Stay-Over Tourism

Cruise and Stay-Over Arrivals 2022

SHOPPING / DINING / ACTIVITIES / NIGHTLIFE / FAMILY FUN

STAT
DEPARTMENT OF STATISTICS

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Introduction

The Department of Statistics (STAT) conducts the Tourism Exit Survey (TES) multiple times a year in which visitors are surveyed before their departure. They are approached at our two main ports of entry, namely, at Princess Juliana International Airport to collect information from stay-over visitors and at Port St. Maarten to collect data from cruise visitors. This survey assesses visitor and trip characteristics, spending, and travel patterns. TES consists of two types of surveys - the expenditure and the satisfaction surveys. The former mainly captures the average amount spent on various categories, such as accommodation, food, and transportation. The latter captures the level of satisfaction for multiple products and services.

This report, which presents the results of the TES conducted in 2022, is divided into two sections. Part one provides the findings for the stay-over visitors, and part two focuses on cruise visitors. Consequently, individuals residing in 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 apply to individuals residing abroad permanently.

TES is usually conducted four times throughout the year and on a yearly basis, with at least one survey conducted in each high and low season. The survey period lasts for 14 days, starting on the third Sunday of the month until the last Saturday of that month. However, in 2022, data collection was only conducted during March, September, and December. Although the data observation periods were limited, they still represented the island's high and low tourist seasons.

Methodology

1. Coverage

The Tourism Exit survey covered a sample of all tourists visiting St. Maarten by means other than via commercial vessels and private yachts. In this case, focus was placed particularly on tourists that left the island by aircraft via the Princess Juliana International Airport. According to the WTO (2001), tourism is defined 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.[1] Individuals that were residing on St. Maarten/St. Martin for one year or longer were excluded from the survey. Due to the geographical location and size of St. Maarten/St. Martin, in this report, all tourists were viewed as international visitors.

As the objective of this survey was to obtain the purpose of visit and measure the economic activity of tourists within the island, it was crucial to define visitor consumption, determine the timing of purchase, and distinguish between the goods and services purchased. Visitor consumption covers the total purchases made by a visitor or on behalf of a visitor for and during his/her trip and stay at the destination. It encompasses these purchases as well as all expenditure on goods and services by all institutional units on behalf of the visitors; it also includes all forms of transfers in kind along with other transactions benefitting the visitors that are not cash or financial assets provided to the visitors but goods and services (thus, the consumption of individual non-market services is included). Consequently, visitor consumption includes all categories of consumption goods and services (UNWTO, 2001).[1] This survey collected data on consumption of both market and non-market services through expenditure behaviors and satisfaction statistics, respectively.

2. Sampling Method

2.1 Design

The goal of this survey was to cumulate data on various segments within St. Maarten's tourism market-both cruise and stay-over. This suggests that the use of the stratified sampling procedure would be appropriate in gathering data. Daniel (2012) defines stratified sampling as a probability sampling procedure which separates the target population into mutually exclusive, homogenous strata, from which a stratum is extracted. Stratums selected from various strata are then combined into a single sample. The research's objective was descriptive, in that it sought to describe the parameters, differences between or among population, or relationships among variables in the tourist population. Disproportionate stratified sampling was used as the sampling method. It is a stratified sampling procedure in which the number of elements sampled from each stratum is not proportional to their representation in the total population.[2] Population elements are not given an equal chance to be included in the sample. The same sampling

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[1] https://www.unwto.org/glossary-tourism-terms
[2] Daniel, J. (2011). Sampling Essentials: Practical Guidelines for Making Sampling Choices. SAGE.

fraction is not applied to each stratum (Daniel, 2011). Disproportionate stratified sampling may be broken into three subtypes (within-strata, between-strata analyses, or optimum allocation) based on the purpose of allocation that was implemented. This research utilized the within-strata sub-type sampling method for STS 2013. Proportionate allocation may not yield enough cases for such detailed analyses. Thus, it offered an option to oversample the small or rare strata, although it would create a disproportional distribution of the strata in the sample when compared to the population. Nevertheless, there may be enough cases to carry out the within-strata analyses required by the study's objectives. The following steps were made:

A. Identify the target population. The targeted population were all tourists visiting for at least one day (24hrs) but less than 1 year on Dutch Sint Maarten. These recipients must all be leaving the island via PJIAE, must be 18 or older, and

B. Stratums were determined by grouping countries into regions by using the proportional population of visitors distributed over the five highest percentage of region. Example is that North America region consists of the USA and Canada which holds 80 % market share.

