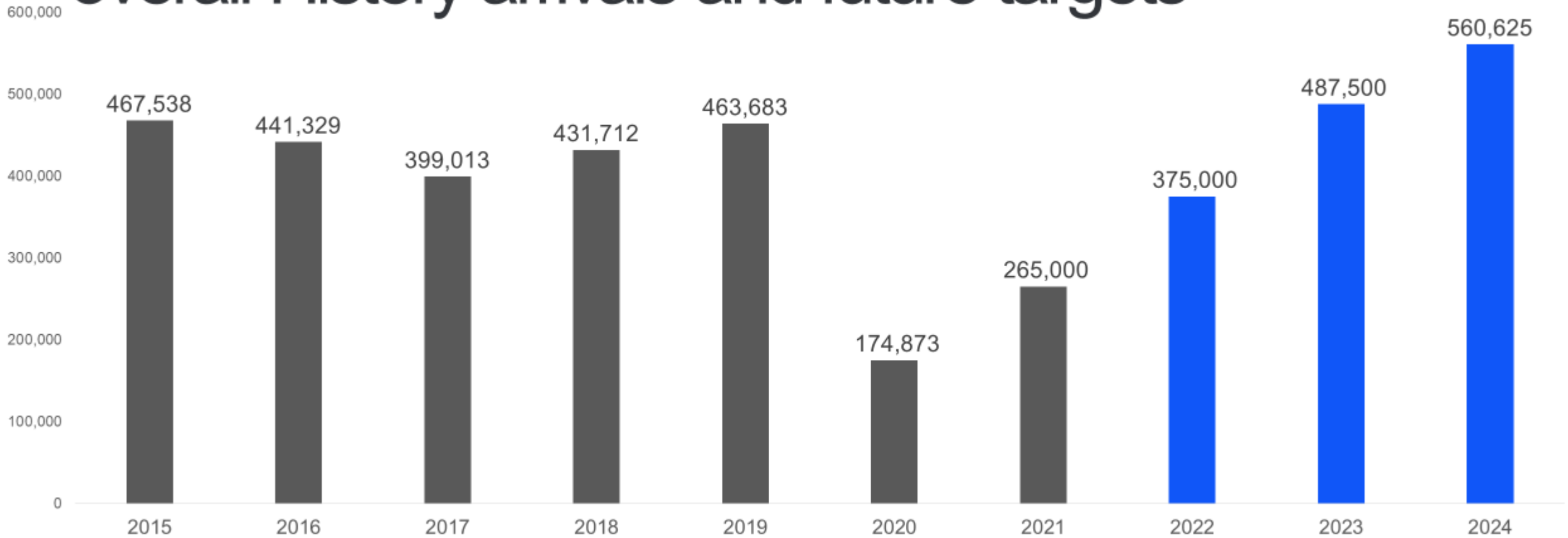


road to recovery

OVERALL PERFORMANCE

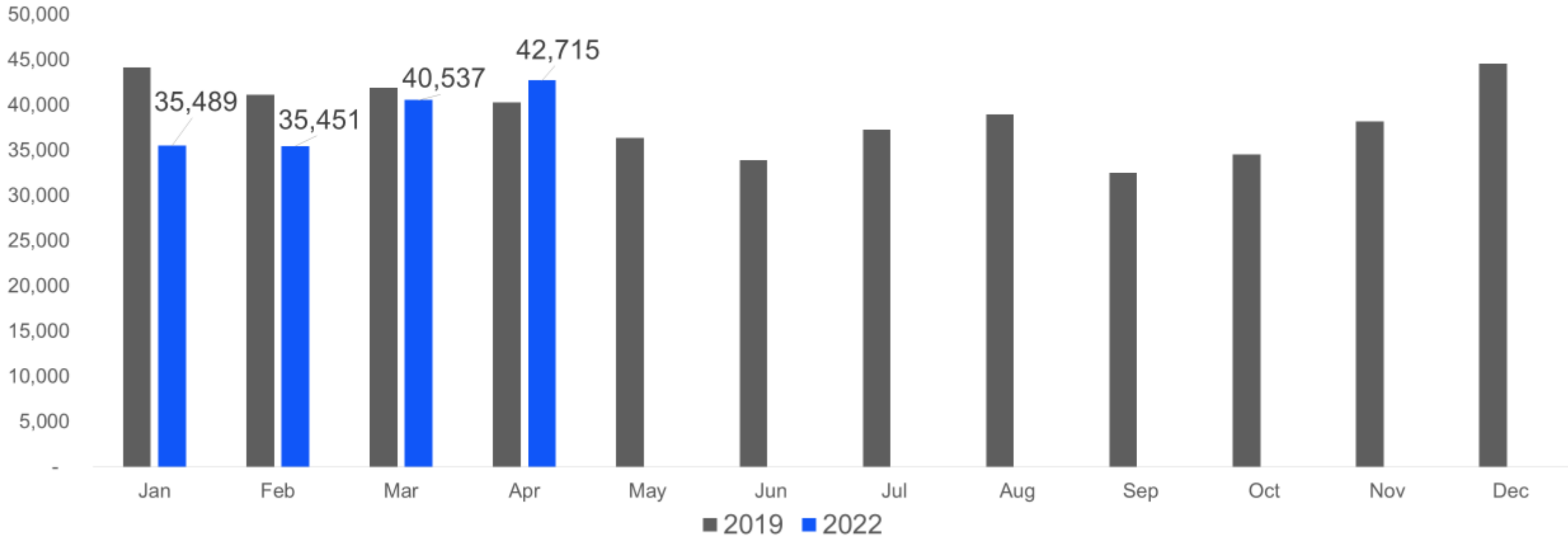
# overall History arrivals and future targets



