



Feel It!

Kyrsha Attaf
Miss Universe Curaçao 2019



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CURAÇAO TOURISM FACTS & FIGURES

JANUARY – DECEMBER 2018



STAYOVER ARRIVALS

431,701



CRUISE ARRIVALS

757,278



TOTAL ARRIVALS

1,209,668*



TOTAL TOURIST
NIGHTS

3.9 MILLION



TOTAL ECONOMIC IMPACT
(DIRECT + INDIRECT) INCL. CRUISE

\$1.1 BILLION



AVERAGE NIGHTS
SPENT

8.3



AVERAGE DAILY RATE

\$162.42



REVENUE
PER AVAILABLE ROOM

\$128.70



OCCUPANCY RATE

77.8%



CUSTOMER SERVICE
TRAINING

162
PARTICIPANTS



TOURISM SAFETY
TRAINING

51
PARTICIPANTS



TOURIST GUIDE &
HOSPITALITY COURSE

13
GRADUATES



SOCIAL MEDIA



231.9K



55.1K

* Including Day Trippers: 20,689

Source: Curaçao Tourist Board • Ministry of Economic Development • Curaçao Hospitality & Tourism Association • Curaçao Ports Authority

Feel It!

Year 2018 was a positive one for tourism in Curaçao. There was an increase in stayover arrivals from all the major markets. This annual report will look back at all that was accomplished during the year. It will reflect the energy of our team and give a feel of the momentum that was developed from all that was executed in 2018. We present the milestones digitally so you can relive these moments in colorful pictures, videos and interactive pages allowing you to really **Feel It!**



Watch video!

Directors' Year Review

Feel the Growth

Despite a slow start in the first quarter and periodic financial challenges, Curaçao finished 2018 with 431,701 stayover arrivals. There was significant growth from all major markets except the South American region, because of huge losses from Venezuela – a market that not so long ago supplied as much as 25% of the annual stayover arrivals. The team, however, made an agile response to the developments in Venezuela and was able to replace most of that business with business from other South American markets, particularly Colombia and Brazil.

It was during 2018 that the new branding campaign was launched globally. The new look-and-feel was well received and should continue to have a positive impact in 2019 and beyond.

On the product side of the equation, work began on the second phase of the Marie Pampoen development, which features a new sports complex. In September, we hosted the National Tourism Conference, for which we received positive feedback from the participants.

Looking ahead, there is optimism about Curaçao's tourism. This optimism is fueled primarily by the planned openings of newly renovated and newly built rooms in the accommodation sector. We continue to pursue additional airlift into Curaçao so that the projected growth targets can be realized.

The theme of 2018 has special meaning for us. The new branding speaks of the island vibes, the island's heritage and culture and the very pulse of the nation. Growth in tourism has a positive impact on the island's population and it makes a considerable contribution to the economy. It is therefore our hope that from this report, everyone will get a feel for what we do in our efforts to promote Curaçao to the world.

Paul Pennicook
CEO



Hugo Clarinda
Deputy Director





A Word from Our Board

Feel the Forward Leap

The year-in-review proved to be both interesting and challenging for the Curaçao Tourist Board (CTB). With great pride, we can characterize 2018 as a very active, productive and exciting year in which many worthy developments unfolded. In January, I was appointed Chairman of the Board of Directors at CTB.

In addition, Mr. Angelo Tyrol, a veteran in the financial business community, was selected to complete the Board of Directors, which now consists of a group of five well-balanced professionals, each successfully driven to support one common objective: Tourism growth!

While an audit committee comprised of three board members was installed to monitor the financial progress of the organization, the main pillar of success was the introduction of the new software, Exact, to streamline CTB's accounting and financial data processing. Preparations were well underway to be tested at the end of 2018, prior to full implementation and execution in 2019. The Board had the opportunity to visit some trade shows and conferences throughout the

year, including: ITB travel trade show in Germany, ANATO tourism showcase in Colombia and SOTIC (State of the Tourism Industry Conference) in the Bahamas, to assess growth opportunities for tourism in Curaçao. We were pleased to see that our efforts to open communication channels with the Curaçao Hospitality & Tourism Association (CHATA) had paid off, resulting in the formation of an Advisory Council to consult and make recommendations on the management of certain strategies.

The council met five times during 2018 and focused on the formation of a preliminary framework to establish a Curaçao Tourism Authority (CTA), comparable to what the Curaçao Ports Authority (CPA) represents to our harbor, and what Curaçao Airport Holding (CAH) embodies for our airport.

The envisioned CTA would have greater independence and authority to apply and reinforce methods that will create a better environment in which to operate and manage the growth of tourism for our destination. Examples of its proposed autonomous control include: certification of vacation apartments; the coordination and management of beaches and tourism areas, and most importantly, the collection of tourism-related taxes and fees which would be submitted to the Authority.

The transition into an Authority is an important priority for the Board, and aligns with both the Tourism Master Plan (TMP), and the Government Coalition Agreement to expedite efficiency and growth.

The Board also urged that the National Tourism Conference should emphasize that the inclusion of stakeholders is the only route to success. We furthermore supported the process of rebranding the island and the efforts to restructure the curacao.com website. In October, after an intensive recruitment and selection process, the Board appointed and welcomed Mr. Paul Pennicook as the new CEO of CTB. Under his leadership, CTB will vigorously continue with its efforts to reach significant growth in the tourism sector in the years to come.