C. The sample per region were determined by the seasonality of visitors and the percentage of market share their region holds in Sint Maarten market based on a two-year average. Therefore, low percentage markets with seasonal visits may be over sampled during their peak visiting periods. Whereas regions with a constant visiting trend throughout the year would have a consistent sample size per each survey quarter.

D. The sample of visitors per stratum were randomly selected.

E. Quarterly sampling and analyses will be aggregated to offer a snapshot of seasonal trends and overall yearly assessment of visitors.

2.2 Measurement Scales and Surveys

This study employed a casual research design using several questions utilized by previous Tourist Expenditure Surveys[3]. STAT together with partners from St. Maarten Tourist Bureau, and the Economic department evaluated the questions which resulted in the enclosed questionnaire (see annex 1). The questionnaire was prepared in English but can eventually be translated into more languages. It consisted of four sections pertaining to travel activities, satisfaction ratings, travel expenditures, and general information. Prior to the launch of the study, the questionnaire was tested during a pilot survey and revisions made where appropriate. To ensure that the interviewers were properly trained a manual was prepared in which explanations were given on how to conduct the survey.

2.3 Sample Size

After developing the survey, a sample size had to be determined. The equation below was used to determine the sample size for each surveying period equating to 1,066 per survey, expenditure, and satisfaction, per period. A sample is a subset of the population elements that results from a sampling strategy. Sample size determination is an important and often difficult step in planning an empirical study.

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[3] In developing the present Tourism Expenditure Survey questions were generated and selected from previous surveys conducted on the island, as well as those available from other islands (Anguilla and Aruba).

To determine the viability, the sample size of 95 percent confidence level is used. A confidence interval is of the form: estimate +/- margin of error. The margin of error shows how accurate we believe our guess is based on the variability of the estimate.

So, the margin of error gets smaller when:
- z gets smaller
- σ gets smaller
- n gets larger

Table 1: Confidence Level

Confidence Level	Tail area α	$Z_{\alpha/2}$
90%	.05	1.645
95%	.025	1.960
99%	.005	2.576

Sample size formula: $n = \left(\dfrac{Z_{\alpha/2} * \sigma}{E}\right)^2$; for the maximum error E of estimate where σ is known.

When σ is unknown we replace it with $p * q$ and population is known N
Then Sample Size formula (Krejcie & Morgen, 1970):

$$n = \frac{X^2 * N * (pq)}{d^2 * (N-1) + X^2 * (pq)}$$

$p = 0.5$
$q = 1 - p$
$d = degree\ of\ accuracy = 0.035$
$N = target\ population$

$X^2 = 3.84\ (.05\ level = 95\%\ confidence\ level)$ `Chi-square @ d.f.= 1`

$$n = total\ sample$$

2.4 Sampling Summary

In total, 4,481 surveys were performed, and approximately 100 percent were interviews conducted in person or face-to-face. Due to the need for high response rates, face-to-face interviews were chosen as the preferred technique of interaction between the interviewers and respondents prior to the start of the survey.

Of the total, 3963 surveys were completed by stay-over visitors, of which 1857 indicated the level of satisfaction and 2106 provided an overview of spending habits whilst on the island. On the other hand,

cruise visitors accounted for a total of 518 completed surveys, which consisted of 302 expenditures and 216 satisfactions (see *Table 2*).

Table 2: Samples Collected		
	Surveys collected	**Percentage of expected responses**
	N	%
Stay-over survey	3963	62%
Cruise survey	518	8%

The Stay-over survey was comprised of the high and low season arrivals in which the low season (May to November) consisted of 2,579 visitor responses and the high season (December to April) consisted of 1,384 visitor responses. The Cruise survey also contained results from arrivals during both seasons, with the low season having a total collection of 143 visitor responses and the high season having 375 visitor responses. Therefore, the cruise results were slightly skewed towards high season.