2019 grew by 7%  
2020 decreased by 62%  
2021 grew by 52%

2022 PERFORMANCE

# overall stayover visitors by month



Total stayover arrivals YTD: 154,192 visitors  
41% of the 2022 target is achieved

# 2022 target

Region	Realized 2019	Realized 2021	Target 2022	% Growth 2022/2021	Recovery rate 2022/2019	% M. Share 2022
Canada	22,100	3,573	10,000	180%	45%	3%
USA	74,050	39,095	60,000	53%	81%	16%
<b>Total North America</b>	<b>96,150</b>	<b>42,668</b>	<b>70,000</b>	<b>64%</b>	<b>73%</b>	<b>19%</b>

Spending per person per day: **\$262 USD**

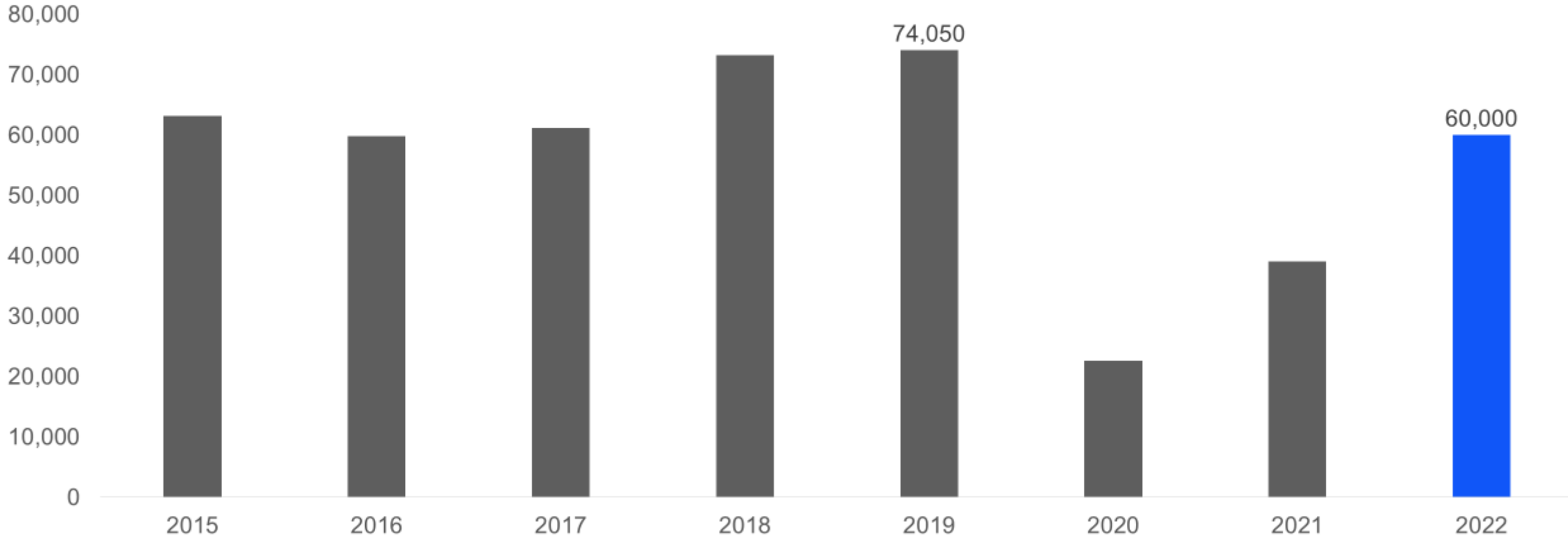
Current avg. nights: **7.7 nights**