During 2018 the Supervisory board was actively involved in numerous committees, including the one regarding the execution of the TMP. Once the new Authority has been established, we anticipate a huge leap forward in keeping with the historically proven track records of several other successful tourism destinations in the region.

Year 2018 also presented some challenges. The main hurdle was the inconsistent cash flow which impacted the organization's ability to carry out competitive and timely marketing activities for the destination. This also affected CTB's relationship with international creditors, airlines, hotels and other third-party business partners.

Overall, the entire Board is satisfied with the results of the year-in-review, and we look forward to another productive year of growth and the transition to a new era in tourism.



ir. K.C. Jonckheer
Chairman of the Board

Performance

Feel the Impact of Tourism



[Download Report](#)



The 2018 Tourism Performance reflects the positive developments in our main markets, and an overall growth of our tourism industry. Some notable aspects are that almost all markets registered growth in 2018, with the Netherlands topping the list of arrivals in absolute numbers (177,042), followed by the USA (73,259), Colombia (23,593), Canada (21,169) and Germany (18,536).

All of them reached new record highs in arrival figures, with the exception of Germany. Despite the collapse of the Venezuelan market, which used to be one of our main markets, the South American market performed well, showing a slight decline of 4% overall in visitor arrivals.

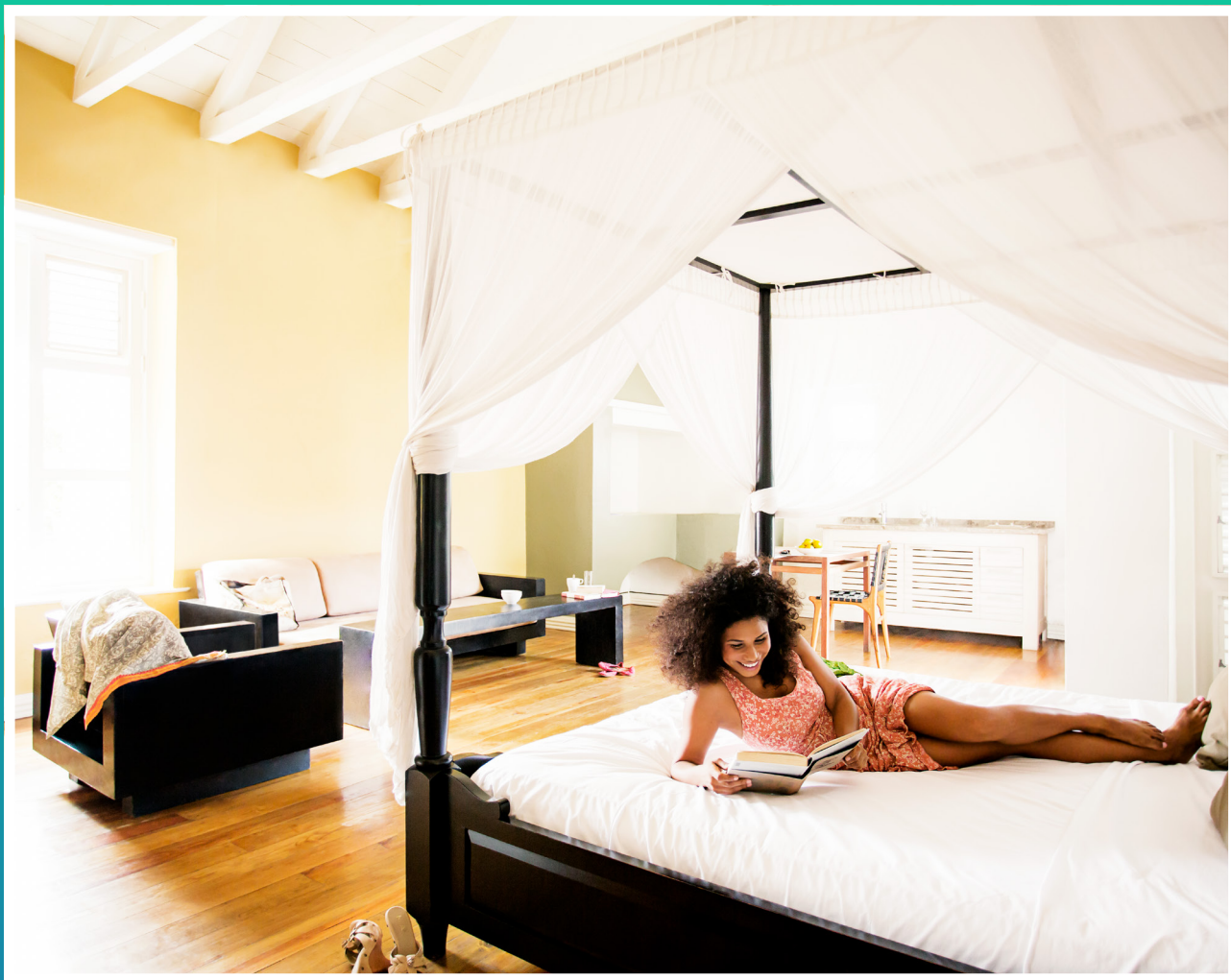
More notably, there was a 38% increase in Colombian arrivals and a 23% increase out of Brazil. Also noteworthy was that visitor spending on accommodation increased, and spending on food and beverages continues to show a rising trend. The economic impact of tourism has grown once more and is predicted to continue to move upward in 2019.

