



# *Annual* REPORT 2021

CURACAO 

Curaçao Tourist Board



# *Annual* REPORT 2021



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# OPTIMISTIC OUTLOOK

Even though 2020 was challenging, key stakeholders in Curaçao's tourism industry remained optimistic. This reflected the strength of our industry, considering that the world was experiencing a difficult period, with no indication as to when the pandemic would end.

By 2021, the industry had made significant adjustments to meet the demands of the new reality. For the most part, the results have been positive. Even though total visitor arrivals did not reach 2019 levels, arrivals from our main source market surpassed pre-pandemic numbers in the second half of 2021. Looking back, 2021 was a year of Optimistic Outlook. Our achievements were underpinned by hard work as well as a spirit of resilience and a deep sense of hope. It was also a year of preparation for the future.

# DIRECTOR'S ANNUAL REVIEW

## PREPARING FOR FUTURE DEVELOPMENT

Laying a solid foundation for future growth and development was our primary focus in 2021. Towards this end, we completed a tourism master plan that calls for new policies and approaches that will strengthen the industry and lead to sustainable outcomes. We also supported the establishment of several new properties and commissioned research on critical issues in the sector. Our proactive actions and leadership are evidence of our commitment to the development of the industry and our country.

## HIGHLIGHTS

We executed several online marketing campaigns that successfully showcased Curaçao's myriad open-air activities, leading to unprecedented arrivals out of the Netherlands, where visitors who came between July and December consistently surpassed pre-pandemic numbers. Organizing PRESS, FAM, and VIP trips together with organic changes in the industry, such as the restart of previously scheduled flights, also led to the results achieved. We also took concrete steps together with other partners to clean our island and to make our community aware of the importance of keeping our island clean.

In 2021, we had several inaugural flights from Jamaica, Belgium, and Medellín, and some airlines restarted their services. We also saw construction and remodeling of several properties, to increase room capacity in 2022 and beyond.

## COMPETITIVE ADVANTAGE

Due to an increase in COVID numbers at the start of the year, travelers from the Netherlands were barred from visiting Curaçao. When restrictions were lifted, Curaçao was one of the few Caribbean destinations that Dutch travelers could visit. One reason for this was that Curaçao had very few restrictions compared to other Caribbean islands where full vaccination was required for returning nationals and tourists.

Our dedicated team worked primarily from home in 2021. They did an outstanding job with limited resources, which is why we are entering 2022 with a firm belief in our ability to achieve even better results.





# A MESSAGE FROM OUR CHAIRMAN

## UNCERTAINTY AND HOPE

The Board entered the year with a sense of hope, even though we were uncertain of how our destination would perform. With less budget available, we prepared to get the most out of 2021 and to set a foundation for unprecedented growth in 2022. Fortunately, 2021 far exceeded our most optimistic predictions.

## GETTING THE ORGANIZATION READY

In 2021, we started the recruitment process for the position of Regional Manager for North America. This position is a top priority because of the importance of this market.

## STRATEGIC DIRECTION

While all previous masterplans were prepared with the assistance of international consultants, the new masterplan was created by local experts with input from stakeholders. The masterplan will be presented to the Council of Ministers and the Parliament of Curaçao before its implementation.

## COLLABORATION AND CONTRIBUTION

CTB made significant contributions to various local projects in 2021, including aiding with the optimization of the passenger locator form, which was introduced in 2020. The digital processing of immigration and COVID-related health information of incoming visitors is an important

achievement, especially because some Caribbean islands still require visitors to manually fill out their forms. Additionally, the Board was very intentional about building strong relationships with stakeholders in government and the hospitality and tourism industry, particularly with the Ministry of Economic Development and the Curaçao Hospitality and Tourism Association (CHATA). To further improve the collaboration with CHATA, we will work towards a Memorandum of Understanding (MOU) between the Curaçao Tourism Development Foundation and CHATA.

## GOVERNANCE STRUCTURE

The governance structure of the Curaçao Tourism Development Foundation is being reviewed.

## OUTLOOK 2022

Even though the organization was forced to work with a limited budget, the Supervisory Board is pleased with the developments and results achieved in 2021. The Board looks forward to the appointment of the remaining members in 2022 and will continue to collaborate with CTB's management.

At the very least, we hope to maintain the number of visitors out of Europe and to grow the North American and other regional markets in South America and the Caribbean.

# ACCURATE FORESIGHT

## TOURISM PERFORMANCE 2021

Curaçao welcomed 265,000 stayover visitors in 2021 which exceeded CTB's original target of 260,000. Stayover arrivals were below projections in the first 5 months of the year. The numbers began to increase in June 2021, particularly from the Netherlands, our main producing country. In some months, despite challenges caused by COVID-19, we achieved record-breaking numbers of Dutch visitors. This magnificent performance, coupled with visitor arrivals from other main regions, resulted in a spectacular second half of the year. Overall, we achieved 57% of the pre-pandemic arrivals, compared to 2019, when we welcomed 463,683 stayover visitors. The graph below shows the monthly stayover arrivals in 2019, 2020, and 2021.

