

# FIRST NINE MONTHS TOURISM

## PERFORMANCE 2018



TOTAL STAYOVER ARRIVALS	TOTAL CRUISE ARRIVALS	TOTAL VISITOR NIGHTS	AVERAGE HOTEL OCCUPANCY	ECONOMIC IMPACT (DIRECT + INDIRECT) INCL. CRUISE
<b>309,732</b>	<b>525,258</b>	<b>2,743,461</b>	<b>73.8%</b>	<b>\$807.4 million</b>

### HOW WAS THE FIRST NINE MONTHS OF THE YEAR?

Curaçao welcomed altogether in the first nine months of the year 2018 a total of **834,990** tourist arrivals. The Curaçao Ports Authority recorded a total of **525,258** cruise arrivals, while the Curaçao Tourist Board registered a total of **309,732** stayover visitors who spent **2,743,461** nights in Curaçao. On average the stayover visitors spent **8.4** nights per person in the first nine months of the year. Smith Travel Research reported an average occupancy of **73.8%** during this period accompanied by an average daily rate **\$ 128.58**. The Ministry of Economic Development together with CTB calculated the total economic impact (direct + indirect) including cruise tourism at **807.4** million US \$ during the first nine months of 2018 using the Turistika Model.



	JAN	FEB	MAR	APR	MAY	JUNE	JUL	AUG	SEP	SUMMARY
<b>2018</b>	39,513	34,671	36,241	32,310	31,251	30,820	35,410	36,862	32,654	<b>309,732</b>
<b>2017</b>	38,744	35,906	34,550	35,074	29,196	27,958	29,775	30,863	31,094	<b>293,160</b>
<b>% Change</b>	2.0%	-3.4%	4.9%	-7.9%	7.0%	10.2%	18.9%	19.4%	5.0%	<b>5.7%</b>



NORTH AMERICA



SOUTH AMERICA



CARIBBEAN



EUROPE








OTHERS

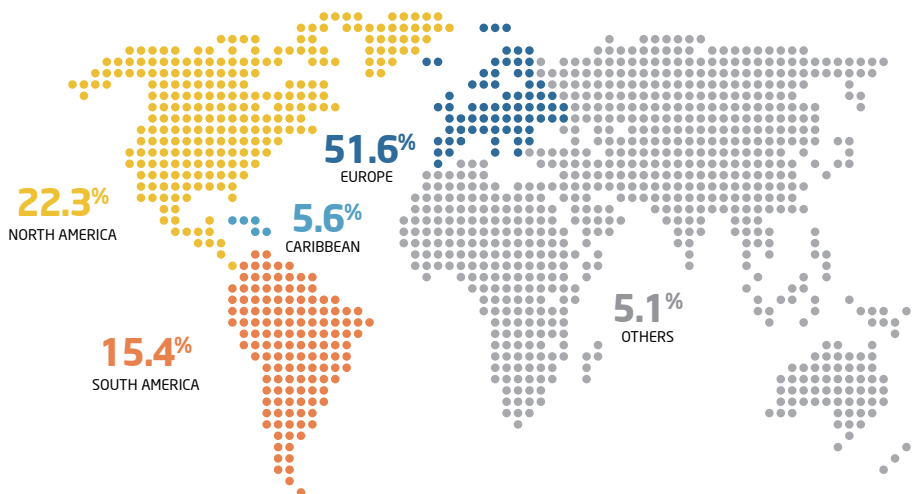
### WHERE DID OUR VISITORS COME FROM?

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	2018	2017	% CHANGE
	9,099	9,284	9,641	7,089	7,016	7,523	6,733	7,515	5,267	69,167	59,817	15.6%
	5,972	4,047	4,203	3,638	4,056	5,120	5,575	7,448	7,588	47,647	55,478	-14.1%
	1,835	1,203	1,884	2,033	1,800	1,989	2,234	2,491	1,918	17,387	19,193	-9.4%
	20,847	18,594	19,128	18,189	16,674	14,729	18,854	16,890	15,855	159,760	150,921	5.9%
	1,760	1,543	1,385	1,361	1,705	1,459	2,014	2,518	2,026	15,771	7,751	103.5%
<b>SUMMARY</b>	<b>39,513</b>	<b>34,671</b>	<b>36,241</b>	<b>32,310</b>	<b>31,251</b>	<b>30,820</b>	<b>35,410</b>	<b>36,862</b>	<b>32,654</b>	<b>309,732</b>	<b>293,160</b>	<b>5.7%</b>

The year to date arrivals to Curaçao shows an increase of 5.7% visitors. In total 309,732 stayover visitors travelled to Curaçao in the first nine months of 2018. In 2017, we welcomed 293,160 stayover visitors during this same period.