2.5 Sample Size and Margin of Error

The margin of error associated with the total sample and the specific sub-groups used (i.e., tourism season) in this report is summarized in Table 3. In terms of statistical accuracy, the actual margin of error for each market will vary slightly due to minor variations in the sample size. Overall, a sample of this size has a sampling error of ±1.56 percent and ± 4.30 percent at a 95 percent confidence level for the Stay-Over and Cruise arrivals, respectively. However, the margins of error for the sampling periods are higher (low season = ±1.93% and ±8.19; high season = ±2.63% and = ±5.06) (see Table 3). Please note, this is a guideline only. Caution should be applied when interpreting significance testing throughout this report.

Table 3: Sample Size and Margin of Error				
	Stay-Over		**Cruise**	
	Total		**Total**	
	Sample Size	**Margin of Error** [a]	**Sample Size**	**Margin of Error** [a]
Survey period 1 (May)	1,378	±2.64	118	± 9.02
Survey period 2 (Sep-Oct)	1,201	±2.83	25	± 19.60
Low Season (May-Nov)	**2,579**	**±1.93**	**143**	**±8.19**
Survey period 3 (Dec)	1,384	±2.64	375	± 5.06
High Season (Dec-Apr)	**1,384**	**±2.63**	**375**	**±5.06**
Full-Year (12 months)	**3,963**	**±1.56**	**518**	**± 4.30**

Note: a) Margin of error indicates % of total number of responses used in each sub-group at the 95% confidence level.

3. Data Collection

The surveys were designed to target specific groups of tourists visiting St. Maarten. Survey periods consisted of 1 week for the expenditure and another for satisfaction. and took place every third Saturday of the month during the first 3 quarters of the year; however, during the 4th quarter, the period was initiated a week earlier due to the Christmas holiday season. The interviews were held in the departure hall of the Princess Juliana International Airport (PJIAE) for departing air passengers and at Port St. Maarten's cruise facilities (A.C. Wathey and Captain Hodge Wharf). Questionnaires were filled out, collected, and scanned by the interviewers for errors or non-responses. As previously mentioned, the interviewers received intensive training by staff members of the Department of Statistics ahead of the survey period, which encompassed locating, identifying, soliciting respondents, examining the responses for errors, and terminating the discussions. The interviewers were strongly advised to adhere to the training instructions and procedures prior to interviews. During data processing and error detection:

- All questionnaires were reviewed manually to determine if they were complete and coherent.
- Data was captured, coded, and verified.
- Outliers were identified during analysis and removed or corrected.

3.1 Survey Instrument

The TES questionnaire gathered information on the travel habits of visitors travelling to St. Maarten/St. Martin including the following:

- Usual place of residence (country, province/state, city, postal code/zip code);
- Date of entry and exit (day, month, year);
- Entry and exit point;
- Mode of transportation during visit;
- Party size, characteristics, and composition;
- Primary reason for trip;
- Primary features that attracted visitors to the island;
- Primary destination of the trip and trip duration;
- Type of accommodations used;
- Locations visited during the trip;
- Activities while on trip;
- Number of prior visits to the island;
- Travel expenditures;
- Satisfaction ratings of goods, services, and facilities/infrastructure.
- Likes/dislikes, and future behavioral intentions; and
- Demographic information.

Stay-Over Tourism

Summary of Overall Results

Part 1. Stay-over visitors

This section focused on the stay-over visitors covering St. Maarten's overall stay-over arrivals. In addition, this section presents the results of the expenditure and satisfaction surveys conducted at Princess Juliana International Airport in 2022.

