



TOURISM PERFORMANCE 2020

TOTAL STAYOVER
ARRIVALS

174,871

DAY
TRIPPERS

5,338

TOTAL CRUISE
ARRIVALS

256,033

TOTAL VISITOR
NIGHTS

1.7 million

AVERAGE HOTEL
OCCUPANCY

34.2%

ECONOMIC IMPACT
(DIRECT + INDIRECT) INCL. CRUISE

579 million US\$

HOW WAS THE YEAR 2020?

We look back at a strong start of 2020 where 62% of all stayover arrivals were welcomed in the first three months. The introduction of travel restrictions started in March 2020, because of the Covid-19 pandemic. The travel restrictions began to be lifted mid-June with the Dutch Caribbean islands followed by Europe on July 1, 2020.

Curaçao welcomed altogether during the year 2020 **436,242** tourist arrivals. The Curaçao Ports Authority recorded **256,033** cruise arrivals, while the Curaçao Tourist Board registered **174,871** stayover visitors who spent **1.7 million** nights in Curaçao. On average, the stayover visitors spent **9.4** nights per person in 2020. Smith Travel Research reported an average occupancy of **34.24%** during this period accompanied by an average daily rate of **\$ 135.31**. The Ministry of Economic Development together with CTB calculated the total economic impact (direct + indirect) including cruise tourism at **579** million US \$ in 2020 using the Turistika Model.



VISITOR ARRIVALS

ARRIVAL COUNT	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	SUMMARY
2020	45,691	44,198	18,596	210	217	947	8,195	9,227	10,420	13,556	13,705	9,909	174,871
2019	44,156	41,148	41,866	40,289	36,386	33,927	37,249	38,933	32,510	34,526	38,159	44,534	463,683
% change	3%	7%	-56%	-99%	-99%	-97%	-78%	-76%	-68%	-61%	-64%	-78%	-62%



WHERE DID OUR VISITORS COME FROM?



The 2020 shows a decrease of 62% stayover arrivals. In total 174,871 stayover visitors travelled to Curaçao. In 2019, we welcomed 463,683 stayover visitors during this same period.

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	2020	2019	CHANGE
CANADA	4,258	3,922	1,822		3	3	13	23	34	32	43	137	10,290	22,100	-53%
USA	8,514	8,778	3,586	82	49	71	58	91	135	122	200	960	22,646	74,050	-69%
TOTAL NORTH AMERICA	12,772	12,700	5,408	82	52	74	71	114	169	154	243	1,097	32,936	96,150	-66%
BRAZIL	1,054	886	345				53	36	74	113	1	6	2,568	13,446	-81%
COLOMBIA	3,170	2,664	819		4	29	9	8	12	14	16	30	6,775	30,090	-77%
OTHERS SOUTH AMERICA	1,865	1,914	741	73	68	187	111	110	94	70	22	147	5,402	29,122	-81%
TOTAL SOUTH AMERICA	6,089	5,464	1,905	73	72	216	173	154	180	197	39	183	14,745	72,658	-80%
CARIBBEAN	2,689	3,090	1,099	30	13	353	907	483	83	168	555	424	9,894	40,133	-75%
GERMANY	1,612	1,392	936			1	158	291	358	358	231	306	5,643	20,821	-73%
NETHERLANDS	18,862	17,801	7,602	23	53	126	6,372	7,518	8,649	11,978	11,917	7,092	97,993	193,962	-49%
OTHERS EUROPE	2,653	2,675	1,079	1	7	69	311	413	481	385	361	356	8,791	29,060	-70%
TOTAL EUROPE	23,127	21,868	9,617	24	60	196	6,841	8,222	9,488	12,721	12,509	7,754	112,427	243,843	-54%
OTHERS	1,014	1,076	567	1	20	108	203	254	500	316	359	451	4,869	10,899	-55%
SUMMARY	45,691	44,198	18,596	210	217	947	8,195	9,227	10,420	13,556	13,705	9,909	174,871	463,683	-62%

MARKETS BY REGION



HOW MANY NIGHTS DID THEY STAY?

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	2020	2019	CHANGE
NORTH AMERICA	100,965	95,371	38,005	2,573	444	280	927	1,140	1,584	3,488	3,226	10,986	258,989	672,080	-61%
SOUTH AMERICA	43,497	39,308	13,462	137	158	306	951	702	1,329	1,310	467	1,330	102,957	522,605	-80%
CARIBBEAN	13,219	17,385	6,202	116	92	1,345	4,600	2,287	550	1,188	3,422	2,573	52,979	225,412	-76%
EUROPE	277,149	238,316	104,101	309	903	2,139	98,201	98,474	109,953	139,430	141,867	108,108	1,318,950	2,681,737	-51%
OTHERS	2,537	3,049	1,470	0	0	87	677	1,117	1,026	1,927	1,459	2,957	16,306	30,088	-46%
SUMMARY	437,367	393,429	163,240	3,135	1,597	4,157	105,356	103,720	114,442	147,343	150,441	125,954	1,750,181	4,131,922	-58%



WHAT IS THE AVERAGE NIGHT SPENT PER PERSON?