## MARKETS BY REGION

	North America	22.3%
	South America	15.4%
	Caribbean	5.6%
	Europe	51.6%
	Others	5.1%
		100%



NORTH AMERICA



SOUTH AMERICA



CARIBBEAN








EUROPE








OTHERS

## HOW MANY NIGHTS DID THEY STAY?

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	2018	2017	% CHANGE
	73,322	69,823	65,967	47,859	44,773	48,705	44,749	44,570	32,392	472,160	402,761	17.2%
	44,015	31,682	34,771	26,963	30,851	36,752	39,865	50,553	50,620	346,072	404,849	-14.5%
	10,291	7,883	10,329	11,746	10,852	11,779	14,372	14,496	10,728	102,476	110,824	-7.5%
	243,196	188,350	210,988	190,810	176,727	162,925	235,384	191,238	174,520	1,774,138	1,684,017	5.4%
	6,295	4,475	6,187	4,833	5,783	4,623	5,288	6,053	5,080	48,617	38,531	26.2%
<b>SUMMARY</b>	<b>377,119</b>	<b>302,213</b>	<b>328,242</b>	<b>282,211</b>	<b>268,986</b>	<b>264,784</b>	<b>339,658</b>	<b>306,910</b>	<b>273,338</b>	<b>2,743,463</b>	<b>2,640,982</b>	<b>3.9%</b>

## WHAT IS THE AVERAGE NIGHT SPENT PER PERSON?

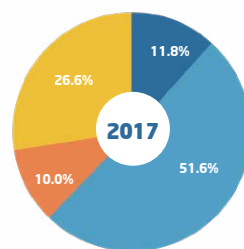
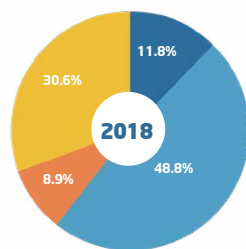
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	2018	2017	% change
	7.6	7.0	6.8	6.7	6.3	6.4	6.5	5.9	6.0	6.6	6.7	-1.6%
	7.4	7.8	8.3	7.4	7.6	7.2	7.1	6.8	6.7	7.3	7.3	-0.5%
	5.6	6.6	5.5	5.8	6.0	5.9	6.4	5.8	5.6	5.9	5.8	2.1%
	10.6	8.5	10.6	10.1	10.1	10.4	11.8	10.8	10.5	10.4	11.2	-7.0%
	3.6	2.9	4.5	3.6	3.4	3.2	2.6	2.4	2.5	3.1	5.0	-38.0%
<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>9.2</b>	<b>8.1</b>	<b>8.1</b>	<b>8.4</b>	<b>9.0</b>	<b>-6.4%</b>

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

## WHERE DID OUR VISITORS STAY?



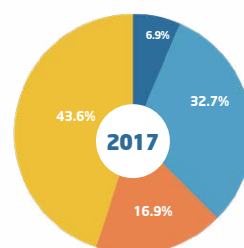
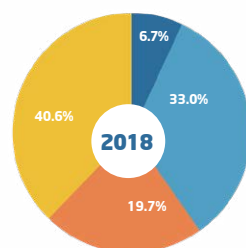
North America	2018	2017
Bungalows	11.8%	11.8%
Large Hotels	48.8%	51.6%
Small Hotels	8.9%	10.0%
Alternative Accommodations	30.6%	26.6%
<b>Summary</b>	<b>100.0%</b>	<b>100.0%</b>



■ Bungalows ■ Large Hotels ■ Small Hotels ■ Alternative Accommodations



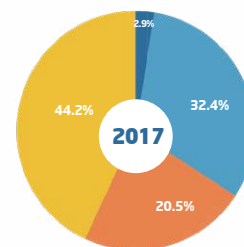
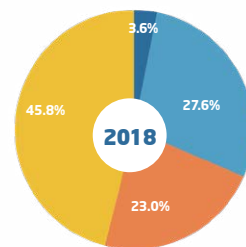
South America	2018	2017
Bungalows	6.7%	6.9%
Large Hotels	33.0%	32.7%
Small Hotels	19.7%	16.9%
Alternative Accommodations	40.6%	43.6%
<b>Summary</b>	<b>100.0%</b>	<b>100.0%</b>



