

TOURISM PERFORMANCE 2018

TOTAL STAYOVER ARRIVALS
431,701

TOTAL CRUISE ARRIVALS
757,278

TOTAL VISITOR NIGHTS
3,912,704

AVERAGE HOTEL OCCUPANCY
77.8%

ECONOMIC IMPACT
1.1 billion US\$

HOW WAS THE YEAR 2018?

Curaçao welcomed altogether during the year 2018 a total of **1.2 million** tourist arrivals. The Curaçao Ports Authority recorded a total of **757,278** cruise arrivals, while the Curaçao Tourist Board registered a total of **431,701** stayover visitors who spent **3.9 million** nights in Curaçao. On average the stayover visitors spent **8.4** nights per person in 2018. Smith Travel Research reported an average occupancy of **77.8%** during this period accompanied by an average daily rate **\$ 162.42**. The Ministry of Economic Development together with CTB calculated the total economic impact (direct + indirect) including cruise tourism at **1.1 billion US \$** in 2018 using the Turistika Model.



VISITOR ARRIVALS

MONTH	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	SUMMARY
2018	39,735	34,771	36,358	32,491	31,430	31,042	35,636	37,094	32,823	35,662	37,601	47,058	431,701
2017	38,744	35,905	34,550	35,074	29,196	27,958	29,775	30,863	31,094	31,982	33,726	40,146	399,013
% Change	3%	-3%	5%	-7%	8%	11%	20%	20%	6%	12%	11%	17%	8%



WHERE DID OUR VISITORS COME FROM?

MONTH	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	2018	2017	CHANGE
NORTH AMERICA	9,224	9,386	9,696	7,137	7,075	7,558	6,802	7,628	5,337	5,868	7,577	11,140	94,428	80,289	18%
SOUTH AMERICA	6,057	4,111	4,249	3,665	4,114	5,172	5,691	7,579	7,658	7,183	7,581	9,876	72,936	75,585	-4%
CARIBBEAN	2,520	1,723	2,412	2,622	2,528	2,770	3,154	3,596	2,761	2,845	2,776	2,617	32,324	28,321	14%
EUROPE	21,092	18,898	19,377	18,381	16,867	14,900	19,059	17,109	16,126	18,994	18,838	22,212	221,853	205,789	8%
OTHERS	842	653	624	686	846	642	930	1,182	941	772	829	1,213	10,160	9,029	13%
SUMMARY	39,735	34,771	36,358	32,491	31,430	31,042	35,636	37,094	32,823	35,662	37,601	47,058	431,701	399,013	8%

The 2018 stayover arrivals to Curaçao show an increase of 8% visitors. In total 431,701 stayover visitors travelled to Curaçao in 2018. In 2017, we welcomed 399,013 stayover visitors during this same period.

MARKETS BY REGION



HOW MANY NIGHTS DID THEY STAY?

MONTH	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	2018	2017	CHANGE
NORTH AMERICA	75,332	71,341	67,268	48,317	45,355	49,160	46,631	47,372	33,140	38,148	48,953	81,992	653,009	546,263	20%
SOUTH AMERICA	44,824	32,296	35,346	27,322	31,178	37,242	41,607	53,267	51,703	49,336	51,301	83,741	539,163	564,758	-5%
CARIBBEAN	15,261	11,520	13,701	16,174	15,481	16,127	20,582	20,596	15,615	18,078	16,174	18,251	197,560	172,149	15%
EUROPE	252,424	202,520	215,950	194,608	179,726	166,091	246,490	199,041	180,032	199,640	199,348	256,629	2,492,469	2,260,857	10%
OTHERS	2,731	1,963	4,147	1,896	2,980	2,551	1,919	2,817	2,626	2,478	2,093	2,302	30,503	34,622	-12%
SUMMARY	390,572	319,640	336,412	288,317	274,720	271,171	357,229	323,093	283,116	307,680	317,869	442,915	3,912,704	3,578,649	9%

WHAT IS THE AVERAGE NIGHT SPENT PER PERSON?