Other Research and Analysis

Online Survey Past Visitors



In 2018 we collected numerous email addresses of our past visitors via the immigration arrival cards. These visitors received a 'Thank You' email where they were asked to fill in a survey. In total we received approximately 8,000 completed surveys. From this data we were able to gauge our visitors' likes and dislikes, the size of their traveling group, their accommodations, vacation expenditures, demographics, and much more. This allows us to more accurately assess if we are successfully reaching our target audience.



In cooperation with CHATA, we conducted a Room Inventory Research (RIR) in 2018. The main objective of the RIR was to determine whether the current supply of rooms in Curaçao is enough to accommodate the targeted growth figure of 475,500 stayovers that we are aiming for in 2019.



The survey included questions regarding the number of rooms, future bookings, occupancy levels, room capacity and more. The challenge with this research was to obtain information on the large number of privately-owned properties that are not registered with CHATA. According to our calculations, approximately 38% of rooms on the island are not registered. The results of this analysis will be made available in 2019.

Other Research Data

In 2018, we once again assisted The University of Central Florida in collecting data for research purposes at the Curaçao North Sea Jazz Festival. The objective of this research was to gauge the economic impact of the festival.

We furthermore expanded the analytics in 2018 to produce Hotel Room Occupancy Overviews, Seat Capacity Overviews and more detailed airlift analysis. Having expanded the analytics, we were able to have more effective discussions with our partners for further planning.

Digital Performance

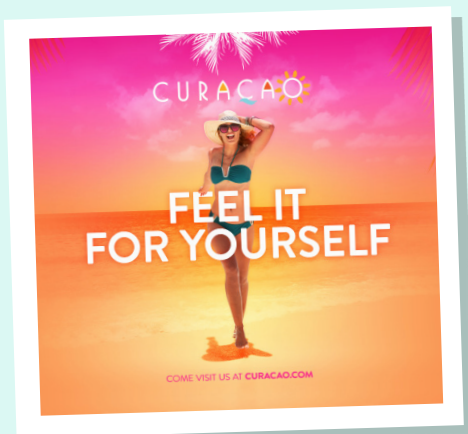
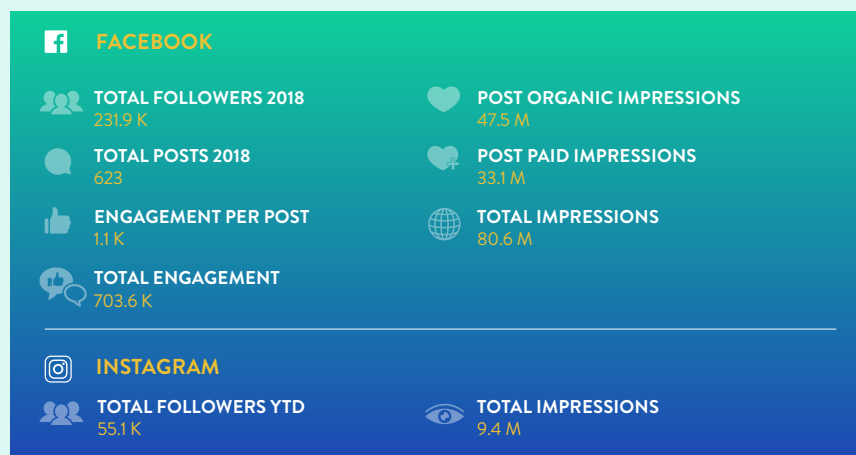
With approximately 2 million web visits, our destination website curacao.com is the most visited website in Curaçao, and our social media pages boast of the most followers. Accordingly, we are constantly working on improving our digital presence to obtain optimal benefits from our impressions. Our destination website is the main performance indicator when it comes to measuring our digital performance.



In 2018 our web sessions dropped from 2.1 million to 2.0 million. This drop of 6% could worry us in any other year, but in 2018 there were so many factors that made it difficult to accurately compare the data to previous years. Some of the variables included changes in Google's crawler tool and the fact that Facebook also adapted its algorithms.

The latter makes it not only more difficult for fan pages like ours to stay on top in visitors' news feeds, but also makes it tricky to compare the numbers with those of previous years. We should also factor in that we needed to make fundamental changes to our website, and in 2018 we made the necessary preparations to build a new site which would fit the new branding image and keep in line with the latest digital developments.

These preparations were well underway by the end of 2018. We used Facebook to drive visitors to our website, which entailed that the change in Facebook algorithms also affected our web session figures. We worked diligently on search engine ranking to meet Google's crawler changes, and we also tackled GDPR compliance to ensure that we met all requirements.



The most noteworthy development was the effect of our new branding, "Feel It For Yourself," on our web session figures. By mid-year we were concerned that we wouldn't be able to reach any targets, but when the time came for the launch of "Feel It For Yourself" in September, our web/digital sessions started growing rapidly. The last three months of 2018 clearly showed a steep upswing in web sessions. This indicates that "Feel It For Yourself" has reached our target groups and was effective in generating the impressions that were intended.

Branding

Feel It For Yourself



Prior to this year, the last time we created a branding campaign was in 2011. We felt it was time to honor the recommendation of the Tourism Master Plan by launching a new branding that truly captured our island's identity. Preparations started in August 2017, and in September 2018 we rolled out Curaçao's new image – “Feel It For Yourself”. While some markets were quicker to launch than others, by the end of 2018 the new branding was officially launched in all our source markets.