■ Bungalows ■ Large Hotels ■ Small Hotels ■ Alternative Accommodations



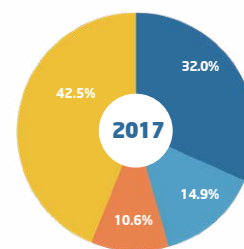
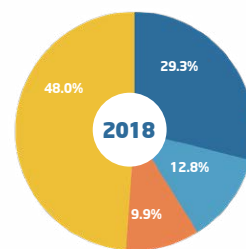
Caribbean	2018	2017
Bungalows	3.6%	2.9%
Large Hotels	27.6%	32.4%
Small Hotels	23.0%	20.5%
Alternative Accommodations	45.8%	44.2%
<b>Summary</b>	<b>100.0%</b>	<b>100.0%</b>



■ Bungalows ■ Large Hotels ■ Small Hotels ■ Alternative Accommodations



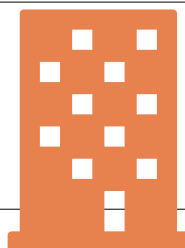
Europe	2018	2017
Bungalows	29.3%	32.0%
Large Hotels	12.8%	14.9%
Small Hotels	9.9%	10.6%
Alternative Accommodations	48.0%	42.5%
<b>Summary</b>	<b>100.0%</b>	<b>100.0%</b>



■ Bungalows ■ Large Hotels ■ Small Hotels ■ Alternative Accommodations

## CURAÇAO HOTEL PERFORMANCE FIRST NINE MONTHS

SEPTEMBER	2017	2018	% Change
% Occupancy	76.3%	73.8%	-4.4% (points)
ADR	\$130.19	\$128.58	-1.2%
RevPAR	\$100.51	\$94.93%	-5.5%



**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 September saw a decline in hotel performance. Occupancy decreased by -4.4% points compared to September 2017. Average Daily Rate (ADR) decreased by 1.2% compared to 2017, while Revenue Per Available Room (RevPAR) decreased by 5.5% compared to 2017. Note that the September month of 2017 was an extraordinary month in terms of performance due to the hurricane situation that affected the Caribbean islands which led to an "superficial" increase of demand for Curaçao. Therefore, hotel performances for the month of September and October of 2018 are expected to be less compared to the superficial months of 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>JUL</b>	67.8%	80.3%	12.5%	\$ 137.19	\$ 153.07	11.6%	\$ 93.04	\$ 122.86	32.1%
<b>AUG</b>	68.8%	76.3%	7.5%	\$ 119.47	\$ 156.49	31.0%	\$ 94.28	\$ 136.95	45.3%
<b>SEP</b>	76.3%	73.8%	-2.5%	\$ 130.19	\$ 128.58	-1.2%	\$ 100.51	\$ 94.93	-5.6%
<b>YTD</b>	<b>73.2%</b>	<b>77.8%</b>	<b>4.7%</b>	<b>\$ 139.84</b>	<b>\$ 161.72</b>	<b>15.6%</b>	<b>\$ 104.74</b>	<b>\$ 129.20</b>	<b>23.4%</b>



As can be seen in the above figures, there was an overall increase in hotel performance for Q1, Q2 and Q3 of 2018 compared to 2017. Occupancy, ADR and RevPAR all saw an increase compared to 2017 for all 3 quarters.

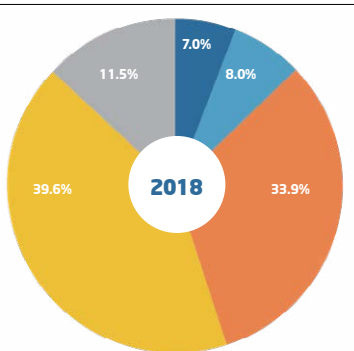
Note: Month of September and October 2018 are considered superficial when compared to 2017.