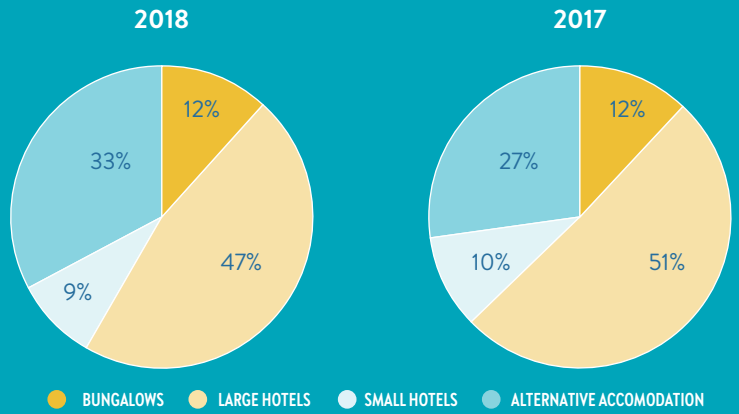
MONTH	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	2018	2017	% CHANGE
NORTH AMERICA	7.5	7.0	6.7	6.6	6.2	6.4	6.5	5.8	5.9	6.3	6.2	6.5	6.5	6.8	-4%
SOUTH AMERICA	7.3	7.7	8.2	7.4	7.5	7.1	7.0	6.7	6.6	6.7	6.6	7.9	7.2	7.5	-4%
CARIBBEAN	5.6	6.1	5.3	5.7	5.5	5.1	5.8	5.0	4.9	5.8	5.4	6.3	5.5	6.1	-9%
EUROPE	10.5	8.4	10.5	10.0	10.1	10.3	11.8	10.7	10.3	9.8	9.9	8.2	10.0	11.0	-9%
OTHERS	3.2	3.0	6.6	2.8	3.5	4.0	2.1	2.4	2.8	3.2	2.5	1.8	3.0	3.8	-22%
SUMMARY	8.8	7.7	8.8	8.5	8.3	8.2	9.2	8.1	8.1	8.1	8.0	7.5	8.3	9.0	-8%

WHERE DID OUR VISITORS STAY?



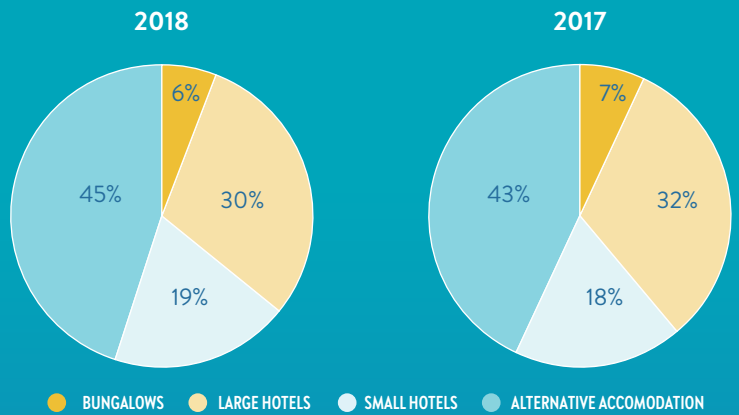
NORTH AMERICA

	2018	2017
BUNGALOWS	12%	12%
LARGE HOTELS	47%	51%
SMALL HOTELS	9%	10%
ALTERNATIVE ACCOMMODATION	33%	27%
SUMMARY	100.0%	100.0%



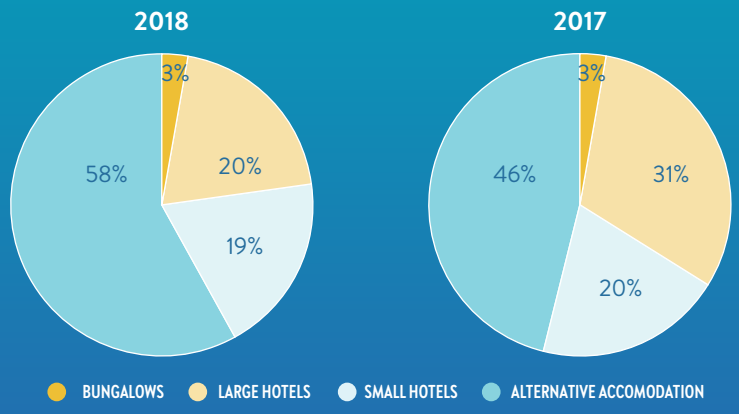

SOUTH AMERICA

	2018	2017
BUNGALOWS	6%	7%
LARGE HOTELS	30%	32%
SMALL HOTELS	19%	18%
ALTERNATIVE ACCOMMODATION	45%	43%
SUMMARY	100.0%	100.0%



