

# Tourism in numbers 2013-2014

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## Introduction

*Tourism is a social, cultural and economic experience which involves the movement of people to countries or places outside their usual environment for personal, business or professional purposes. The tourism industry generates substantial economic benefits to the local economy. It provides foreign exchange without exporting tangible goods out of the country. It increases export earnings from services and the rate of growth of the economy. It generates employment. It brings about investment in infrastructure and most certainly contributes to government revenues.*

*In this article a general view will be given in numbers on the tourism industry in Curaçao and how its position is compared to other countries in the Caribbean region.*

*The data presented in this article is primarily based on data that the Curaçao Tourist Bureau (CTB) has gathered together with data that Curaçao Hospitality and Tourism Association (Chata) and the Central Bureau of Statistics (CBS) has compiled. A range starting from 2010 to 2014 will be given with an emphasis on the last year, depending on the availability of the data. The methodology that is used among the sources of data is also different.*

*The data will be divided in:*

- Volume characteristics data which entail the number of visitors (arrivals) and overnight stays.
- Trip characteristics which involve length of stay, period of stay, and place of stay.
- Accommodation data (hotels and lodgings).

## Definitions<sup>1</sup>

The definitions used in this article have been adopted from Eurostat Tourism Satellite Account.

**Visitor:** any person travelling to a place other than that of his/her usual environment for less than 12 months and whose main purpose of trip is other than the exercise of an activity remunerated from within the place visited.

**Inbound visitors:** the tourism of non-resident visitors within the economic territory of the country of reference.

**Stay over visitors:** visitors, who stay one or more nights in the place visited.

**Same day visitors:** visitors, who visit a place for less than one night.

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<sup>1</sup> Eurostat, OECD, WTO, UNSD, *Tourism Satellite Account: Recommended Methodological Framework*, (Luxembourg, Madrid, New York, Paris, 2001), 13, 16, 29.

*Occupancy rate (Occ):* Rooms sold divided by rooms available multiplied by 100. Occupancy is always expressed as a percentage of rooms occupied.

## Volume characteristics

In this segment the data entails the number of visitors (arrivals) and overnight stays. An overview will be given of the general development in these aforementioned areas.

### Stay over visitors

The number of stay over visitors between 2010 and 2014 has been steadily growing; although improvement has been attained, there is a deceleration in growth. For Curaçao there has been an increase of 3 percent in visitors in 2014 in comparison to 2013.

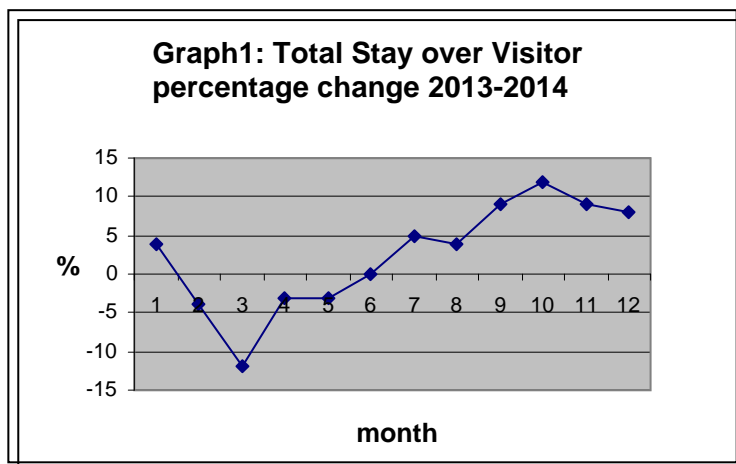
Generally mid-December through March are the most popular vacation months for the North Americans this due to primarily winter season, while Europeans tend to travel more during mid-June through August period. The prices drop significantly from end-April through end-June and July till mid-December (low season). The highest peaks of visitors visiting the island in the last five years have been in August, October through December 2014 (Table 1).

The decrease in stay over visitors during the months February to May 2014 is a result of the airlift challenge on different routes compared to 2013. This situation has affected the visitor arrivals from North America, South America and the Caribbean region.

For the months of August/September from 2013-2014 the amount of stay over visitors has catapulted to a higher position, this is mainly due to the tourists who visit the North Sea jazz festival that is held in this period.