Research

We conducted extensive research, focusing on our consumers' needs and desires to arrive at our key message. We staged focus groups in our six biggest markets: USA, Canada, the Netherlands, Germany, Colombia and Brazil. The research was geared towards understanding the travel behavior of those who had already come to Curaçao, in addition to those who had not yet visited our shores. We further investigated the factors that drive their decision on a vacation destination and what would lead them to choose Curaçao. We obtained a vast amount of information from these focus groups and we also interviewed experts in the industry including airline representatives, tour operators, hoteliers and travel agents.

Core Findings

The first round of research gave rise to three main pillars for our brand: Authenticity, Diversity and a Feeling of Freedom. The latter was surprising because it referred to an emotion rather than a point of interest on the island; as one person expressed, “There's something to the island, a sense of freedom, that I don't find at home.”



We therefore concluded that the lure of Curaçao is more of an individual sensory experience than a specific activity or attraction. The next step was to acknowledge that the ‘feeling-free’ pillar needed to be accompanied by the authenticity and diversity of the island. Together, they capture the true essence of the Curaçao experience, leading us to a brand manifesto that appropriately captures and packages the visual image we wanted to create.

Market Testing

Based on our findings, our advertising agency created several creative campaign drafts, which were narrowed down to two.

Both drafts were tested via digital interviews with focus groups in North America, Europe, and South America. The clear preference led us to the campaign that we implemented.

Launch

After the completion of many photoshoots and videos, we launched the new campaign in September 2018 on World Tourism Day, which was concurrent with our own National Tourism Conference. The Netherlands, Germany and USA were the first markets to fully implement the campaign, with the rest of the markets launching it in their own language by the end of the year. Each market was customized to the traveler’s preferences. For example, South America focused more on activities and rumba, while Europe focused more on the beaches.

A local out-of-home (OOH) campaign (including billboards, kiosks, bus wraps, etc.), was introduced to get the local population acquainted with the new visuals. After the initial phase, we continued with digital campaigns, allowing us to target our groups more directly.

Tangible results for 2018 are difficult to assess, because measuring brand awareness requires the campaign to be live for an extended period of time. Digital campaigns however, are more easily measured. What we observed is that visitor bookings to Curaçao are on the rise, and our figures have improved.





Markets

Feel the Leaps and Bounds



NORTH AMERICA

USA

The 20% increase in visitor arrivals was largely due to the strategic marketing plan that was implemented. It was more data-driven than before and based on extensive research on the behavior of our preferred traveler. This allowed us to strategically place our advertisements in the target markets, which made a significant difference in the results.

Training our Sellers

We focused on educating our trade partners through trade shows, webinars, educational sessions, and in-house training, among others. We also hosted several reservation center trainings. We also conducted training sessions with tour operators, including American Airlines Vacations, Jet Blue Vacations and Cheap Caribbean.

At these major events we introduced the Travel Agents Rewards Program. This reward program was set in place by Curaçao Airport Partners (CAP) and CHATA in order to provide agents with points and cash rewards when they successfully book Curaçao. Most agents work on commission, which made the Travel Agents Rewards Program a valuable extra tool in order to stimulate business from travel agents.

Enticing the Consumers

Year 2018 was about reaching the right consumers. We attended the New York Times Travel Show, and Curaçao hosted an activity at the Color Run in Ft. Lauderdale and New York, to stimulate Curaçao brand awareness.

Digital Advertising

We deployed digital marketing in all our Northern American markets (New York, Miami, Charlotte, Toronto), which included:

Digital banner ads

- A campaign on podcast radio
- Campaigns on Trip Advisor, Afar, social media, online radio, and Dynamic TV Sync.
- Digital billboards in Aventura Mall in conjunction with CAP.



New York Color Run

▶ Watch video!



Collaboration with popular athletes in Charlotte and New York. For instance, we had Curtis Samuel, wide receiver of the Carolina Panthers, tweet about Curaçao and we also had our own Didi Gregorius of the New York Yankees show his favorite spots around his home island.



“This is Curaçao”
campaign in NYC

▶ Watch video!

Out-of-Home advertising

OOH advertising in the form of bus wraps, train station dominations, branded solar kiosks, etc., was executed in the New York, New Jersey, Miami and Charlotte markets.

Canada

Roadshows

In 2018 we chose the west part of Toronto as the focus of our Canada roadshow. This roadshow always attracts a lot of participation from our island, with an average of 10 hotels accompanying us on the road to help promote Curaçao.

Advertising

Advertising in Canada centered around our “Feel It For Yourself” branding campaign which included digital billboards, subway train interior ads and posters. We also had a huge matrix wall of six screens with video footage of Curaçao running continuously during the winter months.



Press and familiarization trips

We held several group press trips for journalists. The press trips were once again based on themes and towards the end of the year we incorporated our new branding with themes like: “Feel the Water” which was about diving; “Feel the Rhythm” for the Curaçao North Sea Jazz Festival (CNSJF); “Feel the Warmth” for more general occasions, etc.

In addition, we hosted some trips for travel agents to familiarize themselves with the Curaçao product so they are better able to sell it. We also hosted several individual media visits for influencers, bloggers and journalists who preferred to visit the island independently.

SOUTH AMERICA



The South American market performed well, despite the fact that the political turmoil in Venezuela, which was traditionally a main market, led to a drastic reduction in arrival figures from that country. On the other hand, the growth of the Colombian (38%) and Brazilian (23%) markets made up partially for the Venezuelan decrease, and the outlook for more growth from these and other countries from the region is promising.

