

Swift RECOVERY

ANNUAL REPORT 2022



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An aerial photograph of a sandy beach meeting the ocean. On the left, two people are kayaking in the shallow, rippling water. On the right, five red rowing boats are lined up on the sand. Two people are sitting on the sand between the second and third boats from the right. The text 'Swift RECOVERY' is overlaid in the center.

Swift RECOVERY

As the world grappled with the far-reaching impacts of the global COVID-19 pandemic, the travel and tourism industry faced a period of profound transformation, forcing destinations around the globe to adapt, innovate, and ultimately find a path towards renewal.

The year 2022 marked a pivotal moment for Curaçao, as it witnessed a remarkable resurgence in tourism, defying the uncertainties cast by the pandemic. With unwavering resilience and collective efforts, our destination managed to thrive in 2022.

Let's navigate the narrative of swift recovery, symbolized by a renewed commitment of our community, industry partners, and our own dedicated efforts in steering the course toward renewal.

Rising

STRONG

A Message from Our Chairperson

MR. PERCY PINEDO

As we reflect upon the remarkable strides of the Curaçao Tourist Board throughout 2022, I am filled with pride and appreciation for the collective achievements that define our journey. Curaçao's triumphant recovery from the challenges imposed by the pandemic stands as a testament to our resilience and determination. We have surpassed pre-pandemic numbers, proudly asserting our presence on the world stage.

LEADERSHIP TRANSITIONS

In navigating these transformative times, we welcome Murjad de Bruin as Counterpart Statutory Director of CTB. His training, supported by the Deputy Director, ensures a seamless transition, fortifying the leadership that propels our destination forward. Additionally, Jacqueline Sybrandy-Held assumes the role of Manager for North America, bringing valuable expertise to our team.

MANAGEMENT EXCELLENCE

Our commitment to transparency and efficiency is underscored by the regular and insightful management reports that guide our decision-making. The cohesive collaboration within the Board and with our management team ensures a unified approach towards our shared goals. Furthermore, the signing of a new collective labor agreement for three years reflects our dedication to fostering a positive work environment.

PARTNERSHIPS AND COLLABORATIONS

Our harmonious relationship with the Ministry of Economic Development is a cornerstone of our success. Clear insight into our endeavors, mutual understanding, and commitment from the minister further strengthen our collaborative efforts, ensuring a cohesive strategy for the prosperity of Curaçao's tourism.

In addition, we are delighted with the collaborative partnership with Ajax, which not only enhances our visibility but also brings positive publicity to our destination. As we embark on the next chapter, buoyed by our successes, we extend our gratitude to our dedicated team, partners, and stakeholders. Together, we stand poised to continue our journey of growth, resilience, and shared success.



Sailing

THE TIDES OF SUCCESS

Our Deputy Director's annual review

MR. HUGO CLARINDA

EXCEPTIONAL GROWTH

The year 2022 marked an era of exceptional growth for Curaçao's tourism industry. Although we fell short of the target of 500,000 visitor arrivals, the remarkable achievement of surpassing pre-COVID numbers by 6% is a testament to the resounding success of our swift recovery efforts. Cruise tourism also experienced positive momentum, further solidifying our position as a sought-after destination.

MARKET PERFORMANCE

A breakthrough year unfolded with the US market leading the charge. The strategic partnership with Sandals Royal Curaçao, with their grand opening on June 1, 2022, contributed significantly to the surge in US arrivals from June onward. Canada, while not fully recovered, witnessed the resumption of flights in 2022. The Netherlands, achieving record-breaking numbers, showcased the strength of our European presence, even as KLM's announced future flight reductions pose a potential challenge in 2023. Nevertheless, our aggressive promotion strategies instill confidence that our European momentum will continue to thrive.

South America, particularly Colombia and Brazil, demonstrated robust recovery, reaffirming their status as Curaçao's main South American target markets.

DEVELOPMENTS AND ATTRACTIONS

Our commitment to enhancing the allure of our island manifested in various developments and attractions throughout 2022. We prioritized cleanliness in touristic areas and finalized the Quick Win Plan for Zakito, set to be implemented in 2023. Furthermore, the inauguration of Hôfi Mango and the Curaçao Rif Mangrove Park in Willemstad enriched our product offering. Noteworthy events, such as the friendly match between AFC Ajax and Team Curaçao, brought a unique blend of sports and talent development to our shores.

ACCOMMODATION AND AIRLIFT ADVANCEMENTS

The hospitality landscape witnessed exciting additions in 2022. Harbor Hotel & Casino Curaçao opened its doors in the last quarter in Otrobanda, while the Brion City Hotel, a BW Signature Collection hotel, reopened after a renovation period. The ongoing construction of phase two for Mangrove Beach Corendon Curaçao All-Inclusive Resort, Curio by Hilton, slated to open in 2023, promises an expanded capacity of about 800 rooms. Progress is evident in the construction of Courtyard by Marriott Curaçao, anticipated to open its doors in 2024. When it comes to airlift, notable developments unfolded in 2022.

