



Tourism Exit Survey 2018 Results

Cruise and Stay-Over Arrivals



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Introduction

The Department of Statistics (STAT) conducts the Tourism Exit Survey (TES) multiple times per year. The survey is conducted amongst visitors who are leaving the island. They are hence approached at our two main ports of entry namely at the Princess Juliana International Airport to collect information about stay-over visitors and at Port Sint Maarten to collect information about cruise visitors.

This survey is used to assess visitor and trip characteristics, spending and travel patterns. TES consists of two types of surveys namely the expenditure and the satisfaction survey. The expenditure survey captures mainly information pertaining to what was spent on various categories such as accommodation, food, transportation etc. and the satisfaction survey captures the level of satisfaction for various products, services and aspects.

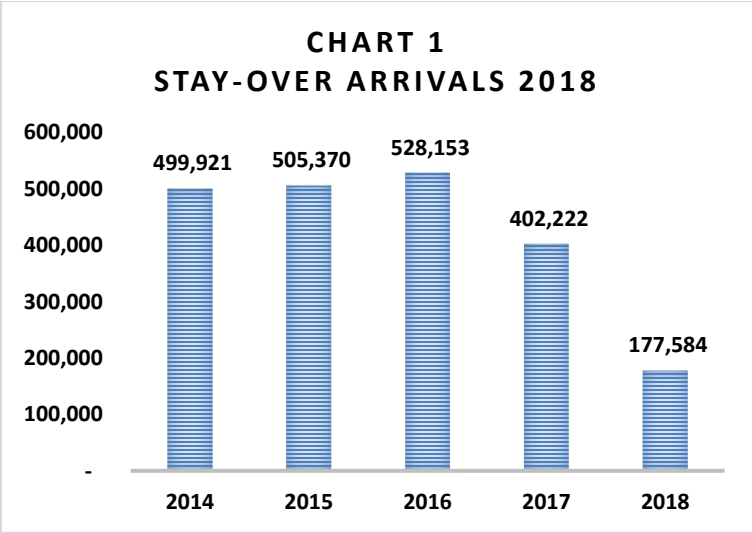
This report presents the results of the TES surveys conducted in 2018. The report is divided in two parts: part one presents the results for the stay-over visitors and part two for the cruise visitors.

Part 1: Stay-over visitors

The focus on this section is on the stay-over arrivals. In this section, you will find information pertaining to St.Maarten’s overall stay-over arrivals in 2018. In addition, this section presents the results of the expenditure and satisfaction surveys that were conducted at the Princess Juliana International Airport in 2018. The surveys took place in August and in December 2018.

Stay-over arrivals 2018

The island saw a continued decrease in stay-over arrivals in 2018. Stay-over arrivals decreased from 402,222 in 2017 to 177,584 in 2018, a decrease of 56%. This decrease was larger than the decrease from 2016 to 2017 when stay-over arrivals went from 528,153 in 2016 to 402,222 in 2017, a decrease of 24%.



In terms of arrivals by region, visitors from North America and Europe remained the largest groups and accounted for 43% and 42% of the total stay-over arrivals for 2018, respectively. Moreover, visitors from the Caribbean, South America and the Rest of the world accounted for 15% of stay-over arrivals in 2018. The largest decrease in arrivals was from the North America and South America regions namely North America arrivals dropped by 69% and South America arrivals dropped by 61% in 2018 compared to 2017.

When comparing the 2017 and 2018 arrivals by region it appears that there were significant changes with the arrivals from North America and Europe. In 2017, visitors from North America accounted for 62% of overall stay-over arrivals whereas they accounted for only 43% of arrivals in 2018. Moreover, the visitors from Europe accounted for 29% of overall stay-over arrivals in 2017 and this increased to 42% in 2018.

TABLE 1: STAY-OVER ARRIVALS BY REGION

	2017	2018	% of 2017 overall arrivals	% of 2018 overall arrivals	% change 2017/2018
North America	247,391	76,696	62%	43%	-69%
Europe	115,166	75,096	29%	42%	-35%
Caribbean	15,169	11,752	4%	7%	-23%
Rest of the world	13,729	9,867	3%	6%	-28%
South America	10,766	4,174	3%	2%	-61%
Total	402,222	177,584	100%	100%	-56%

Results 2018 Tourism Exit Surveys

1. Visitor profile

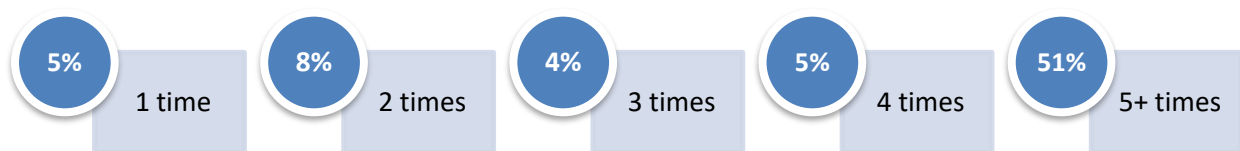
Number of visits

Majority of the respondents in 2018 were not first time visitors. Only 28% were visiting the island for the first time and 72% visited the island before. Of those who visited the island before, 9% indicated that their first visit to the island was via a cruise. Moreover, 13% said that they had visited the island 1 or 2 times before and a significant amount of respondents, 56% indicated that they had been to the island 4 or more times before.

TABLE 2: FIRST VISIT TO ISLAND

	First time visit to island	First visit was via cruise
Yes	28%	9%
No	72%	91%

CHART 2: NUMBER OF VISITS TO ISLAND



Age and gender

Approximately 51% of the respondents were males and 49% were females. Overall, the majority of the respondents were between the ages of 15 - 29 years and 30 - 39 years old (20% each) and the second largest group was between the ages of 40 – 49 and 50 - 59 years old (19% each).

TABLE 3: AGE AND GENDER			
	Male	Female	Total
Under 15 years	3%	3%	6%
15 - 29 years	9%	11%	20%
30 - 39 years	11%	10%	20%
40 - 49 years	10%	9%	19%
50 - 59 years	10%	9%	19%
60 + years	9%	8%	17%
	51%	49%	100%

Travel party size

The average travel party size was 2 persons. Visitors from the United States had the largest travel party size with an average of 2.2 persons. Visitors from Canada, Caribbean and Europe all had an average travel party size of 1.8 persons.

TABLE 4: AVERAGE TRAVEL PARTY SIZE BY REGION/COUNTRY	
Average travel party size	2.0 persons
United States	2.2 persons
Canada	1.8 persons
Caribbean	1.8 persons
Europe	1.8 persons
Central America	1.8 persons
South America	1.7 persons
Other	1.5 persons

Travel party composition

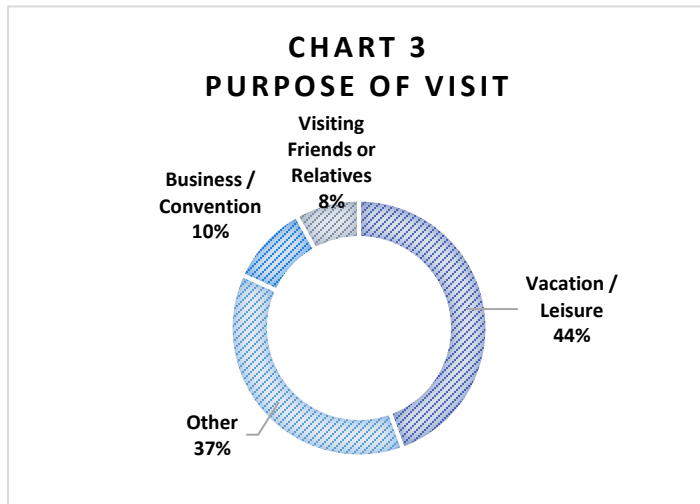
Looking at travel party composition, over 60% of respondents were either travelling alone (42%) or with their spouse or partner (25%). The rest of the respondents were mostly travelling with family and friends (13%).

TABLE 5: TRAVEL PARTY COMPOSITION	
Alone, no travel companion	42%
You & your spouse / partner	25%
Family only	8%
Friends only	9%
Family & Friends	13%
Business associates	3%
	100%

Moreover, looking at the relationship between travel party composition and region reveal that visitors from the Caribbean and Europe were mostly travelling alone whereas visitors from the United States mostly had a companion and was travelling with their spouse/partner.

TABLE 6: TRAVEL PARTY COMPOSITION BY REGION			
	United States	Caribbean	Europe
Alone, no travel companion	11%	17%	7%
You & your spouse / partner	17%	3%	4%
Family only	4%	3%	1%
Friends only	5%	3%	1%
Family & Friends	7%	4%	1%
Business associates	1%	0%	1%
	44%	30%	14%

Purpose of visit



The main reason given for travelling to the island was vacation/leisure, 44%. The second largest reason chosen was other, 37% which consisted mainly of persons who were in transit to other countries. Additionally, 10% of the respondents were on the island for business purposes and 8% were visiting friends or relatives.

