

# 1ST QUARTER TOURISM

PERFORMANCE 2017



TOTAL STAYOVER ARRIVALS

**109,198**

TOTAL CRUISE ARRIVALS

**200,891**

TOTAL VISITOR NIGHTS

**978,131**

AVERAGE HOTEL OCCUPANCY

**78.1%**

ECONOMIC IMPACT

**\$147.5 million**

## HOW WAS OUR FIRST QUARTER?

Curaçao welcomed altogether in the first quarter of the year 2017 a total of 310,089 tourist arrivals. The Curaçao Ports Authority recorded a total of 200,891 cruise arrivals. The Curaçao Tourist Board (CTB) registered a total of 109,198 stayover visitors who in total spent 978,131 nights in Curaçao. On average the stayover visitors spent 9 nights per person. Smith Travel Research reported an average occupancy rate of 78.1% during this period accompanied by an average daily rate of \$167.28. The Ministry of Economic Development together with CTB calculated from the Turistika Model a direct economic impact from tourism at 147.5 million US \$ during the first quarter of 2017.



### STAYOVER ARRIVALS Q1 2017/2016

	JAN	FEB	MAR	Summary
<b>2017</b>	38,744	35,905	34,549	<b>109,198</b>
<b>2016</b>	41,696	41,104	44,734	<b>127,534</b>
<b>% Change</b>	-7.1%	-12.6%	-22.8%	<b>-14.4%</b>



NORTH AMERICA



SOUTH AMERICA



EUROPE



CARIBBEAN








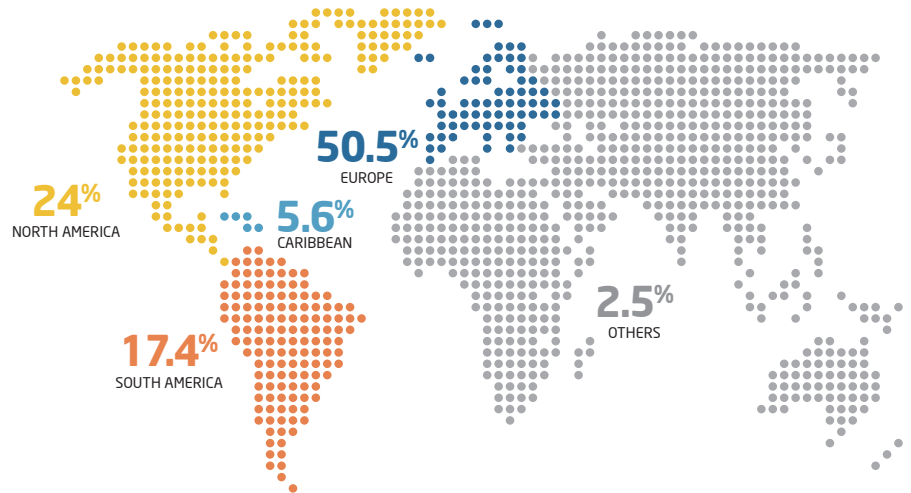
OTHERS

## WHERE DID OUR VISITORS COME FROM?

	JAN	FEB	MAR	2017	JAN	FEB	MAR	2016	% CHANGE
	8,407	8,626	9,127	<b>26,160</b>	8,772	8,868	9,205	<b>26,845</b>	<b>-2.6%</b>
	7,818	6,112	5,049	<b>18,979</b>	10,041	9,527	12,392	<b>31,960</b>	<b>-40.6%</b>
	19,303	18,081	17,728	<b>55,112</b>	19,572	19,278	19,145	<b>57,995</b>	<b>-5.0%</b>
	2,280	2,194	1,694	<b>6,168</b>	2,218	2,444	2,915	<b>7,577</b>	<b>-18.6%</b>
	936	892	951	<b>2,779</b>	1,093	987	1,077	<b>3,157</b>	<b>-12.0%</b>
<b>SUMMARY</b>	<b>38,744</b>	<b>35,905</b>	<b>34,549</b>	<b>109,198</b>	<b>41,696</b>	<b>41,104</b>	<b>44,734</b>	<b>127,534</b>	<b>-14.4%</b>