Avg. Nights in 2019: **6.5 nights**

usa

HISTORY PERFORMANCE & 2022 TARGET

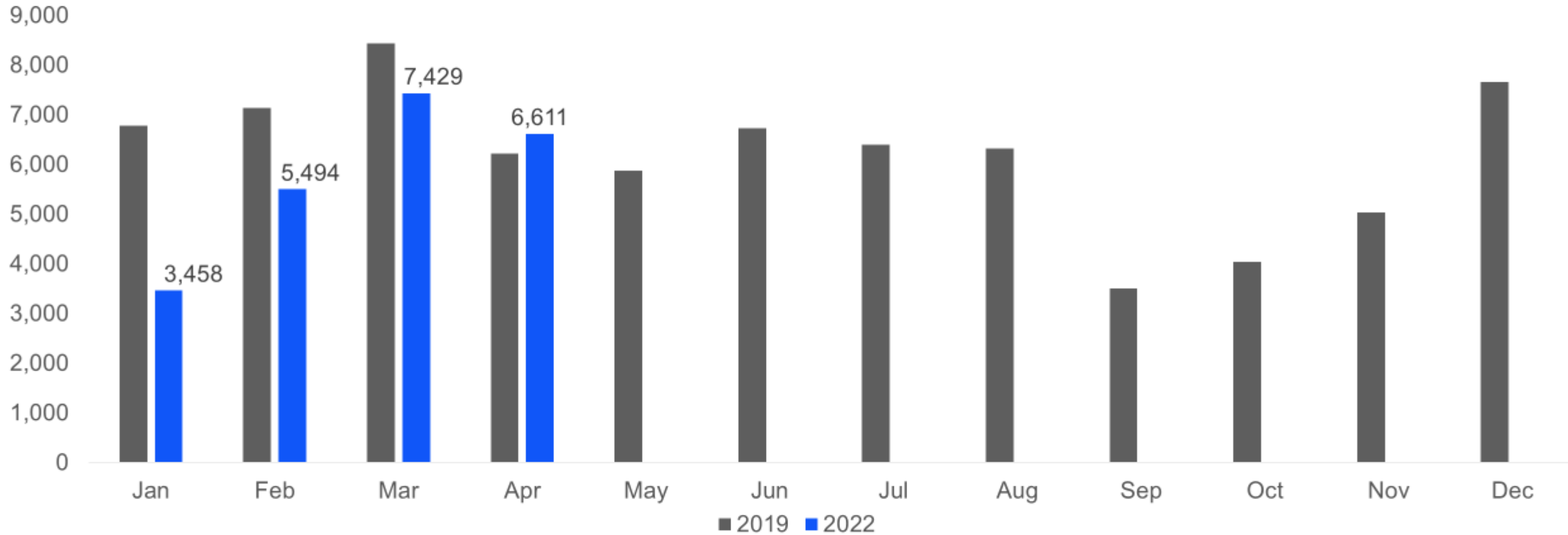
# USA 2015 - 2022



2021 realized recovery rate: 53%  
2022 target recovery rate: 81%

2022 PERFORMANCE

# USA 2022



Realized visitors 2019 YTD (Jan – Apr): 28,542 visitors

Realized visitors 2022 YTD (Jan – Apr): 22,992 visitors

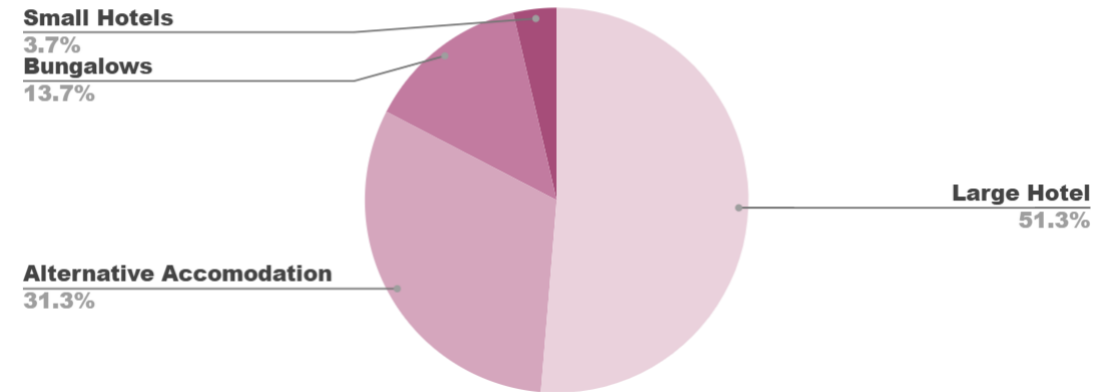
Decrease of 19% visitors compared to benchmark year

# market profile & trends

- accommodation preference for the American visitor has shifted with **more visitors choosing large hotels**. This is a 6% increase compared to 2019 (*benchmark year*).