Stay-over arrivals 2022

The graph below shows the expected seasonal influx of visitors to the island, with an increase in arrivals from January to April, followed by declines at the beginning of the slow season (see Figure 1). In 2022, stay-over arrivals increased from 248,852 the previous year to 372,808. This was an increase of fifty percent. Also, arrivals 2022 was fifteen percent above 2019 pre-covid levels (see Figure 1).
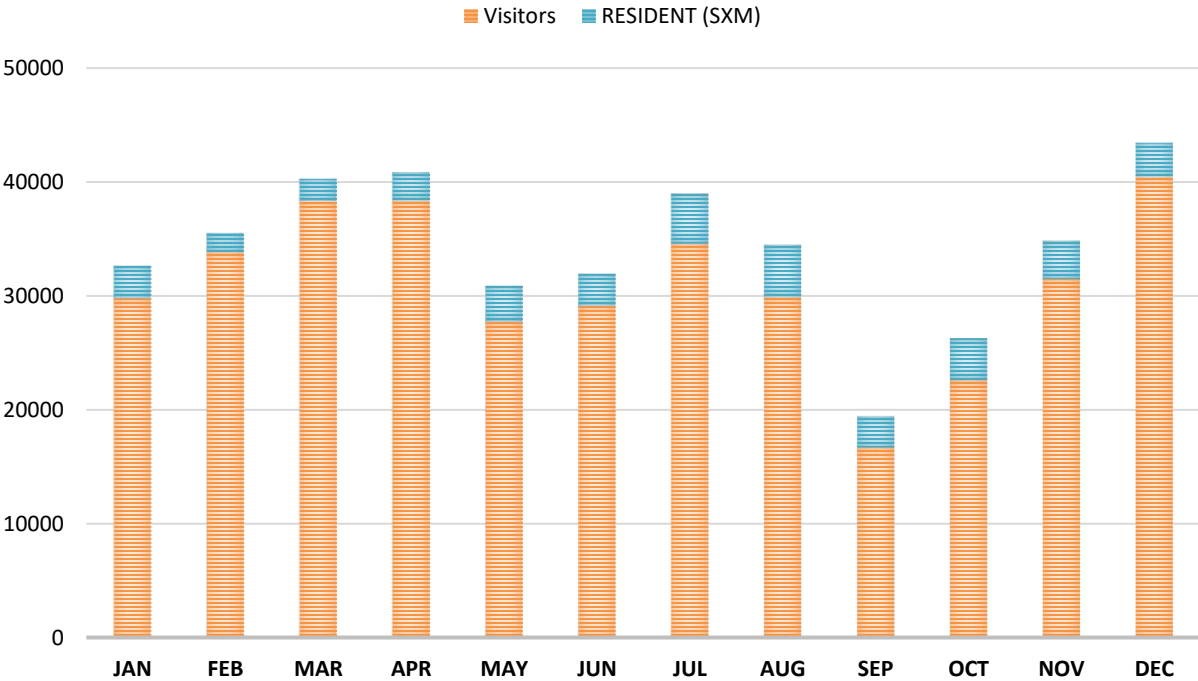

Figure 1. Stay-Over Arrivals

Comparing the 2021 and 2022 arrivals by region reveals significant changes from all areas (see *Table 4*). Regarding arrivals by region, visitors from North America and Europe remained the most prominent groups, accounting for 66% and 26% of the total stay-over arrivals for 2022. Moreover, visitors from the Caribbean, South America, and the rest of the world accounted for 8% of the remaining stay-over arrivals. In 2022, visitors from North America accounted for 66% of overall stay-over arrivals. Moreover, visitors from Europe accounted for 26%.

Table 4: Stay-over arrivals by region					
First Half					
	2022	**2021**	**% of 2022 overall arrivals**	**% of 2021 overall arrivals**	**% Change 2022/2021**
North America	133,815	68,205	68%	69%	96%
Caribbean	3,642	1,804	2%	2%	102%
Europe	51,176	24,406	26%	25%	110%
South America	1,968	735	1%	1%	168%
Rest of the World	6,535	4,041	3%	4%	62%
Total	197,136	99,191	100%	100%	99%
Second Half					
	2022	**2021**	**% of 2022 overall arrivals**	**% of 2021 overall arrivals**	**% Change 2022/2021**
North America	113,789	**100,859**	65%	67%	13%
Caribbean	5,951	2,652	3%	2%	124%
Europe	**46,334**	40,611	26%	27%	14%
South America	2,330	880	1%	1%	165%
Rest of the World	7,268	4,659	4%	3%	56%
Total	175,672	149,661	100%	100%	17%
Full-Year					
	2022	**2021**	**% of 2022 overall arrivals**	**% of 2021 overall arrivals**	**% Change 2022/2021**
North America	247,604	169,064	66%	68%	46%
Caribbean	9,593	4,456	3%	2%	115%
Europe	97,510	65,017	26%	26%	50%
South America	4,298	1,615	1%	1%	166%
Rest of the World	13,803	8,700	4%	3%	59%
Total	372,808	248,852	100%	100%	50%