Air Canada and WestJet resumed their flights from North America, providing travelers with more options for reaching the island. Additionally, Arajjet introduced a new flight route connecting Curaçao to Santo Domingo, Dominican Republic, during the last quarter of the year. Caribbean Airlines also resumed its flight services from Port of Spain, Trinidad, further enhancing connectivity to the region.

Curaçao's local carrier, Jetair, launched services on the Suriname route in the second quarter of 2022, later expanding to include Aruba in the third quarter. Furthermore, the summer season saw an influx of charters from Ecuador, offering travelers unique opportunities for exploration and adventure. These developments signify a steady progression in airlift services, opening up new possibilities for travelers seeking to discover Curaçao. Furthermore, the approval of the Strategic Tourism Destination Development Plan 2022-2026 in 2022 lays a robust foundation for the continued success and sustainable growth of Curaçao's tourism industry.

In closing, I extend my deepest gratitude to our dedicated team, partners, and stakeholders who have been instrumental in steering Curaçao towards this remarkable chapter of success.

EMPOWERING DECISION MAKING *Through Data Excellence*



In the dynamic landscape of tourism, data-driven decision-making is pivotal. In 2022, we expanded our Power BI tourism analytics dashboard, making more KPIs available for monitoring. This enhancement offered a comprehensive view, enabling us to now monitor daily arrivals by the resident country, carrier name, and selected place of stay, among others. The dashboard facilitates evidence-based and trend-oriented decision-making.

Other Caribbean tourist boards have expressed their interest in obtaining additional information on the developed tourism analytics dashboard. Our team showcased select dashboard features to other tourist boards, who are evaluating the feasibility of adopting a similar system for their organization. The tourism analytics dashboard is effective in enabling users to monitor real-time stay-over arrivals, fostering agility in response to ever-evolving market dynamics.

We will continue to expand the dashboard to monitor additional KPIs in the future. Simultaneously, our dedication to transparency and stakeholder engagement is embodied in the external dashboard, accessible on the curacaotouristboard.com website under the “Data and Statistics” category. This user-friendly interface consolidates various KPIs, providing our local stakeholders with real-time insights into Curaçao’s tourism landscape.

Although tourism arrivals got off to a slow start in 2022, we were able to identify and prepare for various scenarios, by

identifying new trends for the second half of the year. By mid-2022, the projected scenario was rather optimistic, with hopes for a positive outcome in tourism arrivals by the end of the year. The ability to effectively communicate new trends was made possible by our advanced data analysis tools and forecasting techniques. These predictions have empowered our organization by allowing us to seize opportunities throughout the year. One notable example involved our decision to pursue additional air service capacity based on our forecasted minimum accommodation occupancy rate, using current room inventory. We furthermore advise and assist stakeholders regarding their business cases.

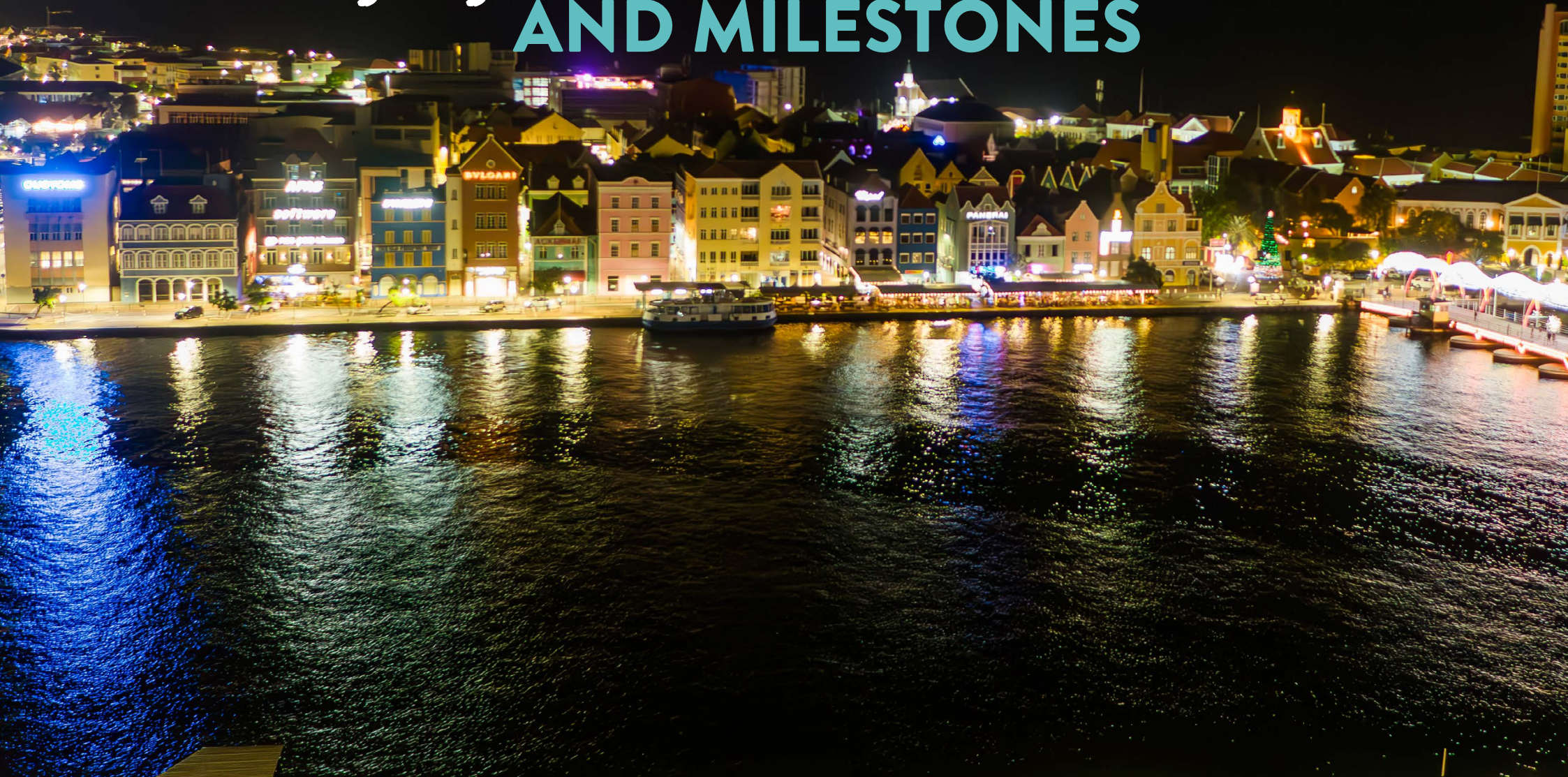
Curaçao is in high demand, and in 2022, we received an unusually high number of requests to assist potential investors with data. This puts the Curaçao Tourist Board in an advantageous position to capitalize on upcoming opportunities. The need to quantify decisions based on data rose compared to previous years, prompting us to intensify our data collection process. Our primary data collection methods include the Digital Immigration card and Visitor