- Large Hotel (51.3%)
- Alternative Accommodation (31.3%)
- Bungalows (13.7%)
- Small Hotel (3.7%)

**USA Accommodation Type 2021**



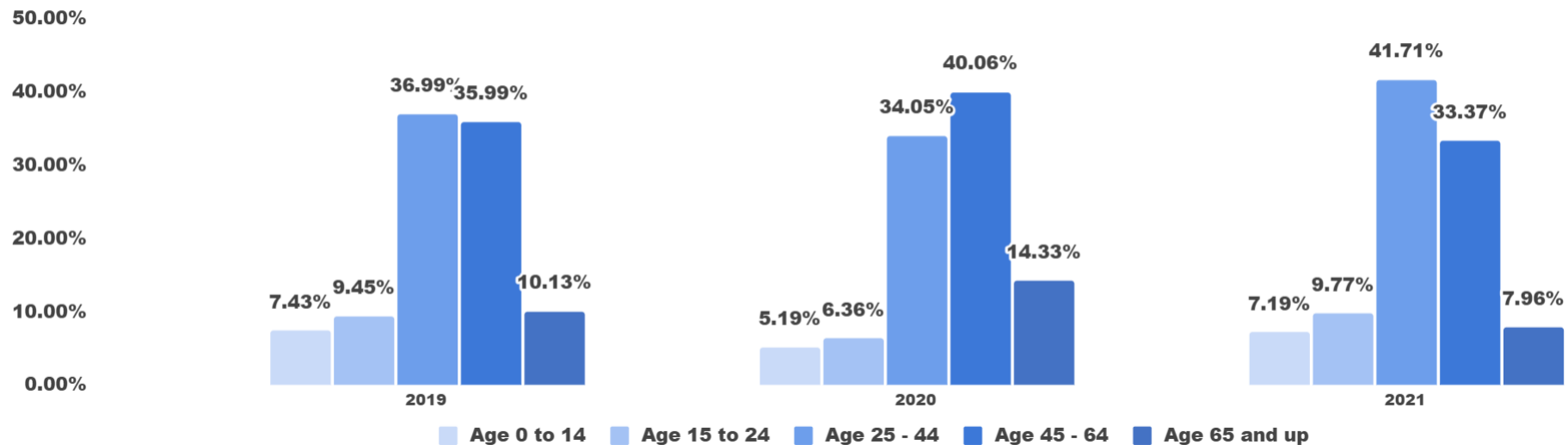
- with the **new hotel openings** we also expect to see an even more increase with the Large Hotel stays, especially with the upcoming all-inclusive and known American brand properties.
- independent travel advisors collectively are seeing a profound **surge in all-inclusive resort reservations**, tour bookings and other land-based sales that require more time for research.



# market profile & trends

- **younger demographic** of US visitors, in 2021 the age **group of 25-44 increased to 41.7%** surpassing the previously leading group of 45 to 64.
- current lead time for the American traveler is about **30 - 60 days**. This has increased, from the previous shorter lead times recorded.

**USA Age Group**



UNITED STATES OF AMERICA

# trade actions Q3 + Q4 including private sector partnership opportunities

Wholesale/ OTA co-op campaigns

Partnership host agencies

Trade education & e-blast

- e-blast
- Webinars (CTB& Private sector)
- Tradeshows
- FAM trips



**CURAÇAO** SEND TO A FRIEND

No Better **TIME THAN NOW**

**NO COVID TEST REQUIRED BEFORE TRAVEL**  
Make sunny getaways even easier by completing client's digital immigration and passenger locator cards online 48 hours before departure

**EXPLORE CURAÇAO HOTELS**

- Rancharum Wind Creek Curaçao Resort. Soak luxury in the heart of Willemstad
- Curaçao Marlin Beach Resort. A tropical hotel with an outstanding panoramic view
- Papagayo Beach Club, Resort, Hotel & Spa. No Curfew! No Curfew!
- LidoDive Beach Resort. The ultimate beach and dive vacation in a small paradise
- Scuba Lodge. Outstanding Beachfront Hotel and dive center minutes from the Hooftkade
- DREAMS Curaçao Resort, Spa & Casino. All Inclusive Unlimited Luxury for couples & families
- Somargu Curaçao Resort, Spa & Casino. All Inclusive Unlimited Fun for kids & adults
- Zalmy Curaçao Resort & Spa. All Inclusive Exclusive Privileges - Your Luxury Inclusions
- ACOTYA Curaçao Resort Villas & Spa. The Hidden Reef in the Caribbean
- Wynhall's Kanakas Aqua Resort. Curaçao's most affordable All Inclusive for family fun!
- Bonnie Luxury Resort. The ultimate getaway for luxury seekers
- Moravia Spa Resort. Stylish & spacious apartments & villas surrounded by nature
- Boutique Hotel 't Kluisje. An oasis of peace in a monumental building in vibrant Plettenburg
- Bako Bahamian Boutique Hotel. A hot bed retreat for fine spirits in the heart of Plettenburg
- Kaaitje Beach Resort. Spectacularly unique! A tropical escape in a Caribbean paradise

