

TOURISM PERFORMANCE FIRST HALF OF 2019

TOTAL STAYOVER ARRIVALS	DAY TRIPPERS	TOTAL CRUISE ARRIVALS	TOTAL VISITOR NIGHTS	AVERAGE HOTEL OCCUPANCY	ECONOMIC IMPACT (DIRECT+INDIRECT) INCL. CRUISE
237,750	8,955	419,832	2 million	74.2%	620 million US\$

HOW WAS THE FIRST SIX MONTHS OF 2019?

Curaçao welcomed altogether during the first six of 2019 **666,537** tourist arrivals. The Curaçao Ports Authority recorded **419,832** cruise arrivals, while the Curaçao Tourist Board registered **237,750** stayover visitors who spent **2 million** nights in Curaçao. On average the stayover visitors spent **7.7** nights per person in the first six of 2019. Smith Travel Research reported an average occupancy of **74.2%** during this period accompanied by an average daily rate **\$ 167**. The Ministry of Economic Development together with CTB calculated the total economic impact (direct + indirect) including cruise tourism at **620** million US \$ in the first six months of 2019 using the Turistika Model.



VISITOR ARRIVALS

ARRIVAL COUNT	JAN	FEB	MAR	APR	MAY	JUN	SUMMARY
2019	44,150	41,145	41,862	40,284	36,385	33,924	237,750
2018	39,735	34,773	36,358	32,491	31,430	31,042	205,830
% change	11%	18%	15%	24%	16%	9%	16%



WHERE DID OUR VISITORS COME FROM?



The first six months of 2019 shows an increase of 16% stayover arrivals. In total 237,750 stayover visitors travelled to Curaçao. In 2018, we welcomed 205,830 stayover visitors during this same period.

	JAN	FEB	MAR	APR	MAY	JUN	2019	2018	CHANGE
CANADA	3,768	3,757	4,028	1,948	765	756	15,022	13,606	10%
USA	6,767	7,136	8,425	6,213	5,863	6,722	41,126	36,472	13%
TOTAL NORTH AMERICA	10,535	10,893	12,453	8,161	6,628	7,478	56,148	50,078	12%
BRAZIL	1,446	922	1,293	973	945	1,001	6,580	5,419	21%
COLOMBIA	2,824	1,609	1,614	2,704	2,586	3,106	14,441	9,165	58%
OTHER SOUTH AMERICA	3,250	2,905	1,768	2,434	2,744	1,913	15,014	12,785	17%
TOTAL SOUTH AMERICA	7,520	5,436	4,675	6,111	6,275	6,020	36,037	27,369	32%
GERMANY	1,753	1,709	2,717	2,242	1,480	1,562	11,463	9,063	26%
THE NETHERLANDS	18,298	17,286	16,161	16,151	15,712	13,081	96,689	86,969	11%
OTHERS EUROPE	2,772	2,770	2,214	3,226	1,874	1,607	14,464	13,483	7%
TOTAL EUROPE	22,822	21,765	21,092	21,619	19,066	16,250	122,616	109,515	12%
CARIBBEAN	2,127	2,134	2,474	3,351	3,397	3,136	16,620	14,577	14%
OTHERS	1,145	916	1,167	1,042	1,019	1,040	6,329	4,291	48%
SUMMARY	44,150	41,145	41,862	40,284	36,385	33,924	237,750	205,830	16%

MARKETS BY REGION



HOW MANY NIGHTS DID THEY STAY?

	JAN	FEB	MAR	APR	MAY	JUN	2019	2018	CHANGE
NORTH AMERICA	80,804	80,628	84,445	54,434	42,813	49,863	392,987	356,747	10%
SOUTH AMERICA	53,800	39,355	32,475	44,091	42,972	41,978	254,671	208,207	22%
CARIBBEAN	13,182	13,062	15,227	19,384	17,227	17,566	95,648	88,264	8%
EUROPE	261,441	236,971	225,122	224,936	197,986	178,488	1,324,944	1,211,029	9%
OTHERS	2,703	1,947	1,969	2,533	2,428	2,391	13,971	16,268	-14%
SUMMARY	411,930	371,963	359,238	345,378	303,426	290,286	2,082,221	1,880,515	11%



WHAT IS THE AVERAGE NIGHT SPENT PER PERSON?