Exit Survey. It’s crucial to ensure proper data correlation across all collection methods to provide reliable data output for data-driven decision-making.

In the coming years, we aim to provide increased data insights that will help improve outcomes for the tourism industry. Currently, we are conducting global market research to update our personas in each market of focus. The research results will enhance our understanding of the target audience, allowing us to tailor our marketing messages and communication to their specific needs and preferences. Attracting the right customers leads to increased conversion rates and heightened visitor satisfaction.

[Download Tourism Performance Report 2022.](#)

Engagement AND MILESTONES



IMPROVED ENGAGEMENT

In an effort to further enhance the content and user interactivity on curacao.com, we introduced several improvements to the site, aimed at providing accurate information and easier navigation. As part of these improvements, we introduced the following niche market pages: meetings and conferences, romance and weddings, and cruise vacation.

Interactive travel maps with customized content are more likely to engage travelers. We have therefore enhanced the user experience with more user-friendly map directions platforms: Interactive Travel and Google Maps, both of which are GPS-enabled.

Our dedication to an enhanced online experience persists into 2023. Planned efforts include continuous refinements to the island map and a strategic exploration of artificial intelligence integration across various areas of the website.

REACHING MILESTONES

Celebrating a remarkable milestone, we are proud to announce that Curacao.com achieved a record-breaking

3,149,872 WEB VISITS IN 2022!

This marks the first time the site has surpassed three million web sessions.



An aerial night photograph of a city waterfront. A bridge with a white canopy and red lights spans a body of water. The city is illuminated with various lights, and buildings are visible along the shore. The text 'Leveraging THE MOMENTUM' is overlaid on the image.

Leveraging THE MOMENTUM

The year 2022 marked a successful chapter for Curaçao's tourism, with record-breaking visitor numbers, resulting in our best year ever. Our consistent presence throughout the COVID-19 pandemic, with messaging that resonated with travelers in our target markets and paired with our continuous delivery of transparent and easily accessible information, truly paid off in 2022.

Despite a limited marketing and public relations budget, CTB successfully re-established a mix of traditional and digital media to promote the destination and create multiple touch points for top-of-mind awareness. Traditional media initiatives comprised captivating billboards on busy highways, mall displays, airport exhibits, and train station takeovers that allowed potential visitors to envisage their next vacation. The pleasant atmosphere of Curaçao was furthermore conveyed through radio, magazines, and ads, ensuring that we effectively reached our target audience.

In-market activities resumed after a two-year hiatus, including themed cooking sessions with media representatives in Germany, Belgium, and the Netherlands, as well as media dinners in Canada and Colombia.

After the pandemic, the island garnered substantial media attention, and many people expressed interest in visiting. As a result, CTB hosted 257 media representatives, 169 influencers, 286 travel agents, 50 MICE representatives, 264 VIPs, and 97 production members, all of whom participated in a dedicated island program.

Notable partnerships include various sports-centered projects such as the sponsorship of Miami Marlins and Atlanta Braves, a first full championship season with AFC Ajax, including the Champions League, and the Haarlemse Honkbal Week. Additionally, CTB partnered with the local

esports team, FuegoCW, and Brazilian brands Polo Wear and Planet Girls, reaching their followers through social channels and in-store.

