>OTHERS</b>	2,703	1,947	1,969	6,619	8,841	8%
<b>SUMMARY</b>	411,938	371,963	359,157	1,143,058	1,046,359	9%



### WHAT IS THE AVERAGE NIGHT SPENT PER PERSON?

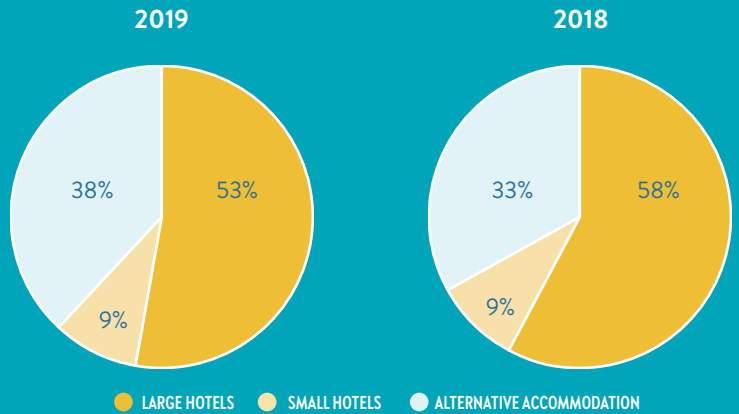
	JAN	FEB	MAR	2019	2018	% CHANGE
<b>NORTH AMERICA</b>	7.0	7.0	6.1	6.7	7.1	-6%
<b>SOUTH AMERICA</b>	6.8	7.0	6.7	6.9	7.7	-10%
<b>CARIBBEAN</b>	5.4	5.1	5.1	5.2	5.6	-7%
<b>EUROPE</b>	9.0	9.3	7.7	8.7	9.8	-11%
<b>OTHERS</b>	2.4	2.1	1.7	2.0	4.2	-52%
<b>SUMMARY</b>	7.8	8.0	6.8	7.5	8.4	-11%