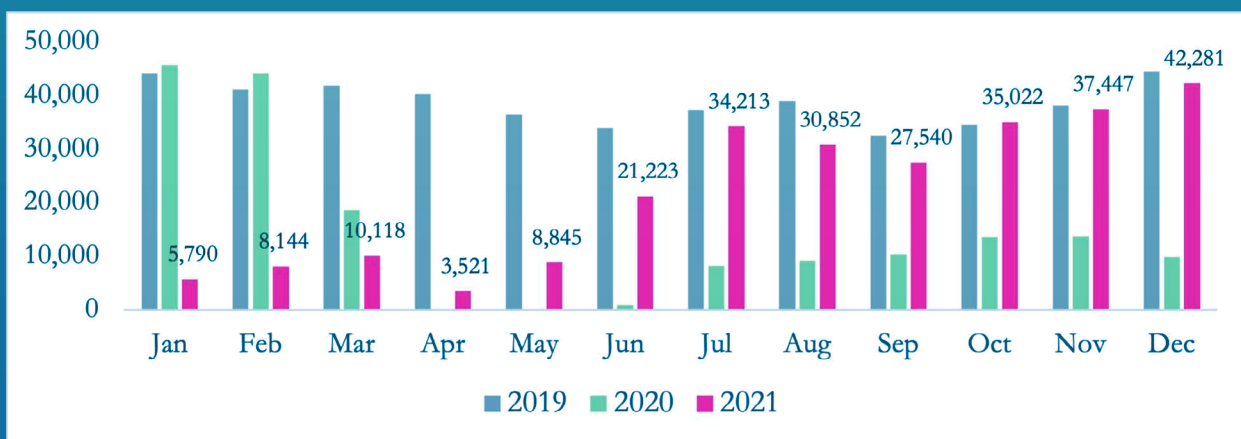


Figure 1 Monthly stayover arrivals in 2021 compared to 2020 and 2019



We welcomed 183,856 European visitors (69%) in 2021. Of these visitors, 160,384 resided in the Netherlands. After visitor numbers started to increase in June, we welcomed over 20,000 Dutch visitors in some months. This was our first time welcoming so many visitors from the Netherlands in a single month. The graph below shows the number of Dutch arrivals per month in 2021, compared to 2019.

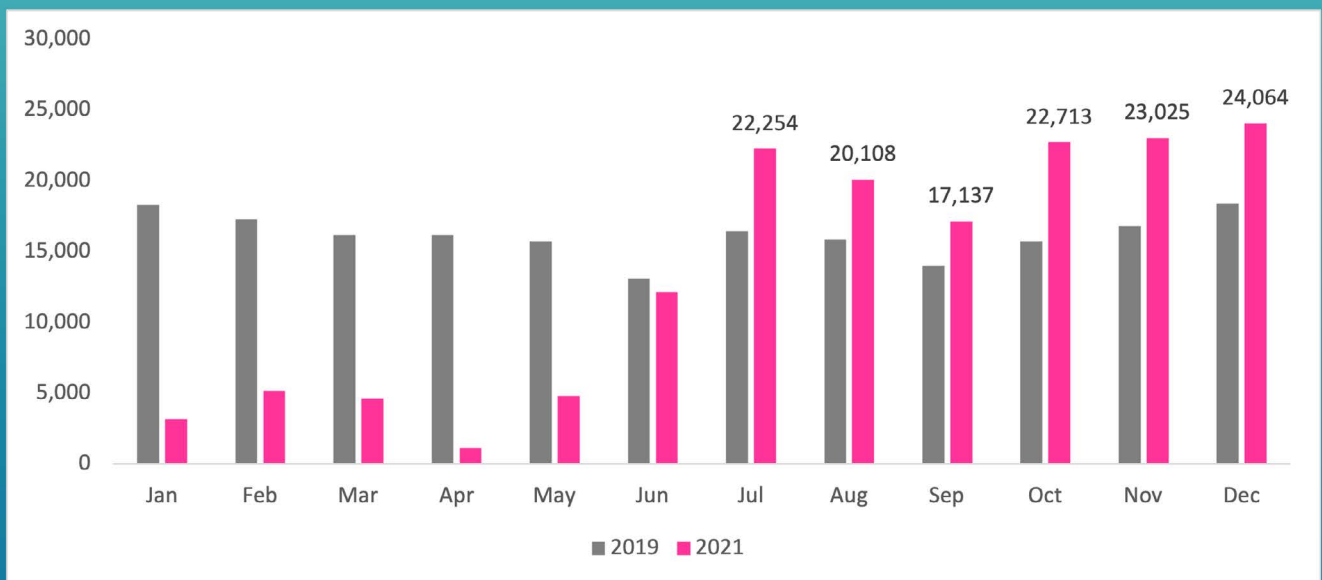


Figure 2 Monthly Dutch stayover visitors in 2021 compared to 2019

As a result of the huge number of arrivals from the Netherlands in the second half of the year, we were able to recover from losses during the first 5 months. Other source markets also recovered in the second half of the year. Our top source markets in 2021 were the Netherlands, the United States of America, Colombia, Germany, Aruba, Brazil, and Belgium.

The table below shows the number of visitors and market share of the top 7 source markets in 2021 compared to 2019.

Country	Number of Visitors 2021	Market share 2021	Number of Visitors 2019	Market share 2019
The Netherlands	160,384	61%	193,964	42%
United States of America	39,096	15%	74,050	16%
Colombia	9,288	4%	30,090	6%
Germany	9,236	3%	20,820	4%
Aruba	5,371	2%	13,787	3%
Brazil	4,267	2%	13,446	3%
Belgium	4,129	2%	7,265	2%
Others	33,235	11%	110,262	24%
<b>Total</b>	<b>265,000</b>	<b>100%</b>	<b>463,684</b>	<b>100%</b>

Figure 3 Number of visitors and market share of top 7 countries in 2021 compared to 2019

Fifty-three percent (53%) of all the tourists who traveled by air to Curaçao in 2019 were Europeans, which was 16% less than the 69% in 2021.

Country	Number of Visitors 2021	Market share 2021	Number of Visitors 2019	Market share 2019
Europe	183,856	69%	243,844	53%
North America	42,674	16%	96,150	21%
South America	20,226	8%	72,659	16%
Caribbean	11,953	5%	40,135	9%
Others	6,307	2%	10,896	2%
<b>Total</b>	<b>265,000</b>	<b>100%</b>	<b>463,684</b>	<b>100%</b>

Figure 4 Number of visitors and market share by region in 2021 compared to 2019

North America accounted for 42,674 visitors or 16% share of all stayover arrivals to Curaçao. Of this number, 39,096 (92%) visitors came from the United States of America. Canadian authorities imposed strict travel restrictions and thus business out of Canada did not resume in 2021.