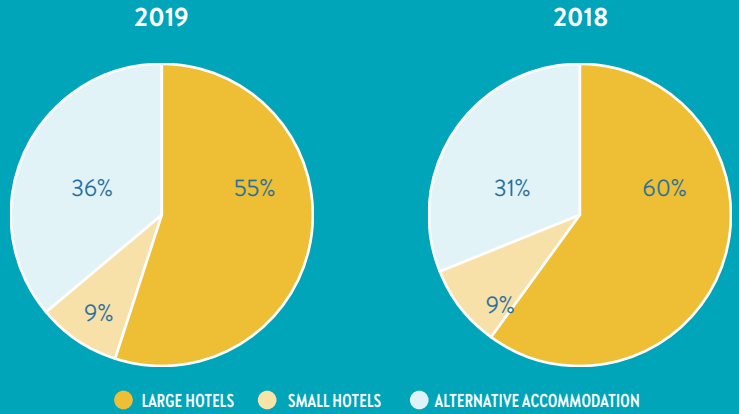
	JAN	FEB	MAR	APR	MAY	JUN	2019	2018	CHANGE
NORTH AMERICA	7.0	7.0	6.1	6.4	6.3	6.2	6.5	6.8	-4%
SOUTH AMERICA	6.8	7.0	6.7	7.1	6.7	6.8	6.9	7.5	-8%
CARIBBEAN	5.4	5.1	5.1	4.8	4.0	4.3	4.7	5.5	-15%
EUROPE	9.0	9.3	7.7	9.4	9.0	9.5	9.0	10	-10%
OTHERS	2.4	2.1	1.7	2.4	2.4	2.3	2.2	3.8	-42%
SUMMARY	7.8	8.0	6.8	7.9	7.5	7.6	7.7	8.4	-10%

WHERE DID OUR VISITORS STAY?



