



TOURISM PERFORMANCE 2021

| TOTAL STAYOVER ARRIVALS | DAY TRIPPERS | TOTAL CRUISE ARRIVALS | TOTAL VISITOR NIGHTS | AVERAGE HOTEL OCCUPANCY | ECONOMIC IMPACT (DIRECT+INDIRECT) INCL. CRUISE |
|----------------------------|-----------------|--------------------------|-------------------------|----------------------------|---|
| 265,000 | 7,124 | 146,213 | 2.8 million | 51.1% | 827 million US\$ |

HOW WAS THE YEAR 2021?

Curaçao welcomed altogether during the year 2021 **418,337** tourist arrivals. It was until June 2021 that Curaçao welcomed cruise passengers again. The Curaçao Ports Authority recorded **146,213** cruise arrivals, while the Curaçao Tourist Board registered **265,000** stayover visitors who spent **2.8 million** nights in Curaçao. Overall stayover visitors started slow in the first 5 months of the year. An increase was noticeable as of June 2021, especially from our main producing country The Netherlands. Curaçao registered record-breaking number of visitors from Holland in combination with visitor arrivals from other main regions, resulting in a spectacular second half of the year. With these arrivals, the year 2021 achieved 57% of the pre pandemic arrivals of the 2019 year-round arrivals, when we welcomed 463,683 stayover visitors.

On average, the stayover visitors spent **10.8** nights per person in 2021. Smith Travel Research reported an average occupancy of **51%** during this period accompanied by an average daily rate **\$163,36**. The Ministry of Economic Development together with CTB calculated the total economic impact (direct + indirect) including cruise tourism at **827** million US \$ in 2021 using the Turistika Model.



VISITOR ARRIVALS

| ARRIVAL COUNT | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC | SUMMARY |
|------------------|--------|--------|--------|-------|-------|--------|--------|--------|--------|--------|--------|--------|---------|
| 2021 | 5,790 | 8,144 | 10,118 | 3,521 | 8,845 | 21,223 | 34,213 | 30,852 | 27,540 | 35,022 | 37,451 | 42,281 | 265,000 |
| 2020 | 45,692 | 44,198 | 18,598 | 210 | 217 | 947 | 8,195 | 9,229 | 10,420 | 13,556 | 13,705 | 9,909 | 174,876 |
| % Change | -87% | -82% | -46% | 1577% | 3976% | 2141% | 317% | 234% | 164% | 158% | 173% | 327% | 52% |



WHERE DID OUR VISITORS COME FROM?



The 2021 shows an increase of 52% stayover arrivals. In total 265,000 stayover visitors travelled to Curaçao. In 2020, we welcomed 174,876 stayover visitors during this same period.

| | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC | 2021 | 2020 | % CHANGE |
|---------------------|-------|-------|--------|-------|-------|--------|--------|--------|--------|--------|--------|--------|---------|---------|-------------|
| Canada | 121 | 27 | 38 | 21 | 36 | 58 | 69 | 72 | 67 | 589 | 985 | 1,495 | 3,578 | 10,291 | -65% |
| United states | 739 | 1,095 | 2,069 | 1,222 | 2,234 | 4,764 | 5,195 | 4,349 | 3,363 | 3,379 | 4,457 | 6,228 | 39,094 | 22,646 | 73% |
| Total North America | 860 | 1,122 | 2,107 | 1,243 | 2,270 | 4,822 | 5,264 | 4,421 | 3,430 | 3,968 | 5,442 | 7,723 | 42,672 | 32,937 | 30% |
| Brazil | 33 | 5 | 13 | 10 | 9 | 206 | 335 | 335 | 908 | 769 | 719 | 924 | 4,266 | 2,568 | 66% |
| Colombia | 194 | 148 | 278 | 142 | 209 | 647 | 590 | 655 | 711 | 1,494 | 1,676 | 2,543 | 9,287 | 6,775 | 37% |
| Others | 115 | 126 | 244 | 86 | 133 | 529 | 607 | 667 | 832 | 787 | 1,206 | 1,339 | 6,671 | 5,403 | 23% |
| Total South America | 342 | 279 | 535 | 238 | 351 | 1,382 | 1,532 | 1,657 | 2,451 | 3,050 | 3,601 | 4,806 | 20,224 | 14,746 | 37% |
| Caribbean | 456 | 449 | 544 | 211 | 470 | 1,002 | 1,625 | 1,305 | 1,285 | 1,429 | 1,620 | 1,545 | 11,941 | 9,893 | 21% |
| Germany | 191 | 372 | 1,126 | 108 | 222 | 485 | 1,034 | 1,056 | 1,063 | 1,365 | 1,216 | 998 | 9,236 | 5,643 | 64% |
| Netherlands | 3,170 | 5,180 | 4,654 | 1,134 | 4,797 | 12,148 | 22,254 | 20,108 | 17,137 | 22,713 | 23,025 | 24,064 | 160,384 | 97,996 | 64% |
| Others Europe | 475 | 458 | 655 | 375 | 426 | 908 | 1,819 | 1,607 | 1,455 | 1,855 | 1,864 | 2,339 | 14,236 | 8,790 | 62% |
| Total Europe | 3,836 | 6,010 | 6,435 | 1,617 | 5,445 | 13,541 | 25,107 | 22,771 | 19,655 | 25,933 | 26,105 | 27,401 | 183,856 | 112,429 | 64% |
| Others | 296 | 284 | 497 | 212 | 309 | 476 | 685 | 698 | 719 | 642 | 683 | 806 | 6,307 | 4,871 | 29% |
| Summary | 5,790 | 8,144 | 10,118 | 3,521 | 8,845 | 21,223 | 34,213 | 30,852 | 27,540 | 35,022 | 37,451 | 42,281 | 265,000 | 174,876 | 52% |