Traffic out of the South American region increased gradually starting in June. In total, we welcomed 20,226 South Americans, of which 46% came from Colombia and 21% from Brazil.

There were 11,943 stayover visitors from the Caribbean in 2021, primarily from the islands in the Dutch Kingdom (9,023).



## AVERAGE NIGHTS

Compared to 2019 (7.8 nights), visitors spent 3 additional nights in Curaçao. This information is significant because it shows fewer visitors is not necessarily an indication of shorter stays.

Region	Average nights 2021	Average nights 2019	% Change
Europe	12.2	9.4	30%
North America	7.7	6.6	17%
South America	8.9	7.0	27%
Caribbean	5.9	4.5	31%
Others	6.7	2.7	148%
<b>Total</b>	<b>10.8</b>	<b>7.8</b>	<b>39%</b>

Figure 5 Average visitor nights by region in 2021 compared to 2019

## VISITOR NIGHTS

A total of 2,851,851 visitor nights were registered in 2021. Tourists out of Europe spent 2.2 million nights in Curaçao. North American visitors spent 328,000 nights and South Americans spent 180,000. Visitors from the Caribbean region spent 77,000 nights.

## CRUISE TOURISM

The cruise business resumed gradually and Curaçao welcomed the first cruise passengers in June. At the end of the year, 98 cruise ships had docked in Willemstad with 146,231 visitors.

## RESEARCH PROJECTS

In 2021, CTB continued to review data to educate and inform our organization, stakeholders, and local media. This data was used to support many projects, including the development of surveys, making forecasts, preparing presentations and data insights. We also launched the active Power BI dashboard for local stakeholders, enabling industry personnel to monitor key tourism data from a web dashboard at any time. We also set up a Customer Service Software called Zendesk to serve our customers better, and during the pandemic we played a lead role in supporting inbound passengers with various customer-related questions regarding the entry forms.

Click here to **download** the State of the Industry Report 2021.



# CURACAO.COM BREAKDOWN

## WEB SESSION CURACAO.COM BREAKDOWN

2020	2021	Diff
1,755,325	2,939,194	67.44%

## WEB VISIT CURACAO.COM BY MARKETS

USA	801,629
Netherlands	572,974
Colombia	304,484
Germany	286,145
Curaçao	214,906
Brazil	160,681
Canada	107,784
Belgium	58,695

## OVERVIEW:

In May last year we started reviewing and updating the look and feel of curacao.com. As part of this process, we are amending the contents to reflect changes in the industry caused by COVID-19.

Key areas of the site including the Home, Travel Update, Why Curacao, and Where to Stay pages have already been updated. We have also created a new page for regional travel campaigns that facilitate the quick update of contents based on changes to specific campaigns/countries.



# NOTEWORTHY ACHIEVEMENTS

## SOCIAL MEDIA AND OTHER PROJECTS

- Dedicated web care for information provision and social listening
- Expanded presence to other platforms e.g., TikTok and Pinterest
- Increased activity on Latam social media pages
- Finalized the content creation collaboration for 'list' videos highlighting the best things to do in Curaçao
- Initiated several collaborations with locals for content creation
- Initiated the development of the Curaçao Travel Guide App

## EMAIL MARKETING

Cleaned up and added new contacts to our email lists. Our global email contacts grew by 39.2% Increased the frequency of communication with our partners in our main markets

## PAID ADVERTISEMENT

- Adjusted look and feel and tone-of-voice
- Increased our online presence in all focus markets prior to the resumption of travel
- Completed phase segmentation of UTM coding optimizations (web analytics tracking) for travel journey
- Expanded the use of Arrivalist trackers to all display campaigns (global)

## RESULTS: SOCIAL MEDIA PLATFORMS

Total paid impressions on Facebook + Instagram:  
**167,415,576**

Total impressions on Facebook + Instagram:  
**197,442,910**

## TOTAL ORGANIC IMPRESSIONS ON ALL SOCIAL MEDIA PLATFORMS

Facebook, Instagram, Twitter, YouTube, Pinterest and TikTok:

**33,298,282**

### FACEBOOK

Number of followers: 477,066

- Global: 269,633
- Latam: 90,685
- Brazil: 116,748

Number of posts : 1,011

Engagement : 4,477,488

Organic impressions : 19,229,228

### INSTAGRAM

Number of followers: 144,482

- Global: 77,790
- Latam: 38,544
- Brazil: 28,148

Number of posts : 892

Engagement : 509,216

Reels video views : 887,208

Organic impressions : 10,798,106



# MARKETING

## OVERALL RECAP

With rising COVID-19 cases at the beginning of 2021, several countries imposed restrictions that prevented people from entering or traveling outside their borders. Curaçao experienced our second wave of infections in March and April, which was exacerbated by a lack of space in the intensive care unit of our major hospital. Because of these developments, the Government of Curaçao reinstated the lockdown on March 24. These necessary measures had a negative impact on the hospitality and tourism sector.

## GLOBAL COMMUNICATIONS

After using the same ‘Welcome Back’ message in 2020 and for much of 2021, we decided to update our messaging in all markets as consumer confidence grew and travel restrictions were lifted. We made these changes, as well as adjustments, to our branding strategies in response to current realities. Although the direction shifted, the spirit of our 2018 global marketing campaign—its colors and vibrancy—is present in the new strategy, which shows a more true-to-life depiction of the amazing people, places, and things Curaçao has to offer. This campaign presents a clearer, quite literal divide between the imagery—which consists of bold landscapes, portraits, and lifestyle scenes—and the messaging, which captures the one-of-a-kind ‘feeling’ of the original campaign while also acknowledging the current state of the world.