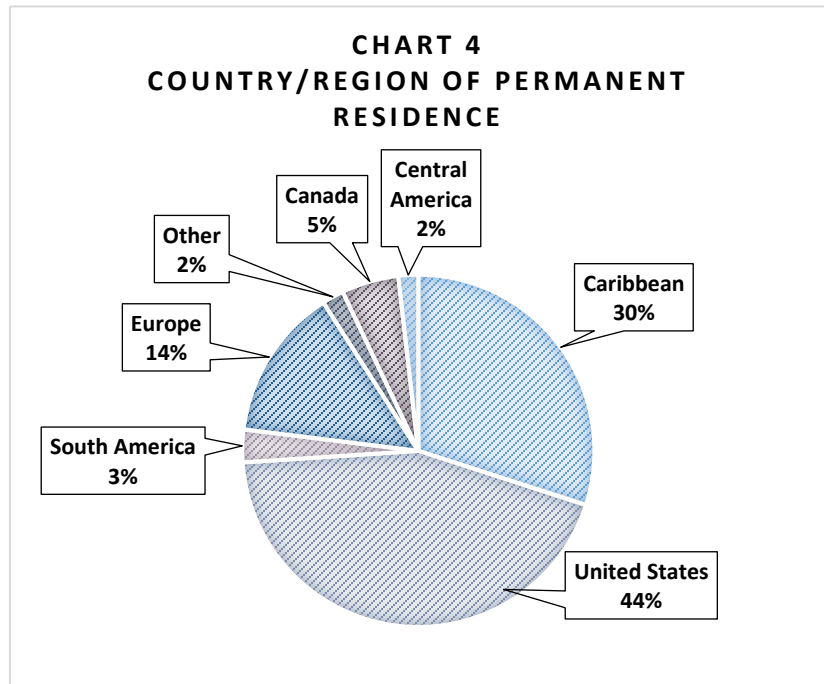
Length of stay

Respondents stayed on average 6.7 nights on the island. Visitors from South America stayed the longest namely 8.1 nights followed by visitors from Canada, 7.5 nights.

TABLE 7: AVERAGE LENGTH OF STAY IN NIGHTS PER REGION	
	Average stay in nights
United States	6.7
Canada	7.5
Caribbean	6.2
Europe	7.4
Central America	4.8
South America	8.1
Other	4.5
	6.7

Country/region

Chart 4 shows the country/region of permanent residence of the visitors surveyed. The majority of the respondents, 44%, were from the United States. The second largest group of respondents were from the Caribbean, 30%. Visitors from Europe and Canada accounted for 14% and 5% respectively of the responses.



Most respondents from the United States were from the state of New York (22%), Florida (10%) and California (8%). The majority of the respondents from the Caribbean were from the US Virgin Islands (9%), Puerto Rico, Saint Kitts and Nevis and the British Virgin Islands (8% each).

Moreover, the most of the respondents from Europe were from the Netherlands (46%), France (18%) and the United Kingdom (14%).

Income

Majority of respondents in 2018 had a gross annual household income of over US \$125,000 (26%). The amount of respondents who had an income of less than US \$25,000 was 20%.

Income Bracket	Percentage
Less than US \$25,000	20%
US \$25,000 - US \$50,000	17%
US \$50,001 - US \$75,000	17%
US \$75,001 - US \$100,000	12%
US \$100,001 - US \$125,000	9%
US \$125,001 and over	26%
Grand Total	100%

2. Activities

Chart 5 shows what activities the respondents participated in during their stay on the island. More than half of the respondents dined and visited beaches, 58% and 52% respectively. A significant amount also did some shopping, 48%. The percentage of respondents who indicated that they visited Philipsburg was 47%, which was significantly lower than those that visited Marigot, 13%. However, the amount that visited Grand Case was 24%. Approximately 20% of respondents visited Orient Bay, went island hopping and took a boat trip during their stay.

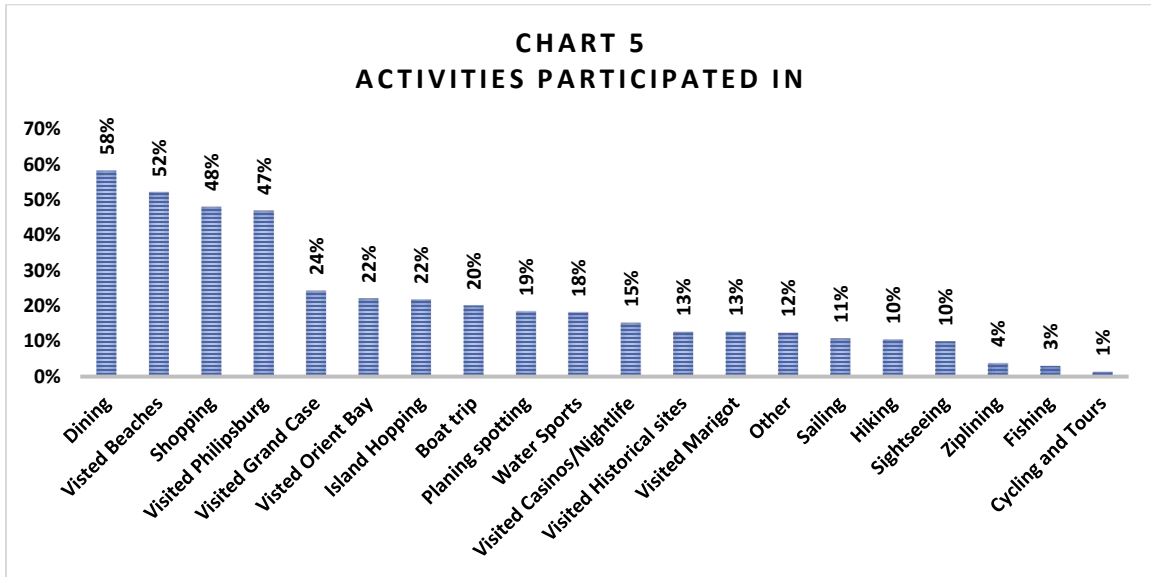
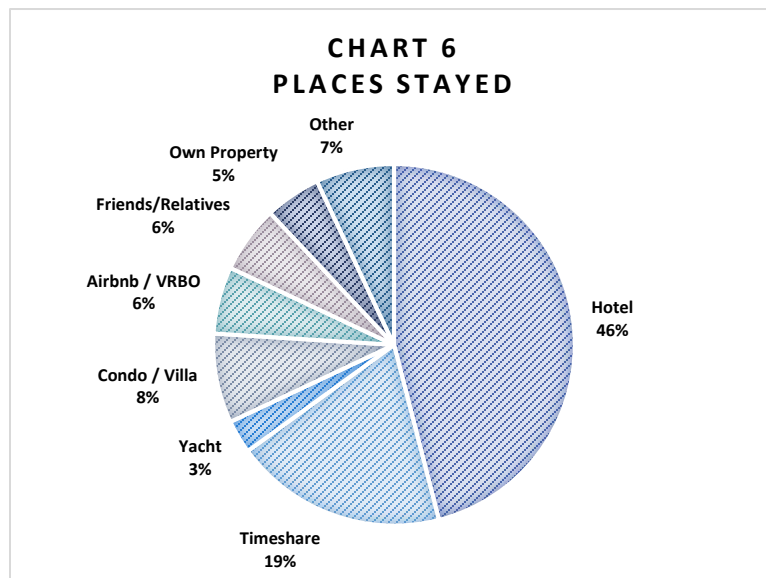
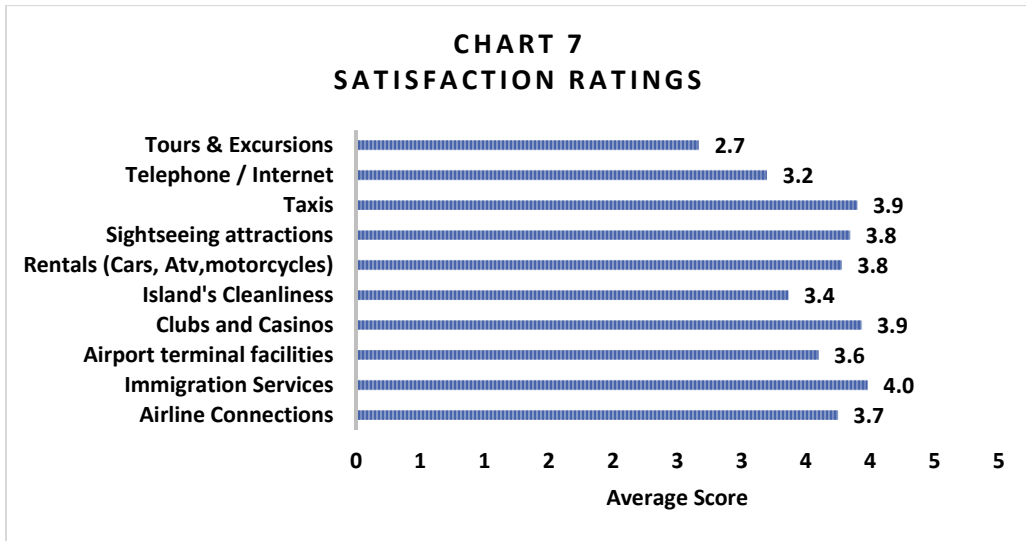


Chart 6 shows where respondents stayed during their stay on the island. The majority of respondents stayed at hotels. The second largest amount of respondents stayed with friends and relatives. Additionally, 10% stayed at timeshare accommodations and interestingly 5% stayed at accommodations found on Airbnb and VRBO.

