

TOURISM PERFORMANCE FIRST NINE MONTHS

TOTAL STAYOVER
ARRIVALS
346,440

DAY
TRIPPERS
13,989

TOTAL CRUISE
ARRIVALS
541,621

TOTAL VISITOR
NIGHTS
3 million

AVERAGE HOTEL
OCCUPANCY
72.1%

ECONOMIC IMPACT
(DIRECT+INDIRECT) INCL. CRUISE
901 million US\$

HOW WAS THE FIRST NINE MONTHS OF 2019?

Curaçao welcomed altogether during the first nine of 2019 **902,050** tourist arrivals. The Curaçao Ports Authority recorded **514,621** cruise arrivals, while the Curaçao Tourist Board registered **346,440** stayover visitors who spent **3** million nights in Curaçao. On average the stayover visitors spent **7.8** nights per person in the first nine months of 2019. Smith Travel Research reported an average occupancy of **72.1%** during this period accompanied by an average daily rate **\$159.64**. The Ministry of Economic Development together with CTB calculated the total economic impact (direct + indirect) including cruise tourism at **901** million US \$ in the first nine months of 2019 using the Turistika Model.



VISITOR ARRIVALS

ARRIVAL COUNT	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	SUMMARY
2019	44,150	41,145	41,862	40,284	36,385	33,924	37,249	38,929	32,509	346,440
2018	39,735	34,773	36,358	32,491	31,430	31,042	35,637	37,094	32,823	311,384
% change	11%	18%	15%	24%	16%	9%	5%	5%	-1%	11%



WHERE DID OUR VISITORS COME FROM?



The first nine months of 2019 shows an increase of 11% stayover arrivals. In total 346,440 stayover visitors travelled to Curaçao. In 2018, we welcomed 311,384 stayover visitors during this same period.

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	2019	2018	CHANGE
CANADA	3,768	3,757	4,028	1,948	765	756	611	717	706	17,056	15,621	9%
USA	6,767	7,136	8,425	6,213	5,863	6,722	6,396	6,309	3,501	57,332	54,225	6%
TOTAL NORTH AMERICA	10,535	10,893	12,453	8,161	6,628	7,478	7,007	7,026	4,207	74,386	69,846	7%
BRAZIL	1,446	922	1,293	973	945	1,001	1,207	935	1,408	10,130	9,339	8%
COLOMBIA	2,824	1,609	1,614	2,704	2,586	3,106	2,288	2,571	2,274	21,573	14,769	46%
OTHER SOUTH AMERICA	3,250	2,905	1,768	2,434	2,744	1,913	2,291	2,923	3,045	23,275	24,189	-4%
TOTAL SOUTH AMERICA	7,520	5,436	4,675	6,111	6,275	6,020	5,786	6,429	6,727	54,977	48,297	14%
GERMANY	1,753	1,709	2,717	2,242	1,480	1,562	1,149	1,162	1,690	15,464	12,844	20%
THE NETHERLANDS	18,298	17,286	16,161	16,151	15,712	13,081	16,455	15,861	14,003	143,009	129,763	10%
OTHERS EUROPE	2,772	2,770	2,214	3,226	1,874	1,607	2,124	2,027	1,744	20,375	19,202	6%
TOTAL EUROPE	22,822	21,765	21,092	21,619	19,066	16,250	19,728	19,050	17,436	178,848	161,809	11%
CARIBBEAN	2,127	2,134	2,474	3,351	3,397	3,136	3,733	5,119	3,295	28,942	24,091	20%
OTHERS	1,108	873	1,147	1,027	1,001	998	995	1,305	831	9,285	7,341	27%
SUMMARY	44,150	41,145	41,862	40,284	36,385	33,924	37,249	38,929	32,509	346,440	311,384	11%

MARKETS BY REGION



HOW MANY NIGHTS DID THEY STAY?

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	2019	2018	CHANGE
NORTH AMERICA	80,804	80,628	84,445	54,434	42,813	49,864	48,842	44,313	27,416	513,577	483,893	6%
SOUTH AMERICA	53,800	39,355	32,475	44,091	42,965	41,978	43,396	43,543	49,663	391,266	354,821	10%
CARIBBEAN	13,457	13,372	15,381	19,484	17,375	17,852	22,593	25,743	18,583	163,840	145,059	13%
EUROPE	261,441	236,971	225,122	224,926	198,006	178,476	245,993	209,961	190,960	1,971,856	1,836,532	7%
OTHERS	2,699	1,943	1,969	2,533	2,428	2,389	2,097	2,439	2,448	20,945	23,630	-11%
SUMMARY	411,201	372,269	359,392	345,468	303,587	290,559	362,921	325,999	289,088	3,061,484	2,843,935	8%



WHAT IS THE AVERAGE NIGHT SPENT PER PERSON?