Naturally, many of the press releases and e-blasts we disseminated in 2021 highlighted Curaçao’s efforts to thrive in the new global environment. We regularly informed all our markets about adjustments in entry requirements and other important developments such as the fact that EU travelers were able to enter Curaçao hassle-free with their EU Digital COVID Certificate. We also hosted numerous influencers and journalists, who visited many key sites and subsequently promoted Curaçao as a safe destination to visit during the pandemic. As for marketing communications, the main emphasis was placed on digital marketing, with an ‘always on’ strategy with varying tactics (social advertising, display, search, and retargeting) depending on the travel status within that focus market.



## EUROPE

After the first quarter of 2021, the Netherlands finally lifted its travel restrictions for Curaçao in May. During the lockdown period, we executed a search campaign in the Netherlands and Germany to encourage people to choose Curaçao for their next vacation. The campaign focused on:

1. Consumers searching for vacation destinations in 2021.
2. Consumers positioning for vacations in different seasons and months.
3. Curaçao's special activities and selling points, such as beaches and diving.

To celebrate our partnership and to congratulate Ajax on becoming champions of the Eredivisie for the 35th time, we did a co-op with SV Ajax Life, the largest supporters' organization, as well as digital outdoor advertising at 70 locations in the center of Amsterdam.

In May, we started a five-week digital campaign with our new messaging. It included programmatic rich media displays and online videos. Additionally, similarly to last year, we partnered with Sunny Days of Radio 10 for a one-week campaign in June 2021. Radio 10 is a national station in the Netherlands with a reach of nearly 1 million per day, of which 60% are in the AB welfare class. Their market share has been steadily increasing since they contracted morning radio personalities such as Gerard Ekdom. To complement this campaign, we had branded contents in De Telegraaf and Metro which told readers that they can come to Curaçao without any worries.

Similar to the Netherlands, we extended our search campaigns in Germany from March to April, and in May, after Curaçao was removed from the high-risk country list in Germany, we expanded the campaigns by including more digital touchpoints (social, display, remarketing) with our 'It's time' message.

In response to Air Belgium's twice weekly direct flights to Curaçao, which began on July 1st, we amped-up our presence in the market, sending e-blasts to past visitors and publishing branded content on social media. We also launched 'It's time', our new campaign, in this market. Additionally, we hosted a Virtual Press Trip on June 10 with eight journalists who were shown how to get to Curaçao and what the island has to offer.





## NORTH AMERICA

After the previous USA media campaign ended in March, we started a new one in April which ended in September. The campaign focused on primary markets, including the NY/Tri-State Area, Miami Dade, Broward, and Palm Beach County, as well as secondary markets such as Charlotte, Dallas, Houston, Philadelphia and Boston. In order to succeed in getting Americans to visit Curaçao, we studied our media partners and adjusted our strategy to focus on:

1. Travel specific partners and core consumer destinations for information
2. More targeted opportunities
3. Increased Direct-to-Publisher relationships to ensure our audiences are engaged and have access to content that is relevant to them
4. Increasing spends around rich-media placements to encourage viewer engagement
5. Strengthen connection with consumers

## TO ACHIEVE THESE OBJECTIVES, WE PUT THE FOLLOWING IN PLACE:

- Digital Placements in Sojern, TripAdvisor, Travel Spike, AFAR, Undertone, North and Warren Full Time Travel
- Broadcasts on CTV (Spot-On Connected TV)

We also extended our 'Welcome back' campaign in the USA in March-April on social media, display and search. In May, we started a new campaign with our newly adapted 'Feel free' creative messaging, which included remarketing ads and showing JetBlue flight details in the Tri-state area. We also started a collaboration with 'HereYouTravel' (South Florida), which sent traffic to their landing page for a special package and launched the '4th night free' retargeting campaign.

Additionally, together with industry partners, we participated in some special PR activities, including customized versions of the popular gameshows: Wheel of Fortune, Let's Make a Deal, The Price is Right, and 25 Words or Less. In Canada, we switched our campaign strategy to fanbase growth due to insecure flight start date changes that endured until the end of the year.





## **SOUTH AMERICA**

Due to budgetary restrictions in 2021, our marketing and PR strategy in South America prioritized collaborations with the trade campaigns to complement the coops. Borders near the South American markets officially reopened on January 1, 2021, however, airlift from these countries was halted for a long period. The situation normalized in the second quarter of the year.

We started the year with digital presence and public relations activities for Colombia and Brazil, however in September, traditional touchpoints were also added in Colombia, focusing on Bogota and Medellin. Furthermore, CTB collaborated with Universal Music to execute a virtual campaign with well-known Colombian artists, Cali and Dandee. With Brazil having no direct flights to Curaçao, and because of the drastic budget cuts, Brazil was categorized as a secondary market. Therefore, in addition to digital marketing, the main emphasis was on public relations, brand collaborations and celebrity VIP trips with some well-known Brazilian celebrities such as Ludmilla, Andrea Guimarães and Mirella.

## **CARIBBEAN**

In 2021, there were no special events planned for the Caribbean market, so we focused on attracting visitors, especially from Aruba, during holidays and long weekends. These campaigns were carried out through social media, traditional media and we also paid for ads that aired in theaters. Our campaigns in Suriname—which was the last country to recover—started in July when airlift resumed.

In addition to our primary Caribbean markets (Aruba and Suriname), CTB has been exploring opportunities for expansion in other markets where we have direct airlift. These are Jamaica and Trinidad and Tobago.

