

Tourism Exit Survey 2017 Carnival Edition



St. Maarten
Carnival
Come, experience life!

Tourism Highlights 2017 Carnival Edition

Overview:

In 2017, The Americas welcomed 207 million international tourist arrivals, with most destinations enjoying positive results, and the Caribbean obtaining a +4% increase¹. Amidst the trail of devastation that the hurricane season left in its wake, the tourism sector within the Caribbean reached a milestone of surpassing 30 million stay-over tourist visits and an estimated US \$37 billion in total visitor spending². This growth of an increase of 1.7% was due to sustained economic global growth, and particularly in those of our major markets. The Caribbean market share of global visits for 2017 shrank by 0.1 percentage points, therefore retaining 2.3% of the market³.

According to Caribbean Tourism Organization (CTO) several countries reported double-digit increases in 2017 such as Saint Lucia (11%), Belize (10.8%), and Bermuda (10.3%), while the hurricane-impacted countries recorded decreases ranging from -18% to -7%. The contributing factors to the excellent performances in those countries included greater air access from the source markets to the region and the realization of significant investments, including hotels, to enhance the tourism product.

Due to the effects of Hurricane Irma on St. Maarten the scheduled Tourism Exit Surveys in 2017 were disrupted. Therefore, this report focusses on the only period in which the survey was conducted during 2017, which ran parallel to peak of St. Maarten's Carnival season.

¹ <http://media.unwto.org/press-release/2018-01-15/2017-international-tourism-results-highest-seven-years>

² <http://www.onecaribbean.org/events-calendar/industry-media-conf/>

³ <http://www.onecaribbean.org/events-calendar/industry-media-conf/>

Result Exit Survey at Airport

Visitors profile

Total persons

During 2017 Carnival season in which the Tourism Exit (TES) survey was conducted a total of 1738 exit forms were completed, representing 3,634 stay-over passengers. Of this group 948 were administered Satisfaction surveys and 790 Expenditure surveys. The largest group of respondents were residents from North America (59%), 52% from the United States and 7% from Canada. Participants residing in the Caribbean completed 13% of survey forms, European residents represented 11% of forms and Latin America accounted for just 4% of total responses.

Chart 1: Regions distribution

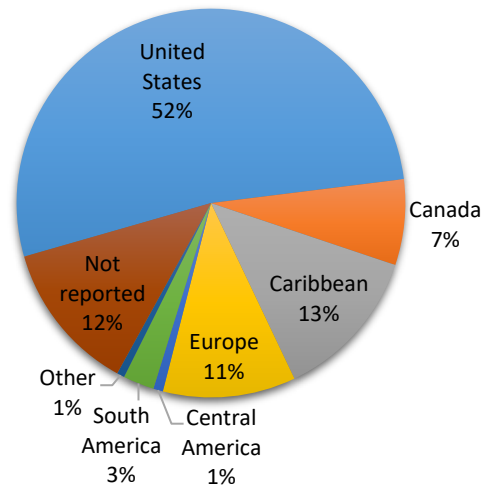
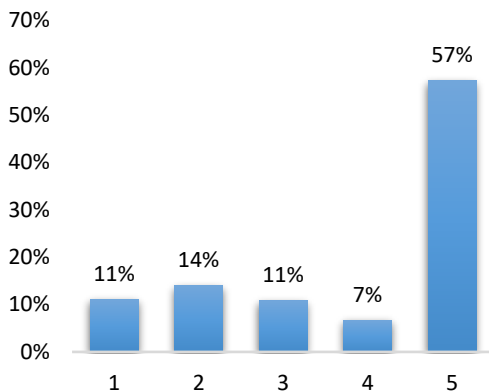


Chart 2: Repeat Visitors by Number of visits



As observed in Table 1, most respondents travelled 'Alone' (29%) or with their 'Spouse / Partners' (38%). The average travel party size was 2 persons per travel group (Table 2).

38% of respondents were first-time visitors to St. Maarten. Of the remaining 53% that indicated to be repeat visitors, 57% indicated to have visited the island 5 or more times in the past.

The average age of visitors during the survey period was found to be approximately 45 (Table 3).