## MARKET SHARE BY REGION Q1 2017

	North America	<b>24.0%</b>
	South America	<b>17.4%</b>
	Europe	<b>50.5%</b>
	Caribbean	<b>5.6%</b>
	Others	<b>2.5%</b>



NORTH AMERICA



SOUTH AMERICA



EUROPE








CARIBBEAN








OTHERS

## HOW MANY NIGHTS DID THEY STAY?

	JAN	FEB	MAR	2017	JAN	FEB	MAR	2016	% CHANGE
	62,343	62,075	59,319	<b>183,737</b>	63,278	59,086	57,510	<b>179,874</b>	<b>2.1%</b>
	50,249	46,422	35,251	<b>131,922</b>	57,780	53,968	74,261	<b>186,009</b>	<b>-29.1%</b>
	229,557	197,489	187,985	<b>615,031</b>	213,230	192,067	186,967	<b>592,264</b>	<b>3.8%</b>
	12,060	13,676	10,182	<b>35,918</b>	11,528	14,593	14,476	<b>40,597</b>	<b>-11.5%</b>
	4,229	3,208	4,086	<b>11,523</b>	3,741	2,650	3,409	<b>9,800</b>	<b>17.6%</b>
<b>SUMMARY</b>	<b>358,438</b>	<b>322,870</b>	<b>296,823</b>	<b>978,131</b>	<b>349,557</b>	<b>322,364</b>	<b>336,623</b>	<b>1,008,544</b>	<b>-3.0%</b>

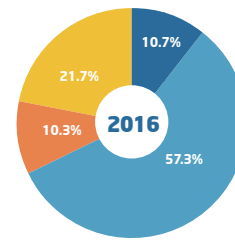
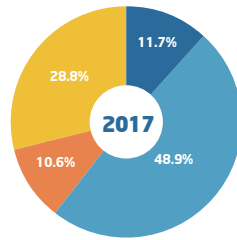
## WHAT IS THE AVERAGE NIGHT SPENT PER PERSON?

	JAN	FEB	MAR	2017	JAN	FEB	MAR	2016	% CHANGE
	7.4	7.2	6.5	<b>7.0</b>	7.2	6.7	6.2	<b>6.7</b>	<b>4.8%</b>
	6.4	7.6	7.0	<b>7.0</b>	5.8	5.7	6.0	<b>5.8</b>	<b>19.4%</b>
	11.9	10.9	10.6	<b>11.2</b>	10.9	10.0	9.8	<b>10.2</b>	<b>9.3%</b>
	5.3	6.2	6.0	<b>5.8</b>	5.2	6.0	5.0	<b>5.4</b>	<b>8.7%</b>
	4.5	3.6	4.3	<b>4.1</b>	3.4	2.7	3.2	<b>3.1</b>	<b>33.6%</b>
<b>SUMMARY</b>	<b>9.3</b>	<b>9.0</b>	<b>8.6</b>	<b>9.0</b>	<b>8.4</b>	<b>7.8</b>	<b>7.5</b>	<b>7.9</b>	<b>13.3%</b>

## WHERE DID OUR VISITORS STAY?



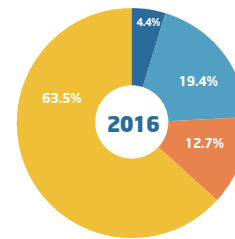
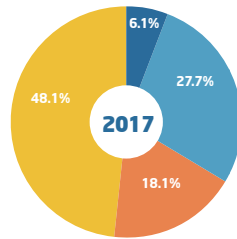
North America	2017	2016
Bungalows	11.7%	10.7%
Large Hotels	48.9%	57.3%
Small Hotels	10.6%	10.3%
Alternative Accommodations	28.8%	21.7%
<b>Summary</b>	<b>100.0%</b>	<b>100.0%</b>