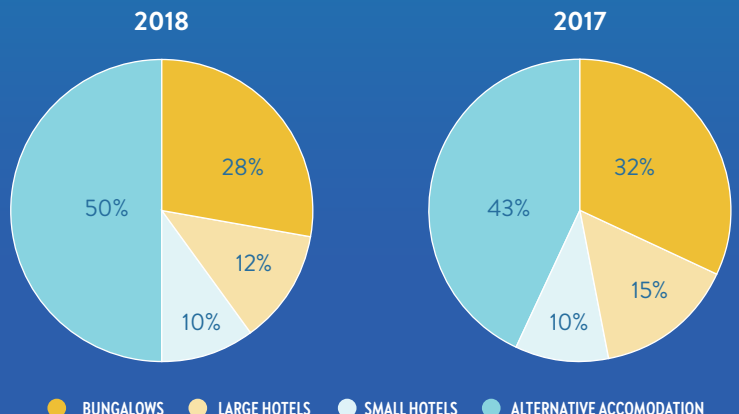

CARIBBEAN

	2018	2017
BUNGALOWS	3%	3%
LARGE HOTELS	20%	31%
SMALL HOTELS	19%	20%
ALTERNATIVE ACCOMMODATION	58%	46%
SUMMARY	100.0%	100.0%




EUROPE


	2018	2017
BUNGALOWS	28%	32%
LARGE HOTELS	12%	15%
SMALL HOTELS	10%	10%
ALTERNATIVE ACCOMMODATION	50%	43%
SUMMARY	100.0%	100.0%



CURAÇAO HOTEL PERFORMANCE IN 2018



DECEMBER	2018	2017	% CHANGE
% OCCUPANCY	74.3%	72.7%	1.6% (POINTS)
ADR	\$195.18	\$175.65	11.1%
REVPAR	\$145.11	\$126.02	15.1%

 Based on:
12 Properties
1689 Rooms

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



Occupancy

2017 2018
72.7% 77.8%

↑ +5.1%points



Average Daily Rate (ADR)

2017 2018
\$144.35 \$162.42

↑ +12.5%



Revenue per Available Room (RevPAR)

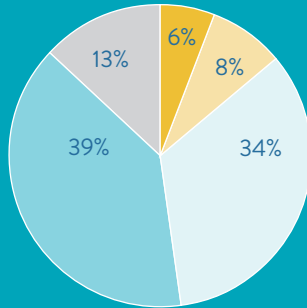
2017 2018
\$104.98 \$128.70

↑ +22.6%

WHAT AGES ARE OUR VISITORS?

NORTH AMERICA

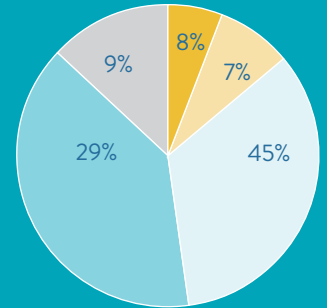
0-14	6%
15-24	8%
25-44	34%
45-64	39%
65+	13%
SUMMARY	100.0%



● 0-14 ● 15-24 ● 25-44 ● 45-64 ● 65+

SOUTH AMERICA

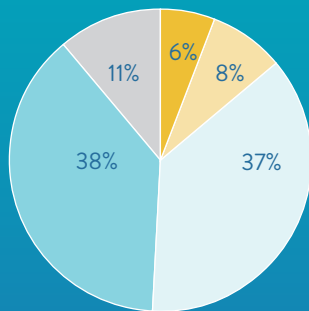
0-14	8%
15-24	7%
25-44	45%
45-64	29%
65+	9%
SUMMARY	100.0%



● 0-14 ● 15-24 ● 25-44 ● 45-64 ● 65+

CARIBBEAN

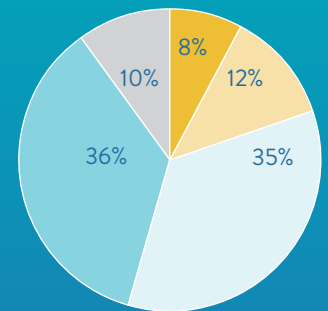
0-14	6%
15-24	8%
25-44	37%
45-64	38%
65+	11%
SUMMARY	100.0%



● 0-14 ● 15-24 ● 25-44 ● 45-64 ● 65+

EUROPE

0-14	8%
15-24	12%
25-44	35%
45-64	36%
65+	10%
SUMMARY	100.0%



● 0-14 ● 15-24 ● 25-44 ● 45-64 ● 65+

WHAT GENDER ARE OUR VISITORS?