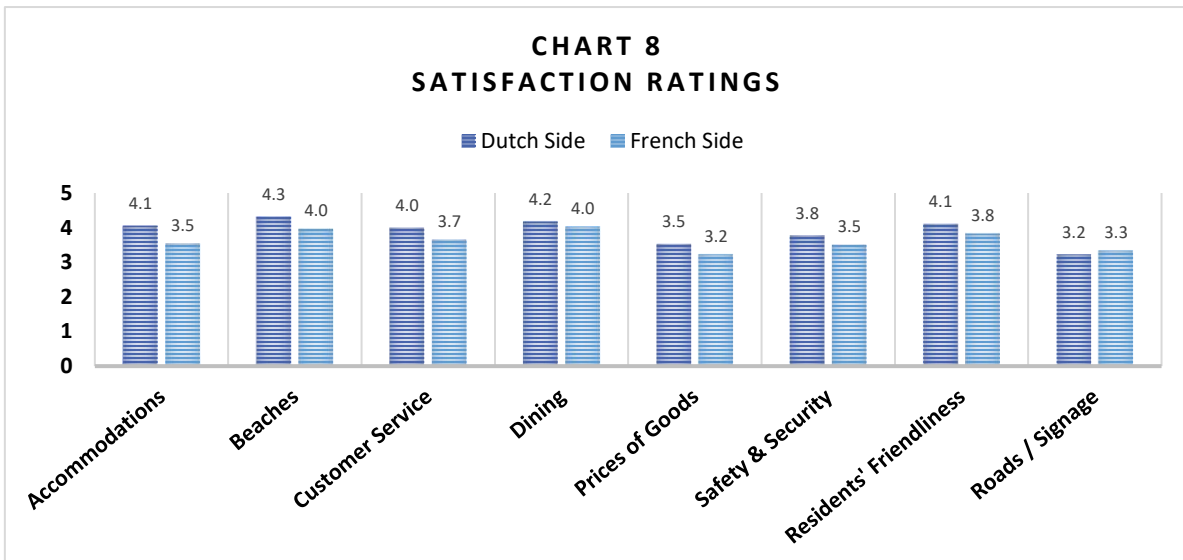


3. Satisfaction

Respondents were asked to rate certain aspects of the island with '1' being 'Very poor' and '5' being 'Excellent'. For the ratings of the entire island, immigration services received the highest average score namely 4. Additionally, taxis received the second highest score of 3.9. The aspect with the lowest score was tours and excursions, this was the only aspect that scored lower than a 3.

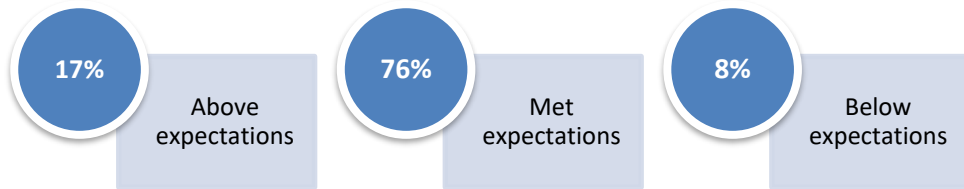


In 7 of the 8 categories, Dutch side scored on average higher than the French side. More specifically, the French side only scored more than the Dutch Side for roads and signage. For both the Dutch and French side, the highest average score was for beaches and dining. The aspect with the largest average score difference was accommodation, with a difference of 0.6. More specifically, the average score for accommodation for the Dutch side was 4.1 and 3.5 for the French side. Noteworthy to mention that no aspect was rated lower than a 3.



The survey also captures to what extent visitors expectations were met during their visit to the island. Over 90% of respondents' expectations were positively met namely 76% indicated that their expectations were met and 17% indicated that their experience exceeded their expectations. For 8% of respondents, their experience on the island was below their expectations.

CHART 9: EXPECTATIONS



The majority of respondents were quite positive when asked if they would return or recommend the island to others. The percentage of respondents who would definitely return and recommend to others was well over 50% and overall the percentage with a positive response (definitely and probably) for both was well above 80%.

CHART 10: RETURN INTENTIONS

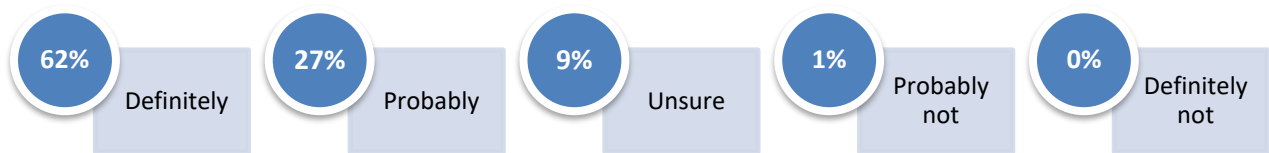
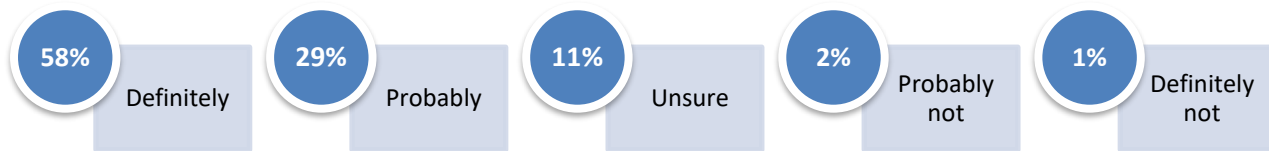


CHART 11: RECOMMEND TO OTHERS



4. Expenditure

The Average Daily Expenditure (ADE) amongst visitors surveyed in 2018 was \$83.20 per person per day. Compared to 2016, this is a decrease of 31% since the ADE was \$119.95 per person per day.

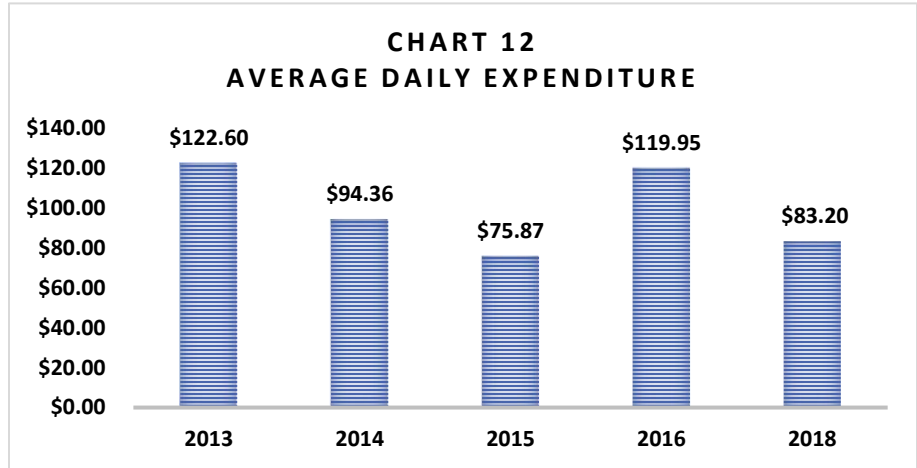
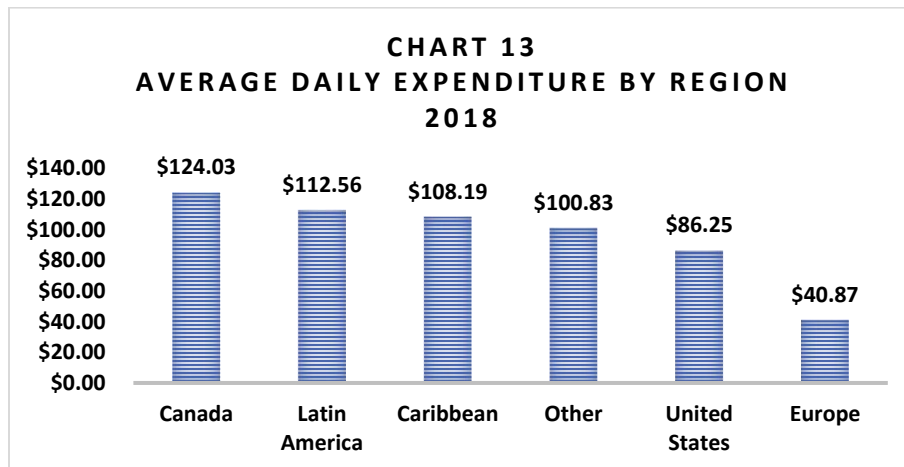
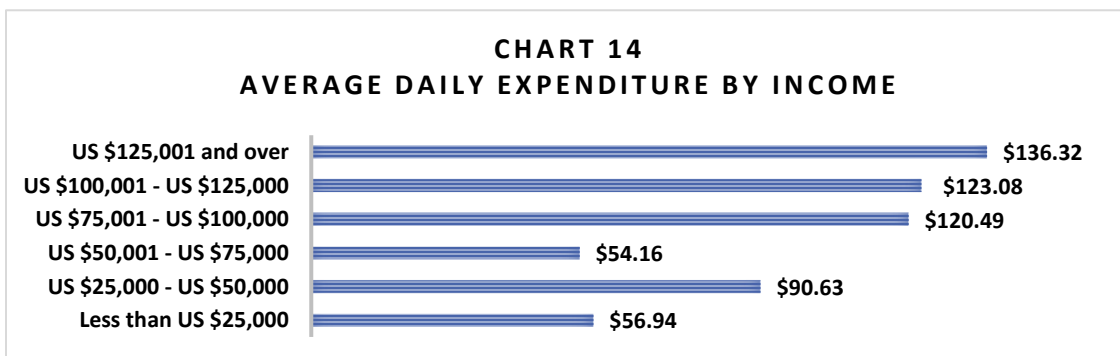


Chart 13 shows the average daily expenditure by region. Visitors from Canada had the largest ADE at \$124.03 per person followed by visitors from Latin America, \$112.56 per person. The lowest ADE was from the group of visitors from Europe namely \$40.87 per person per day.



Looking at average daily expenditure by income shows that respondents with an annual gross household of over US \$75,000 spends more than \$100 per day. Moreover, respondents with an annual household income of over US \$125,000 had the highest ADE namely \$136.32 per day.



For visitors from all regions, the largest percentage was spent on accommodations. Overall, 40% of total expenditures was spent on accommodation on average. Food and beverages consumption outside visitor’s accommodation (restaurants) was the second highest expenditure, overall 26% of total expenditures.