DIGITAL DOMINANCE

The “always on” strategy in digital marketing manifested in impressive statistics. Google Ad impressions totaled 242.6 million globally, while social impressions reached 254.7 million, resulting in 7.7 million engagements. Social media following surged by 53.5 thousand new followers, reaching a total of 699.5 thousand global followers across all international channels. The global email database expanded by 50.8%, totaling 289.4 thousand contacts.

INNOVATIVE INITIATIVES

In 2022 we launched the Curaçao Travel Guide App, with practical information on activities, accommodation, answers to frequently asked questions and other important information needed in the preparation phase of traveling. We also activated the TripAdvisor & Kayak advertising campaigns in Latin America. In addition, we aligned our marketing communication efforts with the private sector, enhancing collaboration and reinforcing their North America campaigns. Continuous and real-time content creation has become increasingly important in a world where everything around digital is evolving at a rapid pace. Identifying key partnerships and opportunities to create

branded island content has had CTB's full attention in 2022 and moving forward.

OUTLOOK FOR 2023

As 2023 unfolds, CTB remains agile and forward focused. With the announcement of new and additional flights, we remain dedicated to promoting awareness of the enhanced connectivity. A comprehensive research project, combining qualitative and quantitative components, is underway to deepen our understanding of our focus markets.

Continued collaboration with PR agencies aims to articulate the current travel experience both on-island and online, emphasizing sustainability, culinary excellence, wellness, and luxury travel. The expansion of digital branding measurement methods, inclusion of social listening and search intent insights, and adoption of new Google Analytics 4 metrics showcase CTB's commitment to staying ahead in the digital landscape.

The implementation of a Digital Asset Management (DAM) account enhances content management efficiency, a crucial aspect in a world where continuous content creation is paramount.

A nighttime photograph of a waterfront promenade. On the left, a row of colorful, multi-story buildings with European-style architecture is illuminated. Signs for 'CUSTOMS', 'AFAS', 'BVLGARI', and 'PANERAI' are visible. To the right, a bridge or walkway features a series of large, illuminated arches in blue, orange, and purple, with lights reflecting in the water below. The sky is dark with some clouds.

EUROPEAN

Comeback

As the world grappled with uncertainties, visitors from the Netherlands soared, setting the stage for an extraordinary year. A soaring achievement was witnessed in 2022, with a remarkable 51% increase in stayover arrivals from Europe, totaling 278,468 visitors. Notably, this figure surpassed the pre-pandemic level of 243,833 arrivals in 2019, signaling a full recovery for Curaçao.

THE NETHERLANDS

With 237,654 stayover arrivals, 2022 was a record-breaking year for the Netherlands. The year had a strong start, as Asia remained closed due to the pandemic and travel confidence for long-haul destinations was low. We capitalized on the fact that Curaçao emerged as an accessible and safe long-haul destination.

We executed traditional joint promotional plans with our primary partners KLM, TUI, and Corendon. Since the demand was high, we did not have to focus much on price-point campaigns, but rather on more inspirational ones. On the travel-trade front, we concentrated greatly on equipping traveling professionals with as much information as possible about what to do in Curaçao.

GERMANY

In 2022, Germany became the fourth-largest source market for Curaçao, contributing 13,304 visitors – a remarkable 44% increase. This growth was predominantly attributed to the exceptional connectivity provided by the high-capacity, twice-daily KLM flights throughout the first three quarters of the year.

Curaçao remained top-of-mind during the post-pandemic period, thanks to our ongoing initiatives. These included educating travel agents through webinars and trade media campaigns about the island's unique selling points, implementing targeted price-point B2C campaigns, and establishing collaborative partnerships with leading German tour operators and online travel agencies, such as Dertour, TUI, Expedia, and more. These collective efforts ensured immediate benefits as tourism resumed.

BELGIUM

Belgium witnessed exceptional growth, with 9,786 passengers contributing to a flourishing year for Curaçao. Collaborative promotional efforts bolstered brand awareness. These initiatives were carried out in collaboration with local partners, Belgian tour operators, including Corendon and Live2travel, and Air Belgium in the first and second quarter.

The focus was on the Wallonian and Flemish communities, where we hosted trade events, participated in consumer fairs, and carried out effective online and offline campaigns. Though flight modifications by Air Belgium caused concerns in the last quarter, proactive redirection to Dutch airline partners ensured a seamless transition.

Moving into 2023, we remain dedicated to boosting our market presence.



North America

UNPRECEDENTED GROWTH

The North American market saw a 147% growth compared to 2021. Growth in tourist numbers had a slow start in the first quarter due to the lingering effects of the pandemic but peaked in June with visitor numbers ranging between 8,000 and 13,000 monthly. This growth continued throughout the year, reaching an all-time high in December with 13,865 visitors. We can attribute this growth to our intensive marketing and PR strategies, the ongoing and expanding airlift, and our tour operators' alliances. The inauguration of Sandals Royal Curaçao in June also significantly contributed to the island's rising popularity among US visitors.



Jacqueline Sybrandy-Held's appointment as the Regional Manager for North America in August further solidified our dedication to unlocking the vast potential of this focal market. Through team fortification, we have heightened our emphasis on crafting and executing strategic sales and branding initiatives for the CTB within the North American market.