Colombia

We have become a trending destination in Colombia. Curaçao has climbed the ladder to become one of the three most popular Caribbean destinations for Colombians.

The highlight of the year for the Colombian market was our attendance at the ANATO Tourism Showcase. ANATO is the Colombian Association of Travel Agents and Tourism.



At this annual tourism fair, we had the privilege to be chosen as the ‘País de Honor’, the country of honor, in 2018. Proud to be the highlight destination and honor guest of the year, we manned a large booth in true Curaçao style and delivered a powerful impression to all wholesalers, travel agents and airlines as we showcased our diversity, authenticity and our ability to get the visitor to “Feel It”.

Brazil

The growth in the Brazilian market was tied to the increased airlift with Avianca and Copa Airlines. “Sinta Você Mesmo” (“Feel It For Yourself”), the new Curaçao branding, was rolled out in Brazil with heavy digital and social media exposure, billboards and print advertising (people still read the newspapers a lot in Brazil). We had an increase in travelers from Brazil despite the country’s tough economic times. Brazilians remained the highest spenders of all visitors to Curaçao, at an average of \$250 per person per day.



Curaçao brings innovation and creativity to its ‘travel agent educational events’ in Brazil

▶ Watch video!



Secondary Markets

Our secondary markets in South America for 2018 were Chile, Ecuador, Argentina, Venezuela and Uruguay. These smaller, but growing markets, fill the gaps in the South American market and with additional airlines seats they can enhance the growth.

At this early stage we opted for a small and targeted focus on social media campaigns and worked with representatives of Avianca and Copa Airlines in those markets.



All our campaign activities in Argentina, Chile and Uruguay were subsidized by CAP. Venezuela, a former primary market, remained in political turmoil and there was a sudden and dramatic loss in business due to the country’s dire economic status and border closing.



EUROPE



Our main focus in Europe continued to be on the Netherlands and Germany. We also conducted promotional activities in Belgium as a secondary market, when a direct TUI flight from Brussels was introduced in 2018.

The Netherlands

Curaçao was by far the biggest long-haul Caribbean destination for people in the Netherlands. We closed the year-in-review with an 11% increase compared to the previous year. This figure surpassed our 2018 target. The increase in visitors from the Netherlands was due mainly to the high demand for Curaçao as a destination. It is a well-known destination, and our airline partners KLM and TUI and tour operator partners, pushed the destination very effectively in the Dutch market.



▶ The Vakantiebeurs 2018 (Vacation Expo). [Watch video!](#)

The two main highlights for 2018 were the Vakantiebeurs (Vacation Expo) in January, and our own roadshow in September. Vakantiebeurs is the most important consumer travel expo in the Netherlands. We were joined by 13 hotel partners, which made it possible to have a strong presence at the expo. During the roadshow in September, which was conducted together with our hotel partners, we visited various cities such as Enschede, Haarlem, Breda, Hoofddorp and the Hague, and welcomed the participation of travel agents at each location. We gave presentations and information on Curaçao's tourism product and memorable experiences, to get the travel agents acquainted with all that the island has to offer.

During the course of the year we also participated in smaller tourism fairs in Brabant, Breda, and Noord-Holland (among others), and educated many travel agents in these areas.



Advertising campaigns

We conducted three campaigns based on seasonality. The first was in January, the month in which Dutch travelers do most of their vacation shopping for the entire year. The second was in May, and it focused on pushing summer sales, mostly targeting families. The third campaign was in September, and it was in this period that we introduced the new 'Feel It For Yourself' branding. The reaction to the new branding was very positive.

Press and familiarization trips

We organized press and familiarization trips throughout the year. Our biggest FAM trip was in November, when 30 fit-and-active travel agents came to Curaçao for the KLM marathon.

Germany



In 2018 the German market resumed growth due to the introduction of the nonstop Condor flight from Frankfurt, Germany to Curaçao. In March we participated at ITB in Berlin (the world's leading travel trade show and the biggest

B2B fair in Germany). As in previous years, we had a large group of 13 local partners participating in the expo with us. Several training sessions for travel agents were hosted throughout the year in Germany. We also staged a large roadshow in Germany with funding assistance from CAP. The main goal was to educate the travel agents about Curaçao and also about the new Condor flight. Together with the dive partners of Curaçao, we also participated at BOOT, the largest boat show and water sports exhibition in Germany. For this 10-day expo we also had local dive operators participate with us.



Advertising campaigns

We conducted two advertising campaigns. In the first half of the year we launched a digital campaign to push summer sales, targeted mainly towards Munich, Berlin and Frankfurt. In the second half, we

used OOH (Out-of-Home) and digital advertising as part of the launch of the new branding, “Feel It For Yourself.”



Press and familiarization trips

There were several press and familiarization trips, including a group of press and travel agents on the inaugural flight of Condor in November.

Belgium

There was a noticeable increase in arrivals from Belgium in 2018. Belgians were travelling via Amsterdam with KLM to come to Curaçao. In June 2018, TUI introduced a flight from Brussels to Curaçao, which further positively impacted the arrivals from Belgium to Curaçao.

CARIBBEAN

The Caribbean market, with Aruba and Surinam as the main focus, showed an upswing despite airlift challenges. Typically, stayover arrivals from the Caribbean spike around major events in Curaçao, such as the Tumba Festival, Carnival Parades, Curaçao North Sea Jazz Festival, and more. However, the need for sufficient flights to bring in visitors to enjoy these popular events remained an issue. In 2018 all flights to and from this region were essentially full.