NORTH AMERICA

	2019	2018
LARGE HOTELS	55%	60%
SMALL HOTELS	9%	9%
ALTERNATIVE ACCOMMODATION	36%	31%
SUMMARY	100%	100%

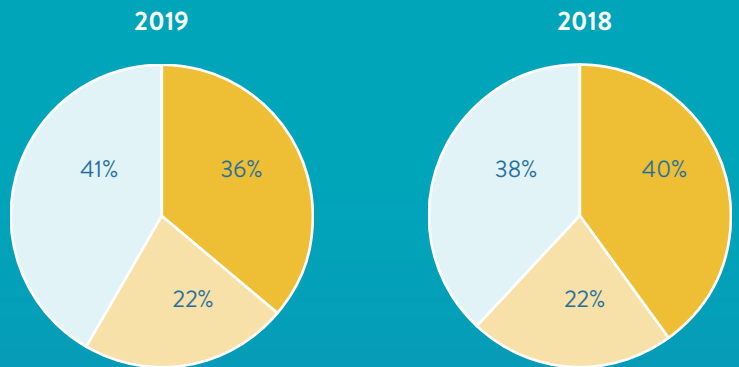


● LARGE HOTELS ● SMALL HOTELS ● ALTERNATIVE ACCOMMODATION



SOUTH AMERICA

	2019	2018
LARGE HOTELS	36%	40%
SMALL HOTELS	22%	22%
ALTERNATIVE ACCOMMODATION	41%	38%
SUMMARY	100%	100%

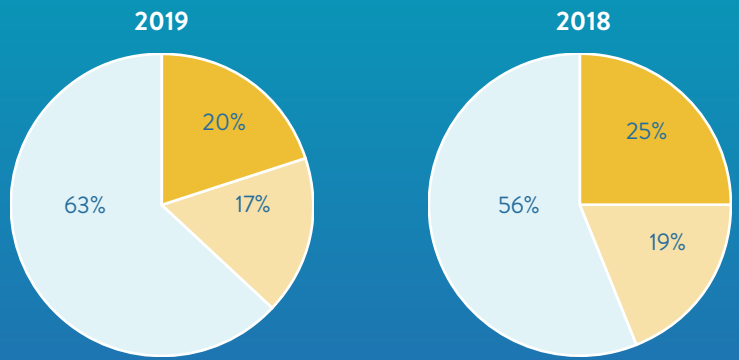


● LARGE HOTELS ● SMALL HOTELS ● ALTERNATIVE ACCOMMODATION



CARIBBEAN

	2019	2018
LARGE HOTELS	20%	25%
SMALL HOTELS	17%	19%
ALTERNATIVE ACCOMMODATION	63%	56%
SUMMARY	100%	100%

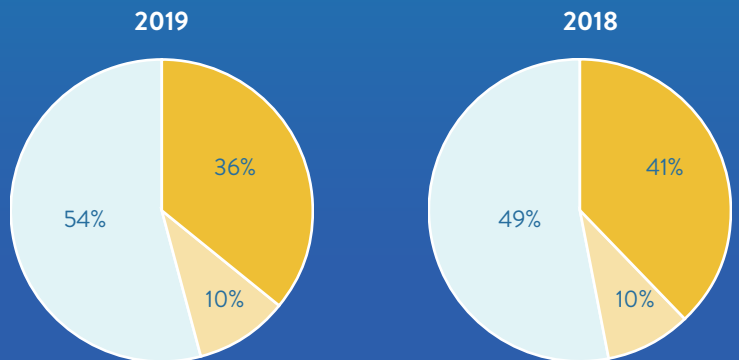


● LARGE HOTELS ● SMALL HOTELS ● ALTERNATIVE ACCOMMODATION



EUROPE

	2019	2018
LARGE HOTELS	36%	41%
SMALL HOTELS	10%	10%
ALTERNATIVE ACCOMMODATION	54%	49%
SUMMARY	100.0%	100.0%



● LARGE HOTELS ● SMALL HOTELS ● ALTERNATIVE ACCOMMODATION



Occupancy

2019	2018
74.2%	72.6%
↑ +2% (points)	



Average Daily Rate (ADR)

2019	2018
\$167.16	\$157.51
↑ +6%	



Revenue per Available Room (RevPAR)

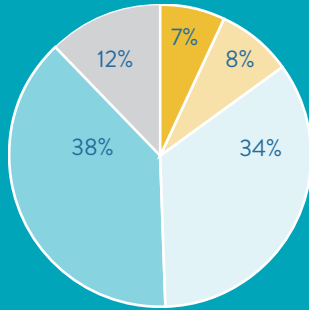
2019	2018
\$125.53	\$115.57
↑ +9%	

SOURCE: STR

WHAT AGES ARE OUR VISITORS?

NORTH AMERICA

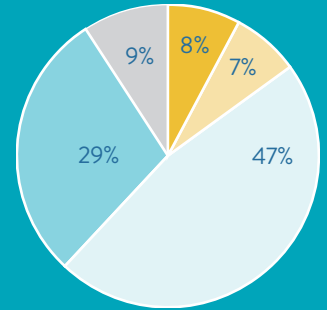
0-14	7%
15-24	8%
25-44	34%
45-64	38%
65+	12%
SUMMARY	100.0%



● 0-14 ● 15-24 ● 25-44 ● 45-64 ● 65+

SOUTH AMERICA

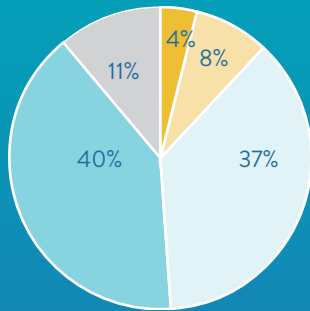
0-14	8%
15-24	7%
25-44	47%
45-64	29%
65+	9%
SUMMARY	100.0%



● 0-14 ● 15-24 ● 25-44 ● 45-64 ● 65+

CARIBBEAN

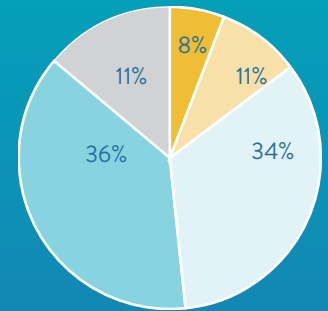
0-14	4%
15-24	8%
25-44	37%
45-64	40%
65+	11%
SUMMARY	100.0%