■ Bungalows ■ Large Hotels ■ Small Hotels ■ Alternative Accommodations



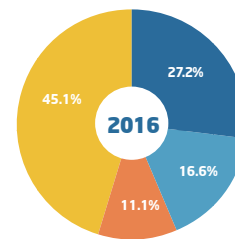
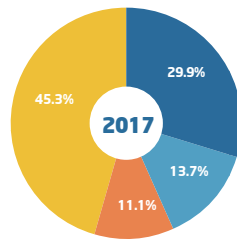
South America	2017	2016
Bungalows	6.1%	4.4%
Large Hotels	27.7%	19.4%
Small Hotels	18.1%	12.7%
Alternative Accommodations	48.1%	63.5%
<b>Summary</b>	<b>100.0%</b>	<b>100.0%</b>



■ Bungalows ■ Large Hotels ■ Small Hotels ■ Alternative Accommodations



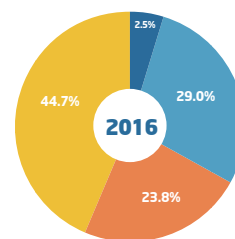
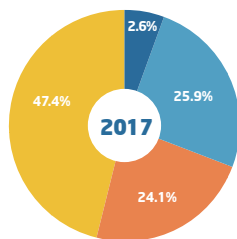
Europe	2017	2016
Bungalows	29.9%	27.2%
Large Hotels	13.7%	16.6%
Small Hotels	11.1%	11.1%
Alternative Accommodations	45.3%	45.1%
<b>Summary</b>	<b>100.0%</b>	<b>100.0%</b>



■ Bungalows ■ Large Hotels ■ Small Hotels ■ Alternative Accommodations



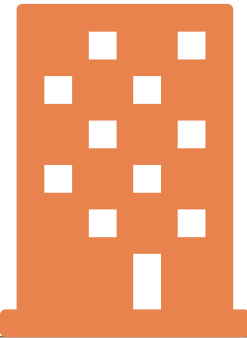
Caribbean	2017	2016
Bungalows	2.6%	2.5%
Large Hotels	25.9%	29.0%
Small Hotels	24.1%	23.8%
Alternative Accommodations	47.4%	44.7%
<b>Summary</b>	<b>100.0%</b>	<b>100.0%</b>



■ Bungalows ■ Large Hotels ■ Small Hotels ■ Alternative Accommodations


## HOW DID THE HOTELS PERFORM?

March	2017	2016	% Change
Rooms	3916	4163	-5.9%
ARN	61,039	72,416	-15.7%
ORN	46,939	53,009	-11.5%
% Occupancy	76.9%	73.2%	+3.70% (points)
ADR	\$167.28	\$165.34	1.2%
RevPAR	\$128.64	\$120.99	6.3%



**BASED ON**  
12 properties & 1969 Rooms

- \* Rooms is based on estimated total rooms inventory of Curaçao
- \* ARN is based on STR Census
- \* ORN is based on STR Sample
- \* Smith Travel Research (STR) is the leading global provider of competitive benchmarking, information services and research to the hotel industry.

POWERED BY 

Compared to 2016, Hotel Occupancy increased with 3.7% (points). ADR increased with 1.2% while RevPAR increased with 6.3%. March saw an overall positive performance compared to 2016, a challenging year.

**Meanwhile in the Caribbean:** Occupancy increased from 75.5% in 2016 to 76.7% in 2017. ADR increased by 0.1%, while RevPAR increased by 3.6% compared to last year. As can be seen, the Caribbean also saw an overall increase Hotel Performance.