MARKETS BY REGION



HOW MANY NIGHTS DID THEY STAY?

| | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC | 2021 | 2020 | %CHANGE |
|---------------|--------|--------|---------|--------|--------|---------|---------|---------|---------|---------|---------|---------|-----------|-----------|---------|
| NORTH AMERICA | 11,651 | 10,025 | 18,233 | 9,149 | 15,139 | 36,642 | 38,618 | 30,996 | 25,089 | 29,454 | 40,225 | 63,678 | 328,899 | 259,028 | 27% |
| SOUTH AMERICA | 4,870 | 4,103 | 5,753 | 3,556 | 5,809 | 14,596 | 14,378 | 18,126 | 19,859 | 23,445 | 25,663 | 40,637 | 180,795 | 102,977 | 76% |
| CARIBBEAN | 3,643 | 3,075 | 3,566 | 2,277 | 3,356 | 5,593 | 10,586 | 8,530 | 8,253 | 8,852 | 8,820 | 11,394 | 77,945 | 52,975 | 47% |
| EUROPE | 60,753 | 74,537 | 82,363 | 27,983 | 70,048 | 161,564 | 334,265 | 266,475 | 232,198 | 278,866 | 292,583 | 340,205 | 2,221,840 | 1,319,080 | 68% |
| OTHERS | 2,871 | 2,634 | 3,670 | 1,521 | 2,175 | 2,917 | 3,888 | 3,567 | 4,532 | 3,815 | 3,810 | 6,926 | 42,326 | 16,306 | 160% |
| SUMMARY | 83,788 | 94,374 | 113,585 | 44,486 | 96,527 | 221,312 | 401,735 | 327,694 | 289,931 | 344,432 | 371,101 | 462,840 | 2,851,805 | 1,750,366 | 63% |



WHAT IS THE AVERAGE NIGHT SPENT PER PERSON?