# SUPPORTIVE RELATIONSHIPS

## DESTINATION SERVICES

COVID-19 radically reshaped the travel industry. Fortunately, advances in social and traditional media enabled us to communicate frequently and effectively with our partners to sustain their interest in the destination. Because of CTB's ongoing communication, many of our partners eagerly attended our in-person Press Trips after travel restrictions were lifted.



CTB is well aware of the value of firsthand experience to our media contacts, influencers, and content creators. Such experiences usually lead to more robust and evocative reviews and recommendations that reflect the wonderfully diverse adventures our destination and its island partners offer. No press release or artfully crafted advertisement can create the sense of excitement and commitment that is generated by these personalized interactions.

The second wave of COVID-19 infections at the start of 2021 led to an island-wide lockdown in March. Following the island's reopening in May, we hosted several Press, FAM, VIP trips, and production crews to showcase the destination and recover losses experienced at the beginning of the year. In total, we hosted 733 individuals (637% more than the original target). They included 8 press groups and 52 individual personnel (157 media/influencers), 48 FAM trips (366 travel agents), 12 productions (83 crew members), and 32 VIP trips (127 TV personalities, artists and others).





We received many requests from journalists, influencers, and travel agents who had already taken concrete steps to visit the island. Because we did not have to cover their airfare and other major expenses, we were happy to include them in the promotional activities and this allowed us to exceed our original target. We also facilitated smaller groups and individual press members by modifying itineraries. These modifications enhanced the press trip experience for all involved.

Like other sectors in our technology-driven world, the travel industry is experiencing rapid digitalization. Following this trend, CTB fully digitalized its programs for incoming press members, exceeding their expectations and demonstrating our grasp of recent digital advances in the industry. Some of these new approaches were reflected on their itineraries, which contained all essential details about their trips including hotel check-in information and the times, dates, and locations of core events and activities.

The media houses and influencers that we hosted include: Metro—one of the biggest online news outlets in the Netherlands; JAN Magazine—an authentic glossy magazine known for its high-quality interviews and beautiful photography; VROUW Glossy—this magazine covers human interest stories and lifestyle and travel experiences. Vriendin—a human-interest magazine targeting 20-49-year-olds who have or are interested in having children. Forbes—one of the top news and lifestyle outlets in the USA with millions of readers per month. Honest Cooking—provides tips and tricks for consumers as well as information on trends in the culinary industry.



De Zondag—the biggest free newspaper in Belgium which reaches 1.5 million readers each week. TAUCHEN Magazine—collected information for an article and created a picture portfolio so that they will have sufficient original content for their year-round media commitment. Andrea Guimarães—launched a Brazilian fashion collection and did her photoshoot in Curaçao.

We also collaborated with PROTEUS™ Curaçao, which is led by renowned aquanaut, ocean conservationist, and documentary filmmaker Fabien Cousteau, and members of the nonprofit organization Map the Gaps who are working with the ocean mapping community to increase mapping activities. Additionally, we worked with Kevin Curry, the popular fitness influencer and creator of the #1 bestselling Food and Drink app @FitMenCook.

As part of our partnership with the AFC AJAX, CTB hosted AJAX's production team who gathered content for a promo shoot. The Cheerleading Athletics brand, Rebel Athletics, also filmed their upcoming couture catalog in Curaçao.





# EUROPE

## INTRODUCTION

Despite the challenges posed by COVID-19 at the start of 2021, the total number of visitors from the European region increased, providing strong evidence that the tourism industry is on its way to recovery.

**There were 183,798 STAYOVER ARRIVALS from Europe, a 63.5% INCREASE compared to 2020, with the majority arriving between the second and fourth quarters.**

## THE NETHERLANDS

Due to an increase in COVID-19 infections, the Dutch government issued a negative travel warning which ended after the first quarter. During this time, we shifted most of our activities to digital platforms to keep Curaçao visible and prominent. These included the Virtual Site Inspection Happy Hour, where we allowed hotels to showcase their properties.

At the start of the second quarter, the travel warning was lifted, and we resumed normal operations, welcoming arrivals out of the Netherlands. Overall, long-haul travel was largely curtailed by the pandemic as travelers were hesitant to take risks. Fortunately, because of Curaçao's reputation as a safe destination, many travelers opted to visit our island during this time.

From July to December, Curaçao received over 20 thousand visitor arrivals each month from the Netherlands, which was more than some pre-pandemic numbers.

## GERMANY

In 2021, there was a 64% increase in visitor arrivals from Germany, compared to 2020. However, the lockdown in the first quarter resulted in fewer visitors from Germany than from the Netherlands. To spur interest in the destination, we conducted several Virtual Site Inspection Happy Hour sessions for the German market. This led to a notable increase in arrivals in March and between the summer and winter months. The increases in the German market resulted from changes to the travel window, which decreased from 90 to 120 days to 20 to 35 days. This development will be beneficial to Curaçao as long as seats are available on KLM and hotels are not full.



## BELGIUM

Immediately after the first quarter lockdown, we started a promotion for the launch of the new Air Belgium flight that commenced in June. It flew twice a week out of Charleroi, Brussels with a stop in Martinique. Unfortunately, the flight halted three months after the launch because of a surge in COVID-19 cases in Martinique. CTB and Air Belgium discussed other options and they decided to resume operations in December. This time the flight started at Brussels Airport with a stop in Punta Cana. Arrivals from Belgium in 2021 were 156% more than in 2020.







# NORTH AMERICA

In March 2021, during the second wave of COVID infections, the US-based Centers for Disease Control and Prevention (CDC) classified Curaçao as a 'Level 4' risk. This is CDC's highest warning which comes with a recommendation against traveling to destinations in this category. This led to several cancellations out of the US market.

Similarly, Canada had very strict protocols in place, including mandatory quarantine for returning nationals. As a result, the first flight out of Canada arrived in Curaçao in October.