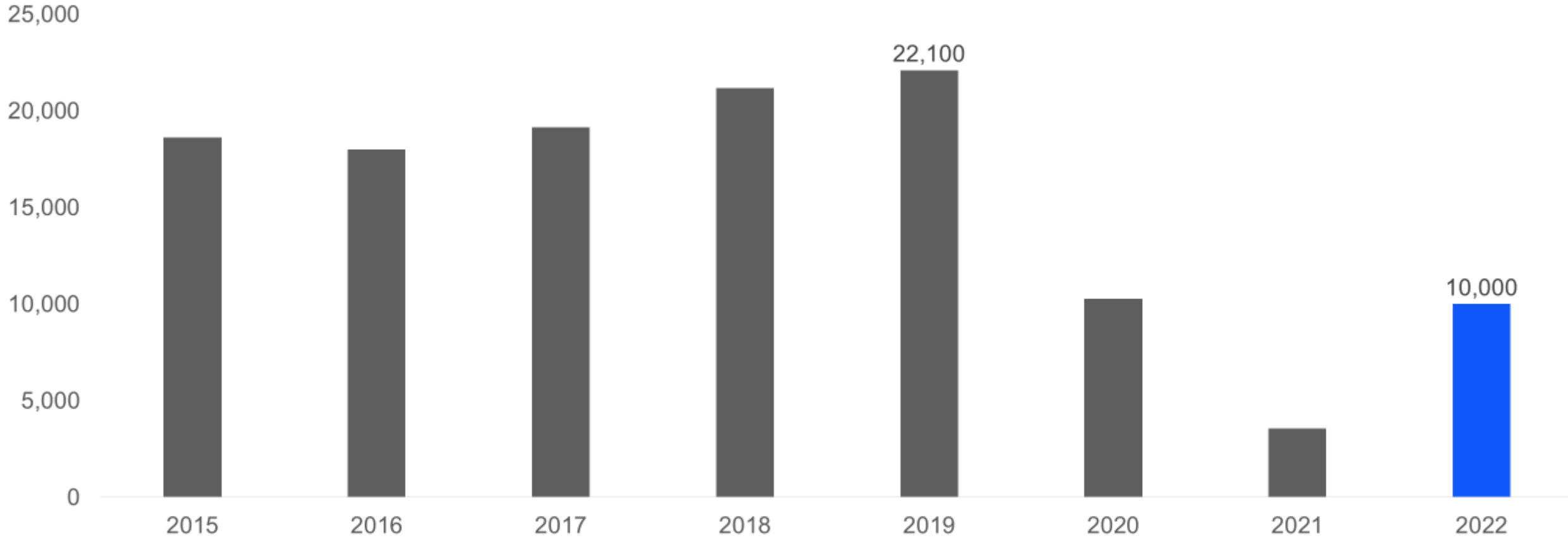
**SEE ALL CURAÇAO HAS TO OFFER**

- A Gem In The Dutch Caribbean
- A World Of Color In Willemstad
- Beaches & Waterports To Indulge
- Thrilling Land Adventures
- A Band Of Flowers
- Please To Stay