	%
ALONE, NO TRAVEL COMPANION	29
YOU & YOUR SPOUSE / PARTNER	38
FAMILY & FRIENDS	10
FAMILY ONLY	8
FRIENDS ONLY	12
BUSINESS ASSOCIATES	1
OTHER	0
NOT REPORTED	1
TOTAL	100%

	Avg. Persons	%
UNITED STATES	2.2	56
CANADA	2.7	9
NORTH AMERICA	2.3	66
CARIBBEAN	1.4	9
EUROPE	2.4	13
CENTRAL AMERICA	1.4	1
SOUTH AMERICA	1.8	2
LATIN AMERICA	1.7	3
OTHER	1.5	0
NOT REPORTED	1.6	10
TOTAL	2.1	100%

	2017		
	MALE	FEMALE	TOTAL
UNDER 15	4	3	3
15 - 29	14	17	15
30 - 39	17	17	17
40 - 49	17	13	15
50 - 59	21	24	23
60+	28	26	27
AVERAGE AGE	44.8	44.5	44.6

Stay-Over Satisfaction Survey

Attributes satisfaction rating

In evaluating the aspects of Sint Maarten that tourists usually encounter during their vacation, it is noticeable that the highest ratings went to aspects encompassing their initial or last contact with the island. Namely the elements involving the passage through the airport, and to and from accommodations. When respondents were asked to rate island specific attributes, which were comparable on both sides of the island, their satisfaction ratings remain highest among beaches and dining.

TABLE 4. ST. MAARTEN / ST. MARTIN ATTRIBUTES SATISFACTION RATING

	Excellent	Good	Average	Poor	Terrible	Average Score
Airline	31%	48%	16%	3%	2%	3.3
Immigration	40%	41%	15%	2%	1%	3.7
Airport facilities	48%	50%	0%	2%	0%	4.1
Island cleanliness	16%	40%	27%	13%	3%	3.1
Clubs and Casinos	22%	37%	32%	5%	4%	1.8
Taxi rentals	30%	40%	23%	5%	3%	2.3
Tours	21%	24%	13%	2%	0%	1.9
Communication services	18%	30%	28%	18%	7%	2.5
Sightseeing	33%	44%	20%	3%	1%	2.6
<i>Dutch Side</i>						
Accommodations	49%	38%	10%	2%	1%	3.2
Dining	43%	42%	12%	2%	1%	3.3
Goods and Prices	23%	43%	27%	5%	2%	3.0
Customer service	41%	40%	14%	3%	2%	3.2
Beaches	55%	35%	8%	1%	0%	3.4
Safety and security	17%	33%	30%	14%	5%	2.6
Roads and signage	44%	36%	16%	3%	2%	3.4
Residents friendliness	31%	44%	20%	3%	2%	3.2
<i>French Side</i>						
Accommodations	51%	35%	12%	1%	1%	1.5
Dining	53%	34%	11%	2%	0%	2.5
Goods and Prices	19%	41%	29%	8%	2%	2.1
Customer service	41%	38%	15%	4%	1%	2.2
Beaches	68%	25%	6%	1%	1%	2.7
Safety and security	16%	38%	28%	13%	5%	1.9
Roads and signage	40%	36%	17%	6%	2%	2.4
Residents friendliness	30%	41%	24%	3%	2%	2.3
Average Score						2.7

* Ratings score – 1= Terrible and 5= Excellent

Expectations, Return, and Recommendations Intentions

TABLE 6. RETURN AND RECOMMEND INTENTIONS	
RETURN INTENTIONS	2017
DEFINITELY	60%
PROBABLY	25%
UNSURE	8%
PROBABLY NOT	3%
DEFINITELY NOT	2%
NOT REPORTED	2%
RECOMMEND INTENTIONS	
2017	
DEFINITELY	62%
PROBABLY	25%
UNSURE	5%
PROBABLY NOT	2%
DEFINITELY NOT	1%
NOT REPORTED	5%

Amongst the return visitors 89% indicated that their expectations were either met or exceeded during their visit (Table 5). Approximately 85% of respondents in 2017 indicated that they will likely return to the island and 87% were likely to recommend to potential future visitors (Table 6). These high return and recommendation results are further indications that visitors' expectations were either met or surpassed during their stay on St. Maarten.

Table 5. Expectations	%
Above Expectations	24
Met Expectations	65
Below Expectations	5
Not reported	6
Grand Total	100%

Value of money paid

In terms of respondents' conceptual view of the value for money spent for goods and services in Sint Maarten / Sint Martin, the majority ratings were either good or excellent. Therefore, for each category the combined percentage rating that was excellent and good are as follows: Meals and drinks (54%), Shopping (47%), Tours and Excursions (28%), Transportation (48%), Overall cost of visit (55%), and Other (1%).