To remain in the thoughts of potential visitors during these challenging months, we launched several digital campaigns, organized digital press trips, and executed joint promotions with Expedia, AMResorts, and Leisure Group. Additionally, we sent several e-blasts to tour operators throughout the year.

We closed 2021 with 42,674 visitors who spent an average of 7.7 visitor nights on our island. We look forward to better results in 2022, as more COVID-related restrictions are expected to end.





# SOUTH AMERICA MARKETS

## PRIMARY MARKETS IN SOUTH AMERICA

After a slow period, the airlines connecting Curaçao with South America resumed operations gradually. Colombia and Brazil were our strongest South American markets in 2021. This success resulted from our strategic efforts to attract visitors during the pandemic.

Overall, arrivals from South America fell short of expectations in 2021, but the steady numbers provided reasons for optimism, especially because leisure travel gradually gained traction. Many destinations like Curaçao took a long time in scaling back entry restrictions and testing requirements, allowing our competitors like Mexico and the Dominican Republic to gain an advantage. Both countries had open borders, attractive price points, and no testing requirements. We responded to these challenges by adopting a flexible approach to ever-changing market conditions and consumer habits.

## COLOMBIA

Colombia's economy remained resilient throughout the pandemic, making it possible for many vaccinated Colombians to travel after restrictions were lifted. To generate Colombians' interest in Curaçao, we executed a series of webinars and campaigns in conjunction with wholesalers, hotel partners, transfer, and tour companies across Colombia. These included the 'stay 3 nights and receive the 4th-night free' campaign and several joint campaigns with tour operators: Aliados Travel, CIC, Fuerza Delta, Hoturis Cali, TravelPlans, and TuReserva.com.

We also executed a co-op campaign with Avianca, Wingo, and other airlines that are trying to increase their capacity for the island. As part of this, we encouraged potential travelers to quickly purchase affordable airline tickets and sent e-blasts informing travel agents of the ongoing developments. We also actively courted new airline partners to assist us in developing the Medellin market. Curaçao now has 9 weekly flights from Bogota, 6 weekly flights from Medellin, and twice weekly flights from Barranquilla.



## **BRAZIL**

Many Brazilians traveled throughout the pandemic despite the restrictions. Unfortunately for us, it took a long time for connecting flights through Panama with Copa Airlines and Bogota with Avianca to be reactivated. As soon as these connections were reestablished, our number of Brazilian visitors grew. To further increase sales, we executed a digital campaign with Copa and Avianca to lure traffic to Curaçao's section of the airlines' landing pages. Additionally, we educated and stimulated travel agents to do more to promote the island and communicated frequently with the wholesalers and airlines.

## **SECONDARY MARKETS IN SOUTH AMERICA**

Within the secondary markets, Uruguay delivered a stellar performance through wholesale partnerships, while others like Argentina and Chile faltered under strict travel restrictions. In these periods, CTB launched destination awareness campaigns and pushed for sales throughout LATAM. We held more than 50 webinars and our email communications were sent to over 99 thousand travel agencies across the continent. Upon reactivation of the Cono Sur market, we engaged in smaller coop-promotional programs with wholesalers such as Aero, Almundo, and Siga Turismo (Argentina), and TourMundial (Chile). In Ecuador, we launched a social media campaign through three travel agency platforms in Quito, Guayaquil, and Cuenca to reach consumers. A similar campaign was conducted in Venezuela for wholesalers including Conkhep, Alpi Viajes, Mundo Kanguro, and Corporación Salta.





# CARIBBEAN

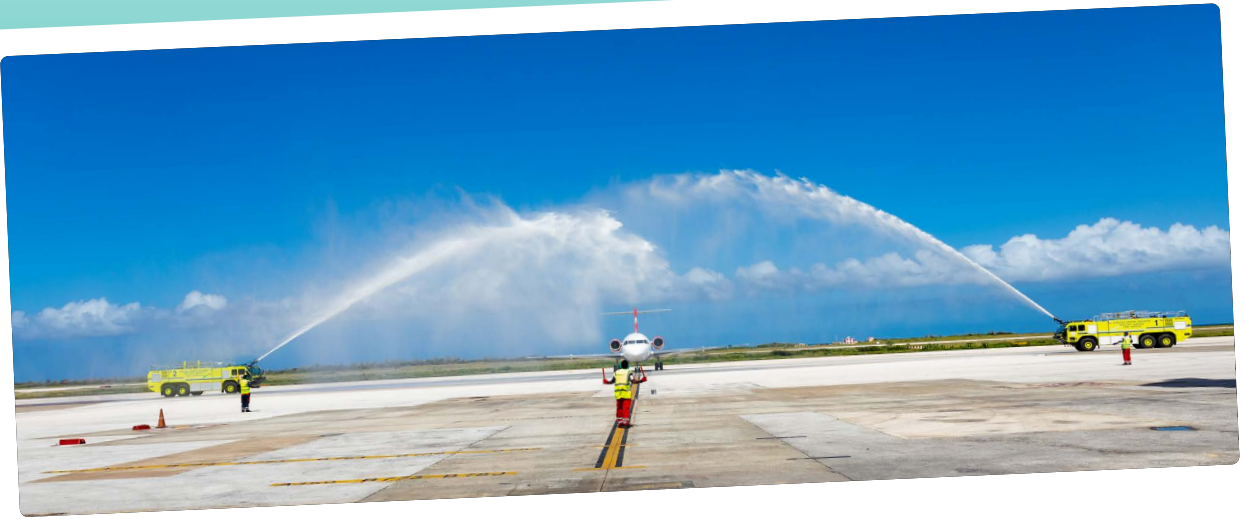
In 2021, there was a 30% increase in arrivals from the Caribbean market compared with 2019. The percentage could have been higher if there were no COVID restrictions. For instance, visitors from Aruba were limited to those traveling for family and business matters because they were required to do a PCR test. After vaccinated citizens from Aruba were allowed to travel freely, Curaçao received 5371 Aruban visitors at the end of 2021.