# WHERE DID OUR VISITORS STAY?



## NORTH AMERICA

	2019	2018
LARGE HOTELS	53%	58%
SMALL HOTELS	9%	9%
ALTERNATIVE ACCOMMODATION	38%	33%
SUMMARY	100.0%	100.0%

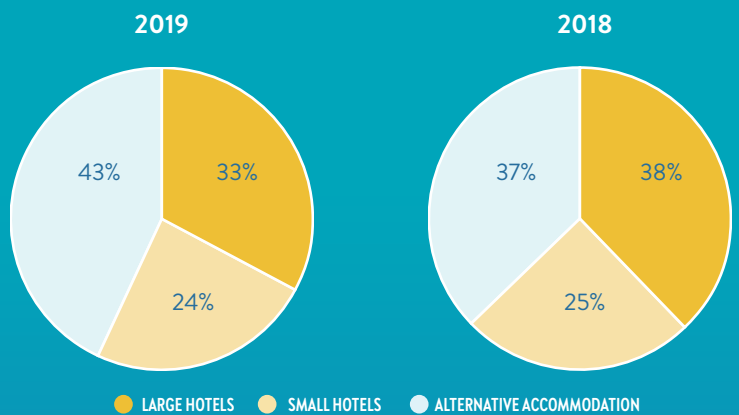


● LARGE HOTELS ● SMALL HOTELS ● ALTERNATIVE ACCOMMODATION



## SOUTH AMERICA

	2019	2018
LARGE HOTELS	33%	38%
SMALL HOTELS	24%	25%
ALTERNATIVE ACCOMMODATION	43%	37%
SUMMARY	100.0%	100.0%

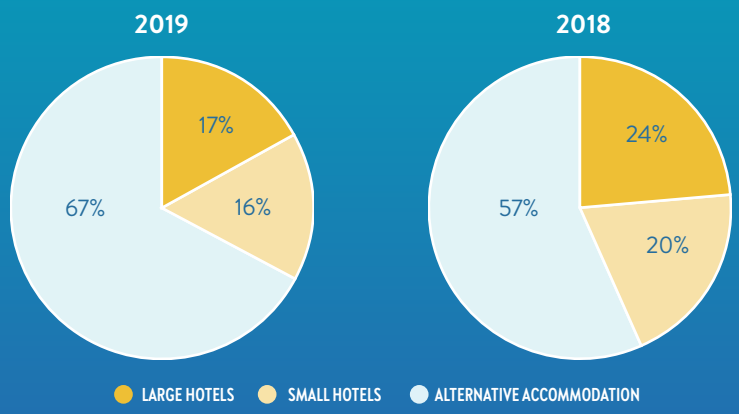


● LARGE HOTELS ● SMALL HOTELS ● ALTERNATIVE ACCOMMODATION



## CARIBBEAN

	2019	2018
LARGE HOTELS	17%	24%
SMALL HOTELS	16%	20%
ALTERNATIVE ACCOMMODATION	67%	57%
SUMMARY	100.0%	100.0%

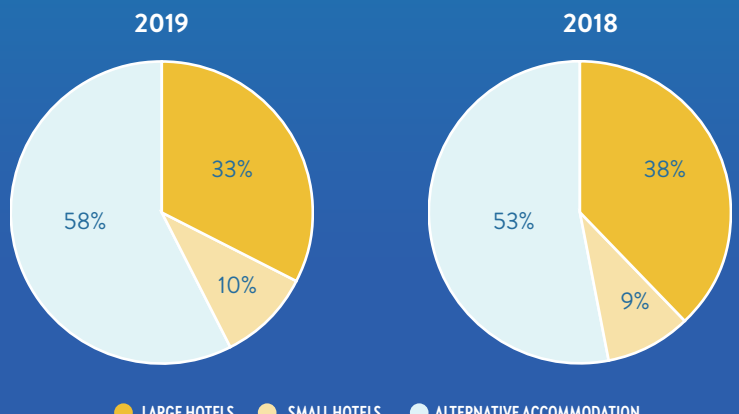


● LARGE HOTELS ● SMALL HOTELS ● ALTERNATIVE ACCOMMODATION



## EUROPE

	2019	2018
LARGE HOTELS	33%	38%
SMALL HOTELS	10%	9%
ALTERNATIVE ACCOMMODATION	58%	53%
SUMMARY	100.0%	100.0%



● LARGE HOTELS ● SMALL HOTELS ● ALTERNATIVE ACCOMMODATION

# CURAÇAO HOTEL PERFORMANCE IN Q1 2019



	2019	2018	% CHANGE
<b>% OCCUPANCY</b>	84.1%	80.2%	+4.0% (POINTS)
<b>ADR</b>	\$197.94	\$183.45	+7.9%
<b>REVPAR</b>	\$166.83	\$147.10	+13.4%

Source: STR



## Occupancy

2019  
**84.1%**

2018  
**80.2%**

↑ +4.0% (points)



## Average Daily Rate (ADR)

2019  
**\$197.94**

2018  
**\$183.45**

↑ +7.9%



## Revenue per Available Room (RevPAR)

2019  
**\$166.83**

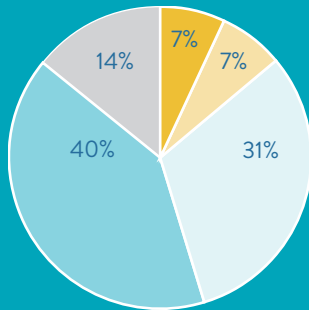
2018  
**\$147.10**

↑ +13.4%

## WHAT AGES ARE OUR VISITORS?

### NORTH AMERICA

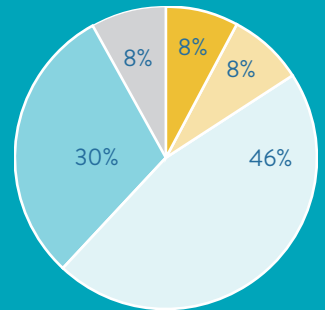
0-14	7%
15-24	7%
25-44	31%
45-64	40%
65+	14%
<b>SUMMARY</b>	<b>100.0%</b>



● 0-14 ● 15-24 ● 25-44 ● 45-64 ● 65+

### SOUTH AMERICA

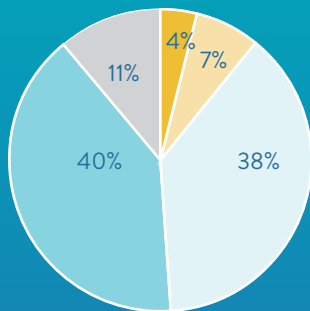
0-14	8%
15-24	8%
25-44	46%
45-64	30%
65+	8%
<b>SUMMARY</b>	<b>100.0%</b>



● 0-14 ● 15-24 ● 25-44 ● 45-64 ● 65+

### CARIBBEAN

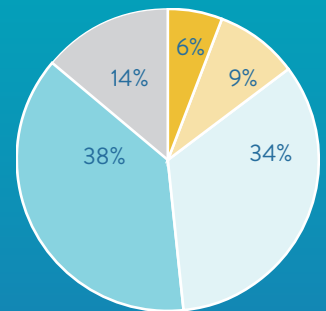
0-14	4%
15-24	7%
25-44	38%
45-64	40%
65+	11%
<b>SUMMARY</b>	<b>100.0%</b>