USA

The United States, as the primary North American market and the second-largest source market for Curaçao, experienced a 139% surge in arrivals in 2022. This spike translates to a total of 93,428 passengers, with July and December marking the peak travel months.

HIGHLIGHTS:

1. **Joint Promotions:** We conducted a series of joint promotions with partners such as Classic Vacations, Apple Leisure Group, Vacation Express, and Expedia, with the aim of targeting both consumers and the travel trade market.
2. **Travel Agent Engagement:** We reached out to independent and affiliated travel agents through various means, including travel agent affiliations, consortia platforms, webinars, trade shows, newsletters, travel guides, and podcasts.
3. **Trade Shows:** We participated in various trade shows to showcase our services and network with industry professionals. Curaçao participated in fifteen major travel and trade shows, such as the Travel and Adventure Show in New York, The Global Trade Market Place in Fort Lauderdale, and the CHTA Caribbean Travel Market Place in Puerto Rico.
4. **FAMs:** Additionally, two smaller familiarization (FAM) trips were organized in collaboration with Classic Vacations and American Airlines to showcase the island to agents. We also offered assistance to agents visiting Curaçao, whether by land or cruise, through guided tours and site visits. Furthermore, various US partners attended the Curaçao Symposium and visited the island.

OUTLOOK:

We expect this market to continue experiencing growth. Additional flights are planned from existing markets such as New York and Charlotte, and there is potential for expansion into new cities, which we anticipate will result in increased tourist numbers.

Our target audience for this market is primarily interested in branded properties, both all-inclusive and non-all-inclusive, although non-independent properties also generate interest. The spending patterns of this clientele typically skew towards the higher end, and they prioritize seeking out luxurious accommodations and activities, while still placing a premium on authenticity.

To capitalize on these emerging trends in 2023, it is essential to connect with a representative partner who has the ability to reach this community. Additionally, forging strategic partnerships with entities that specialize in high-end luxury and cater to African American travelers is critical.

CANADA

The Canadian market experienced monthly growth throughout 2022, culminating in a 240% increase compared to the previous year, totaling 12,165 passengers. Collaborative promotions with Air Canada and WestJet, trade shows in Toronto and Montreal, and focused travel agent engagement through e-blasts and webinars underlined our commitment. The peak travel season for the Canadians was November and December.

HIGHLIGHTS:

1. Joint Promotions: We have agreed to large cooperative promotions with our airline partners Air Canada and WestJet. Our primary focus is on consumer targeting, while also including some trade elements.
2. Travel Agent Engagement: Our travel agent community was mainly reached through e-blasts and webinars. In preparation for the upcoming FAM trip, Curaçao partnered with agency Voyage Synergia/Aquaterra.
3. In terms of trade shows, Curaçao participated in the Outdoor and Adventure Show in Toronto, the Air Canada Vacations Product Launch, and the Salon International Tourisme Voyage 2022 consumer show in Montreal.
4. FAMs: The American Airline FAM trip included high-performing Canadian agents. During the last quarter, a FAM trip for Canadians was jointly arranged with Voyage Synergia/Aquaterra.

OUTLOOK:

We anticipate market growth, with Air Canada now offering year-round flights from Toronto and increasing interest from cities that operate winter flight schedules, especially Toronto and Montreal. The target audience seeks branded all-inclusive properties, but there is also a significant demand for alternative accommodations, including villas and rentals. To ensure sustainable growth, it is crucial to increase brand awareness and stay at the forefront of potential travelers' minds. Our primary focus for 2023 will be establishing partnerships with consortia and strengthening our relationship with airlines.

MICE

The island's access has been impacted by restricted airlift and escalating ticket costs. However, with the potential future growth of airlift, combined with the efforts of hotel partners and DMCs, we are continuing our commitment to promote Curaçao as a MICE destination in the US and Canada.

HIGHLIGHTS:

1. Joint Promotions: We collaborated with eGroup on multiple digital marketing campaigns to announce Curaçao for the 2023 land exchange and promote attendance and appointments at IMEX.
2. Meeting Planner Engagement: We participated in partner platforms including SITE, MPI, PCMA, IRF, Prevue Meetings, Connect Meetings, and eGroup networking events and educational webinars.
3. Trade Shows: Curaçao participated in The eGroup River X-Change Appointment Show, NorthStar Destination Caribbean, The Land X-Change Show, and IMEX, together with four private sector partners. It was announced during the River X-Change Show that Curaçao won the bid to host the program on the island in 2023. This event offers an excellent opportunity to present our island to essential meeting planners from the North American market.
4. FAMs: Two meeting planner FAM trips were organized in collaboration with local DMC ECO and SITE, bringing high-level buyers from the US and Canada to the island. Our MICE representative also participated in the North American buyer FAM trip, hosted by Sandals Royal Curaçao.

OUTLOOK:

The MICE market holds significant promise. Maintaining partnerships with our MICE representative, participating in targeted shows and events, and leveraging local MICE partners on the island are instrumental in solidifying our position. The upcoming Land Exchange event in July/August 2023 is poised to further enhance Curaçao's appeal among meeting planners.