Throughout this period, we carried out promotional campaigns to stimulate visits, focusing on the Tumba Revival Festival, long weekends, and vacations via several joint projects, in conjunction with Maduro Travel Aruba. Before the summer and fall vacations, we also aired the 'Curaçao welcome back' videos in 10 theaters in the Gloria Building, one of Aruba's newest attractions.

Due to delays in the opening of airports for commercial flights in Suriname and Trinidad, only a small number of visitors from these markets visited Curaçao. The numbers were small despite FlyAllways, Suriname's second airline, organizing several business flights on the Paramaribo-Curaçao route. In July 2021, FlyAllways also implemented a weekly flight to Curaçao which lasted until the end of the year. Additionally, Surinam Airways returned in November 2021 with a weekly flight, with a stopover in Trinidad.

During the lockdown and curfew periods in Suriname, which lasted from January to July 2021, CTB worked with a food delivery company to disseminate 'Curaçao Information' packages. Over 800 potential visitors received packages and a chance to win a stay on the island.





We also used webinars to provide travel agents with periodic updates about the situation on the island. These included agents from Trinidad and Tobago. The sensitization efforts were supported by Copa Airlines and many of our trade and media partners.

At the end of 2021, we organized Curaçao Drive Thru in Paramaribo to thank our partners for their support. During the pandemic, Curaçao also functioned as a crew hub for the oil industry. As a result, Caribbean Airlines executed several charters to Trinidad.

Our sensitization and training programs were tailored to meet the needs of other Caribbean countries such as Jamaica, Martinique, Guadeloupe, Dominican Republic, and St. Maarten. This was done to support existing, new, and potential routes such as Air Century, Sky High, and Jetair on the Dominican routes. Curaçao's local airline, Jetair, also renewed its connectivity with Jamaica in July 2021, starting with one flight per week, which later became two. Due to these Jetair flights, visitors from Jamaica increased by 79% compared to 2019.

CTB, with support from Curinde, the Curaçao Economic FreeZone, and Jetair, promoted the island and its FreeZone via social and traditional media. Other promotional activities included participation in the Martinique Travel Show, which facilitated conversations and communication with airport authorities, press members and tour operators. We used the opportunity to prepare for Air Belgium out of Martinique and to welcome the French Caribbean citizens to the island. In 2021, the Caribbean market accounted for 13,334 visitor arrivals, a 21% increase compared with 2020.



# CLARITY OF VISION

## Strategy Development and Planning Department

CTB's vision provides clarity and purpose and inspires the team to lead intentionally and make astute decisions in challenging times.

Guided by this vision, we worked towards building consensus with other stakeholders, with guidance from the Strategic Tourism Master Plan: 2015-2020 and CTB's Business Plan, which translate the broad vision into actionable steps. The steps have led to the creation of the Destination Development Plan for 2022-2026, which is pending final approval from the Council of Ministers.

As Curaçao recovers from losses caused by COVID, it is crucial that we continuously monitor developments and make timely adjustments that reflect an understanding of travelers' behavior and the nature of the competition in the industry. In each quarter of 2021, we produced a Key Performance Indicator Report that assessed the organization's success in achieving its goals. CTB's overall target achievement rate for 2021 was 76%, a commendable attainment given the challenges. We also prepared the monthly Global Management Report which provided overviews of activities related to marketing and sales.

CTB chaired and participated in several task forces that worked on the development of specific tourist areas. These task forces included representatives from the government, the private sector, and relevant stakeholders. This kind of collective effort will pave the way for significant improvements in visitors' experience.



We received funding approval for the development of Marie Pampoen Phase 3 and promptly hired contractors who are working on the project. The task force working on the development of the Caracasbaai Peninsula also acquired funding and is creating a vision document. A multidisciplinary team has started the preparatory work to redevelop, improve and manage eight public beaches. Additionally, the first phase of the Quick Win Plan for Zakitó was completed and the implementation of the second phase has commenced. With funding from Korpodeko, we also commissioned several studies about the coral and mangrove populations in Zakitó. Researchers will also assess Zakitó's history and culture and examine possibilities for the redevelopment of the fishing port and public spaces.

Other developments included the approval of the Pact for Punda initiative, via which major stakeholders have committed to the implementation of 25 short-term actions to improve visitors' experiences in Punda. We also produced reports for public and private stakeholders with information on the expected development of the accommodation sector in the coming years.





# PRODUCT DEVELOPMENT

During 2021 we executed several activities, among which several awareness campaigns, training programs and projects to contribute to a cleaner island.

## KÒRSOU TA DUSHI I LIMPI

CTB started ‘Kòrsou ta dushi i limpi’ in February 2021 with support from Selikor, the Ministry of Health, Environment and Nature, the Public Works Department, and the Ministry of Economic Development. Through ‘Kòrsou ta dushi i limpi’, CTB worked with 39 contractors to spruce up roundabouts, plazas, various public beaches, and tourist attractions.



[Click here for video](#)



These efforts were coupled with an awareness campaign which aired on radio, TV and was shared through our social media channels. The campaign consisted of a jingle, a TV spot, awareness ads and infomercials, aimed at promoting cleanliness across the country, including a dogs and cats sterilization campaign.

[Click here for video](#)



## CLEANUP DAY

CTB's activities on World Cleanup Day (18 September) included the cleanup of Jeanne D'Arc Huishoudschool in Kustbatterij. The building now houses homeless families. CTB staff and several contractors cleaned up the school and surrounding areas.

## UPGRADING AUDIT PROGRAM

We upgraded the certification program by introducing a classification system that compares the quality of accommodations using several key metrics. This will help visitors to have a comprehensive view of their accommodations before they come to Curaçao. In coming months, we will also introduce the 'Green Certification' for businesses that are complying with our program for sustainable tourism.