## WHAT AGE ARE OUR VISITORS?



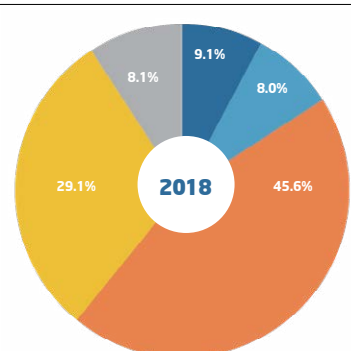
### North America

0-14	7.0%
15-24	8.0%
25-44	33.9%
45-64	39.6%
65+	11.5%
<b>Summary</b>	<b>100.0%</b>



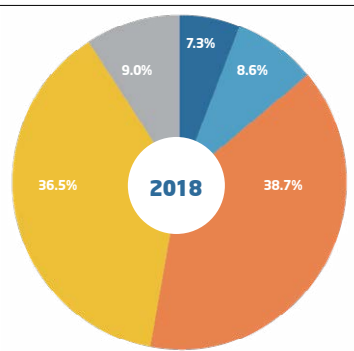
### South America

0-14	9.1%
15-24	8.0%
25-44	45.6%
45-64	29.1%
65+	8.1%
<b>Summary</b>	<b>100.0%</b>



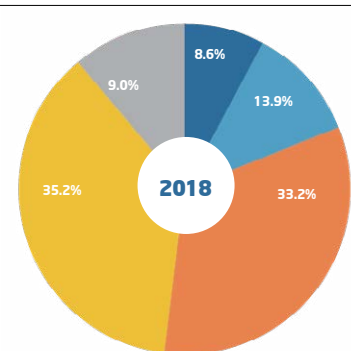
### Caribbean

0-14	7.3%
15-24	8.6%
25-44	38.7%
45-64	36.5%
65+	9.0%
<b>Summary</b>	<b>100.0%</b>



### Europe

0-14	8.6%
15-24	13.9%
25-44	33.2%
45-64	35.2%
65+	9.0%
<b>Summary</b>	<b>100.0%</b>



## WHAT GENDER ARE OUR VISITORS?

# 2018



## 50.8%

FEMALE VISITORS



## 49.1%

MALE VISITORS

# 2017



## 50.4%

FEMALE VISITORS



## 49.5%

MALE VISITORS

# DIGITAL



## WEB SESSION BREAKDOWN FIRST NINE MONTHS

Item	2018	2017	% Change
Total Users	1.13M	1.33M	-16.0%
New Users	1.11M	1.33M	-16.6%

## WEB VISIT BY FOCUS MARKETS FIRST NINE MONTHS

Country	2018	2017	% CHANGE
United States	297,376	441,337	-32.6%
Colombia	161,118	163,681	-1.6%
Netherlands	147,517	179,581	-17.9%
Brazil	68,319	42,049	62.5%
Germany	65,802	122,906	-46.5%
Canada	56,004	51,410	8.9%
Venezuela	13,616	23,879	-42.9%
Ecuador	9,011	7,338	22.8%
Suriname	6,215	6,018	3.2%
Aruba	5,527	5,065	9.1%

## SOCIAL MEDIA FIRST NINE MONTHS



### Facebook

Total followers ytd	229.4k
Total Posts	539



### Engagement

Total Engagement	581,500
Engagement per Post	1,079
<b>Total Reach</b>	<b>5,161,126</b>



### Impressions

Post Organic Impressions	39.7m
Post Paid Impressions	25.1m
<b>Total Impressions</b>	<b>64.8m</b>



### Instagram

Total Followers ytd	50,600
<b>Total Impressions</b>	<b>8.08M</b>

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



### CRUISE CALLS

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	SUMMARY
2018	42	35	32	27	11	10	15	15	12	199
2017	33	29	33	15	15	11	15	14	11	176
Difference	27.3%	20.7%	-3.0%	80.0%	-26.7%	-9.1%	0.0%	7.1%	9.1%	13.1%