South American SUCCESS

In 2022, the South American market delivered a total of 63,806 visitors to Curaçao. The main contributors to this number were Colombia, Brazil, and some potential secondary regions. After a challenging 2021, paired with a conservative process of eliminating entry requirements, our performance in the region initially struggled in the first quarter. However, the South American market has demonstrated significant growth and delivery potential for Curaçao in the second quarter and beyond, through increased service and connectivity by airlines such as Avianca, Copa Airlines, Wingo, and others. This trend is expected to continue going forward.



COLOMBIA

Colombia has been the largest source of tourists in South America, with 28,460 visitors. Despite the heavily fluctuating US dollar affecting travel patterns, the Colombian economy rebounded quickly and remained strong throughout the year, making travel to destinations like Curaçao affordable and accessible.

HIGHLIGHTS:

1. Private sector partners' commitment and active participation in the market facilitated package sales with wholesalers. Additionally, CTB developed effective platforms for conducting business, such as Curaçao Roadshows, travel agent educational seminars, and workshops. We also represented Curaçao at special trade events and fairs, mostly in Bogotá and Medellín.
2. An airline promotional partnership was formed to increase visibility and sales with partners such as Wingo and Avianca in Bogotá. In the Medellín region, a series of promotional campaigns featuring local carriers JetAir Caribbean and EZ Air, and Aeroline Sarpa were launched.
3. Additionally, CTB's trade representation for Curaçao is widely recognized as one of the most present and engaging among tourist boards in Colombia. It ensures that travel agents engage and commit to freelancers and new agencies, while maintaining good relationships with current partners.

OUTLOOK:

We expect sustained growth in this market and are poised for additional flights as we are experiencing ongoing demand. Bogotá is ready for expansion, while Medellín needs more sales and marketing support to generate interest in Curaçao. The luxury traveler is being drawn to new properties such as Sandals Royal Curaçao, Kontiki Luxury Resort, Dreams Curaçao Resort, Spa & Casino, Zoëtry Curaçao and Mangrove Beach Corendon Curaçao All-Inclusive Resort, Curio by Hilton for a pampered experience. We will take advantage of this opportunity. Colombia also has great potential for travel related to events, festivals, and concerts, thanks to its proximity and competitive airfare. Furthermore, pursuing segments such as LGBT and MICE could prove to be valuable.

BRAZIL

The Brazilians did not stop traveling during the pandemic; they are eager to discover sun, beaches, fun, and all the ‘instagrammable’ hotspots possible. In 2022, our Brazilian market welcomed slightly over 10,000 visitors, mostly residing outside São Paulo, which aligns with our focus for Brazil.

Nonetheless, the absence of direct airlift is obstructing the potential for growth from Brazil. They rely on connecting flights with Copa Airlines and Avianca. Brazil represents untapped potential in South America, as our products meet the needs of Brazilians. Our unique selling points and premium hotel offerings, both all-inclusive and chain hotels, differentiate us in the market.

HIGHLIGHTS:

1. Consistent and regular communication with trade partners, including agents and wholesalers, through various channels, such as Panrotas, eblasts and live sessions on Facebook and Instagram called “Curaçao Academy” featuring several guest speakers. Trade influencers and public relation efforts were crucial in ensuring our agents stayed informed.
2. Maintaining visibility, representation, and education initiatives to keep Curaçao at the forefront of customers’ minds. We utilized various platforms to promote Curaçao, including travel conventions such as AVIRP, WTM Latin America, ABAV, Festuris, and others. Furthermore, we organized our own Curaçao events such as seminars, brunches, cocktails, and workshops to educate agents on how to sell Curaçao packages.
3. Joint Promotions: A co-op campaign was executed with Copa Airlines to boost brand awareness and sales in São Paulo.

OUTLOOK:

We expect higher demand, more dedicated wholesalers, and increased participation from the private sector. However, nonstop flights to Brazil will be crucial to maintain market growth in 2023.

SECONDARY SOUTH AMERICAN MARKETS

We have been selective in our approach to secondary markets, but certain countries are primed for immediate growth with minimal investment. CTB, Curaçao Airport Partners, and some private sector partners have been investigating emerging market prospects like the Cono Sur region, as well as Ecuador and Venezuela.

HIGHLIGHTS:

Through strategic trade partnerships, we have successfully achieved our objectives. By utilizing trade publications, such as Ladevi, and conducting a series of online and in-person seminars for travel agents, we were able to promote the sale of more Curaçao packages. It is worth noting that the extensive support we have received from the hotel sector has been paramount in the development of these markets. Several charter flights will be conducted from Quito and Guayaquil, Ecuador in collaboration with wholesalers MaxiTravel, Golden Vacations, Mas Travel, and other smaller partners.





Caribbean **REVIVAL**

In the landscape of the Caribbean travel industry, 2022 marked a significant leap forward for Curaçao. Overcoming past challenges with resilience, our island paradise welcomed 29,818 stayover visitors from the Caribbean and 6,248 from Suriname.