canada

HISTORY PERFORMANCE & 2022 TARGET

# Canada 2015 - 2022

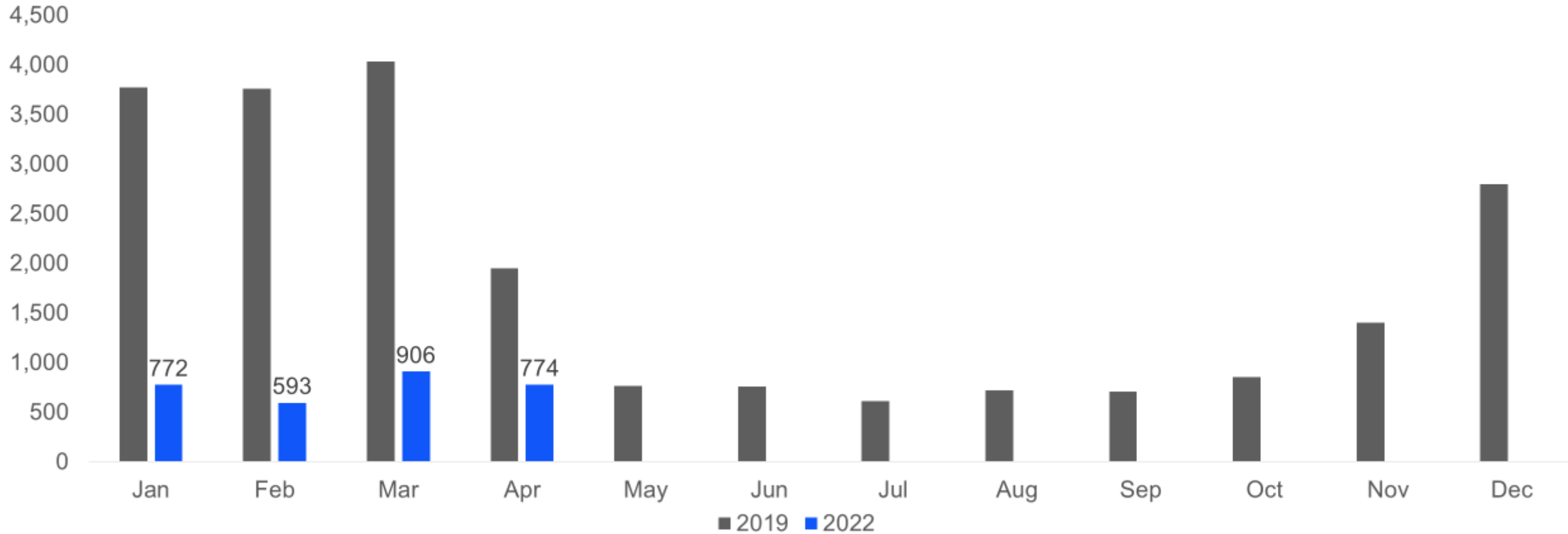


2021 realized recovery rate: 16%

2022 target recovery rate: 45%

2022 PERFORMANCE

# Canada 2022



Realized visitors 2019 YTD (Jan – Apr): 13,501 visitors

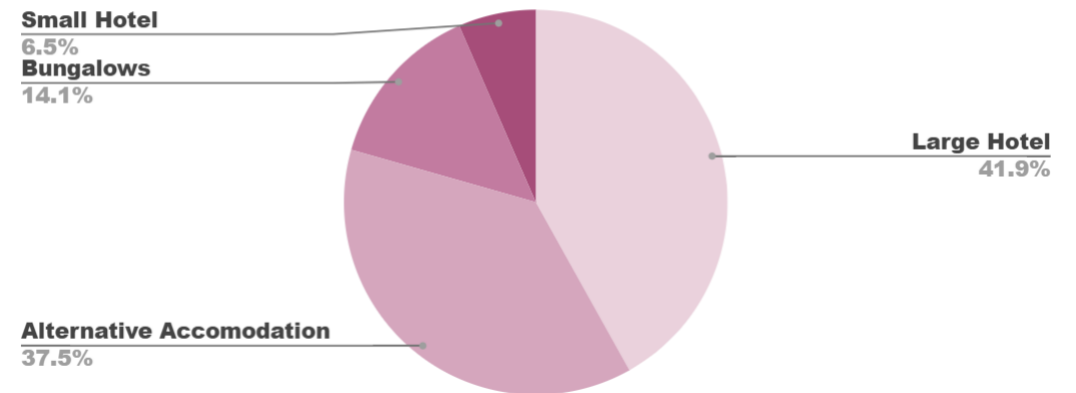
Realized visitors 2022 YTD (Jan – Apr): 3,045 visitors

Decrease of 77% visitors compared to benchmark year

# market profile & trends

- accommodation preference for the Canadian visitor has remained unchanged:
  - Large Hotel (41.9%)
  - Alternative Accommodation (37.5%)
  - Bungalows (14.1%)
  - Small Hotel (6.5%)
- with the **new hotel openings** we also expect to see an increase in Canadian interest, especially with the all-inclusive brands.