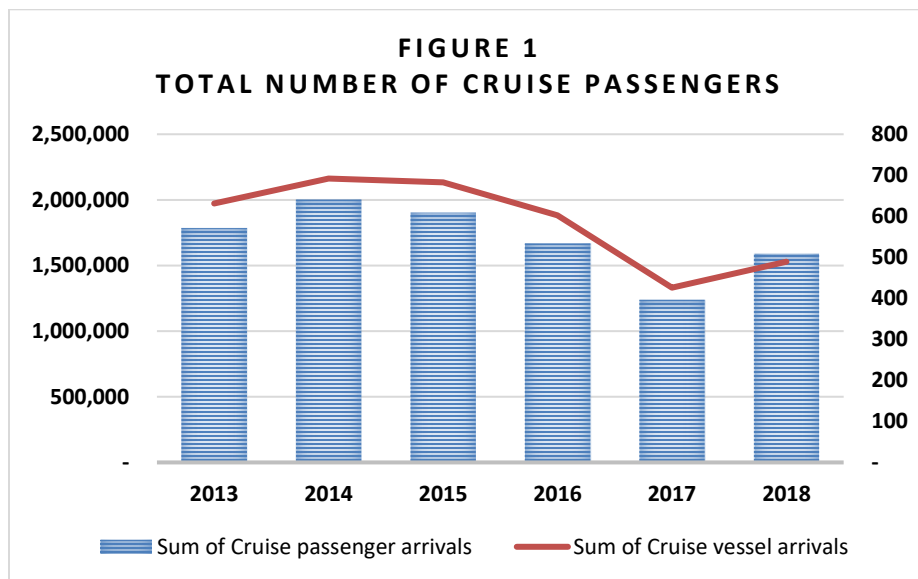
TABLE 9: PERCENTAGE OF DAILY EXPENDITURE PER CATEGORY						
	United States	Canada	Caribbean	Europe	Latin America	Other
Accommodations	46%	47%	30%	35%	37%	25%
Room	30%	19%	24%	21%	26%	25%
Food	8%	5%	2%	1%	5%	0%
Groceries	6%	6%	8%	7%	2%	0%
Restaurants	20%	21%	16%	22%	21%	20%
Night club	3%	6%	4%	5%	2%	0%
Casinos	3%	3%	3%	2%	2%	14%
Attraction	2%	2%	1%	4%	4%	0%
Sports	1%	0%	0%	3%	0%	0%
Special events	1%	0%	0%	0%	2%	0%
Adult entertainment	0%	0%	4%	0%	2%	0%
Taxi	1%	1%	2%	2%	3%	0%
Car rental	3%	1%	2%	4%	4%	10%
Public bus	0%	0%	0%	0%	0%	0%
Scooters / Atvs / etc	0%	0%	0%	0%	0%	0%
Boat Charters	0%	0%	0%	3%	1%	0%
Clothing	2%	4%	12%	5%	7%	5%
Jewelry	5%	3%	3%	1%	1%	0%
Electronics	1%	1%	6%	2%	5%	5%
Alcohol	1%	3%	3%	1%	2%	8%
Tobacco	0%	0%	0%	1%	1%	3%
Other goods	1%	2%	5%	0%	5%	8%
Other services	0%	0%	0%	2%	0%	0%

Part 2: Cruise visitors

Cruise passengers and cruise calls

This section provides figures in relation to cruise visitor arrivals, the number of cruise liners docking, and the changes in their numbers. The other figures presents information concerning several aspects of the visitors' experience whilst in St. Maarten. The first few Figures presents this information in absolute figures, ranging from 2013 – 2018 and often provides the year ranging from 2014 – 2018, with their respective changes.

Displayed in figure 1 is the total number of cruise passengers and cruise vessels in absolute numbers for six years. In 2014 St. Maarten reached its peak cruise visitor arrivals with over 2 million (2,001,996) persons arriving at its Port via 692 cruise vessels. However, that number steadily declined in the following years with the exception of 2018, where there was a sharp increase following the devastating cruise year in 2017 due to hurricane Irma in the second half of the season. Figures 2 and 3 show increases in both cruise passenger numbers and vessel arrivals, respectively 29% and 15%.



Nevertheless, considering the circumstances of 2017, when comparing 2016 and 2018 it is evident that there was a 4% decrease in passenger arrivals with a 19% decrease in cruise vessels visits. This is interesting, considering that the 12% decrease in cruise vessels in 2015 – 2016 resulted in a larger reduction (12%) of passenger arrivals in comparison with the figures above.

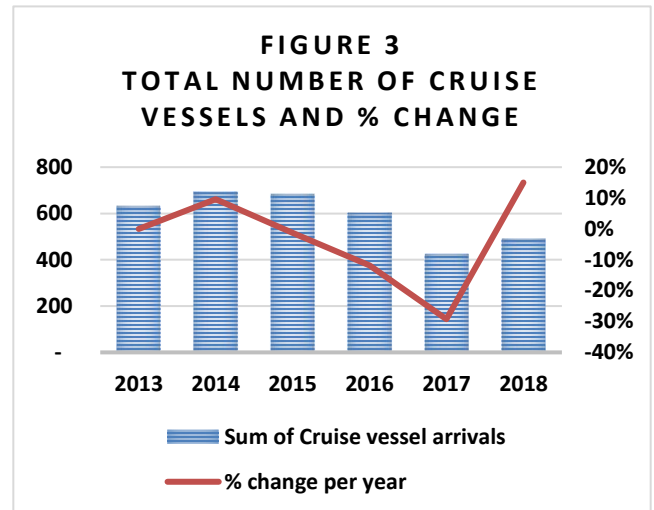
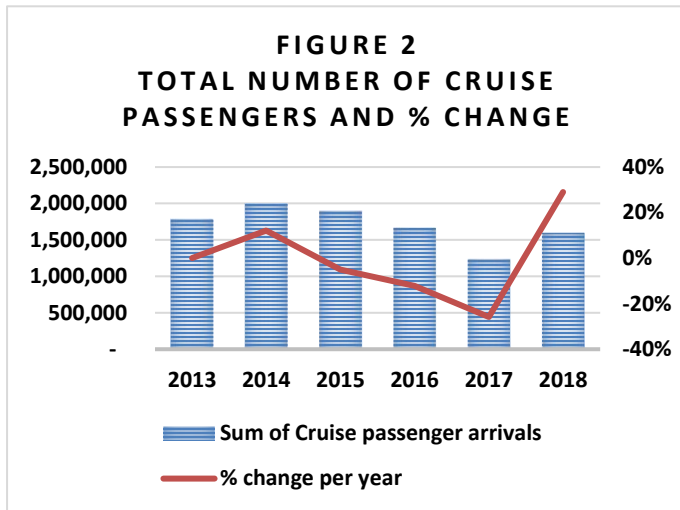
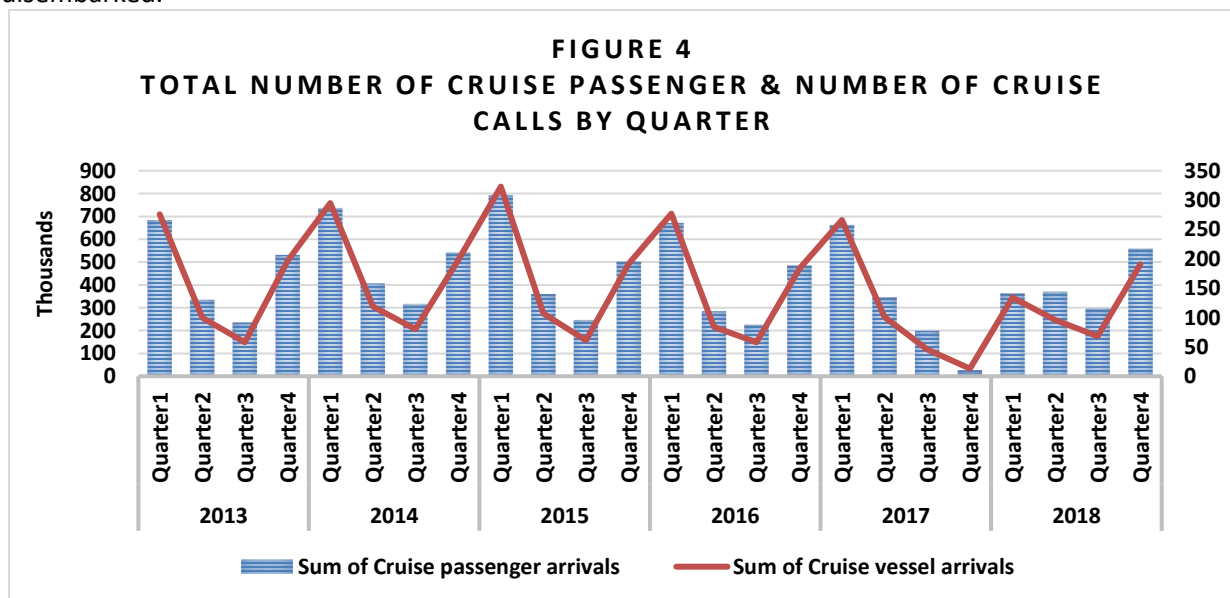
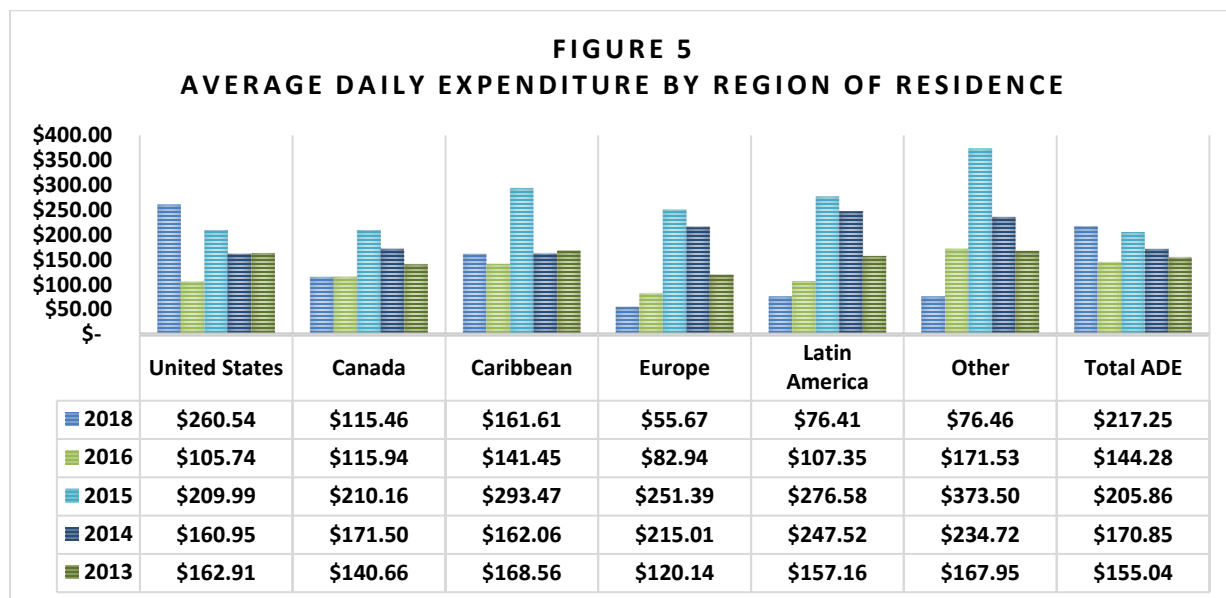