ARUBA

Aruba played a vital role in driving Caribbean visitor arrivals to Curaçao, exceeding its goal of 10,000 visitors with a total of 10,935 arrivals in 2022. In the latter half of 2022, events resumed and played a significant role in the increase of arrivals. Throughout the year, the Caribbean team conducted numerous online webinars and made an in-person sales visit in October. Moreover, through collaboration with local and trade partners, the Curaçao Ban Topa consumer show provided attendees with the opportunity to gather information on traveling to Curaçao and secure their tickets at a reduced cost.

SURINAME

Despite challenges in 2021, efforts to improve travel connections with Suriname bore fruit. JetAir Caribbean, Suriname Airways, and Copa Airlines facilitated 6,248 stayover arrivals. Investment in training and webinars equipped travel agents with the tools to promote Curaçao effectively. The Curaçao Infomart in April showcased JetAir's direct flights from Paramaribo to Curaçao. Furthermore, sales visits and training sessions were conducted throughout the rest of the year.

PROMOTIONAL EFFORTS

CTB utilized multiple promotional channels to increase awareness of Curaçao, by engaging with travel agents and potential visitors. Virtual educational and familiarization webinars were conducted to keep travel agents up-to-date on the latest island developments. CTB also organized educational trainings for trade partners in other Caribbean markets, such as Trinidad and Tobago, Jamaica, and the Dominican Republic to support existing, new, and potential routes. Curaçao's local carrier, JetAir Caribbean, provided biweekly connections to Jamaica in 2022. CTB collaborated with the Curaçao Free Economic Zone (Curinde) and JetAir Caribbean to advertise the island and its shopping prospects using social media campaigns and live radio interviews.

AIRLINE COLLABORATIONS

Strategic partnerships with Divi Divi Air, EZAir, JetAir Caribbean, Suriname Airways, Caribbean Airlines, Copa, Winair and Arajet played a pivotal role in the increase in visitor arrivals compared to 2021.

In 2022, the inaugural flights of JetAir Caribbean's route connecting Paramaribo to Curaçao, and Arajet's inaugural flight from Santo Domingo, Dominican Republic, to Curaçao were celebrated. In summary, Curaçao's resolute efforts in 2022 solidified its standing as a premier Caribbean destination. The tourism industry's resilience and the magnetic pull for travelers signal promising prospects for the future.



An aerial photograph of a coastal city, likely St. John's, Antigua and Barbuda. The harbor is filled with two large cruise ships. The city features colorful, multi-story buildings with red-tiled roofs. The sky is blue with scattered white clouds, and a few birds are visible in flight.

Navigating PROGRESS AND PARTNERSHIPS

In 2022, we maintained our commitment to aligning internal organization and external stakeholder relationships. The Strategic Tourism Destination Development Plan 2022-2026 (STDDP) and the CTB's Business Plan became our guiding frameworks, translating vision and mission into actionable programs. A noteworthy achievement was the initiation of STDDP implementation by stakeholders, reflecting a shared commitment to our strategic goals.

While the tourism sector saw a significant recovery in 2022, our focus internally was on monitoring KPIs through quarterly analyses. The analyses underscored CTB's resilience in navigating challenges. We also presented comprehensive Global Management reports, summarizing marketing and sales activities.

Our strategic objective is to spearhead and actively engage in task forces dedicated to managing and elevating the overall tourist experience, aligning with our tourism goals. These initiatives entail collaboration with stakeholders, including government officials, developers, and consultants, presenting significant opportunities to create visitor experiences that surpass expectations, while addressing the needs of our local community. Key initiatives in this regard included:

- The construction of Phase 3 at Marie Pampoen Recreation Area, which will offer more options for recreation, sports, and relaxation.
- The successful completion of the Second Phase of the Quick Win Plan for Zakito, opening up additional opportunities for recreational use in the area. We initiated multiple studies with the goal of promoting sustainability in Zakito's development, which improved stakeholders' understanding of the location's potential. CTB secured funding for Phase 2 development of the public area, set to commence in 2023. The government furthermore entrusted CTB with the management of Koredor.
- The creation of a comprehensive vision document for the Caracasbaai peninsula, detailing the long-term goals for developing this valuable area.
- The Council of Ministers' approval of the development of eight public beaches and the forthcoming transfer of beach management to CTB mark significant milestones. The task force formulated a comprehensive management agreement between the government and CTB, presenting proposals geared towards enhancing these beachfront locations.
- CTB's coordination to address pertinent matters with regard to the upliftment of Willemstad. The proposed committee for the Pact for Punda initiatives did not materialize, however key stakeholders convened regularly. We furthermore partnered with a community organization for the Seru Otrobanda locality's advancement.

We facilitated both local and foreign private investments by providing advice to various private and public initiatives. We also shared an in-house report on the anticipated development of the accommodation sector in the upcoming years.

The outlook for 2023 is promising, with global travel recovery offering growth potential for the local tourism industry. While challenges from global and local economic fluctuations may arise, resilience and vigilance are anticipated to drive sustainable tourism growth. The implementation of well-crafted policies and innovative, sustainable programs will remain central to our strategic endeavors.



Empowering OUR FUTURE



PRIMING TOMORROW'S WORKFORCE

The Curaçao Tourist Board commemorated World Tourism Day by launching tourism as a curriculum for group 5 children at elementary and special schools. This initiative aims to broaden children's understanding of the significance of tourism for our nation. The instructional materials for this subject include a set of interactive videos, a comprehensive guidebook for teachers, and a workbook containing assignments for children.