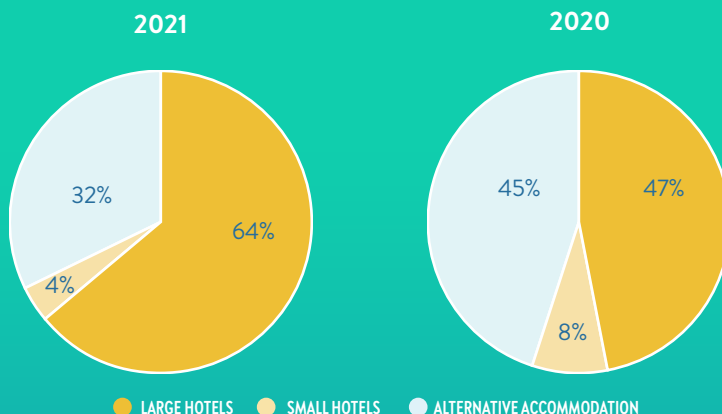
| | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC | 2021 | 2020 | %CHANGE |
|---------------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|---------|
| NORTH AMERICA | 13.4 | 9.1 | 8.6 | 7.2 | 6.5 | 7.6 | 7.3 | 7.0 | 7.3 | 7.4 | 7.3 | 8.2 | 7.7 | 7.5 | 3% |
| SOUTH AMERICA | 13.7 | 14.3 | 10.6 | 14.9 | 16.3 | 10.4 | 9.4 | 10.8 | 8.1 | 7.6 | 7.1 | 8.4 | 8.9 | 6.8 | 31% |
| CARIBBEAN | 7.7 | 6.1 | 5.9 | 9.8 | 6.7 | 4.4 | 5.8 | 5.5 | 6.0 | 5.7 | 5.0 | 7.0 | 5.9 | 3.9 | 51% |
| EUROPE | 17.4 | 13.1 | 13.4 | 17.7 | 13.5 | 12.0 | 13.4 | 11.6 | 11.9 | 10.7 | 11.2 | 12.5 | 12.2 | 11 | 11% |
| OTHERS | 9.6 | 9.3 | 7.4 | 7.2 | 7.0 | 6.1 | 5.6 | 5.1 | 6.3 | 5.9 | 5.6 | 8.6 | 6.7 | 3.3 | 103% |
| SUMMARY | 15.4 | 12.0 | 11.6 | 12.7 | 11.2 | 10.4 | 11.8 | 10.5 | 10.6 | 9.7 | 9.8 | 10.9 | 10.8 | 9.4 | 15% |

WHERE DID OUR VISITORS STAY?



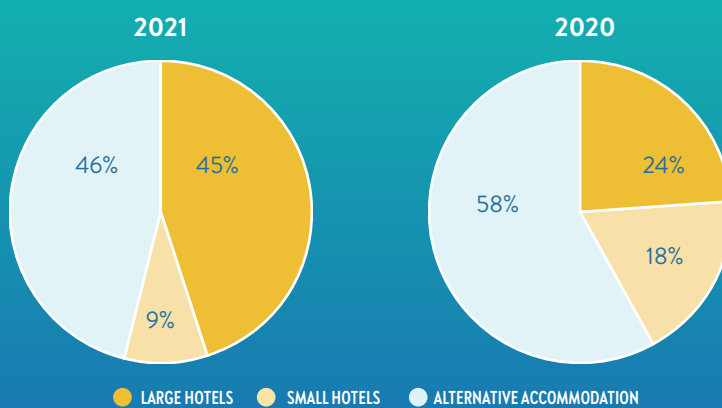
NORTH AMERICA

| | 2021 | 2020 |
|---------------------------|------|------|
| LARGE HOTELS | 64% | 47% |
| SMALL HOTELS | 4% | 8% |
| ALTERNATIVE ACCOMMODATION | 32% | 45% |
| SUMMARY | 100% | 100% |



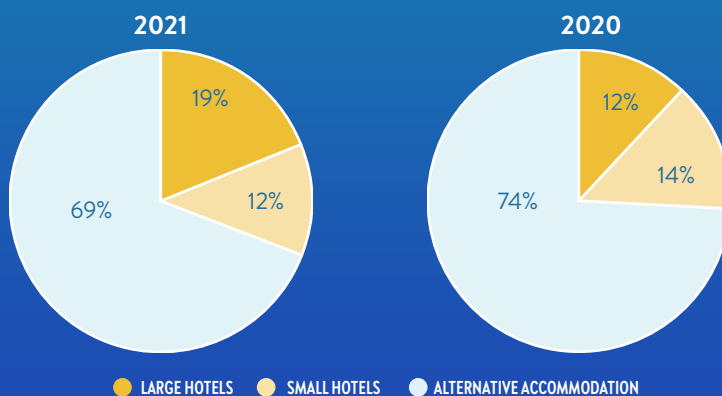
SOUTH AMERICA

| | 2021 | 2020 |
|---------------------------|------|------|
| LARGE HOTELS | 45% | 24% |
| SMALL HOTELS | 9% | 18% |
| ALTERNATIVE ACCOMMODATION | 46% | 58% |
| SUMMARY | 100% | 100% |