● 0-14 ● 15-24 ● 25-44 ● 45-64 ● 65+

### EUROPE

0-14	6%
15-24	9%
25-44	34%
45-64	38%
65+	14%
<b>SUMMARY</b>	<b>100.0%</b>



● 0-14 ● 15-24 ● 25-44 ● 45-64 ● 65+

## WHAT GENDER ARE OUR VISITORS?

**2019**  
VISITORS

52%

48%

**2018**  
VISITORS

51%

49%

## DIGITAL



### WEB SESSION BREAKDOWN IN Q1 2019

2019 Q1  
652 K

2018 Q1  
563 K

CHANGE  
+16%

## WEB VISIT CURACAO.COM BY FOCUS MARKETS IN Q1 2019

### UNITED STATES

2019 141,465  
2018 147,479  
CHANGE -4%

### NETHERLANDS

2019 118,139  
2018 85,210  
CHANGE 39%

### COLOMBIA

2019 84,047  
2018 57,507  
CHANGE 46%

### BRAZIL

2019 36,903  
2018 38,226  
CHANGE -4%

### GERMANY

2019 31,941  
2018 54,315  
CHANGE -41%

### CANADA

2019 20,689  
2018 21,502  
CHANGE -4%

## FACEBOOK FIRST QUARTER 2019



TOTAL FOLLOWERS  
236.1 K



TOTAL ENGAGEMENT  
130.6 K



TOTAL POSTS  
90



TOTAL IMPRESSIONS  
17.2 M



## INSTAGRAM FIRST QUARTER 2019



TOTAL FOLLOWERS  
57.2 K



TOTAL ENGAGEMENT  
98.2 K



TOTAL POSTS  
77



TOTAL IMPRESSIONS  
2.6 M

## HOW DID THE CRUISE INDUSTRY PERFORM IN Q1 2019?



### CRUISE CALLS Q1 2019

	JAN	FEB	MAR	SUMMARY
<b>2019</b>	51	35	31	117
<b>2018</b>	42	35	32	109
<b>% CHANGE</b>	21%	0%	-3%	7%



### CRUISE PASSENGERS Q1 2019

	JAN	FEB	MAR	SUMMARY
<b>2019</b>	120,358	81,839	75,908	278,105
<b>2018</b>	97,651	85,687	80,975	264,313
<b>% CHANGE</b>	23%	-4%	5%	5%



## SECTORAL IMPACT IN Q1 2019

### EXPENDITURE JANUARY – MARCH 2019 (X \$1000)



#### TOTAL DIRECT ECONOMIC IMPACT

\$ 209.1 million ↑ 9%



#### TOTAL INDIRECT ECONOMIC IMPACT

\$ 134 million ↑ 9%



#### TOTAL ECONOMIC IMPACT

\$ 343.1 million ↑ 9%

## HOW DID OUR STAYOVER VISITORS SPEND THEIR MONEY?

### EXPENDITURE (X \$1000)

	Jan – Mar 2019	Jan – Mar 2018	% Change
ACCOMMODATION	73.4	67.2	9%
RESTAURANT	50.7	46.4	9%
GROCERIES	9.3	8.6	8%
SHOPPING	24.2	22	10%
ACTIVITIES	10.6	9.7	9%
TRANSPORTATION	16.6	15.2	9%
ENTERTAINMENT	7.9	7.2	10%
OTHER	16.4	14.9	10%
<b>TOTAL DIRECT ECONOMIC IMPACT</b>	<b>209.1</b>	<b>191.2</b>	<b>9%</b>

SOURCE: TURISTIKA MODEL

## EXPENDITURE IN PERCENTAGES



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



## FIRST QUARTER 2019 IN REVIEW

	2019 – Q1	2018 – Q1	Changes
STAYOVER ARRIVALS	127,156	110,866	15%
DAY TRIPPERS	4,924	5,412	-9%
CRUISE ARRIVALS	278,105	264,313	5%
TOTAL ARRIVALS	410,185	380,591	8%
TOTAL TOURIST NIGHTS	1.1 million	1 million	9%
AVERAGE NIGHTS	7.5	8.1	-11%
OCCUPANCY RATE	84.1%	80.2%	4% (points)
AVERAGE DAILY RATE	\$197.94	\$183.45	8%
REVENUE PER AVAILABLE ROOM	\$166.83	\$147.10	13%
TOTAL ECONOMIC IMPACT (DIRECT, INDIRECT + CRUISE)	\$343.1 million	\$313.8 million	9%