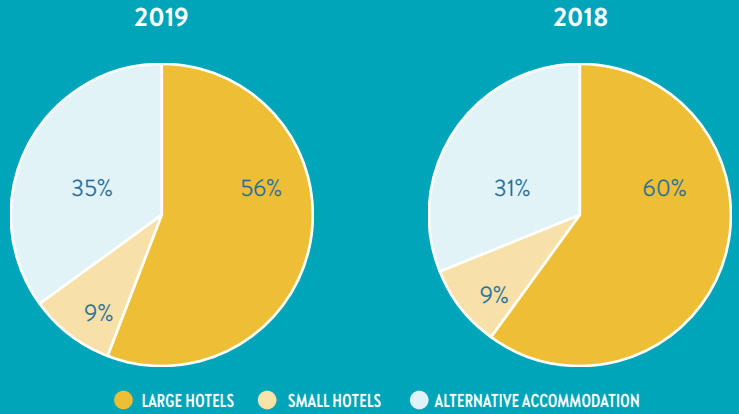
	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	2019	2018	CHANGE
NORTH AMERICA	7.0	7.0	6.1	6.4	6.3	6.2	6.6	6.0	6.3	6.5	6.6	-2%
SOUTH AMERICA	6.8	7.0	6.7	7.1	6.7	6.8	7.4	6.6	7.3	6.9	7.2	-4%
CARIBBEAN	5.3	5.0	5.0	4.8	4.0	4.3	5.1	4.1	4.7	4.6	5.4	-15%
EUROPE	9.0	9.3	7.7	9.4	9.0	9.5	11.2	10.1	9.7	9.4	10.3	-9%
OTHERS	2.4	2.1	1.7	2.4	2.4	2.3	2.1	1.9	2.9	2.2	3.2	-31%
SUMMARY	7.8	8.0	6.8	7.9	7.5	7.6	8.9	7.7	8.1	7.8	8.4	-7%

WHERE DID OUR VISITORS STAY?