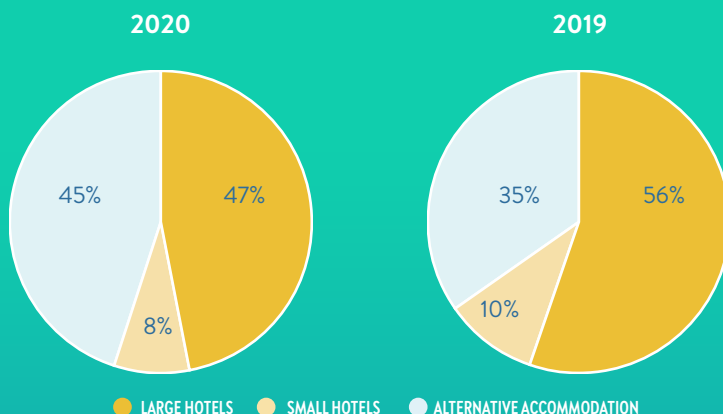
	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	2020	2019	%CHANGE
NORTH AMERICA	7.6	7.1	6.5	30.8	3.3	3.8	13.1	9.5	9.4	22.6	13.2	9.5	7.5	6.6	15%
SOUTH AMERICA	7.0	7.0	6.7	1.8	1.8	1.1	5.2	3.8	7.2	7.4	11.8	6.7	6.8	7.0	-3%
CARIBBEAN	3.9	4.3	4.4	0.0	4.8	0.9	2.7	1.6	4.3	6.0	5.7	5.1	3.9	4.5	-13%
EUROPE	11.1	9.4	9.3	9.5	5.5	4.3	14.5	11.7	11.3	10.8	11.4	13.6	11.1	9.4	18%
OTHERS	2.5	2.8	2.5	0.0	0.0	0.8	3.4	4.4	2.0	6.1	4.1	6.5	2.9	2.7	22%
SUMMARY	9.0	7.9	7.8	13.7	3.2	1.9	12.7	10.8	10.7	10.8	11.1	12.4	9.4	7.8	21%

WHERE DID OUR VISITORS STAY?