<b>Table 1: Total Stay Over Visitor stats overview</b>						
<b>Month</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>Change % 2013-2014</b>
January	28067	30083	34293	36083	37659	4
February	26912	31338	35122	36977	35547	-4
March	29772	33029	35752	40444	35690	-12
April	25986	34249	34921	36714	35592	-3
May	26558	28047	30616	33316	32420	-3
June	23072	28912	31317	32997	33080	0
July	29845	33137	35815	35196	36844	5
August	30767	36406	39075	38918	40507	4
September	26784	31144	33105	34324	37409	9
October	32116	32459	34355	37033	41482	12
November	29435	33386	35468	38579	42234	9
December	32337	37921	39824	40170	43578	8
<b>Total</b>	<b>341651</b>	<b>390111</b>	<b>419663</b>	<b>440751</b>	<b>452042</b>	<b>3</b>

Source: CTB



### Stay over visitors by origin

The majority of visitors to Curaçao are originating from the Netherlands, Venezuela and USA (Table 2). The number of Dutch visitors has encountered a fall in 2011 and 2014; it has slightly recovered in 2014 with more than 6 percent.

In 2010 Venezuela has been confronted with a devaluation of their local currency which led to tightened restrictions on access to foreign currency. These foreign developments had a negative impact on the local tourism sector. As a result, the number of Venezuelan tourists in Curaçao dropped significantly that year. By 2011 the number of Venezuelan visitors has been progressively on the rise, reaching a peak in 2014 of 6 percent growth, which is the second highest visitor group.

Tourism number from the USA has been fluctuating, it increased after 2009 (35953 US visitors) in 2010 and 2013, in 2012 and 2014 there has been a dip in overnight visitors. The increase in Canadian and other European stay over visitors in 2014 is attributed to the new flight service that started end of 2014 together with the additional joint marketing efforts.

**Table 2: Stay over visitors by Origin**

Year	Total visitor	Visitors by Origin								
		USA	Canada	Venezuela	Other America	Aruba	Other Caribbean	Netherlands	Other Europe	Rest of the World
2010	341651	49487	7619	44353	30923	18827	19585	140189	23662	7006
2011	390111	63334	8791	61564	35297	20452	20678	141546	27622	10827
2012	419663	61408	9687	82520	39738	21557	17851	136976	36027	13899
2013	440751	61709	9608	92357	43658	20048	18922	132176	43673	18600
2014	452042	53185	12468	98331	43388	17985	15509	140702	45536	24938

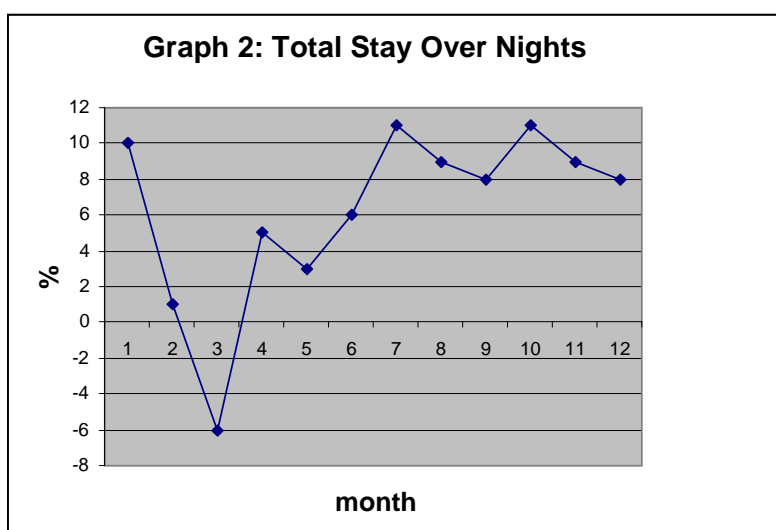
Source: CTB

## Overnight stays

The total number of nights spent in a country is influenced by the number of visitors and their average length of stay. It is the most important indicator that measures the nights a tourist stays in a country. By staying overnight it generates income for the industry and subsequently for the country. January, July and October are the highest grossed stay over months in 2014 (see table 3). There is a growth trend in the stay over nights throughout the years 2010-2014.