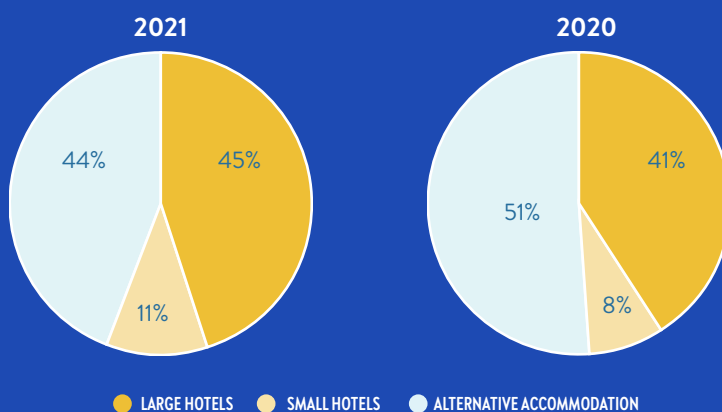
CARIBBEAN

| | 2021 | 2020 |
|---------------------------|------|------|
| LARGE HOTELS | 19% | 12% |
| SMALL HOTELS | 12% | 14% |
| ALTERNATIVE ACCOMMODATION | 69% | 74% |
| SUMMARY | 100% | 100% |



EUROPE

| | 2021 | 2020 |
|---------------------------|------|------|
| LARGE HOTELS | 45% | 41% |
| SMALL HOTELS | 11% | 8% |
| ALTERNATIVE ACCOMMODATION | 44% | 51% |
| SUMMARY | 100% | 100% |



CURAÇAO HOTEL PERFORMANCE IN 2021



Occupancy

| 2021 | 2020 |
|-------|-------|
| 51.1% | 35.4% |
| ↑ 44% | |



Average Daily Rate (ADR)

| 2021 | 2020 |
|----------|----------|
| \$163.36 | \$144.97 |
| ↑ 13% | |



Revenue per Available Room (RevPAR)

| 2021 | 2020 |
|---------|---------|
| \$88.12 | \$55.22 |
| ↑ 60% | |

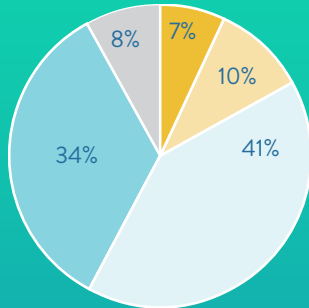
SOURCE: STR

WHAT AGES ARE OUR VISITORS?



NORTH AMERICA

| | |
|----------------|-------------|
| 0-14 | 7% |
| 15-24 | 10% |
| 25-44 | 41% |
| 45-64 | 34% |
| 65+ | 8% |
| SUMMARY | 100% |

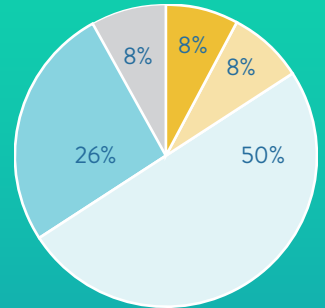


● 0-14 ● 15-24 ● 25-44 ● 45-64 ● 65+



SOUTH AMERICA

| | |
|----------------|-------------|
| 0-14 | 8% |
| 15-24 | 8% |
| 25-44 | 50% |
| 45-64 | 26% |
| 65+ | 8% |
| SUMMARY | 100% |

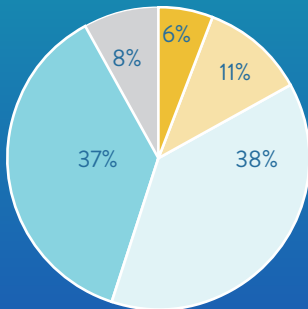


● 0-14 ● 15-24 ● 25-44 ● 45-64 ● 65+



CARIBBEAN

| | |
|----------------|-------------|
| 0-14 | 6% |
| 15-24 | 11% |
| 25-44 | 38% |
| 45-64 | 37% |
| 65+ | 8% |
| SUMMARY | 100% |

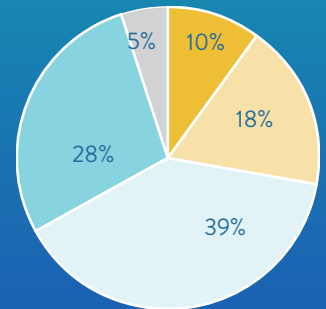


● 0-14 ● 15-24 ● 25-44 ● 45-64 ● 65+



EUROPE

| | |
|----------------|-------------|
| 0-14 | 10% |
| 15-24 | 18% |
| 25-44 | 39% |
| 45-64 | 28% |
| 65+ | 5% |
| SUMMARY | 100% |



● 0-14 ● 15-24 ● 25-44 ● 45-64 ● 65+

WHAT GENDER ARE OUR VISITORS?