[▶ InfoMart Suriname. Watch video!](#)

In June of 2018 we organized the Curaçao InfoMart in Surinam for the fifth time. It was a 3-day consumer event where CTB with partners from the private sector provided visitors with information on what to expect when visiting the island. CTB also organized a press conference to inform the Surinam population regarding the different Curaçao activities and upcoming events during the second half of the year.

In October, we also attended the consumer trade show United Caribbean Business & Trade Fair 2018 in Surinam, where over 5000 people visited the Curaçao booth. CTB's educational sessions at this event were geared towards keeping the travel trade and tour operators informed, and the sessions were a huge success.

In combination with sales calls to travel agencies, the participation at this fair provided CTB with the perfect opportunity to launch Curaçao's new international branding campaign, "Beleef het Zelf" ("Feel It For Yourself") in Surinam. The new branding campaign continued through the end of the year, at which time we participated in Surinam's hugely popular end-of-the-year street celebrations, with a fully decorated Curaçao pop-up stand at key locations.



In Aruba we organized several press conferences throughout the year and held the consumer show, Curaçao Explosion in Aruba (CEA), for the first time. The CEA kicked off with a press conference, and the Curaçao delegation, which included a number of private sector members and event organizers, showcased the Curaçao product and promoted events in Curaçao.



Curaçao Explosion in Aruba

[▶ Watch video!](#)

Frankfurt - Curaçao

„The only non-stop flight from Germany to this Caribbean Island“
Inaugural Flight November 7th, 2018



Airlift

Feel the Connectivity

The success of any destination is dependent on airlift. In 2018 we had 951 thousand seats coming to the destination.

USA

In the USA, American Airlines increased its Charlotte flight from once to twice a week during the summer, while the Miami flight was increased from two to three times a day during the second half of December. Jet Blue from New York increased its flights from three to four times per week for the summer months June, July and August.

Canada

In December, Air Canada increased its Toronto flights from two to three times a week and its Montreal flights from once to twice per week.

Netherlands

Curaçao had increased airlift capacity from the Netherlands in 2018. In October 2018, KLM increased its frequency from 11 to 14 flights per week. TUI also added two weekly flights to its schedule in December 2018, making it 11 flights a week.

Germany

For the first ten months of 2018, most Germans traveled to Curaçao on KLM via Amsterdam. On November 11, 2018, Condor began weekly nonstop service from Frankfurt to Curaçao, which immediately had a positive impact on the German arrivals.

Belgium

In June of 2018, TUI introduced a once weekly flight from Brussels to Curaçao. This flight was discontinued in October 2018. Although the flight only operated for five months, it had a positive impact on the seat capacity and the visitor arrivals from Belgium for 2018.

Colombia

The number of Colombian seats grew significantly in 2018. Avianca expanded its flight schedule from seven times per week to 11 times per week. The 11 flights per week from Bogotá, Colombia to Curaçao had their positive impact on Colombian arrivals.

Caribbean

The challenge of intra Caribbean airlift continued in 2018 and the situation was made worse by the continued deterioration in Insel Air's performance. Winair started flying to Curaçao from Aruba in 2018, and by November it had switched to a larger ATR aircraft. Divi Divi Air also started flying to and from Aruba in 2018. In addition, Air Century began its service from Dominican Republic to Curaçao in 2018.

Divi Divi Air



▶ Watch video!

Air Century



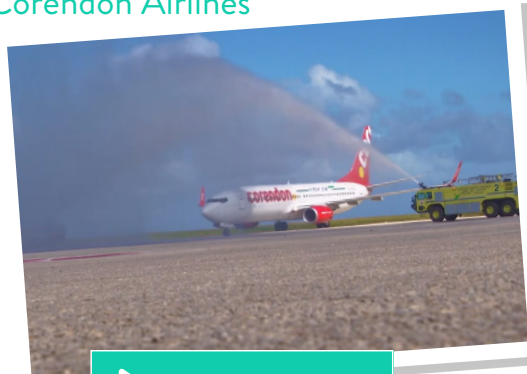
▶ Watch video!

Brazil

Towards the end of 2018, we welcomed a new weekly nonstop charter flight from São Paulo to Curaçao on Sundays, and returning on Saturdays. These charters were a partnership between Corendon Airlines and Divi Divi Air, and generated a lot of awareness for Curaçao in the Brazilian market.

Another airline partner for Curaçao from Brazil is Copa Airlines. In July of 2018 Copa increased its frequency from four flights a week to daily flights from its Panama hub into Curaçao. Additionally, it switched to a larger aircraft for its peak flights.

Corendon Airlines



▶ Watch video!



Tourism Product

Feel the Upgrade

Training Programs

We rolled out several training programs to educate participants and equip them with the required skills and knowledge to excel in the tourism industry. In 2018, three types of courses were offered:

Customer Service Course

In conjunction with CHATA, CTB organized a customer service course to improve customer service in our hotels. The 162 hospitality workers who completed the course were mostly hotel front desk and back office personnel, and they indicated that the course was of high quality and exceeded their expectations.



▶ Watch video!