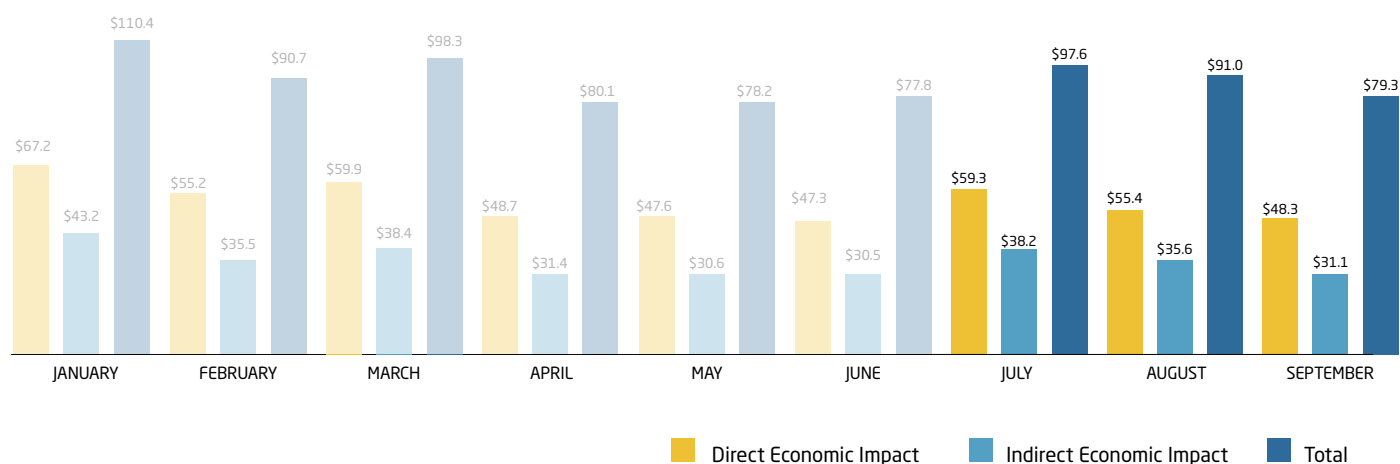
### CRUISE PASSENGERS

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	SUMMARY
2018	97,651	85,687	80,975	62,073	37,126	33,093	45,573	41,542	41,538	525,258
2017	68,581	62,229	71,293	33,809	42,809	31,518	30,223	45,379	24,317	410,158
Difference	42.4%	37.7%	13.6%	83.6%	-13.3%	5.0%	50.8%	-8.5%	70.8%	28.1%



**CURAÇAO PORTS**  
AUTHORITY

## EXPENDITURE JAN - SEP 2018 (X \$ 1000)



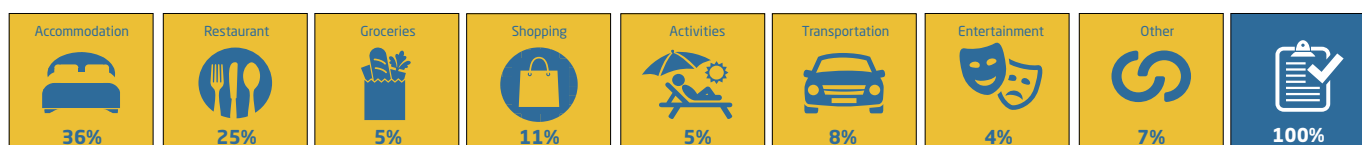
## HOW DID OUR STAYOVER VISITORS SPEND THEIR MONEY? (DIRECT ECONOMIC IMPACT)

Source: Turistika Model

## EXPENDITURE (X \$1000)

	Jan - Sep 2018	Jan - Sep 2017	% Change	% Total
Accommodation	175.7	166.7	5.4%	35.7%
Restaurant	121	114.9	5.3%	24.5%
Groceries	22.5	21.7	3.7%	4.6%
Shopping	53.3	49.5	7.7%	10.8%
Activities	24.7	23.3	6.0%	5%
Transportation	38.7	36.6	5.7%	7.9%
Entertainment	18.8	18	4.4%	3.8%
Other	36.9	34.3	5.0%	7.5%
<b>Total Direct Economic Impact</b>	<b>491.5</b>	<b>465.0</b>	<b>5.7%</b>	<b>100%</b>

## EXPENDITURE IN PERCENTAGES



MINISTRY OF  
ECONOMIC DEVELOPMENT



## 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 NINE MONTHS IN REVIEW 2018

	2018	2017	% CHANGES
STAY OVER ARRIVALS	309,732	293,160	5.7 %
CRUISE ARRIVALS	525,258	410,158	28.1%
TOTAL ARRIVALS	834,990	703,318	18.7%
TOTAL TOURIST NIGHTS	2,743,461	2,640,982	3.9%
AVERAGE NIGHTS	8.4	9.0	-6.4%
AVERAGE OCCUPANCY RATE	77.8%	73.2%	4.7%
AVERAGE DAILY RATE	\$161.78	\$139.84	15.6%
AVERAGE REVENUE PER AVAILABLE ROOM	\$129.20	\$104.74	23.4%
Total economic impact ( direct + indirect) incl cruise	\$807.4	\$764.1	5.7%