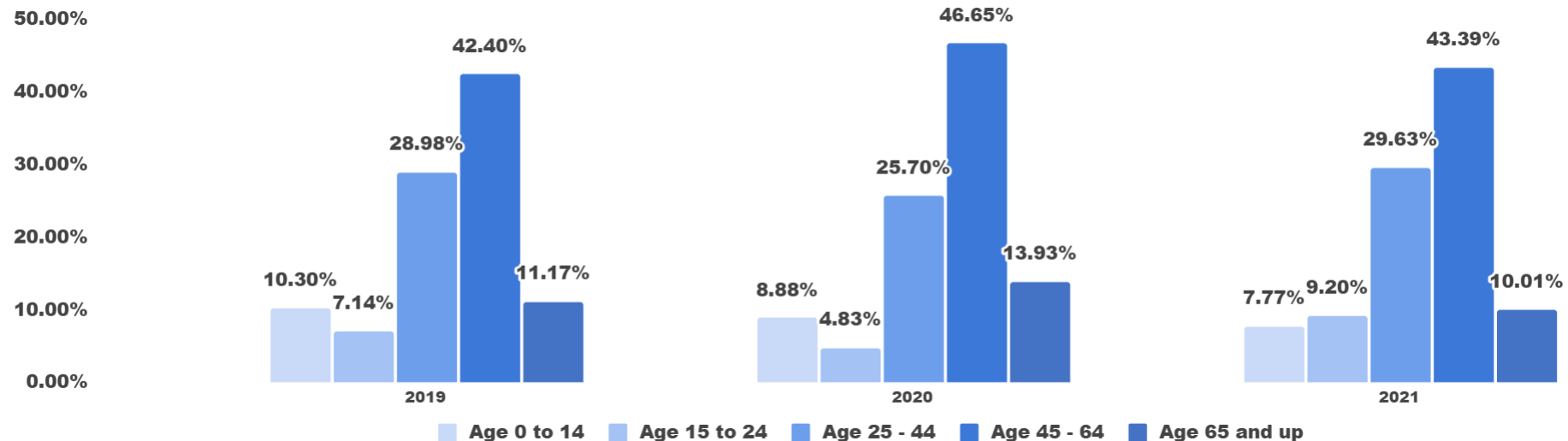
**CANADA Accommodation Type 2021**



# market profile & trends

- the age group for Canadian visitors also remains unchanged with **43.39% are between the ages of 45 to 64.**
- average lead time for the Canadian traveler is about **90 days**. This has decreased due to the uncertain nature of travel and travel restrictions.

**CANADA Age Group**





# trade actions Q3 + Q4 including private sector partnership opportunities

## Wholesale/ OTA co-op plans

- *Resume co-plans*

## Trade education & e-blast

- e-blast
- Webinars (CTB& Private sector)
- Tradeshows
- FAM trips



**One part Serenity, One part Adventure, All Curaçao!**

Join us to learn more about Curaçao. This Southern Caribbean island destination offers a rugged terrain as the perfect backdrop for all types of travelers: adventure seekers, beach bums, divers, history buffs, epicureans and modern city explorers.

May 17, 2022  
01:00 PM ET

[REGISTER NOW!](#)