Table 8. Value for Money Paid							
	Excellent	Good	Average	Poor	Terrible	Not reported	Average Score
Overall cost of visit	15%	42%	25%	3%	1%	13%	3.3
Tours / Excursions	11%	20%	17%	2%	0%	50%	1.9
Meals / Drinks	18%	41%	30%	5%	1%	5%	3.6
Transportation	17%	39%	22%	4%	1%	17%	3.2
Shopping	14%	34%	26%	4%	0%	21%	2.9
Other	2%	1%	1%	0%	0%	95%	0.2
Average Score							2.5

Likes and Dislikes

Having concluded above that tourist re-patronage and positive word-of-mouth is high, as a destination St. Maarten/St. Martin must determine the primary reasons for these attitudes and behaviors. By investigating the praises and complaints of a destination, this provides insight into areas for marketing opportunities, as well as for improvements. Table 7 provides the top ten reported likes and dislikes of stay-over visitors during the survey period.

The top two enjoyable factors were the island's beaches and friendly residents (hospitality). The cleanliness of the beaches and quality of the water is of major importance to visitors due to in-water (snorkeling, diving, swimming, and water sports) or onshore activities they often engage

in individually or as a group. Negative aspects that were mentioned concerning the beaches primarily related to pollution. The top two unpleasing factors were the traffic congestion and road infrastructure on the island. The negative replies related to road infrastructure encompassed not only the roads, but also the lack of maintenance and proper sidewalks or paths. Thereby, possibly endangering the lives of tourists, resident pedestrians and leisure cyclists.

Table 7. Reviews			
Like	%	%	Unlike
beaches	33	9	traffic
hospitality	14	8	roads
weather	9	5	pollution
accommodations	5	5	internet
cuisine	5	4	prices
scenery	4	3	customer service
sea	2	3	accommodations
dining	2	3	weather
customer service	2	2	motorists
activities	2	2	safety
Total sample	948		

Stay-Over Expenditure Survey

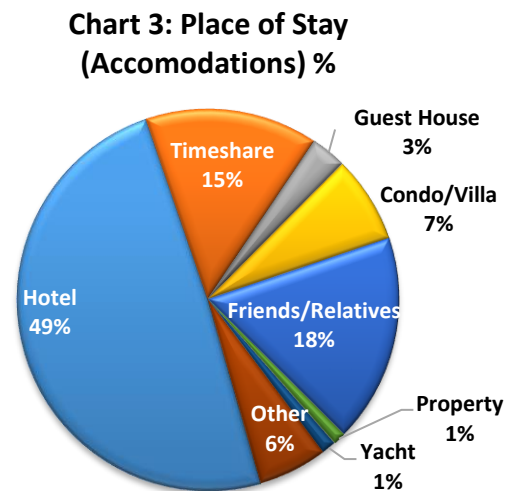
Average nights stayed

The average visitor stayed for 9.1 nights on the island. Visitors that stayed on both the Dutch side and French side of the island, stayed 8.5 nights and 10.3 nights respectively. Whereas, visitors that stayed on the Dutch side or the French side only, stayed 8.5 and 9.1 nights respectively (Table 9). These results suggest that visitors that stayed on both sides of the island throughout the duration of their trip, tends to stay a day longer than those who does not.

TABLE 9. NUMBER OF NIGHTS STAYED					
	AVG. LENGTH OF STAY	DUTCH	DUTCH ONLY	FRENCH	FRENCH ONLY
UNITED STATES	8.0	7.9	8.0	7.4	7.7
CANADA	8.1	8.0	8.0	8.3	8.3
CARIBBEAN	7.9	7.8	7.8	8.6	8.6
EUROPE	18.9	16.2	17.2	20.7	22.0
CENTRAL AMERICA	3.6	3.6	3.6	0.0	0.0
SOUTH AMERICA	8.7	10.3	10.3	7.3	7.3
OTHER	5.0	4.0	4.0	5.7	5.7
NOT REPORTED	8.0	8.2	8.4	5.5	5.7
GRAND TOTAL	9.1	8.5	8.6	10.3	10.8

Place of Stay

Respondents were asked to indicate the type of accommodation they occupied during their stay in Sint Maarten / Saint Martin. Note that 49% of all respondents indicated that they stayed in a 'Hotel' during their visit, 18% with Friends / Relatives, and 15% indicated 'Timeshare', whilst 18% collectively stayed in the remaining accommodation options (chart 2).