Table 5	**2016**	**2019**	**2020**	**2021**	**2022**	**% change 2016-2022**	**% change 2019-2022**	**% change 2021-2022**
North America	332,322	193,478	63,879	169,064	247,604	-25%	28%	46%
Caribbean	20,725	13,287	2,537	4,456	9,593	-54%	-28%	115%
Europe	142,715	91,813	33,735	65,017	97,510	-32%	6%	50%
South America	13,668	7,188	1,580	1,615	4,298	-69%	-40%	166%
Rest of the World	18,723	13,930	4,695	8700	13,803	-26%	-1%	59%
Total	528,153	319,696	106,425	248,852	372,808	-29%	17%	50%

Results of 2022 Stay-over Tourism Exit Survey

1. Visitor Profile

Number of visits

Slightly over one-half of the respondents in 2022 were returning visitors. First-time visitors accounted for 55% of the sample, compared to 45% of returning visitors. Of those returning, 8% indicated that their first visit to the island was via a cruise (see Table 6). Likewise, 44% of returnees indicated that they had visited the island one to three times, whereas 56% indicated that they had been there four or more times before (see Figure *2*).

Table 6: First visit to the island		
	First-time visit to the island	**The first visit was via cruise**
Yes	55%	8%
No	45%	92%

Visit frequency

19%	14%	10%	8%	48%
1 time	2 times	3 times	4 times	5+ times
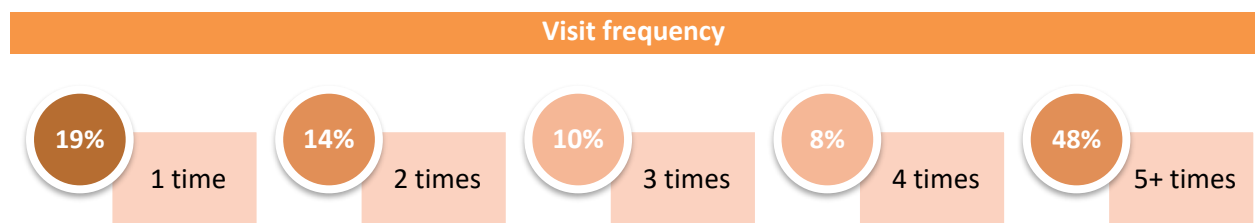
Figure 2. Number of visits to the island.

Age and gender

Approximately 41% of the respondents were male, and 59% were female. The most significant percentage of respondents were aged 55 – 64, followed by ages 45 – 54. Ages 25 - 34 and 35 – 44 years were the third and fourth highest responses. Ages 65+ years, 18 - 24 years, and under 18 years came after that (see *Table 7*).

Table 7: Age and Gender			
	Male	**Female**	**Total**
Under 18 years	4%	4%	4%
18 - 24 years	7%	9%	8%
25 - 34 years	19%	18%	19%
35 - 44 years	18%	18%	18%
45 - 54 years	24%	18%	20%
55 - 64 years	22%	21%	21%
65 + years	5%	13%	10%
Average Age (2022)	43	44	44
Average Age (2021)	43	35	39

Travel party size

The average travel party size was two persons. Visitors from the United States and Central America had the largest travel party size, averaging 2.6 persons. Visitors from South America followed with the next largest travel group size (see Table 8).

Table 8: Average travel party size by region/country		
	2022	**2021**
Average travel party size	**2**	**3**
United States	3	3
Canada	2	2
Caribbean	2	2
Europe	2	4
Central America	3	1
South America	3	2
Other	2	1
Not reported	2	2

Travel party composition

The travel party composition indicates that 57% of respondents traveled alone (12%) or with their spouse/partner (45%). The remaining respondents traveled with their family, friends, or a combination of both (39%). In contrast, 4% traveled with business associates (see Table 9).

Table 9: Travel party composition		
	2022	**2021**
Alone, no travel companion	12%	19%
You & your spouse/partner	45%	42%
Family only	11%	10%
Friends only	16%	13%
Family & Friends	12%	11%
Business associates	2%	2%
Other	0%	0%
Not reported	2%	3%
Total	**100%**	

Moreover, observing the relationship between travel party composition and region reveals that visitors from the Caribbean and Europe traveled alone more than their counterparts. However, most areas, to a lesser degree the Caribbean, frequently traveled with their companion or spouse/partner (see Table 10).