Figure 4 notes the absolute number of cruise passengers and the total number of cruise calls by quarter starting from the year 2013 until 2018. Both, the total number of cruise passengers and the total number of cruise calls reflect very constant patterns and generally exhibits the same adjustments. Except for a few cases, especially in 2018, where the cruise passenger arrivals are high when compared to cruise vessel arrivals. When factoring out 2017 cruise year, it appears that on average 1.2 more tourists reached our shores per cruise vessel arrivals. However, as indicated in the Figure, unlike former years, 2018 started slowly. Nonetheless, St. Maarten experienced a strong low season and a very strong fourth quarter when compared to former years, an indication of the constant seasonal patterns that is very evident for both markers. St. Maarten / St. Martin received 15% more cruise calls in 2018 compared to 2017, reaching 490 cruise calls. This represents 64 extra cruise vessels visits in which an additional 359,341 cruise passengers disembarked.



Tourism related expenditures

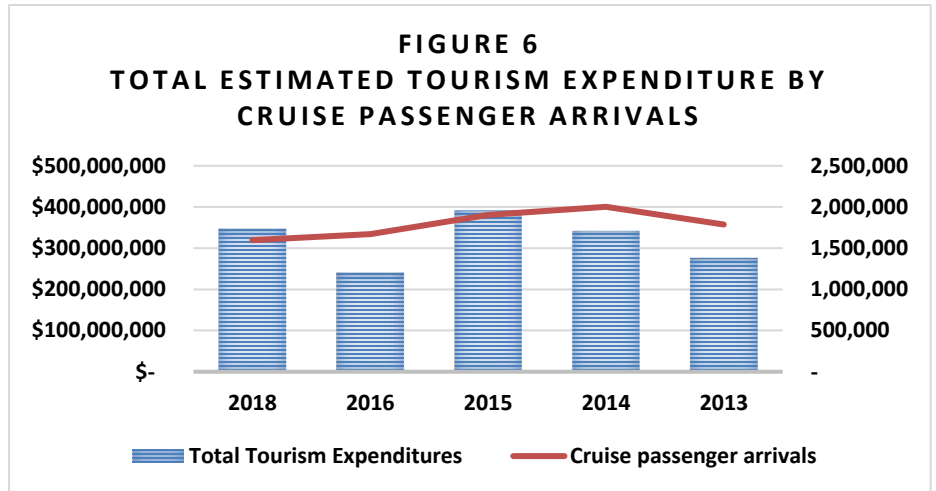
This section will cover tourism related expenditure indicators, which are very significant markers as our economy is heavily reliant on this industry. The indicators include the average daily expenditures (ADE) of \$217.25 in 2018 in St. Maarten per cruise visitor. In Figure 5, the ADE by region of residence are presented by primarily the five major regions whose residents usually embark on cruises destined for the Caribbean that disembarked in St. Maarten along their journey. This chart also includes data gathered from residents of countries outside the “Western world” were grouped together in a category labeled as “Other”.



The group “Other” on average contributes the largest amount of daily expenditure per person for goods and services provided while visiting the island. Especially evident in 2015, “Other” is obviously the largest spending group, followed by the Caribbean and Latin American regions. For the St. Maarten tourism product, the United States is the island’s largest market; however, as is evident in Figure 6, this group is not exactly the highest cruise spender, except for in 2018. As a caveat to this observation, it must be mentioned, that the methodology regarding the calculation of ADE was adjusted in 2016. Nevertheless, where North Americans, predominately USA, lack in spending power they compensate in volume of visitors (see table 1)

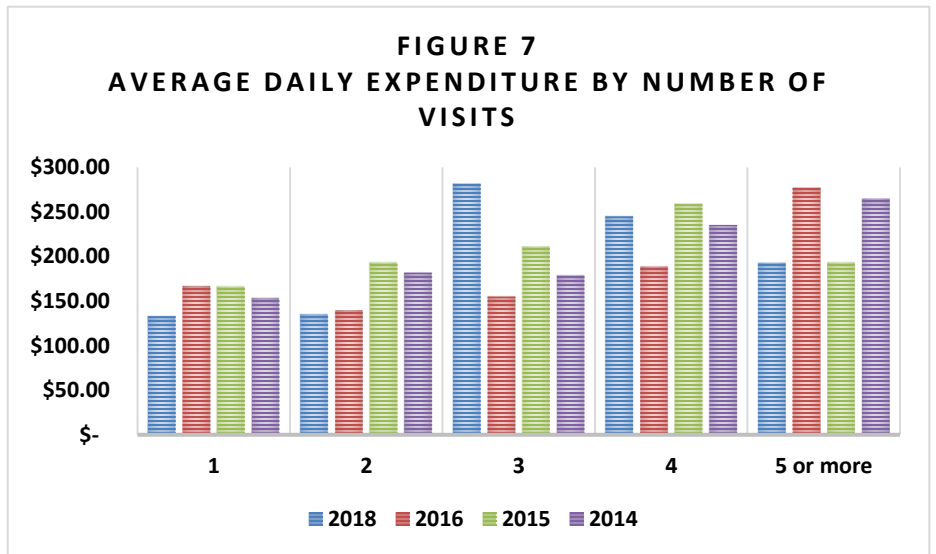
TABLE 1: CRUISE VISITORS PER REGION					
	2018	2016	2015	2014	2013
United States	63%	70%	72%	72%	47%
Canada	5%	3%	3%	6%	8%
Caribbean	23%	9%	15%	9%	12%
Europe	3%	12%	8%	9%	17%
Latin America	2%	3%	2%	3%	15%
Other	3%	3%	1%	1%	2%
Grand Total	100%	100%	100%	100%	100%

Further, Figure 6 shows the annually estimated total expenditures for cruise passenger arrivals. According to the estimates provided by this research, it appears that although there was a reduction in arrivals in two of the three years, both sides of the island still recorded growth in the total tourism expenditures. The cruise arrivals decreased by 5% in 2015,

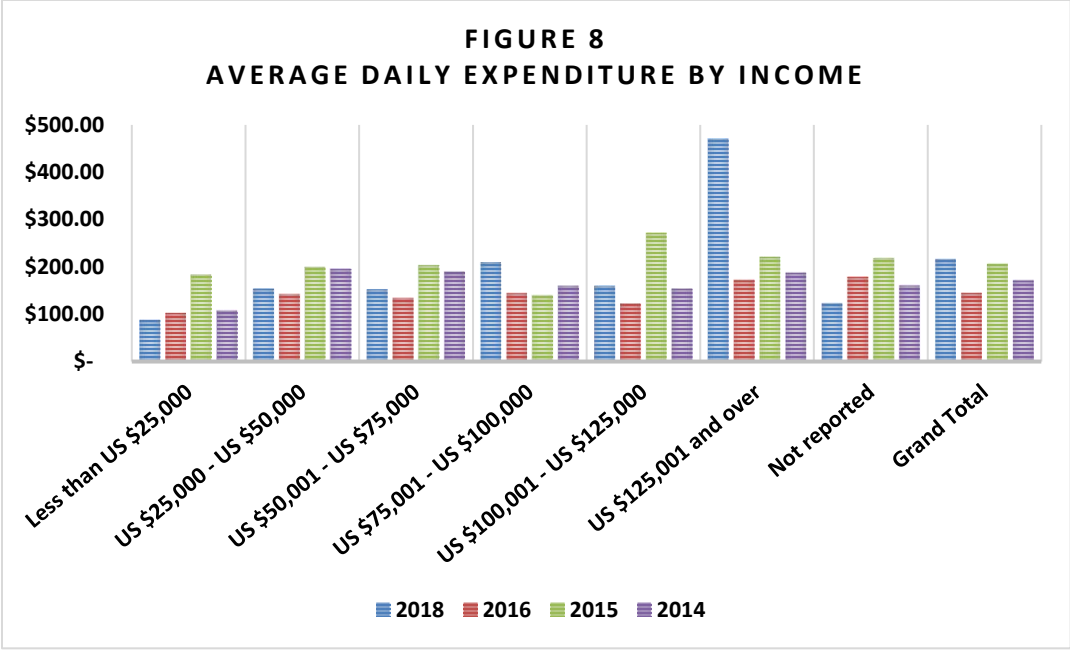


but the revenues increased by an estimated 14% (\$391,466,876); also in 2018 there was a similar occurrence with a 4% decrease in cruise arrivals, resulting in a revenue increase of 44% (\$346,970,501). This is an effect of high cruise visitors' expenditures while in St. Maarten, irrespective to the total cruise arrivals.