DEVELOPING SKILLED TALENT

Due to the rapid growth of the tourism industry, there is a high demand for skilled professionals, particularly in the areas of tourist guidance, wellness services, food and beverage, and housekeeping. Responding to this need, the Curaçao government, through the Ministry of Economic Development, allocated funds to launch a short-term, immersive work-and-learn program. Aimed at training approximately 1,000 jobseekers, this initiative addresses the urgent need for qualified individuals. The sectors with the greatest demand were food and beverage and housekeeping.

In June and July 2022, an extensive recruitment campaign unfolded across traditional and social media platforms, attracting potential candidates to partake in this transformative program. Job seekers eagerly registered at three island locations, with evaluations and interviews meticulously conducted to align candidates with their desired training disciplines. The subsequent quarter saw the submission of quotes by various institutions, leading to the selection of several training providers.

The project commenced with the training of tourist guides, masseuses, and receptionists, each completing their programs successfully. The tourist guides secured full-time employment offers during their practical sessions, a testament to the program's effectiveness. In December 2022, a new cohort, focused on bartenders, waitstaff, and cooks, embarked on their training journey. The training program emphasized practical sessions and included a 5-month work-and-learn program within the hospitality industry. Apart from technical skills, participants underwent training in self-confidence, interpersonal skills, customer service, motivation, and professional demeanor. The overarching importance of sustainable tourism development on the island was underscored through CTB-led sessions on statistics, product development, tourism awareness, marketing, and hotel investment.

Additionally, a new initiative will focus on training jobseekers who wish to work in housekeeping and hospitality employees who wish to become job coaches, to guide participants through their 5-month work-based learning program. A fresh cohort of tourist guides is planned to start in the second quarter of 2023. The commitment to personal empowerment training

and information sessions on sustainable tourism development will continue. In a valuable addition, the Ministry of Social, Labor, and Welfare will provide insight into employees' rights and obligations in the workplace.

CTB, in conjunction with the Ministry of Economic Development, the Ministry of Social Labor and Welfare, and the Ministry of Education, Science, Culture and Sport, will continue to work closely with stakeholders and partners in the sector on these initiatives.



THE LAUNCH OF CURAÇAO'S LEARNING HOTEL

On October 27, a lively groundbreaking ceremony marked the start of the Learning Hotel/Hospitality Experience Center project at John F. Kennedy Boulevard, formerly Hector Suites Hotel. Led by the Curaçao Hospitality and Tourism Training Centre (CHTTC), a collaboration between CTB, CHATA, and ROC Mondriaan in The Hague, this initiative aims to educate aspiring hospitality and tourism professionals. Partnering with educational institutions like Maris Stella SBO, Nilda Pinto SBO, and University of Curaçao Dr. Moises Da Costa Gomez (UoC), alongside government bodies, businesses, and other stakeholders, the project seeks to undergo thorough renovation, with plans for the Learning Hotel to be operational by the first quarter of 2023.



Financial Modernization **AND AUDITED SUCCESS**

In 2022, our commitment to digital transformation took center stage, ushering in a new era of efficiency. Multiple departments embraced digitalization, fostering streamlined workflows for previously unstandardized processes. Despite challenges, the meticulous audit process, though prolonged, was successfully concluded. As we close this chapter, we eagerly anticipate the promising prospects that 2023 holds for our financial endeavors.

	NOTES	2022	2021
REVENUES			
Government (Grant)	11	15,600,000	15,600,000
Revenue capital account	11	4,512,049	-
Room, tourism sales tax collection	11	16,917,676	8,525,986
Revenue Island Government	11	780,815	66,734*
Revenue miscellaneous	11	541,285	11,211*
Revenue Special Account	11	-	3,246,423
Revenue other source	11	321,681	(58,838)*
		<u>38,673,506</u>	<u>27,391,516</u>
EXPENSES			
PERSONNEL AND OPERATING EXPENSES			
Personnel expenses	12	6,722,943	6,931,320
Housing expenses	13	1,134,876	905,934
Representation expenses	14	781,449	391,683
		<u>8,639,268</u>	<u>8,228,937</u>
ACTIVITY EXPENSES			
Sales and marketing	15	22,742,509	13,860,845
Product development	16	2,430,191	1,873,080
Depreciation of property and equipment	6	167,593	162,570
Capital account and extra budget special projects	17	3,102,568	3,313,157
General expenses	18	875,410	471,811
Supervisory Board Expenses	18	55,788	72,248
		<u>38,013,328</u>	<u>27,982,648</u>
OPERATING INCOME/ (LOSS)		660,179	(591,132)
Financing costs – net	19	(2,168,966)	207,448
INCOME/ (LOSS) FOR THE YEAR		2,829,145	(798,580)
OTHER COMPREHENSIVE INCOME FOR THE YEAR		--	--
COMPREHENSIVE INCOME/ (LOSS) FOR THE YEAR		2,829,145	(798,580)



CURAÇAO TOURIST BOARD

CURAÇAO 
Curaçao Tourist Board