Table 10: Travel party composition by region				
	North America	**Caribbean**	**Europe**	**Latin America**
Alone, no travel companion	7%	42%	21%	25%
You & your spouse/partner	48%	24%	38%	33%
Family only	12%	11%	10%	6%
Friends only	18%	6%	13%	11%
Family & Friends	13%	6%	11%	11%
Business associates	1%	7%	5%	6%
Other	0%	0%	0%	0%
Not reported	2%	3%	2%	8%
	100%	**100%**	**100%**	**100%**
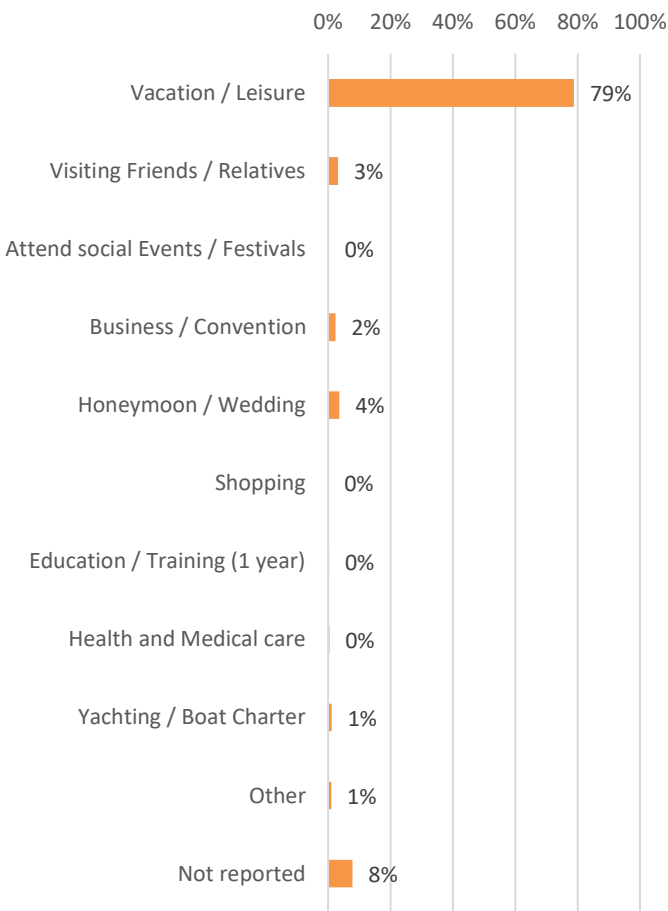
Purpose of visit

The main reason for traveling to the island was vacation/leisure at 79%. The second largest reason chosen were Visiting friends, Honeymoon / Weddings (4%), and Visiting friends (3%), mainly of persons in transit to other countries. Additionally, 2% of the respondents were on the island for business purposes and 1% for yachting/boating or other endeavors (see Figure 3).

Purpose	Percentage
Vacation / Leisure	79%
Visiting Friends / Relatives	3%
Attend social Events / Festivals	0%
Business / Convention	2%
Honeymoon / Wedding	4%
Shopping	0%
Education / Training (1 year)	0%
Health and Medical care	0%
Yachting / Boat Charter	1%
Other	1%
Not reported	8%

Figure 3. Purpose of Visit

Length of stay

Respondents stayed, on average, seven nights on the island. European visitors had the most prolonged stay, namely, sixteen nights. They were followed by South Americans and Canadians, averaging ten nights, respectively. Central America, the United States, and the Caribbean were next in line with six nights (see Table 11).

Table 11: Average length of stay in nights (per region)		
	2022	**2021**
United States	6	7
Canada	10	12
Caribbean	6	9
Europe	16	13
Central America	6	0
South America	10	4
Other	7	7
Not reported	10	8
Total Average	**7**	**8**

Country/region

Figure 4 displays the country/region of permanent residence of the visitors surveyed. Most of the respondents, 72%, were from the United States. The second largest group of respondents was from Europe at 9%. Visitors from Canada and the Caribbean accounted for 8% and 7%, respectively.