Figure 7 presents the cruise passengers' ADE based on their number of visits. Previous visits ranged from one time prior to the present trip and up to five or more previous visits. The bar chart in the Figure indicates that as visitors return to the island (otherwise known as loyal or retained visitors) they were more likely to have higher expenditures per person when compared to previous trips. Although this is not always linear, in most years it appears that after three visits the trajectory of expenditures increases exponentially. However, in 2018 it seems that this trend may not have applied.



In Figure 8, the focus is on the expenditures of the cruise visitors, based on their average household income ranges, during their disembarkment on St. Maarten. There seems to be no specific trend associated concerning the value of their total expenditures in relation to household earnings. Only in 2018, it appears that visitors with the highest household incomes (US\$ 125, 001 and over) also had the highest total expenditures. Overall it appears that the average range of expenditures for cruise visitors from 2014 – 2018 remained within a range 34% increase from the lowest cruise expenditure point of \$144.28 (2016).



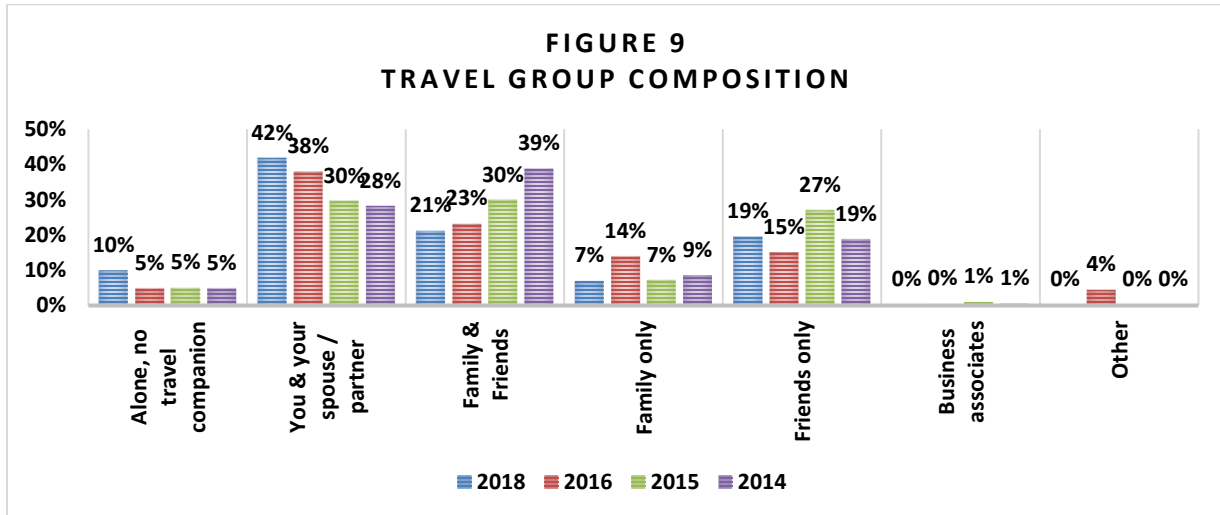
A short analysis of survey results & trends

The Tourism Exit Survey of 2018 covers a sample of all tourists visiting St. Maarten and departing by either cruise vessel or aircraft. This text covers the cruise section of the survey. According to the World Trade Organization (2001), tourism is define as the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited. Consequently, individuals residing on St. Maarten for one year or longer are excluded from the survey. Due to the geographical location and size of the island, all tourists are viewed as international visitors in this report. The term international visitors also includes individuals residing abroad permanently.

The Tourism Exit Survey is conducted usually 4 times per year, with at least 1 survey being conducted in the high and low seasons each. The survey period lasts for 14 days, starting on the third Saturday until the last Saturday within that month. However, in 2018 data-collection was conducted during only two periods, July/August and December. Although the data observation periods were limited, it stills provides a representation of both the High & Low tourist-seasons on the island.

The analyzed results of the following figures also illustrate the tourism expenditures data (extracted from the Visitor’s Survey results), in which the most significant trends that occurred in 2018 were observed.

Figure 9 displays the travel party categories and the percentage of cruise visitors pertaining to each group. Evidently, most cruisers in this Figure are either traveling as an intimate group of spouses/partners or family and friends.



In 2018, the percentage of visitors within the measured annual household income brackets followed the same trend of the previous years. The majority of visitors (+50%) have an income between US\$ 25,000 – US\$ 100,000, with the lowest representative group usually placed within the household income range of less than US\$ 25,000. See Figure 10.

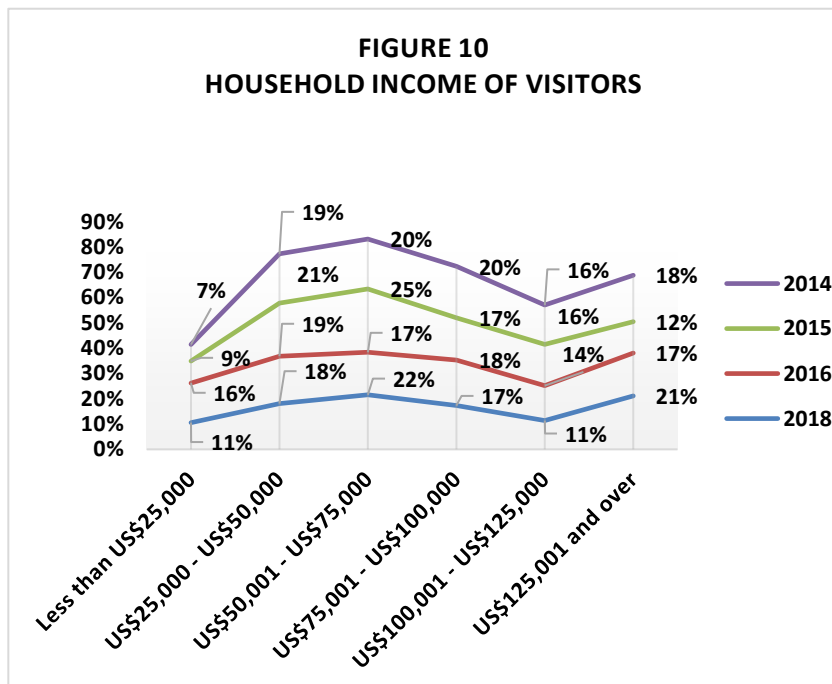


Figure 11 displays the percentage of cruise passengers that visited St. Maarten for the first time. As can be seen, the number of first-time visitors over years has steadily declined. Presently, most cruise visitors have been to St. Maarten previously, via cruise or stay-over and have returned anywhere between 2 to 3 or 5 times. See Figure 12.

FIGURE 11

PREVIOUS VISITS TO ST. MAARTEN /ST. MARTIN

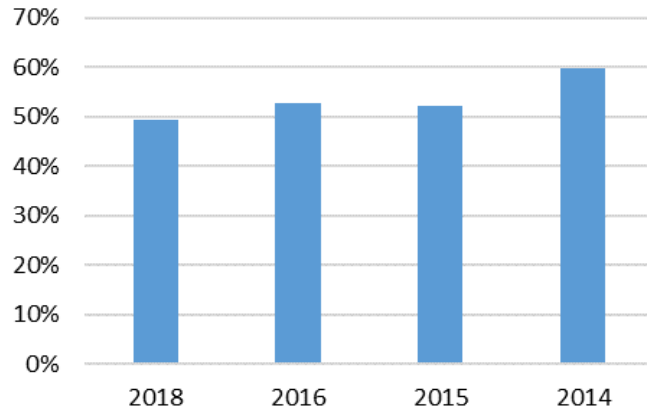
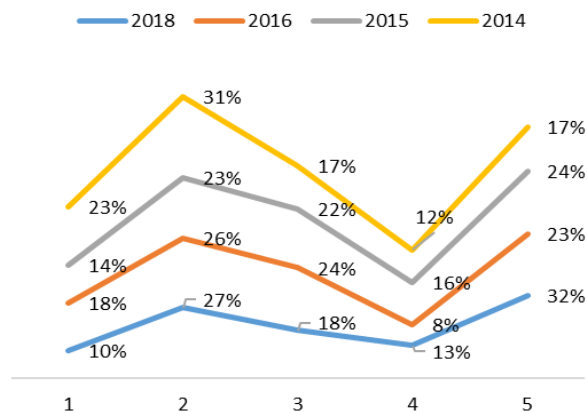


FIGURE 12

NUMBER OF VISITS TO ST. MAARTEN / ST. MARTIN



Results 2018 Tourism Exit Surveys

1. Tourism in St. Maarten/St. Martin

TOURISM INDICATOR SHEET FOR 2018

	2018	2016	2015	2014	% change (18/16)	% change (16/15)
<i>Cruise Ship Calls</i>	490	602	683	692	-19%	-12%
<i>Total number of Visitors</i>	1,597,101	1,668,863	1,668,863	2,001,996	-4%	0%
<i>Cruise Passengers sampled</i>	1149	1135	794	1352		
<i>First Time Visitors (in rel. %)</i>	49.3	51.5	32.6	20.9	-4%	58%
<i>Repeat Visitors (in rel. %)</i>	50.7	44.9	44.0	39.1	13%	2%
<i>Average Daily Expenditure spent in St. Maarten per person (in US\$)</i>	\$ 217.25	\$ 144.28	\$ 205.86	\$ 170.85	51%	-30%
<i>Estimated Total Cruise Tourism Expenditure (in US\$ in thousands)</i>	\$ 346,971	\$ 240,785	\$ 343,552	\$ 342,039	44%	-30%