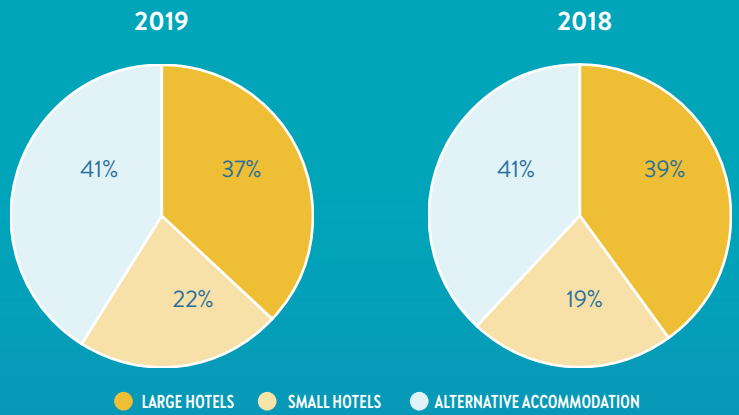
NORTH AMERICA

	2019	2018
LARGE HOTELS	56%	60%
SMALL HOTELS	9%	9%
ALTERNATIVE ACCOMMODATION	35%	31%
SUMMARY	100%	100%



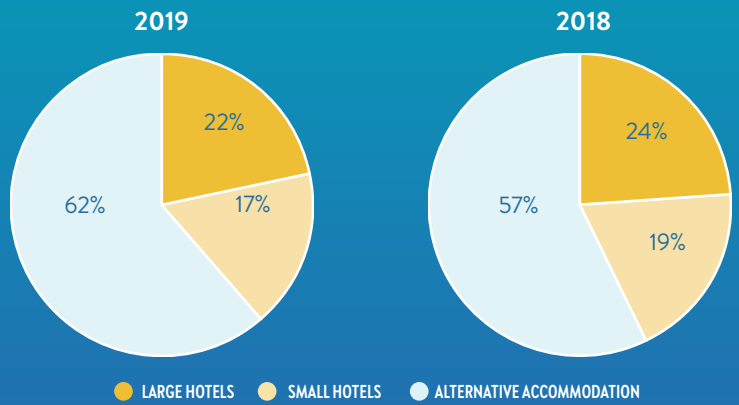
SOUTH AMERICA

	2019	2018
LARGE HOTELS	37%	39%
SMALL HOTELS	22%	19%
ALTERNATIVE ACCOMMODATION	41%	41%
SUMMARY	100%	100%



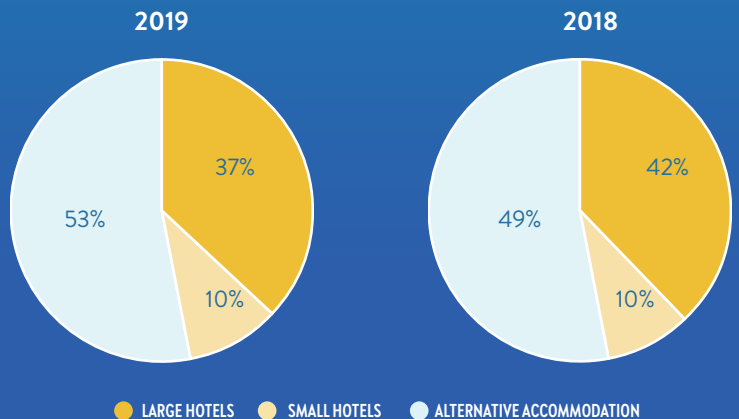
CARIBBEAN

	2019	2018
LARGE HOTELS	22%	24%
SMALL HOTELS	17%	19%
ALTERNATIVE ACCOMMODATION	62%	57%
SUMMARY	100%	100%



EUROPE

	2019	2018
LARGE HOTELS	37%	42%
SMALL HOTELS	10%	10%
ALTERNATIVE ACCOMMODATION	53%	49%
SUMMARY	100.0%	100.0%



CURAÇAO HOTEL PERFORMANCE IN FIRST NINE MONTHS 2019



Occupancy

2019	2018
72.1%	72.0%
0% (points)	



Average Daily Rate (ADR)

2019	2018
\$159.64	\$152.86
↑ +4%	



Revenue per Available Room (RevPAR)

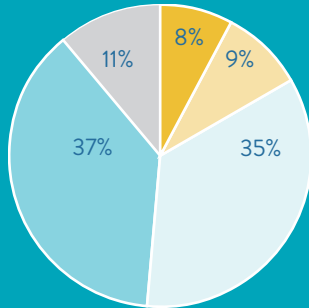
2019	2018
\$116.55	\$110.77
↑ +5%	

SOURCE: STR

WHAT AGES ARE OUR VISITORS?

NORTH AMERICA

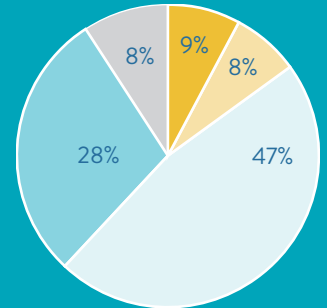
0-14	8%
15-24	9%
25-44	35%
45-64	37%
65+	11%
SUMMARY	100.0%



● 0-14 ● 15-24 ● 25-44 ● 45-64 ● 65+

SOUTH AMERICA

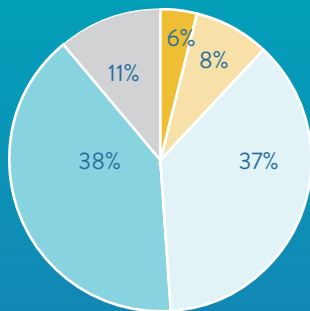
0-14	9%
15-24	8%
25-44	47%
45-64	28%
65+	8%
SUMMARY	100.0%



● 0-14 ● 15-24 ● 25-44 ● 45-64 ● 65+

CARIBBEAN

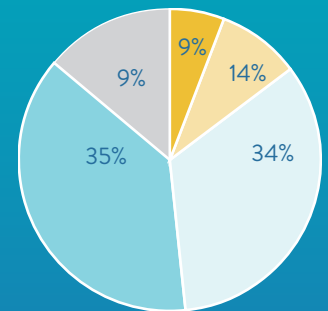
0-14	6%
15-24	8%
25-44	37%
45-64	38%
65+	11%
SUMMARY	100.0%



● 0-14 ● 15-24 ● 25-44 ● 45-64 ● 65+

EUROPE

0-14	9%
15-24	14%
25-44	34%
45-64	35%
65+	9%
SUMMARY	100.0%



● 0-14 ● 15-24 ● 25-44 ● 45-64 ● 65+

WHAT GENDER ARE OUR VISITORS?