Most respondents from the United States were from the top five states ranked in the following order New York, Florida, New Jersey, Georgia, and Massachusetts. The top five respondents from the Caribbean were from Curacao, Sint Eustatius, Saba, Anguilla, Dominican Republic. The top five European respondents were from France, the Netherlands, the United Kingdom, Germany, and Sweden.
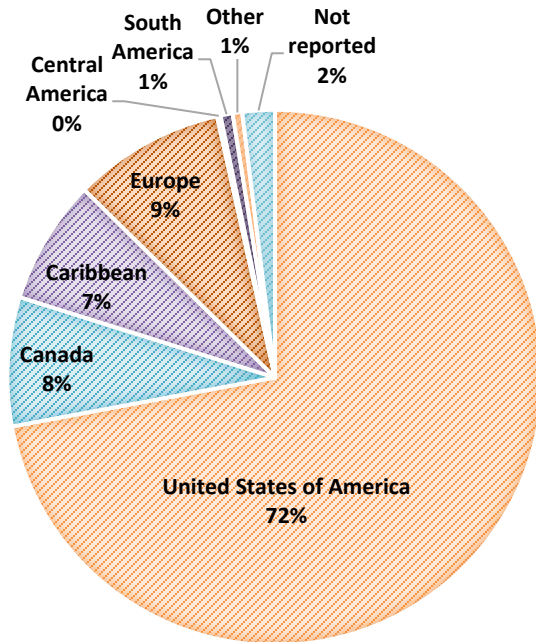
Figure 4. Country/region of permanent residence.

Income

The majority of respondents in 2022 had a gross annual household income of over $125,000 (32%). Of the remaining groups, 10% fell into the category of $100,001 - $125,000, 14% grossed between $75,001 - $100,000, 10% grossed $50,001 - $75,000, 8% grossed $25,000 - $50,000, and respondents who had an income of less than $25,000 were 26% of the total (see Table 12).

Table 12: Household income		
	2022	**2021**
Less than $25,000	26%	18%
$25,000 - $50,000	8%	12%
$50,001 - $75,000	10%	13%
$75,001 - $100,000	14%	14%
$100,001 - $125,000	10%	11%
$125,001 and over	32%	31%
Total	**100%**	**100%**

2. Activities

Figure 5 shows the respondents' activities during their stay on the island. More than one-half of the respondents dined (89%), visited the beaches (87%), shopped (67%), and visited Philipsburg (52%). Of the four districts noticeably advertised to visitors, Philipsburg was the most visited, followed by Marigot, Grand Case, and Orient Bay. Boat trips and Plane spotting/watching were also highly attended activities during their stay.
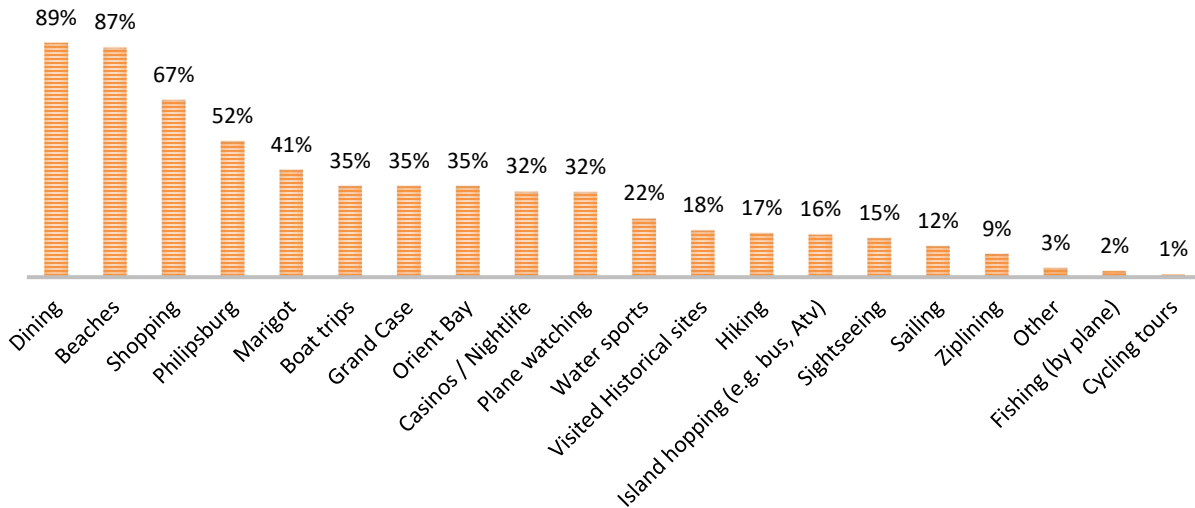
Figure 5. Activity participation