2. Visitor profile

2.1. Characteristics of the visitors

2.1.1 Age groups of the visitors

<i>Males</i>		2018	2016	2015	2014
	Under 15	4%	9%	8%	10%
	15 - 29	15%	19%	18%	17%
	30 - 39	13%	19%	17%	16%
	40 - 49	14%	17%	18%	18%
	50 - 59	18%	18%	17%	21%
	60 +	35%	19%	22%	19%
	Average Age	45.5	39.7	40.6	40.6
<i>Females</i>	Under 15	5%	8%	9%	10%
	15 - 29	14%	17%	19%	12%
	30 - 39	13%	18%	18%	13%
	40 - 49	15%	20%	16%	12%
	50 - 59	19%	17%	14%	12%
	60 +	34%	19%	23%	42%
	Average Age	45.4	40.3	39.8	44.6
	<i>Totals</i>	Under 15	5%	9%	9%
15 - 29		14%	18%	19%	14%
30 - 39		13%	19%	17%	14%
40 - 49		15%	18%	17%	14%
50 - 59		19%	18%	15%	16%
60 +		34%	19%	22%	33%
Average Age		45.4	40.0	40.2	43.0

2.1.2 Yearly household income of the visitors

	2018	2016	2015	2014	% change 18/16	% change 16/15
<i>Less than US \$25,000</i>	9%	10%	7%	5%	2%	-30%
<i>US \$25,000 - US \$50,000</i>	17%	16%	19%	16%	-11%	18%
<i>US \$50,001 - US \$75,000</i>	20%	15%	23%	16%	-30%	33%
<i>US \$75,001 - US \$100,000</i>	15%	18%	15%	17%	15%	-24%
<i>US \$100,001 - US \$125,000</i>	10%	13%	14%	13%	27%	8%
<i>US \$125,001 and over</i>	18%	15%	11%	15%	-18%	-40%
<i>Not reported</i>	11%	13%	11%	18%	19%	-19%
Grand Total	100%	100%	100%	100%		

2.1.3 Group composition of visitors

	2018	2016	2015	2014
<i>Alone, no travel companion</i>	10%	5%	5%	5%
<i>You & your spouse / partner</i>	42%	38%	30%	28%
<i>Family & Friends</i>	21%	23%	30%	39%
<i>Family only</i>	7%	14%	7%	9%
<i>Friends only</i>	19%	15%	27%	19%
<i>Business associates</i>	0%	0%	1%	1%
<i>Other</i>	0%	4%	0%	0%
Grand Total	100%	100%	100%	100%

2.1.4 Average Travel Party Size

	2018	2016	2015	2014
<i>United States</i>	2.2	3.2	3.5	3.9
<i>Canada</i>	2.1	2.5	3.0	4.4
<i>Caribbean</i>	2.1	3.2	3.9	4.3
<i>Europe</i>	1.8	2.8	2.7	5.9
<i>Central America</i>	1.9	4.8	3.3	3.8
<i>South America</i>	2.0	3.2	4.7	4.7
<i>Other</i>	1.4	3.3	2.4	7.0
Grand Total	2.1	3.1	3.5	4.2

2.1.5 Regional residency of visitors

	2018	2016	2015	2014	% change 18/16
<i>United States</i>	64%	69%	72%	72%	-6%
<i>Canada</i>	5%	4%	3%	6%	27%
<i>Caribbean</i>	23%	10%	15%	9%	141%
<i>Europe</i>	3%	12%	8%	9%	-76%
<i>Central America</i>	1%	1%	1%	1%	-15%
<i>South America</i>	1%	2%	1%	1%	-50%
<i>Other</i>	2%	2%	1%	1%	9%
Grand Total	100%	100%	100%	100%	

2.1.6 Visitors from the US by the major states (Top 10)

US States	% in Survey	% of Persons in Expenditure
<i>Florida</i>	19%	18%
<i>New York</i>	9%	10%
<i>Pennsylvania</i>	8%	13%
<i>Maryland</i>	6%	6%
<i>Virginia</i>	5%	4%
<i>New Jersey</i>	4%	4%
<i>Texas</i>	4%	3%
<i>California</i>	4%	3%
<i>Georgia</i>	4%	5%
<i>Ohio</i>	4%	3%

2.1.7 Visitors from the Canada by Provinces (Top 10)

Canadian Provinces	% in Survey	% of Persons in Expenditure
<i>Ontario</i>	53%	54%
<i>Manitoba</i>	15%	16%
<i>British Columbia</i>	9%	11%
<i>Quebec</i>	10%	9%
<i>Alberta</i>	9%	7%
<i>Saskatchewan</i>	3%	2%
<i>Newfoundland and Labrador</i>	1%	1%
<i>New Brunswick</i>	1%	0%
Grand Total	100%	100%

2.2 Behavior of the visitors

2.2.1 Number of visits to St. Maarten

	2018	2016	2015	2014
First time visitor				
yes	49.3	53.4	42.6	34.9
no	50.7	46.6	57.4	65.1
Grand Total	100.0	100.0	100.0	100.0
Frequency of visit				
1	10.5	18.3	14.3	22.6
2	27.2	26.4	23.0	0.3
3	18.2	23.9	22.5	16.7
4	12.4	7.9	16.3	12.3
5	31.7	23.5	23.9	17.3
Grand Total	100.0	100.0	100.0	100.0

2.2.2 Single most important source of information in making a decision to visit St. Maarten

	2018	2016	2015	2014
<i>Friends / Relatives</i>	41.4	43.7	33.2	37.6
<i>Experience(pass visits)</i>	16.7	31.8	31.4	21.4
<i>Travel Agent</i>	14.3	5.7	13.2	13.7
<i>Ad / Promotion</i>	4.5	0.0	1.5	0.7
<i>Social media / Internet search (VacationStMaarten.com)</i>	6.0	5.1	14.9	18.0
<i>Newspaper / Magazine</i>	1.0	0.0	0.8	0.9
<i>Other</i>	16.2	13.7	5.0	7.7
Grand Total	100	100	100	100

2.2.3 Activities performed by visitor

	2018	2016
<i>Shopping</i>	52%	59%
<i>Visited Beaches</i>	32%	81%
<i>Visited Philipsburg (boardwalk, Front / Back street)</i>	22%	14%
<i>Dining</i>	17%	19%
<i>Sightseeing tours</i>	13%	13%
<i>Plane watching</i>	9%	33%
<i>Other</i>	8%	25%
<i>Boat trips</i>	7%	13%
<i>Water sports</i>	6%	13%
<i>Visited Marigot</i>	5%	16%
<i>Visited Historical sites</i>	4%	0%
<i>Visited Orient Bay</i>	4%	44%
<i>Sailing</i>	3%	0%
<i>Tours (e.g. bus, atv)</i>	2%	0%
<i>Zip lining</i>	2%	0%
<i>Visited Casino / Nightlife</i>	2%	6%
<i>Visited Grand Case</i>	1%	0%
<i>Hiking</i>	1%	1%
<i>Cycling tours</i>	0%	0%
<i>fishing</i>	0%	0%
<i>Butterfly farm</i>		45%

3. Satisfaction of the visitors

3.1 Agreement or disagreement of the visitors

Like	% (2018)		Unlike
<i>Beaches</i>	25	8	<i>Internet</i>
<i>Friendly residents</i>	20	7	<i>Climate</i>
<i>Port</i>	13	6	<i>Prices</i>
<i>Scenery</i>	10	5	<i>Solicitation</i>
<i>Shopping</i>	9	4	<i>Traffic</i>
<i>Climate</i>	6	4	<i>Pollution</i>
<i>Cleanliness</i>	5	3	<i>Shopping</i>
<i>Tours</i>	2	2	<i>Signage</i>
<i>Food</i>	2	2	<i>Taxis</i>
<i>Prices</i>	2	2	<i>Beaches</i>
1149			

3.2 Rating of overall aspects during visit to St. Maarten

	Excellent	Good	Average	Poor	Terrible	Average Score			
						2018	2016	2015	2014
<i>Immigration</i>	57%	35%	7%	1%	0%	4.5	4.4	3.4	3.5
<i>Clubs and Casinos</i>	35%	30%	18%	2%	15%	3.7	3.2	2.7	2.9
<i>Island cleanliness</i>	58%	29%	11%	2%	0%	4.4	4.5	3.4	3.5
<i>rentals</i>	40%	30%	15%	5%	10%	3.9	4.0	0.0	0.0
<i>Taxi</i>	52%	33%	10%	2%	3%	4.3	4.4	3.2	3.4
<i>Communication services</i>	58%	31%	8%	1%	2%	4.4	3.4	2.5	2.7
<i>Tours</i>	56%	34%	8%	1%	3%	4.3	4.3	3.2	3.5
<i>Sightseeing</i>	58%	31%	8%	1%	2%	4.4	4.5	3.3	3.5
Dutch Side									
<i>Beaches</i>	70%	25%	3%	1%	1%	4.6	4.6	3.5	3.7
<i>Customer service</i>	60%	30%	8%	1%	0%	4.5	4.5	0.0	0.0
<i>Dining</i>	53%	35%	10%	0%	2%	4.4	4.3	3.3	3.4
<i>Goods and Prices</i>	42%	37%	17%	3%	1%	4.1	4.3	3.3	3.2
<i>Safety and security</i>	64%	28%	6%	1%	1%	4.5	4.6	3.4	3.6
<i>Residents friendliness</i>	69%	24%	6%	1%	0%	4.6	4.7	0.0	0.0
<i>Roads and signage</i>	42%	35%	18%	2%	3%	4.1	3.9	2.9	2.8
French Side									
<i>Beaches</i>	61%	27%	7%	2%	4%	4.2	4.5	3.4	3.6
<i>Customer service</i>	51%	31%	10%	4%	4%	4.0	4.4	0.0	0.0
<i>Dining</i>	50%	30%	14%	2%	4%	4.2	4.5	3.2	3.3
<i>Goods and Prices</i>	39%	33%	22%	3%	3%	4.4	4.1	3.1	2.8
<i>Safety and security</i>	52%	33%	11%	2%	2%	4.3	4.4	3.4	3.6
<i>Residents friendliness</i>	53%	28%	13%	3%	3%	3.9	4.6	0.0	0.0
<i>Roads and signage</i>	30%	37%	25%	4%	4%	4.2	4.0	2.9	2.8
Overall Score						4.4	4.3	3.2	3.3

- Figures in red highlights are the average ratings per category, rated from 5 to 1 (highest to lowest score).