● 0-14 ● 15-24 ● 25-44 ● 45-64 ● 65+

EUROPE

0-14	8%
15-24	11%
25-44	34%
45-64	36%
65+	11%
SUMMARY	100.0%



● 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
FIRST HALF
OF 2019**

**2019
FIRST SIX
MONTHS
1,062,130 M**

**2018
FIRST SIX
MONTHS
1,008,886 M**

**CHANGE
+5%**

WEB VISIT CURACAO.COM BY FOCUS MARKETS IN Q1 2019

UNITED STATES		COLOMBIA		NETHERLANDS	
2019	251,259	2019	177,165	2019	155,933
2018	263,013	2018	118,248	2018	137,244
CHANGE	-5%	CHANGE	50%	CHANGE	14%
GERMANY		CANADA		BRAZIL	
2019	49,931	2019	47,762	2019	41,427
2018	61,826	2018	72,000	2018	40,326
CHANGE	-19%	CHANGE	-34%	CHANGE	3%

FACEBOOK FIRST SIX MONTHS 2019



TOTAL FOLLOWERS
240.1 K



TOTAL ENGAGEMENT
219 K



TOTAL POSTS
201



TOTAL IMPRESSIONS
36.7 M



INSTAGRAM FIRST SIX MONTHS 2019



TOTAL FOLLOWERS
59.2 K



TOTAL ENGAGEMENT
179.2 K



TOTAL POSTS
161



TOTAL IMPRESSIONS
4.8 M

HOW DID THE CRUISE INDUSTRY PERFORM IN THE FIRST HALF OF 2019



CRUISE CALLS

	JAN	FEB	MAR	APR	MAY	JUN	SUMMARY
2019	51	35	31	25	13	10	165
2018	42	35	32	27	11	10	157
% CHANGE	21%	0%	-3%	-7%	18%	0%	5%



CRUISE PASSENGERS

	JAN	FEB	MAR	APR	MAY	JUN	SUMMARY
2019	120,358	81,839	75,908	66,518	39,453	35,756	419,832
2018	97,651	85,687	80,975	62,073	37,126	33,093	396,605
% CHANGE	23%	-4%	5%	6%	6%	8%	6%

SECTORAL IMPACT IN Q1 2019

EXPENDITURE JANUARY – JUNE 2019 (X \$1000)



TOTAL DIRECT ECONOMIC IMPACT

\$ 378 million ↑ 12%



TOTAL INDIRECT ECONOMIC IMPACT

\$ 242 million ↑ 11%



TOTAL ECONOMIC IMPACT

\$ 620 million ↑ 11%

HOW DID OUR STAYOVER VISITORS SPEND THEIR MONEY?

EXPENDITURE (X \$1000)

	JAN – JUN 2019	JAN – JUN 2018	% CHANGE
ACCOMMODATION	134	120	12%
RESTAURANT	92	83	11%
GROCERIES	17	15	13%
SHOPPING	42	38	11%
ACTIVITIES	19	17	12%
TRANSPORTATION	30	27	11%
ENTERTAINMENT	14	13	8%
OTHER	30	26	15%
TOTAL DIRECT ECONOMIC IMPACT	378	339	12%

SOURCE: TURISTIKA MODEL

EXPENDITURE IN PERCENTAGES



WHAT IS THE AVERAGE SPENDING PER DAY PER PERSON?



FIRST SIX MONTHS OF 2019 IN REVIEW

	2019 – FIRST SIX MONTHS	2018 – FIRST SIX MONTHS	CHANGES
STAYOVER ARRIVALS	237,750	205,830	16%
DAY TRIPPERS	8,955	9,877	-9%
CRUISE ARRIVALS	419,832	396,605	6%
TOTAL ARRIVALS	666,537	612,312	9%
TOTAL TOURIST NIGHTS	2 million	1.8 million	11%
AVERAGE NIGHTS	7.7	8.4	-8%
OCCUPANCY RATE	74.2%	72.6%	2% (points)
AVERAGE DAILY RATE	\$167.16	\$157.51	6%
REVENUE PER AVAILABLE ROOM	\$125.53	\$115.57	9%
TOTAL ECONOMIC IMPACT (DIRECT, INDIRECT + CRUISE)	\$620 million	\$557 million	11%