2021
VISITORS



51%



49%

2020
VISITORS



50%



50%

DIGITAL



WEB SESSION CURACAO.COM BREAKDOWN IN 2021

2021
2,939,194 M

2020
1,755,325 M

CHANGE
67.44%

WEB VISIT CURACAO.COM BY FOCUS MARKETS IN 2021

UNITED STATES

2021 801,629
2020 588,439
CHANGE 36.2%

NETHERLANDS

2021 572,974
2020 302,465
CHANGE 89.4%

COLOMBIA

2021 304,484
2020 142,730
CHANGE 113.3%

GERMANY

2021 286,145
2020 173,031
CHANGE 65.4%

BRAZIL

2021 160,681
2020 69,385
CHANGE 131.6%

CANADA

2021 107,784
2020 124,756
CHANGE -13.6%

f SOCIAL MEDIA HIGHLIGHTS JAN-DEC 2021

- **20%** average growth in followers as compared to Jan-Dec 2020 on all our social media platforms
- **2,585** total posts on all our social media platforms
- **5,845,360** total engagement on all our social media platforms



MOST SUCCESSFUL POSTS

Girl in hammock post on
Facebook global
(114K organic reach,
5K engagement)



Jump in water post on Instagram global
(55K organic reach, 3K engagement)

HOW DID THE CRUISE INDUSTRY PERFORM IN 2021?



CRUISE CALLS

| | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC | SUMMARY |
|----------|-------|-------|-------|-----|-----|------|------|------|------|------|------|------|---------|
| 2021 | 0 | 0 | 0 | 0 | 0 | 3 | 6 | 11 | 7 | 8 | 29 | 43 | 107 |
| 2020 | 45 | 35 | 20 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 100 |
| % Change | -100% | -100% | -100% | 0% | 0% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 7% |



CRUISE PASSENGERS

| | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC | SUMMARY |
|---------|---------|--------|--------|-----|-----|-------|-------|--------|-------|--------|--------|--------|---------|
| 2021 | 0 | 0 | 0 | 0 | 0 | 1,586 | 7,630 | 11,850 | 9,730 | 12,605 | 41,280 | 61,532 | 146,213 |
| 2020 | 116,068 | 91,873 | 47,846 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 255,787 |
| %Change | -100% | -100% | -100% | 0% | 0% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | -43% |

SECTORAL IMPACT IN 2021

EXPENDITURE IN 2021



TOTAL DIRECT ECONOMIC IMPACT

\$ 504 million ↑ 58%



TOTAL INDIRECT ECONOMIC IMPACT

\$ 323 million ↑ 60%



TOTAL ECONOMIC IMPACT

\$ 827 million ↑ 59%

HOW DID OUR STAYOVER VISITORS SPEND THEIR MONEY?

DIRECT ECONOMIC IMPACT

| | 2021 | 2020 | % Change |
|-----------------------|------|------|----------|
| ACCOMMODATION | 190M | 114M | 67% |
| RESTAURANT | 130M | 79M | 65% |
| GROCERIES | 26M | 16M | 63% |
| SHOPPING | 38M | 30M | 27% |
| ACTIVITIES | 38M | 26M | 46% |
| TRANSPORTATION | 40M | 24M | 65% |
| ENTERTAINMENT | 19M | 12M | 58% |
| OTHER | 23M | 16M | 44% |
| TOTAL ECONOMIC IMPACT | 504M | 317M | 59% |

SOURCE: TURISTIKA MODEL

EXPENDITURE IN PERCENTAGES



WHAT IS THE AVERAGE SPENDING PER DAY PER PERSON?



2021 IN REVIEW

| | 2021 | 2020 | Changes |
|---|---------------|---------------|---------|
| Stay over arrivals | 265,000 | 174,871 | 52% |
| Day trippers | 7,124 | 5,338 | 34% |
| Cruise arrivals | 146,213 | 255,787 | -43% |
| Total arrivals | 418,337 | 435,996 | -4% |
| Total tourist nights | 2.8 million | 1.7 million | 63% |
| Average nights | 10.8 | 9.4 | 15% |
| Average occupancy rate | 51.1% | 35.4% | 44% |
| Average daily rate | \$163.36 | \$144.97 | 13% |
| Average revenue per available room | \$88.12 | \$55.22 | 60% |
| Total economic impact (direct, indirect + cruise) | \$827 million | \$520 million | 59% |