3.3 Expectations ratings

	2018	2016	2015	2014	% change 18/16	% change 16/15
<i>Above Expectations</i>	41%	38%	44%	44%	8%	-13%
<i>Met Expectations</i>	56%	60%	55%	3%	-8%	9%
<i>Below Expectations</i>	4%	2%	1%	54%	86%	55%
Grand Total	100%	100%	100%	100%		

3.4 Recommend or Return intentions ratings

Recommend	2018	2016	2015	2014
<i>Definitely</i>	77.7	72.8	73.0	82.7
<i>Probably</i>	17.7	23.0	22.4	13.2
<i>Unsure</i>	3.1	2.4	3.1	2.3
<i>Probably not</i>	0.7	0.9	0.5	0.5
<i>Definitely not</i>	0.8	0.8	1.0	1.3
Return				
<i>Definitely</i>	74.5	71.3	70.2	78.8
<i>Probably</i>	0.8	24.5	22.6	16.1
<i>Unsure</i>	4.1	2.4	4.9	2.8
<i>Probably not</i>	19.1	0.9	1.3	1.5
<i>Definitely not</i>	1.4	0.8	1.0	0.9
Grand Total	100.0	100.0	100.0	100.0

4. Money aspects of the visitors

4.1 Average Daily Expenditure spent in St. Maarten / St. Martin per category

	2018	2016	2015	2014	% change 18/16	% change 16/15
<i>United States</i>	\$ 260.54	\$ 105.74	\$ 209.99	\$ 160.95	146%	-50%
<i>Canada</i>	\$ 115.46	\$ 115.94	\$ 210.16	\$ 171.50	0%	-45%
<i>North America</i>	\$ 248.62	\$ 137.23	\$ 209.99	\$ 161.69	81%	-35%
<i>Caribbean</i>	\$ 161.61	\$ 141.45	\$ 293.47	\$ 162.06	14%	-52%
<i>Europe</i>	\$ 55.67	\$ 82.94	\$ 251.39	\$ 215.01	-33%	-67%
<i>Latin America</i>	\$ 76.41	\$ 107.35	\$ 276.58	\$ 247.52	-29%	-61%
<i>Other</i>	\$ 76.46	\$ 171.53	\$ 373.50	\$ 234.72	-55%	-54%
<i>Not reported</i>	\$ 184.27	\$ 161.36	\$ 432.53	\$ 226.15	14%	-63%
Grand Total	\$ 217.25	\$ 144.28	\$205.86	\$170.85	51%	-30%
Average Travel Party Size of persons in Expenditure	2.2	2.9	2.9	3.0		
Total Spend per Cruise Party	\$ 474.09	\$ 380.82	\$ 588.69	\$ 516.93		
Estimated Total Tourism Expenditures (*1000)	\$ 346,971	\$ 240,785	\$ 391,467	\$ 342,039	44%	-38%

4.2 Average Daily Expenditure by place of residency

	United States	Canada	North America	Caribbean	Europe	Latin America	Other	Not reported	Grand Total
<i>Food and Beverages</i>	3%	10%	3%	4%	10%	13%	2%	2%	3%
<i>Casinos</i>	0%	1%	0%	1%	0%	0%	0%	0%	0%
<i>Attractions</i>	5%	14%	6%	3%	7%	4%	31%	7%	5%
<i>Sports</i>	1%	0%	1%	0%	10%	0%	0%	0%	1%
<i>Special events</i>	0%	0%	0%	0%	0%	0%	0%	0%	0%
<i>Strip club</i>	0%	0%	0%	0%	0%	0%	0%	0%	0%
<i>Taxi</i>	2%	3%	2%	4%	6%	9%	7%	2%	2%
<i>Scooters / ATV Rentals / Bicycles</i>	0%	0%	0%	1%	0%	0%	0%	0%	0%
<i>Car rental</i>	0%	1%	0%	0%	0%	1%	3%	0%	0%
<i>Public bus</i>	0%	0%	0%	0%	0%	0%	0%	0%	0%
<i>Clothing</i>	4%	11%	4%	7%	14%	26%	7%	2%	4%
<i>Jewelry</i>	73%	48%	72%	43%	32%	18%	36%	72%	67%
<i>Electronics</i>	1%	0%	1%	14%	0%	0%	0%	5%	4%
<i>Alcohol</i>	3%	2%	3%	4%	2%	0%	3%	2%	3%
<i>Tobacco</i>	0%	0%	0%	1%	0%	0%	0%	1%	1%
<i>Other Goods</i>	6%	7%	6%	17%	14%	30%	11%	6%	8%
<i>Other services</i>	0%	2%	0%	1%	6%	0%	0%	0%	0%
Grand Total	\$ 260.54	\$ 115.46	\$ 248.62	\$ 161.61	\$ 55.67	\$ 76.41	\$ 76.46	\$ 184.27	\$ 217.25

4.3 Average Daily Expenditure by number of visits

Previous visits	2018	2016	% change 18/16
<i>First visit</i>	\$ 244.35	\$ 125.40	95%
<i>1 visit</i>	\$ 132.97	\$ 166.96	-20%
<i>2 visits</i>	\$ 135.12	\$ 139.45	-3%
<i>3 visits</i>	\$ 281.82	\$ 155.07	82%
<i>4 visits</i>	\$ 245.29	\$ 188.76	30%
<i>5 visits</i>	\$ 193.20	\$ 277.22	-30%
Grand Total	\$ 217.25	\$ 144.28	51%

4.4 Average Daily Expenditure by yearly household income

	2018	2016	2015	2014	% change 18/16	% change 16/15
<i>Less than US \$25,000</i>	9%	10%	7%	5%	2%	-30%
<i>US \$25,000 - US \$50,000</i>	17%	16%	19%	16%	-11%	18%
<i>US \$50,001 - US \$75,000</i>	20%	15%	23%	16%	-30%	33%
<i>US \$75,001 - US \$100,000</i>	15%	18%	15%	17%	15%	-24%
<i>US \$100,001 - US \$125,000</i>	10%	13%	14%	13%	27%	8%
<i>US \$125,001 and over</i>	18%	15%	11%	15%	-18%	-40%
<i>Not reported</i>	11%	13%	11%	18%	19%	-19%
Grand Total	100%	100%	100%	100%		

4.5 Number of persons per expenditure (groups)

	# of responses	# of persons in Expenditure	Average persons in Expenditures
<i>United States</i>	818	1810	2.2
<i>Canada</i>	76	162	2.1
<i>Caribbean</i>	272	625	2.3
<i>Europe</i>	29	58	2.0
<i>Central America</i>	6	11	1.8
<i>South America</i>	14	33	2.4
<i>Other</i>	13	24	1.8
<i>Not reported</i>	133	247	1.9
Grand Total	1361	2970	2.2

4.6 Expenditure in St. Maarten / St. Martin by yearly household income of visitors groups

	2018	2016	2015	2014	% change 18/16	% change 16/15
<i>Less than US \$25,000</i>	9%	10%	7%	5%	2%	-30%
<i>US \$25,000 - US \$50,000</i>	17%	16%	19%	16%	-11%	18%
<i>US \$50,001 - US \$75,000</i>	20%	15%	23%	16%	-30%	33%
<i>US \$75,001 - US \$100,000</i>	15%	18%	15%	17%	15%	-24%
<i>US \$100,001 - US \$125,000</i>	10%	13%	14%	13%	27%	8%
<i>US \$125,001 and over</i>	18%	15%	11%	15%	-18%	-40%
<i>Not reported</i>	11%	13%	11%	18%	19%	-19%
Grand Total	100%	100%	100%	100%		

4.7 Average Daily Expenditure by Household Income

	2018	2016	2015	2014
<i>Less than US \$25,000</i>	\$ 88.42	\$102.71	\$184.02	\$107.14
<i>US \$25,000 - US \$50,000</i>	\$ 153.89	\$141.88	\$199.87	\$195.47
<i>US \$50,001 - US \$75,000</i>	\$ 152.41	\$133.64	\$203.65	\$189.25
<i>US \$75,001 - US \$100,000</i>	\$ 210.47	\$143.59	\$139.85	\$159.18
<i>US \$100,001 - US \$125,000</i>	\$ 160.00	\$122.14	\$272.03	\$153.62
<i>US \$125,001 and over</i>	\$ 471.42	\$171.45	\$220.95	\$187.02
<i>Not reported</i>	\$ 123.32	\$178.40	\$218.58	\$159.86
Grand Total	\$ 217.25	\$144.28	\$205.86	\$170.85

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