Tourism Safety Course

The Tourism Safety course was offered to different persons who are either directly or indirectly involved on a daily basis with the safety of tourists and the community at large. The aim of the course was to raise awareness of the importance of tourism safety & security. For the participants, this was an opportunity to hone their skills and learn how to handle certain safety aspects, such as terrorism and other criminal acts, and how to safely handle their guests in potentially dangerous situations.

The course was delivered by Dr. Peter Tarlow, an international expert in the area of crime and terrorism for the tourism industry.



Tourist Guide Course

A Tourist Guide course was provided by CTB in close collaboration with Reda Sosial and the Ministry of Social Development, Labor & Wellbeing. Fourteen persons completed this course successfully. Those persons who completed the course received the internationally recognized Blue Badge.

▶ Watch video!

Audit Certifications

In 2018 CTB, together with the Minister of Economic Development, handed out certificates to four lodging establishments and seven diving operators after they successfully passed an audit program established by CTB in close collaboration with the Curaçao Innovation & Technology Institute (CITI).



▶ Watch video!



Kòrsou ta Dushi

Our community awareness program “Kòrsou ta Dushi. Bib’é. Stim’é.” (Curaçao is Dushi. Live it. Love it.), continued during 2018 and we participated with this theme in a number of major events like Carnival, the Tumba Festival, Seú and Drag Race events.



A new promotional and educational cartoon character called “Pipita Sabí,” (Smart Seed) was created to enlighten our community and raise further awareness of tourism. We also produced a promotional video series on social media called “Bo Tambe Ta Turismo,” (You are Tourism too), to further raise awareness on the role and importance of tourism.



On October 30th, CTB and CHATA launched the one-minute documentary series ‘Tourism for ALL’. The documentary consists of several one-minute videos showcasing the benefits of tourism for all of us. In the first video Mr. Charles Merencia, bellboy at the Avila Beach Hotel, explains what he likes most of his job and why it is important to value our guests and treat them nicely.

Through these short videos CTB and CHATA intend to inspire and motivate everyone who benefits directly or indirectly from the tourism sector. The main message is that tourism is for all of us, and that we should work together to achieve more growth in this sector.



 [Watch video!](#)

National Tourism Conference

World Tourism Day (WTD), was celebrated on September 27, and the theme for 2018 was “Tourism and Digital Transformation.” The main purpose of the WTD is to raise awareness of cultural, economic, political and social values.

Related to the WTD celebration, we held our first National Tourism Conference on September 26-27 with the theme, “Pursuing Sustainable Growth in Tourism through Meaningful, Cutting-edge Transformation.”

The conference was organized by CTB, in collaboration with the Ministry of Economic Development, CHATA, CPA and Bureau Telecommunicatie & Post (BT&P).

The most important goal of the National Tourism Conference was to consolidate plans for sustainable growth in tourism by bringing meaningful and modern transformation throughout our sector, in order to broaden the economic benefits for the majority of our people.

During the conference twelve different topics were addressed by six international speakers, three local keynote speakers and nine local & international moderators. There was a combination of main sessions for the larger public and smaller breakout sessions to allow for more in-depth discussions in small groups. The conference was very well attended by over 300 participants from both public and private sector partners, who indicated that it was a good initiative, and should be organized again in the future.



Experiential Travel

Experiential travel engages visitors in a series of authentic, memorable travel activities that are personal and engaging the senses. In April 2018 we organized for the second time a workshop and public presentation on this concept of experiential travel. During the first workshop in 2016, four organizations participated and at the 2018 workshop, ten organizations signed up to receive assistance and coaching from Judy Karwacki, a well-renowned tourism expert, who conducted this event for the second time. CTB was delighted with the ten projects that were presented in 2018 by Museo Tula, Victor Bartholomeus Museum, Landhuis Dokterstuin, Aquafari, CurAloe Eco City, 2nd Life Curaçao, Integra Natural, Serena's Art Factory and our host venue, Landhuis Bloemhof. A follow-up was also done for the four local companies that had participated in the previous workshop of 2016, and assistance was provided where required.

Year Planner

As usual, our popular year planner was printed and distributed again. The theme for the 2018 year planner was Monuments, and we managed to print 2500 copies which were distributed to the general public, especially among schools.

Beaches

Renovation and maintenance of the beaches remained a priority in 2018. There was ongoing cleanup, maintenance and upgrading projects in collaboration with other stakeholders. This cleanup and maintenance was intensified when we were confronted with the sargassum seaweed that had washed ashore. This prevalence of seaweed can be dangerous for both human health and marine life, and therefore also for our tourism industry.

Safety & Security

CTB continued to support the Tourist Police (known as 'Politur') during 2018. The main responsibility of Politur is to look after the welfare of tourists while they are in Curaçao. During the year, CTB had meetings with all the Consulates on the island, and agreements were made with Politur and the Victim Support organization to assist with tourist complaint handling. CTB furthermore contributed in providing security at some beaches and nature parks during the course of the year.



Development

Feel the Progress

Marie Pampoen Development

The Marie Pampoen boulevard has become indispensable to our community, with many pedestrians making use of the area for recreation, relaxation and outdoor workouts. The Marie Pampoen Recreational Area Development Project is an initiative of three government ministries: the Ministry of Economic Development, together with the Ministry of Traffic, Transport and Urban Planning and the Ministry of Public Health, Environment and Nature. The development of this project is coordinated by CTB, according to an agreement with the Government, which provides the funding.