2019
VISITORS

52%

48%

2018
VISITORS

51%

49%

DIGITAL



WEB SESSION BREAKDOWN FIRST NINE MONTHS OF 2019

2019
FIRST NINE
MONTHS
1,476,965 M

2018
FIRST NINE
MONTHS
1,476,533 M

CHANGE
0%

WEB VISIT CURACAO.COM BY FOCUS MARKETS IN FIRST NINE MONTHS 2019

UNITED STATES

2019 267,933
2018 273,155
CHANGE -2%

COLOMBIA

2019 273,674
2018 182,795
CHANGE 50%

NETHERLANDS

2019 195,297
2018 193,275
CHANGE 1%

GERMANY

2019 63,080
2018 91,498
CHANGE -31%

CANADA

2019 70,682
2018 86,231
CHANGE -18%

BRAZIL

2019 63,618
2018 75,518
CHANGE -12%

FACEBOOK FIRST NINE MONTHS 2019



TOTAL FOLLOWERS
241.2 K



TOTAL ENGAGEMENT
1.6 M



TOTAL POSTS
280



TOTAL IMPRESSIONS
45.2 M



INSTAGRAM FIRST NINE MONTHS 2019



TOTAL FOLLOWERS
61 K



TOTAL ENGAGEMENT
239.3 K



TOTAL POSTS
208



TOTAL IMPRESSIONS
6.4 M

HOW DID THE CRUISE INDUSTRY PERFORM IN THE FIRST NINE MONTHS OF 2019



CRUISE CALLS

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	SUMMARY
2019	51	35	31	25	13	10	14	13	11	203
2018	42	35	32	27	11	10	15	15	12	199
% change	21%	0%	-3%	-7%	18%	0%	-7%	-13%	-8%	2%



CRUISE PASSENGERS

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	SUMMARY
2019	120,358	81,839	75,908	66,518	39,453	35,756	49,056	34,531	38,202	541,621
2018	97,651	85,687	80,975	62,073	37,126	33,093	45,573	41,542	41,538	525,258
% change	23%	-4%	-6%	7%	6%	8%	8%	-17%	-8%	3%

SECTORAL IMPACT IN FIRST NINE MONTHS OF 2019

EXPENDITURE JANUARY – SEPTEMBER 2019 (X \$1000)



TOTAL DIRECT ECONOMIC IMPACT

\$ 549 million ↑ 8%



TOTAL INDIRECT ECONOMIC IMPACT

\$ 352 million ↑ 8%



TOTAL ECONOMIC IMPACT

\$ 901 million ↑ 8%

HOW DID OUR STAYOVER VISITORS SPEND THEIR MONEY?

EXPENDITURE (X \$1000)

	JAN – SEP 2019	JAN – SEP 2018	% CHANGE
ACCOMMODATION	195	180	8%
RESTAURANT	135	125	8%
GROCERIES	25	23	9%
SHOPPING	61	55	11%
ACTIVITIES	28	26	8%
TRANSPORTATION	43	40	8%
ENTERTAINMENT	21	20	5%
OTHER	41	38	8%
TOTAL DIRECT ECONOMIC IMPACT	549	507	8%

SOURCE: TURISTIKA MODEL

EXPENDITURE IN PERCENTAGES



WHAT IS THE AVERAGE SPENDING PER DAY PER PERSON?



FIRST NINE MONTHS OF 2019 IN REVIEW

	2019 FIRST NINE MONTHS	2018 – FIRST NINE MONTHS	CHANGES
STAYOVER ARRIVALS	346,440	311,384	11%
DAY TRIPPERS	13,989	15,011	-7%
CRUISE ARRIVALS	541,621	525,258	3%
TOTAL ARRIVALS	902,050	851,653	6%
TOTAL TOURIST NIGHTS	3 million	2.8 million	8%
AVERAGE NIGHTS	7.8	8.4	-7%
OCCUPANCY RATE	72.1%	72.0%	0% (points)
AVERAGE DAILY RATE	\$159.64	\$152.86	4%
REVENUE PER AVAILABLE ROOM	\$116.55	\$110.77	5%
TOTAL ECONOMIC IMPACT (DIRECT, INDIRECT + CRUISE)	\$901 million	\$833 million	8%