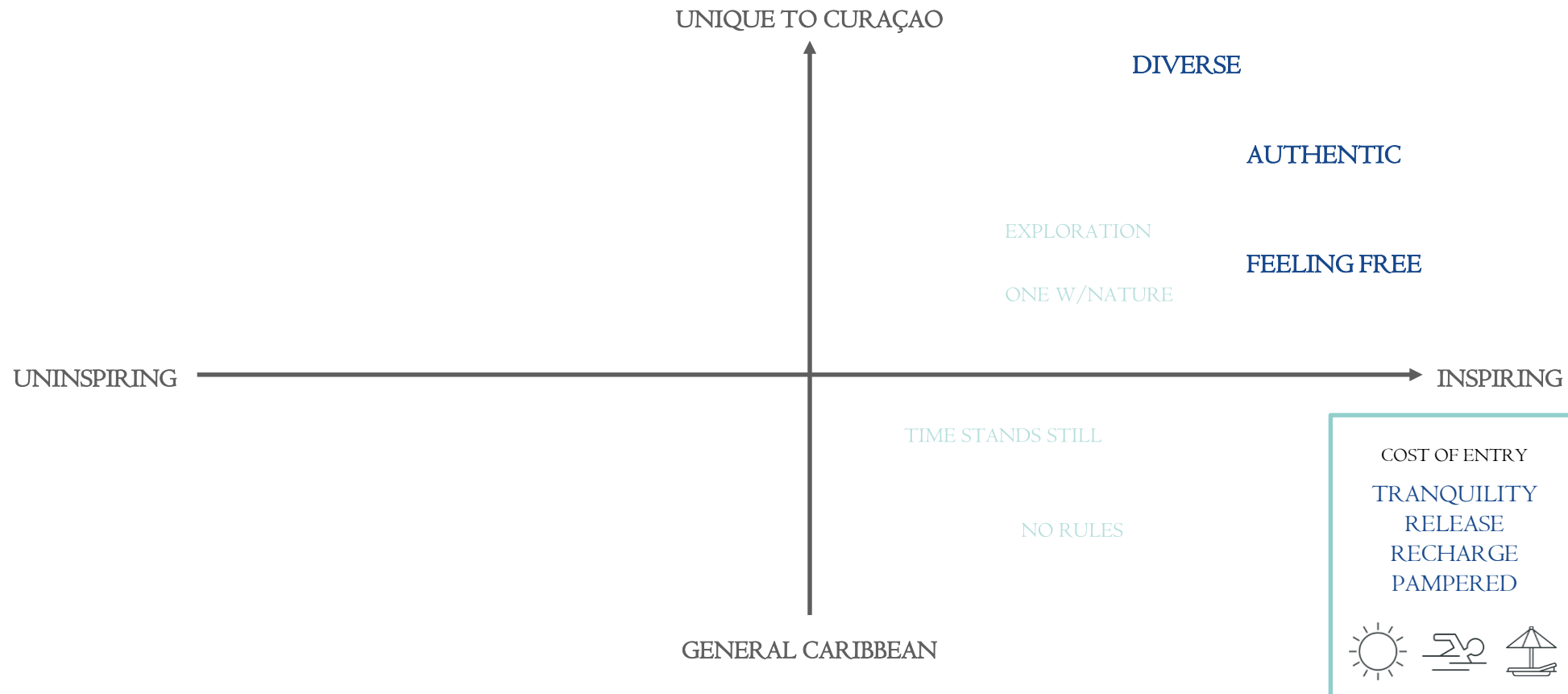




branding – current state

## STRATEGIC FOUNDATION

Even though the campaign has gone through an evolution since its inception, the core strategic foundation has remained.



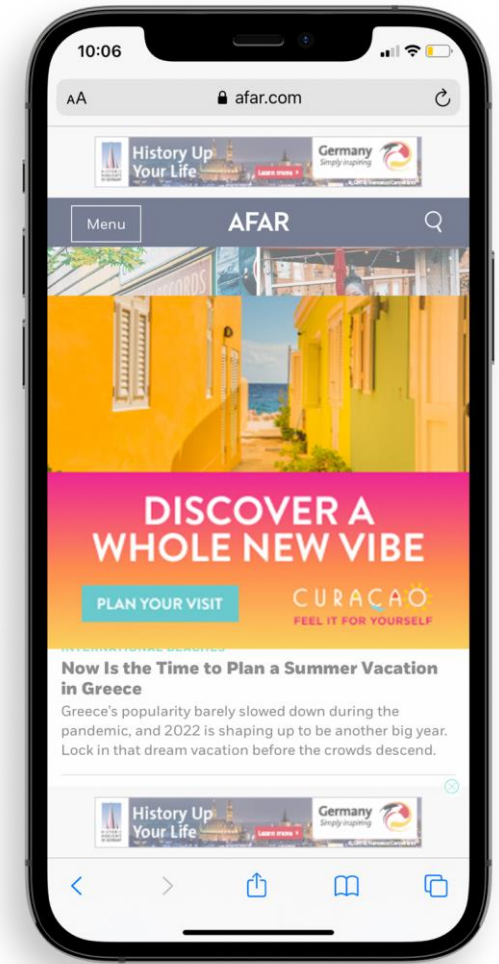
## CURRENT STATE: CAMPAIGN EVOLUTION

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Since 2018, the campaign direction has shifted, giving way to a **more simplified approach while maintaining its color, vibrancy, and emotional messaging.**

In what was originally a more graphic — somewhat ethereal — representation of what it felt to be on the island, has progressed to showcase **true-to-life depictions** to provide a clear visual of the island, always with the safety and wellbeing of travelers in mind.

“Welcome Back” has now further evolved to show the unique blend of culture, adventure, and European-Caribbean flair of Curaçao, ready to safely welcome visitors. Throughout this process, the strategic foundation of the campaign has remained intact. Landscapes, city portraits, and lifestyle scenes give travelers visuals to dream about and plan for their next trip.



## MANIFESTO

We don't live our everyday lives in bold, vivid color. Colors naturally fade into the background, and parts of us fade along with them. But when you get off that plane, it hits you. It's not that you're a whole different person; you're just seeing those colors more clearly, and everything around you shines brighter than ever.

You'll get back on that plane eventually, and tell everyone about the great time you had. But you won't have words for that feeling – the one that let you shine. Maybe you'll tell them they'll just have to feel it for themselves.

**Curaçao. Feel it for yourself.**

q&a

masha danki