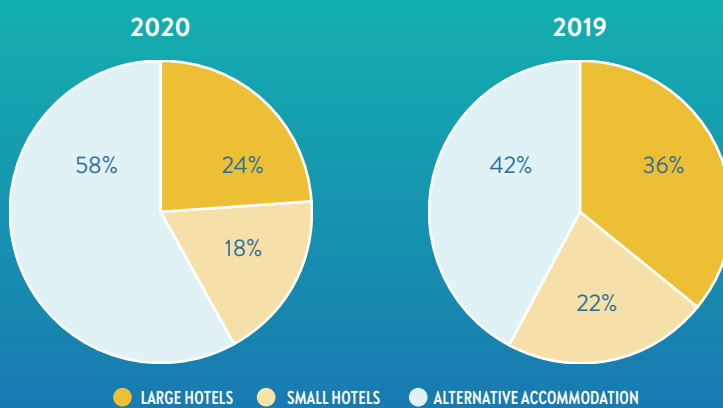
NORTH AMERICA

	2020	2019
LARGE HOTELS	47%	56%
SMALL HOTELS	8%	10%
ALTERNATIVE ACCOMMODATION	45%	35%
SUMMARY	100%	100%



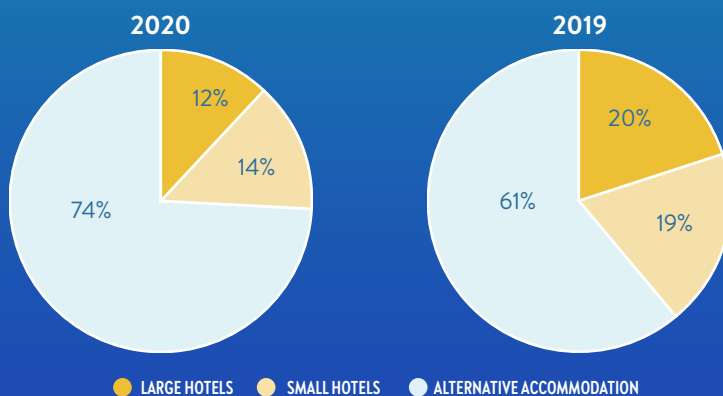
SOUTH AMERICA

	2020	2019
LARGE HOTELS	24%	36%
SMALL HOTELS	18%	22%
ALTERNATIVE ACCOMMODATION	58%	42%
SUMMARY	100%	100%



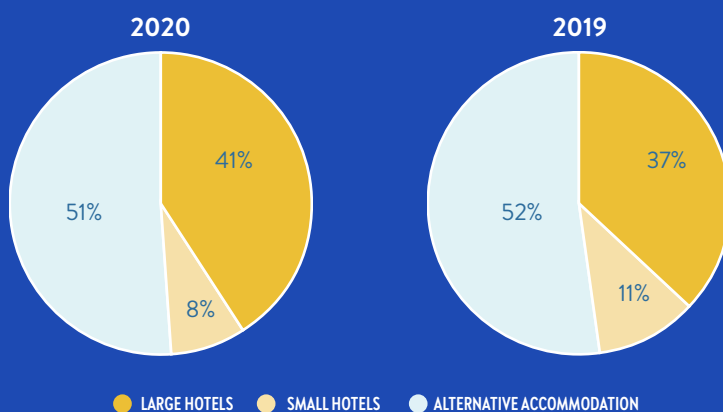
CARIBBEAN

	2020	2019
LARGE HOTELS	12%	20%
SMALL HOTELS	14%	19%
ALTERNATIVE ACCOMMODATION	74%	61%
SUMMARY	100%	100%



EUROPE

	2020	2019
LARGE HOTELS	41%	37%
SMALL HOTELS	8%	11%
ALTERNATIVE ACCOMMODATION	51%	52%
SUMMARY	100%	100%



CURAÇAO HOTEL PERFORMANCE IN 2020



Occupancy

2020	2019
34.24%	72.06%
-52%	



Average Daily Rate (ADR)

2020	2019
\$135.31	\$158.90
-15%	



Revenue per Available Room (RevPAR)

2020	2019
\$54.13	\$114.56
-53%	

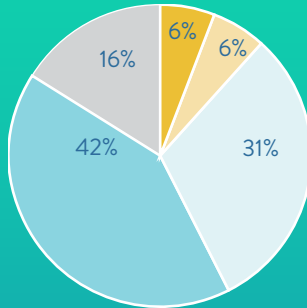
SOURCE: STR

WHAT AGES ARE OUR VISITORS?



NORTH AMERICA

0-14	6%
15-24	6%
25-44	31%
45-64	42%
65+	16%
SUMMARY	100%

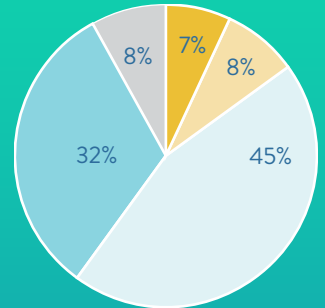


● 0-14 ● 15-24 ● 25-44 ● 45-64 ● 65+



SOUTH AMERICA

0-14	7%
15-24	8%
25-44	45%
45-64	32%
65+	8%
SUMMARY	100%

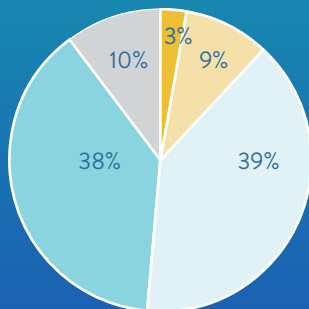


● 0-14 ● 15-24 ● 25-44 ● 45-64 ● 65+



CARIBBEAN

0-14	3%
15-24	9%
25-44	39%
45-64	38%
65+	10%
SUMMARY	100%

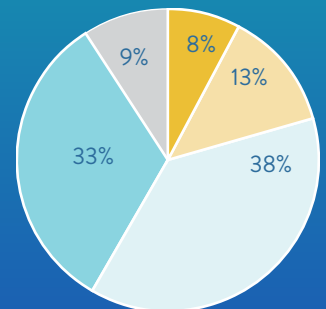


● 0-14 ● 15-24 ● 25-44 ● 45-64 ● 65+



EUROPE

0-14	8%
15-24	13%
25-44	38%
45-64	33%
65+	9%
SUMMARY	100%



● 0-14 ● 15-24 ● 25-44 ● 45-64 ● 65+

WHAT GENDER ARE OUR VISITORS?