Expenditure per category

The Average Daily Expenses (ADE) amongst visitors was \$141.55. Of the regions that exhibit significant responses, the Caribbean were the largest spenders with an ADE per person of \$205.12 person. North American visitors were the next highest with an ADE per person of \$152.72 person (United States \$157.85, Canada \$119.81).

TABLE 10. EXPENDITURES									
	United States	Canada	North America	Caribbean	Europe	Latin America	Other	Not reported	Grand Total
Accommodations	53%	53%	43%	42%	56%	61%	43%	44%	61%
• Room	25%	25%	19%	8%	19%	33%	30%	13%	33%
• Food	4%	4%	3%	1%	2%	3%	13%	3%	3%
Groceries	4%	4%	6%	5%	9%	6%	6%	4%	6%
Restaurants	14%	14%	20%	12%	14%	10%	19%	15%	10%
Night club	0%	0%	2%	2%	1%	2%	0%	2%	2%
Casinos	1%	1%	3%	3%	1%	1%	0%	5%	1%
Attraction	2%	2%	2%	1%	1%	2%	0%	1%	2%
Sports	0%	0%	1%	0%	1%	0%	6%	0%	0%
Special events	0%	0%	1%	3%	1%	1%	0%	2%	1%
Strip clubs	1%	1%	1%	1%	0%	1%	0%	0%	1%
Taxi	2%	2%	1%	1%	1%	1%	0%	0%	1%
Car rental	6%	6%	7%	4%	9%	8%	7%	6%	8%
Public bus	1%	1%	0%	1%	0%	0%	0%	0%	0%
Clothing	3%	3%	2%	11%	2%	4%	11%	7%	4%
Jewelry	4%	4%	5%	5%	0%	0%	0%	2%	0%
Electronics	2%	2%	1%	6%	0%	1%	0%	2%	1%
Alcohol	3%	3%	2%	2%	1%	0%	0%	1%	0%
Tobacco	2%	2%	2%	0%	0%	0%	0%	1%	0%
Other goods	1%	1%	0%	2%	1%	2%	6%	6%	2%
Other services	2%	2%	1%	0%	1%	1%	0%	0%	1%
*Grand Total	\$157.85	\$119.81	\$152.72	\$205.12	\$60.25	\$294.16	\$272.07	\$147.60	\$141.55

* Grand Total is equal to all categories minus Room and Food.

Household income per region

Majority of respondents (22%) have a household annual income of US \$125,000 and over (Table 11). Of these respondents with a household income of US \$125,000, the largest group consisting of 36%, indicated their permanent place of residence to be 'North America', followed by the 'Other' (33%), and 'the Caribbean' (14%). The remaining notable household income categories in ranking order were US\$25,001 - US\$50,000 (18%), US\$50,000 - US\$75,000 (16%), Less than US\$25,000 (15%).

TABLE 11. ANNUAL HOUSEHOLD INCOME PER REGION

	Less than US \$25,000	US \$25,001 - US \$50,000	US \$50,001 - US \$75,000	US \$75,001 - US \$100,000	US \$100,001 - US \$125,000	US \$125,000 and over	Not reported	Grand Total
United States	6%	9%	13%	11%	13%	38%	9%	100%
Canada	14%	7%	16%	14%	18%	20%	11%	100%
North America	7%	9%	14%	11%	13%	36%	10%	100%
Caribbean	20%	26%	15%	5%	10%	14%	10%	100%
Europe	16%	27%	20%	9%	10%	9%	8%	100%
Central America	20%	40%	20%	0%	10%	0%	10%	100%
South America	21%	14%	18%	14%	7%	4%	21%	100%
Latin America	21%	21%	18%	11%	8%	3%	18%	100%
Other	11%	11%	22%	11%	0%	33%	11%	100%
Not reported	30%	28%	21%	6%	4%	4%	8%	100%
Grand Total	15%	18%	16%	9%	10%	22%	10%	100%

References

- “2017 International Tourism Results: the highest in seven years.” *World Tourism Organization UNWTO*, 15 Jan. 2018, media.unwto.org/press-release/2018-01-15/2017-international-tourism-results-highest-seven-years.
- Skeete, Ryan. “Remarks by Ryan Skeete, Director of Research & IT (Ag).” *CTO Caribbean Tourism Performance Report 2017 & Outlook, 2017*, www.onecaribbean.org/events-calendar/industry-media-conf/.

www.stat.gov.sx for more detailed tables