### OCCUPANCY RATE Q1 2017 / 2016

	JAN	FEB	MAR	AVERAGE
2017	78.0%	79.3%	76.9%	<b>78.1%</b>
2016	77.0%	81.6%	73.2%	<b>77.3%</b>
Difference	1.0%	-2.3%	3.7%	<b>0.8%</b>

### REVPAR Q1 2017 / 2016

	JAN	FEB	MAR	AVERAGE
2017	\$139.76	\$142.86	\$128.64	<b>\$137.09</b>
2016	\$131.19	\$132.40	\$120.99	<b>\$128.19</b>
%Change	6.5%	7.9%	6.3%	<b>6.9%</b>

### AVERAGE DAILY RATE (ADR) Q2017 / 2016

	JAN	FEB	MAR	AVERAGE
2017	\$179.15	\$180.26	\$167.28	<b>\$175.56</b>
2016	\$170.29	\$162.23	\$165.34	<b>\$165.95</b>
%Change	5.2%	11.1%	1.2%	<b>5.8%</b>



### QUARTER 1 HOTEL PERFORMANCE CURAÇAO

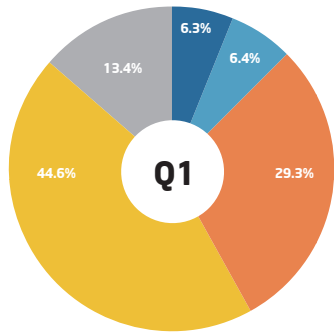
As can be seen in the above figures, the occupancy stayed quite consistent to last year, increase by just 0.8% YTD. ADR and RevPAR both saw a significant increase compared to Q1 2016, ADR increasing with 5.8% and RevPAR increasing with 6.9%.

## WHAT AGE ARE OUR VISITORS?



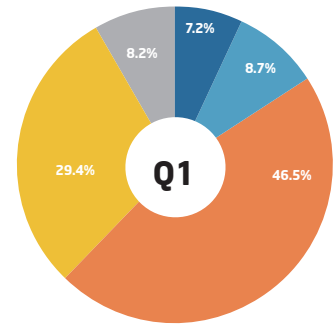
### North America

0-14	6.3%
15-24	6.4%
25-44	29.3%
45-64	44.6%
65+	13.4%
<b>Summary</b>	<b>100.0%</b>



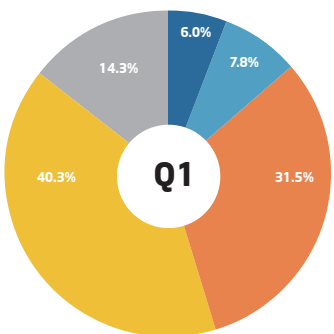
### South America

0-14	7.2%
15-24	8.7%
25-44	46.5%
45-64	29.4%
65+	8.2%
<b>Summary</b>	<b>100.0%</b>



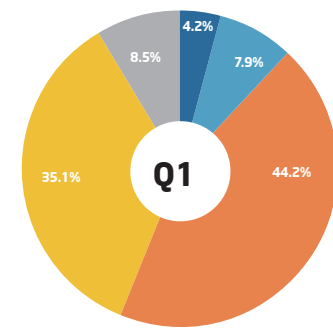
### Europe

0-14	6.0%
15-24	7.8%
25-44	31.5%
45-64	40.3%
65+	14.3%
<b>Summary</b>	<b>100.0%</b>



### Caribbean

0-14	4.2%
15-24	7.9%
25-44	44.2%
45-64	35.1%
65+	8.5%
<b>Summary</b>	<b>100.0%</b>



## GENDER

# 2017



## 49.9%

FEMALE VISITORS



## 50.1%

MALE VISITORS

# 2016



## 51.7%

FEMALE VISITORS



## 48.3%

MALE VISITORS

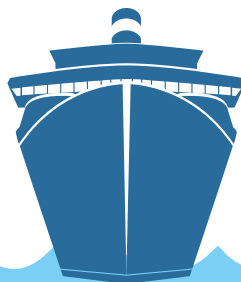
## HOW DID THE CRUISE INDUSTRY PERFORM?