<b>Table 3: Total Stay over Nights</b>						
<b>Month</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>Change % 2013-2014</b>
January	248520	288543	350973	338480	372242	10
February	227024	270253	318505	320646	322392	1
March	229445	270919	307946	334069	313083	(6)
April	217886	274530	302086	296259	311935	5
May	208293	219335	260763	267635	275704	3
June	200729	235227	261048	276194	291404	6
July	293126	308350	332324	311589	344703	11
August	266233	289435	324008	313077	342115	9
September	222950	234187	284608	292087	316224	8
October	256451	254438	290609	306359	339084	11
November	234287	244839	275677	323135	351077	9
December	283499	295334	359550	374781	404249	8
<b>Total (YTD)*</b>	<b>2888443</b>	<b>3185390</b>	<b>3668097</b>	<b>3754311</b>	<b>3984212</b>	<b>6</b>

Source: CTB  
 \*YTD = yield to date



## Cruise tourism

The cruise tourist can be considered as a same-day visitor (excursionist). The cruise tourist generally stays only one day on the island. The amount of passengers that has come to the port of Curaçao in 2014 was 629145 (table 4). This is about 8 percent more cruise passengers than the year before. In 2010 there was a decrease in cruise passengers of about 8 percent compared to 2009 (417324 cruise passengers).

Cruise calls refer to the amount of cruise ships that have docked in the harbor. The amount of calls in 2014 (300) is at an all time high compared to the years before (see table 4). The increase in the amount of cruise passengers is not only due to more cruise calls but also due to the fact that cruise ships, that are visiting have more passenger capacity (see 2013).

<b>Table 4: Cruise statistics</b>			
<b>Year</b>	<b>Cruise passengers</b>	<b>Cruise calls</b>	<b>Change % Cruise passengers</b>
<b>2010</b>	382697	220	-8
<b>2011</b>	400596	246	5
<b>2012</b>	436068	226	8
<b>2013</b>	583994	291	35
<b>2014</b>	629145	300	8

Source: CTB

## Trip characteristics

The trip refers to the travel by a person from the time of departure from his/her usual residence until he/she returns: it thus refers to a round trip. A trip is made up of visits to different places. In this section a view will be given the main characteristics of the trip, the length of stay, period of stay, place of stay.

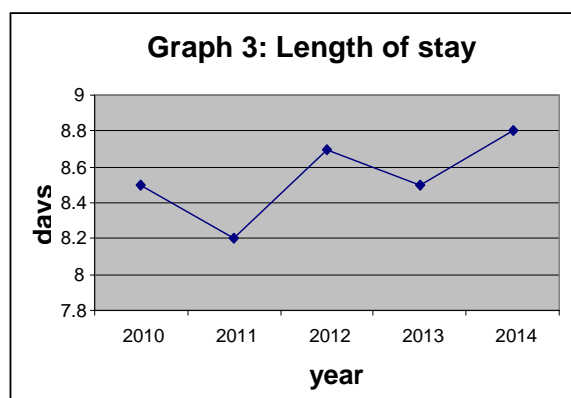
### Length of stay

The **average (avg.) length of stay** (table 5) for a number of holiday trips is calculated by dividing the total number of nights spent by the total number of visitors. The length of stay and the number of visitors reflects the number of overnight stays, which is considered a key indicator for accommodation statistics. The length of stay in Curaçao has progressively been increasing every year. For the period of 2012-2014, the average length of stay was at a steady growth of approximate 9 nights.

**Table 5: Length of stay**

Year	Nights	Visitors	Length of stay (avg.)
2010	2888443	341651	8.5
2011	3185390	390111	8.2
2012	3668097	419663	8.7
2013	3754311	440751	8.5
2014	3984212	452042	8.8

Source: CTB



## Period of stay

The Curaçao travel season is divided into a high season, which runs from mid-December to mid-April, and a low season, which encompasses the rest of the year. In general, the winter season is busier than the summer. Carnival season, from January through February, brings in considerable crowds. In most cases the occupancy rates (table 7) for the year show a higher occupancy in the first half of the year than the second. However in 2014 it is noted that the first half and the second half show occupancy rates above 70 percent with the exception of May, June and July.