## PUBLIC TOILETS

Together with Downtown Management Organization (DMO), we refurbished the toilet buildings in front of the Waterfort arches and at the Ferry station.

## SAFETY AND SECURITY

In 2021, we conducted continuous security surveillance at various tourist attractions. We also handled some complaints and mitigated the effects of some security breaches.

# TOURISM AWARENESS

## THEME BOOK

We contributed a short write-up to 'What do you want to become? - Profession', a book on careers curated by the National Library. As CTB, our aim was to motivate our young citizens to choose a career in the hospitality and tourism industry.



## YEAR PLANNER, AGENDA AND COLORING BOOK

We created a year planner for 2022 under the theme ‘Shine’ ku bo talent (Shine with your talent). With this theme we hope to spread awareness about the importance of honing and displaying one’s talent. We also printed some t-shirts with the theme and gave awards to the youth featured on the planner.

We also did some projects using the theme ‘Resiklahe i medio ambiente’ (recycling and the environment) from the 2021 planner. The projects included creating school agendas and coloring books for primary students. In July, CTB gave away 500 school agendas to primary school students.



## INTRODUCING TOURISM IN PRIMARY SCHOOLS

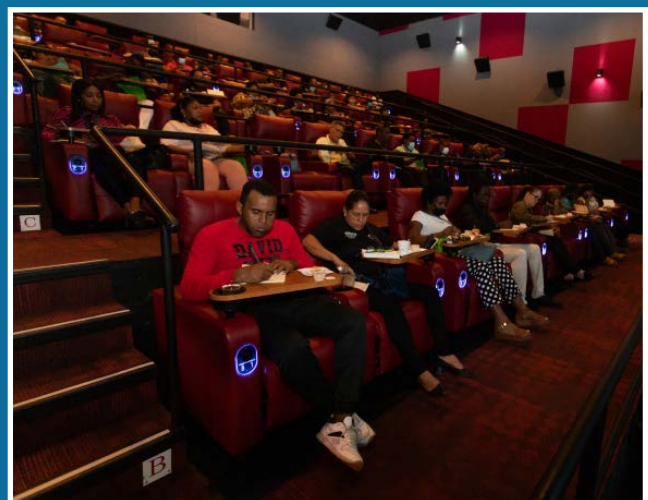
On World Tourism Day (27 September), CTB kicked-off a trajectory that will conclude in 2022, with the introduction of tourism as a subject in primary and special education. To this end, the Product Development team is currently creating new videos in Papiamentu. Tourism will be taught to students between 5 and 7-years-old and 8 and 11-years-old as an official subject.

## KÒRSOU TA DUSHI SONGS

In 2021, we also collaborated with Radio Active on their music project. Local bands were asked to create songs inspired by Kòrsou ta Dushi. Our songs highlighted Curaçao’s natural beauty and encouraged people to find or create happiness during the pandemic. Our top 3 songs are still being played on most radio stations.

## HOSPITALITY TRAINING

In 2021, we organized a seminar for taxi drivers called ‘E futuro di turismo ta AMI!’. With support from Nostra Growth, we provided ideas and tools they can use to maximize their skills and knowledge so that visitors will have rich and fulfilling experiences while in their care. More than 70 drivers participated in the event.







# CONTINUOUS IMPROVEMENT

In 2021, working from home was still the norm and even though it brought about some changes, optimal assistance remained the focus. Meeting deadlines and providing the management team with regular and accurate updates on financial matters was possible thanks to investments and upgrades made during previous years.

The highlight of 2021 was being able to have an audit conducted while working from home. This was the first time that CTB's financial statements were audited remotely.

In 2022 we expect to digitalize other departments and to create new workflows for processes that are presently not standardized. By doing this, we will be maximizing the benefits of our ERP system.

# STATEMENT OF COMPREHENSIVE INCOME FOR THE YEAR ENDED DECEMBER 31, 2021

Stated in Netherlands Antilles Guilders

	NOTES	2021	2020
<b>REVENUES</b>			
Government (Grant)	11	15,600,000	19,014,300
Room, tourism sales tax collection	11	8,525,986	8,544,634
Revenue miscellaneous	11	(47,627)	1,252,558
Revenue Capital Account	11	66,734	1,184,970
Revenue Special Account	11	3,246,423	-
		<u>27,391,516</u>	<u>29,996,462</u>
<b>EXPENSES</b>			
<b>PERSONNEL AND OPERATING EXPENSES</b>			
Personnel expenses	12	6,931,320	7,374,140
Housing expenses	13	905,934	907,461
Representation expenses	14	391,683	483,011
		<u>8,228,937</u>	<u>8,764,612</u>
<b>ACTIVITY EXPENSES</b>			
Sales and marketing	15	13,860,845	15,965,230
Product development	16	1,873,080	2,061,158
Depreciation of property and equipment	6	162,570	155,442
Capital account and extra budget special projects	17	3,313,157	1,184,970
General expenses	18	471,811	1,628,565
Supervisory Board Expenses	18	72,248	45,577
		<u>27,982,648</u>	<u>29,805,554</u>
<b>OPERATING INCOME/ (LOSS)</b>		<u>(591,132)</u>	<u>190,908</u>
Financing costs – net	19	207,448	476,698
<b>INCOME/ (LOSS) FOR THE YEAR</b>		<b>(798, 580)</b>	<b>(285,790)</b>
OTHER COMPREHENSIVE INCOME FOR THE YEAR		--	--
<b>COMPREHENSIVE INCOME/ (LOSS) FOR THE YEAR</b>		<b>(798, 580)</b>	<b>(285,790)</b>





CURAÇAO 

Curaçao Tourist Board

     CURAÇAO TOURIST BOARD