2020

VISITORS



50%



50%

2019

VISITORS



49%



51%

DIGITAL



WEB SESSION CURACAO.COM BREAKDOWN IN 2020

2020
1,755,325 M

2019
1,980,756 M

CHANGE
-11.4%

WEB VISIT CURACAO.COM BY FOCUS MARKETS IN 2019

UNITED STATES

2020 588,439
2019 497,070
CHANGE 18.4%

COLOMBIA

2020 142,730
2019 384,566
CHANGE -63%

NETHERLANDS

2020 302,465
2019 236,941
CHANGE 28%

GERMANY

2020 173,031
2019 123,143
CHANGE 40.5%

CANADA

2020 124,756
2019 102,809
CHANGE 21.4%

BRAZIL

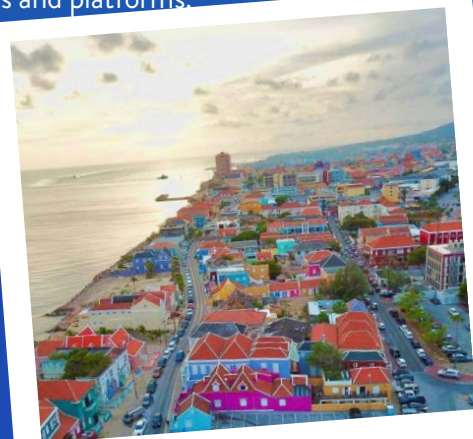
2020 69,385
2019 70,162
CHANGE -1.11%

f SOCIAL MEDIA HIGHLIGHTS 2020

- **10,5%** average growth in followers on all our Facebook and Instagram pages (Global, Latam & Brazil).
- **2,132** total posts on all our social media accounts and platforms (Facebook, Instagram, YouTube, Pinterest & Twitter).
- **4,891,354** Total engagement on all our social media accounts and platforms.

👍 MOST SUCCESSFUL POSTS

Caribbean reef octopus
viral video on Facebook
global (2,4M organic
reach, 9,9K shares)



Aerial shot of Punda
on Instagram global (45K
organic reach, 4,6K engagement)

HOW DID THE CRUISE INDUSTRY PERFORM IN 2020?



CRUISE CALLS

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	SUMMARY
2020	45	35	20	0	0	0	0	0	0	0	0	0	100
2019	51	35	31	25	13	10	14	13	11	21	38	51	313
% Change	-12%	0%	-35%	-100%	-100%	-100%	-100%	-100%	-100%	-100%	-100%	-100%	-68%



CRUISE PASSENGERS

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	SUMMARY
2020	123,316	91,873	47,846	0	0	0	0	0	0	0	0	0	256,033
2019	120,358	81,839	75,908	66,518	39,453	35,756	49,056	34,531	38,202	47,223	92,235	128,795	809,874
%Change	2%	12%	-37%	-100%	-100%	-100%	-100%	-100%	-100%	-100%	-100%	-100%	-68%

SECTORAL IMPACT IN 2020

EXPENDITURE IN 2020 (X \$1000)



TOTAL DIRECT ECONOMIC IMPACT

\$ 354 million

↓ -52%



TOTAL INDIRECT ECONOMIC IMPACT

\$ 225 million

↓ -53%



TOTAL ECONOMIC IMPACT

\$ 579 million

↓ -53%

HOW DID OUR STAYOVER VISITORS SPEND THEIR MONEY?

EXPENDITURE (X \$1000)

	2020	2019	% Change
ACCOMMODATION	116	264	-56%
RESTAURANT	86	183	-53%
GROCERIES	16	34	-53%
SHOPPING	50	83	-40%
ACTIVITIES	16	37	-57%
TRANSPORTATION	27	59	-54%
ENTERTAINMENT	12	28	-57%
OTHER	31	56	-45%
TOTAL DIRECT ECONOMIC IMPACT	354	744	-52%

SOURCE: TURISTIKA MODEL

EXPENDITURE IN PERCENTAGES



WHAT IS THE AVERAGE SPENDING PER DAY PER PERSON?



2020 IN REVIEW

	2020	2019	Changes
STAYOVER ARRIVALS	174,871	463,683	-62%
DAY TRIPPERS	5,338	19,451	-73%
CRUISE ARRIVALS	256,033	809,874	-68%
TOTAL ARRIVALS	436,242	1,293,008	-66%
TOTAL TOURIST NIGHTS	1.7 million	4.1 million	-58%
AVERAGE NIGHTS	9.4	7.8	21%
OCCUPANCY RATE	34.24%	72.06%	-52%
AVERAGE DAILY RATE	\$ 135.31	\$158.90	-15%
REVENUE PER AVAILABLE ROOM	\$54.13	\$114.56	-53%
TOTAL ECONOMIC IMPACT (DIRECT, INDIRECT + CRUISE)	\$579 million	\$1.2 billion	-53%