## Place of stay (Accommodation data)

Between the years 2010-2014 the hotel industry experienced a variation of occupancy rate of visitors. The average hotel occupancy rate has maintained a level above 70 percent for the years 2010 to 2012 (table 7). The highest occupancy rate in this period is seen in 2011 where the peak was 76 percent and the lowest in 2013 with about 67 percent. Occupancy rates are predictors of cash flow, and they provide a method by which the performance of various hotels can be compared. Evidently, investors like to see high occupancy rates. Low occupancy rates can indicate that the hotel cash flow has a problem.

<b>Table 7: Hotel Occupancy Rate (%)</b>					
	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>
January	72	80	73	69	73
February	75	86	79	79	76
March	75	82	79	76	70
April	69	75	74	73	73
May	69	69	72	60	65
June	66	73	72	62	59
July	68	74	74	63	61
August	75	77	72	68	73
September	71	71	65	65	70
October	76	72	64	64	70
November	77	80	65	68	73
December	69	76	56	63	71
<b>Average Occ. rate</b>	<b>72</b>	<b>76</b>	<b>70</b>	<b>67</b>	<b>69</b>

Source: Chata

Curaçao has different types of lodgings from the large to high-end hotels, to smaller hotels/guesthouses and apartments. They vary in size and cost. In 2011 the total amount of rooms available for lodging has been 5708 rooms.

<b>Table 8: Total Hotel Rooms</b>	
	<b>Rooms 2011</b>
Large hotels	4978
Smaller hotels/guesthouses	130
Apartments	600
<b>Total rooms</b>	<b>5708</b>

Source: CTB (<http://www.curacao.com/Corporate/Hotel-Development> )

## World outlook

Within the World, the generally positive outlook varies from one country to the next (table 9). The Caribbean region have done moderately well in 2014, with a 4.7 percent increase in tourist arrivals, while the Americas (North and South) did even better, with a 6.2 percent accelerated increase over 2013. Africa and Asia and the Pacific showed a respective growth 4.3 and 7.2 percent. The Middle East has been plagued with negative travel warnings causing a decrease in tourist arrivals.

For CTO (Caribbean Tourism Organization) member countries was the fact that visitor spending also was steadily trending up a good sign. Nearly 27 and-a-half billion dollars was spent by visitors to the Caribbean in 2012, which is 3.6 percent more than the previous year and the third consecutive year of increase.

<b>Table 9: Outlook for International Tourist Arrivals</b>					
	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013*</b>	<b>2014**</b>
	<b>Real</b>				
	<b>Full Year Change (%)</b>				
<b>World</b>	6.5	4.9	4.1	5.0	5.3
<b>Europe</b>	3.1	6.4	3.6	5.4	5.2
<b>Asia and the Pacific</b>	13.2	6.6	6.9	6.2	7.2
<b>Americas</b>	6.6	3.6	4.3	3.2	6.2
<b>Caribbean</b>	1.6	2.7	4.9	1.8	4.7
<b>Africa</b>	9.3	-0.6	6.6	5.4	4.3
<b>Middle east</b>	11.5	-6.1	-5.4	-0.2	-3.1

*Notes: \* - Revised, \*\* - Preliminary estimates for Jan- Feb only.*

Sources: UNWTO, CTO

## Conclusion

The tourism industry has experienced growth and has become one of the fastest growing economic sectors in Curaçao since 2010. In 2014 the total of stay over visitors and stay over nights has increased respectively with 3 and 6 percent. Tourists have been staying longer bringing the average length of stay to 9 nights. Overall occupancy has risen with 2 percentage points in 2014. Cruise tourism has experienced a decelerated increase of 8 percent in 2014.

Tourism growth goes hand in hand with the World's state of affairs; different countries have experienced economic recessions before 2011 and some beyond 2011. During this time tourist were traveling less, it is observed that more people are traveling to the different parts of the world with the exception of the Middle East which is afflicted with unsafe circumstances. The dynamics in tourism have turned it into a key driver for socio-economic progress, but this does not take away that tourism is a vulnerable sector. The economic share of tourism is taking its position in the diversified economy where the refinery and the financial sector play an important role. Aside from all these positive accolades towards the Curaçao tourism numbers, it is important that tourism continuously is moving to a higher level.