### CRUISE CALLS Q1 2017/2016

	JAN	FEB	MAR	SUMMARY
2017	33	29	34	<b>96</b>
2016	32	31	33	<b>96</b>
% Change	3.1%	-6.5%	3.1%	<b>0%</b>

### CRUISE PASSENGERS Q1 2017/2016

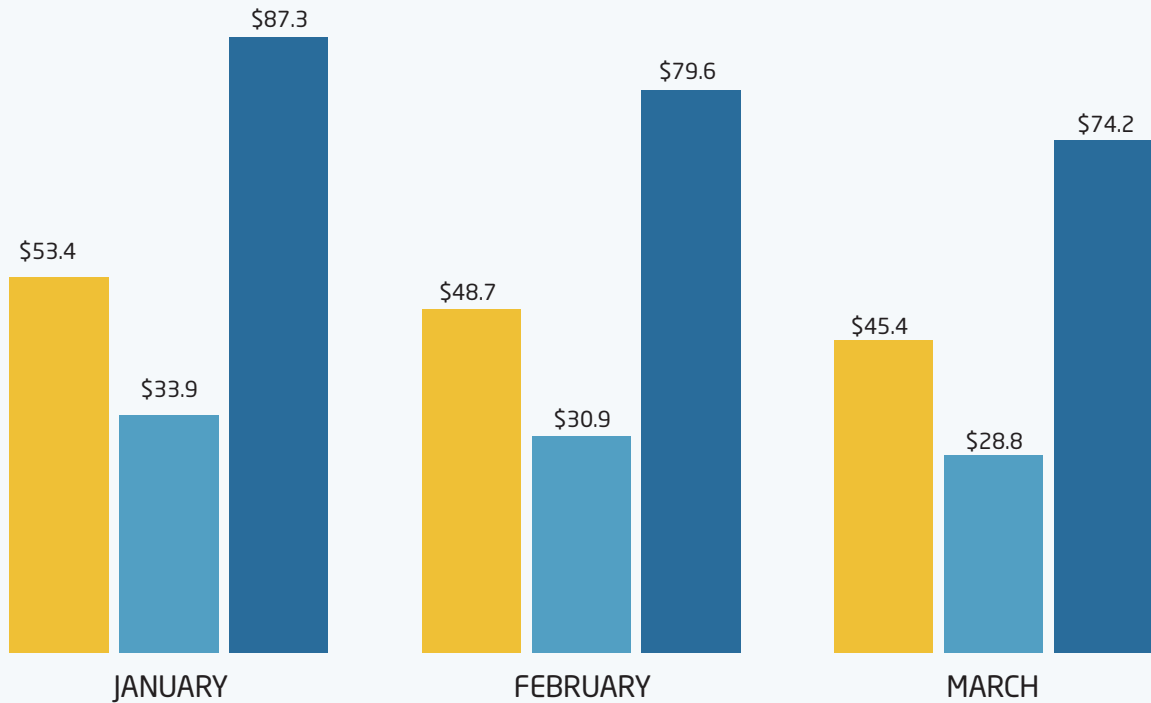
	JAN	FEB	MAR	SUMMARY
2017	68,265	61,953	70,673	<b>200,891</b>
2016	64,871	57,856	65,338	<b>188,065</b>
% Change	5.2%	7.1%	8.2%	<b>6.8%</b>



## ECONOMIC IMPACT FROM TOURISM INDUSTRY

EXPENDITURE (X \$ 1000)

Direct Economic Impact Indirect Economic Impact Total



## HOW DID OUR VISITORS SPEND THEIR MONEY?

Source: Turistika Model

Expenditure (x \$1000)	% MARKET SHARE	
Accommodation	\$47.6	32%
Restaurant	\$34.9	24%
Groceries	\$5.6	4%
Shopping	\$22.4	15%
Activities	\$13.7	9%
Transportation	\$15.9	11%
Entertainment	\$3.1	2%
Other	\$4.3	3%
<b>SUMMARY</b>	<b>\$147.5</b>	<b>100%</b>

SHARE OF THE EXPENDITURE IN PERCENTAGES