2018
VISITORS



2017
VISITORS



DIGITAL



WEB SESSION BREAKDOWN IN 2018

2018
2.0 MILLION

2017
2.1 MILLION

CHANGE
- 6%

WEB VISIT BY FOCUS MARKETS IN 2018

UNITED STATES

2018 503,016
2017 695,106
CHANGE -28%

NETHERLANDS

2018 267,768
2017 296,486
CHANGE -10%

COLOMBIA

2018 247,778
2017 217,114
CHANGE 14%

BRAZIL

2018 132,543
2017 72,952
CHANGE 82%

GERMANY

2018 125,334
2017 204,430
CHANGE -39%

CANADA

2018 108,853
2017 90,633
CHANGE 20%

ARGENTINA

2018 25,091
2017 20,497
CHANGE 22%

VENEZUELA

2018 22,209
2017 35,275
CHANGE -37%

ECUADOR

2018 21,691
2017 10,671
CHANGE 103%



FACEBOOK



TOTAL FOLLOWERS 2018
231.9 K



POST ORGANIC IMPRESSIONS
47.5 M



TOTAL POSTS 2018
623



POST PAID IMPRESSIONS
33.1 M



ENGAGEMENT PER POST
1.1 K



TOTAL IMPRESSIONS
80.6 M



TOTAL ENGAGEMENT
703.6 K



INSTAGRAM



TOTAL FOLLOWERS YTD
55.1 K



TOTAL IMPRESSIONS
9.4 M

HOW DID THE CRUISE INDUSTRY PERFORM IN 2018?



CRUISE CALLS

MONTH	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	SUMMARY
2018	42	35	32	27	11	10	15	15	12	20	36	41	296
2017	33	29	33	15	15	11	15	14	11	20	38	48	282
% CHANGE	27%	21%	-3%	80%	-27%	-9%	0%	7%	9%	0%	-5%	-12%	5%



CRUISE PASSENGERS

MONTH	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	SUMMARY
2018	97,651	85,687	80,975	62,073	37,126	33,093	45,573	41,542	41,538	49,649	84,459	97,912	757,278
2017	68,581	62,229	71,293	33,809	42,809	31,518	30,223	45,379	24,317	42,605	81,314	100,293	634,370
% CHANGE	42%	38%	14%	84%	-13%	5%	51%	-9%	71%	17%	4%	-2%	19%

SECTORAL IMPACT IN 2018

EXPENDITURE JANUARY - DECEMBER 2018 (X \$1000)



TOTAL DIRECT ECONOMIC IMPACT
\$703.3 MILLION



TOTAL INDIRECT ECONOMIC IMPACT
\$451.6 MILLION



TOTAL ECONOMIC IMPACT
\$1.1 BILLION

HOW DID OUR STAYOVER VISITORS SPEND THEIR MONEY?

EXPENDITURE (X \$1000)

	JAN - DEC 2018	JAN - DEC 2017	% CHANGE	% TOTAL
ACCOMMODATION	249.5	226.6	10%	36%
RESTAURANT	173.2	156.8	10%	25%
GROCERIES	31.9	29.3	9%	5%
SHOPPING	78.1	69.3	13%	11%
ACTIVITIES	34.8	31.7	10%	5%
TRANSPORTATION	55.3	48.6	10%	8%
ENTERTAINMENT	27.0	24.5	10%	4%
OTHER	53.5	49.5	8%	8%
TOTAL DIRECT ECONOMIC IMPACT	703.3	636.3	11%	100%

SOURCE: TURISTIKA MODEL

EXPENDITURE IN PERCENTAGES



WHAT IS THE AVERAGE SPENDING PER DAY PER PERSON?



YEAR 2018 IN REVIEW

	2018	2017	CHANGES
STAYOVER ARRIVALS	431,701	399,013	8%
DAY TRIPPERS	20,689	24,204	-15%
CRUISE ARRIVALS	757,278	634,370	19%
TOTAL ARRIVALS	1,209,668	1,057,587	14%
TOTAL TOURIST NIGHTS	3,912,704	3,578,649	9%
AVERAGE NIGHTS	8.3	9.0	-6%
OCCUPANCY RATE	77.8%	72.7%	5%
AVERAGE DAILY RATE	\$162.42	\$144.35	13%
REVENUE PER AVAILABLE ROOM	\$128.70	\$128.70	23%
TOTAL ECONOMIC IMPACT (DIRECT, INDIRECT + CRUISE)	\$1.1 BILLION	\$1.0 BILLION	11%