In 2018, CTB started the second phase of the Marie Pampoen project, with the construction of a new sports complex. This new facility includes a building with office space, a snack bar, a terrace, dressing rooms and toilets, as well as a multifunctional basketball and volleyball court, two “bollas criollas” (boules) fields and an artificial-grass soccer field.

Investment Team

During 2018 a new Investment Team was installed, consisting of representatives of four government ministries (General Affairs, Economic Development, Finance and Traffic, Transportation & Urban Planning), CTB staff members and representatives of certain other government institutions. The Investment Team’s tasks are to gauge progress, find solutions, identify opportunities and work together to tackle new issues.

The multi-disciplinary nature of the team, which holds a certain level of authority and funding in order to execute its mission, created an effective way to move projects forward. Meetings with a steering committee of Ministers were held every two weeks, keeping the communication lines short.



Zakito Development

The goal of this government initiative is to arrive at a vision and development plan for the Zakito area that runs along the waterfront between the cruise terminal at Rif and the World Trade Center. The Zakito Development committee was chaired by CTB as of May 2018.

Together with representatives of the Ministry of Economic Development, Ministry of Traffic, Transport & Urban Planning and Ministry of Health, Environment & Nature, the committee, with the assistance of a consultant, created a vision plan for the area. In December 2018, the Council of Ministers approved the plan for development of the Zakito area. The Council made the committee responsible for the implementation of the plan, which includes a balanced mix of visitor accommodations and nature, together with residential and recreational possibilities for both tourists and locals.

Manpower Planning

We were also involved in a committee called Manpower Planning. The goal of this committee was to analyze the demand and supply of the labor market, specifically in terms of the tourism workforce. In 2018 the labor demand was examined and going into 2019 a labor supply research was in progress.



Balanced Score Card

Throughout 2018 we monitored the activities of all our departments through a balanced scorecard system, commonly referred to as BSC. By implementing the BSC we managed to analyze the daily tasks of our departments, in order to increase efficiency to ensure that strategic targets were met.

Tourism Barometer

We create a tourism barometer every four months to keep track of the most essential indicators for our tourism industry. These indicators are: the macro economic performance, accommodation performance, market performance, cruise performance, air access, room inventory and product development. Based on the evaluations of these indicators, tourism's contribution to the economy measured 10.6% in 2018 compared to 2017.

Tourism Master Plan



In 2018, CTB continued with the implementation of the Tourism Master Plan (TMP), still striving for a tourism boost to further enhance economic growth. However, due to budget constraints, the TMP targets had to be adjusted and the main priority was shifted to focus on getting financial support for the plan. Consequently, we managed to implement the projects that were possible within the limited budget available. The TMP focuses on collaboration between the stakeholders, namely the Government, CTB, CHATA, CAH, CAP and CPA. This collaboration is necessary in order to define the responsibilities of each party, and streamline their efforts to make sure the plan is executed accordingly.



Finance Department

Financial performance

In 2018 CTB confronted some financial challenges, primarily influenced by an inconsistent cash flow, which affected the organization's ability to implement competitive marketing initiatives in a timely manner. This in turn, had an impact on CTB's relationship with our international business partners. On a more positive note, in 2018 we concluded all the preparations to launch a new accounting software, to streamline CTB's accounting and financial data processing. This will lead to a fully digitalized accounting environment which will make reporting a lot more efficient.

Statement of Comprehensive income for the year ended December 31, 2018

Stated in Netherlands Antilles Guilders

	NOTES	2018	2017
REVENUES			
Revenue from Government (Grant)	10	19,451,365	20,097,600
Revenue room, tourism sales tax collection	10	17,551,771	17,944,828
Other revenue	11	260,975	2,342,969
		<u>37,264,111</u>	<u>40,385,397</u>
EXPENSES			
PAYROLL AND OPERATING EXPENSES			
Personnel expenses	12	6,260,041	6,103,996
Supervisory Board expenses	20	194,582	148,862
Operating expenses	13	1,946,736	1,573,615
Depreciation	5	148,060	157,599
		<u>8,549,419</u>	<u>7,984,072</u>
SALES AND MARKETING EXPENSES			
	14	<u>19,583,457</u>	<u>19,298,244</u>
OTHER TOURISM PROJECTS			
Cruise tourism		5,600	24,287
Market research		291,748	480,272
Third party initiative contributions	15	2,352,404	1,354,031
Product Development	16	1,886,351	2,337,385
Strategic Tourism Management	17	6,204,044	8,080,003
		<u>10,740,147</u>	<u>12,275,978</u>
OPERATING PROFIT (LOSS)			
		<u>(1,608,012)</u>	<u>827,103</u>
Currency exchange rate difference	18	79,289	379,500
Financing costs – net	19	295,357	252,003
PROFIT (LOSS) FOR THE YEAR			
		<u>(1,983,558)</u>	<u>195,600</u>
OTHER COMPREHENSIVE INCOME FOR THE YEAR			
		--	--
COMPREHENSIVE INCOME (LOSS) FOR THE YEAR			
		<u>(1,983,558)</u>	<u>195,600</u>

Tourist sales tax

CTB hired the services of the Tax Accounting Office of the government, Stichting Belasting-accountantsbureau (SBAB), to perform on-site observations and book reviews related to the tourist sales tax compliance. This implies that the assessment team appointed by SBAB has the authority by law to approach and audit accommodations, which do not comply with the Sales Tax Legislation. The assistance provided by SBAB in 2018 helped to improve tax compliance and increase the sales tax collections.



Feel It!



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