Figure 6 shows where respondents stayed during their stay on the island. Most respondents stayed at hotels, while the second largest group stayed in timeshares. Additionally, 11% in the alternative lodgings industry (Airbnb, VRBO, Homeaway, etc.), 10% in a condo/villa, 4% with friends/relatives, and 5% divided among the remaining accommodation types.
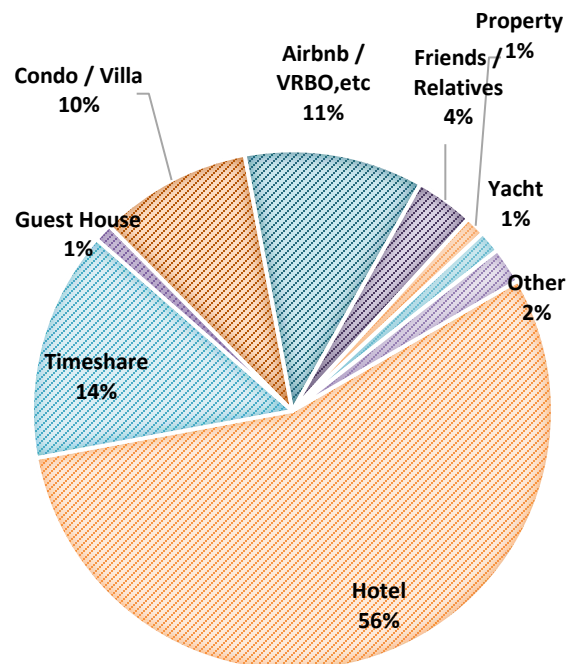
Figure 6. Accommodation Type

3. Satisfaction

Respondents were asked to rate specific aspects of the island, with '1' being 'Very poor' and '5' being 'Excellent.' For the ratings of the entire island, the top scores were considered those above 3.0. The aspects rated above a 3.0, from highest to lowest, were immigration services, airlines, the island's cleanliness, and airport facilities. Communication services and sightseeing were considered average and slightly above, with ratings of 2.9 and 2.6, respectively. The remaining aspects fell below an average score. (see Figure 7).
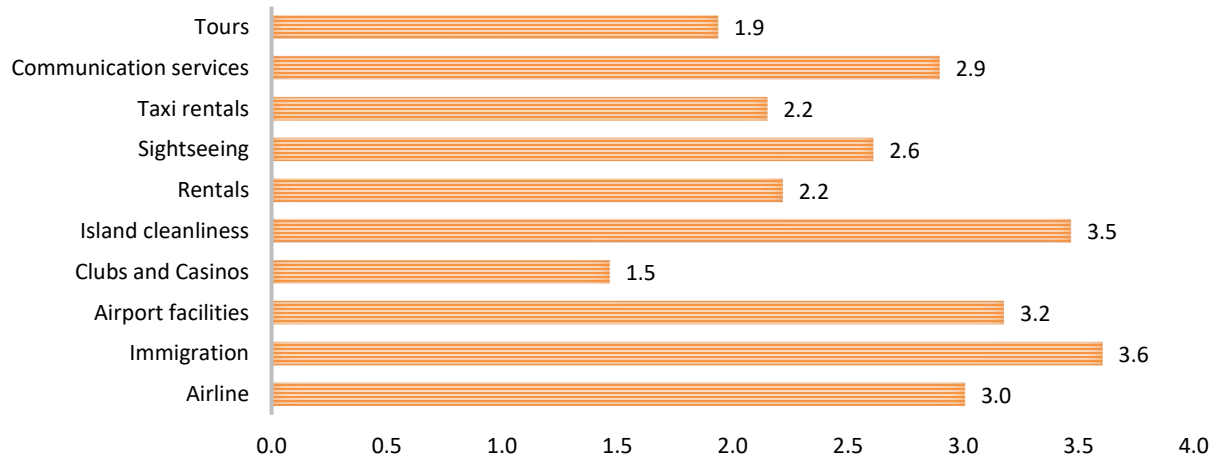
Figure 7. Island-wide satisfaction ratings.

In all the categories shown in Figure 8, the Dutch side (Dutch) scored higher than the French side (French) on average. The Dutch obtained the highest scores in the categories of friendliness and beaches. Whereas, with the French, the highest average scores were beaches and dining. The aspect with the most significant average score difference between both sides of the island was accommodations, with a difference of 1.6, favoring the Dutch side.
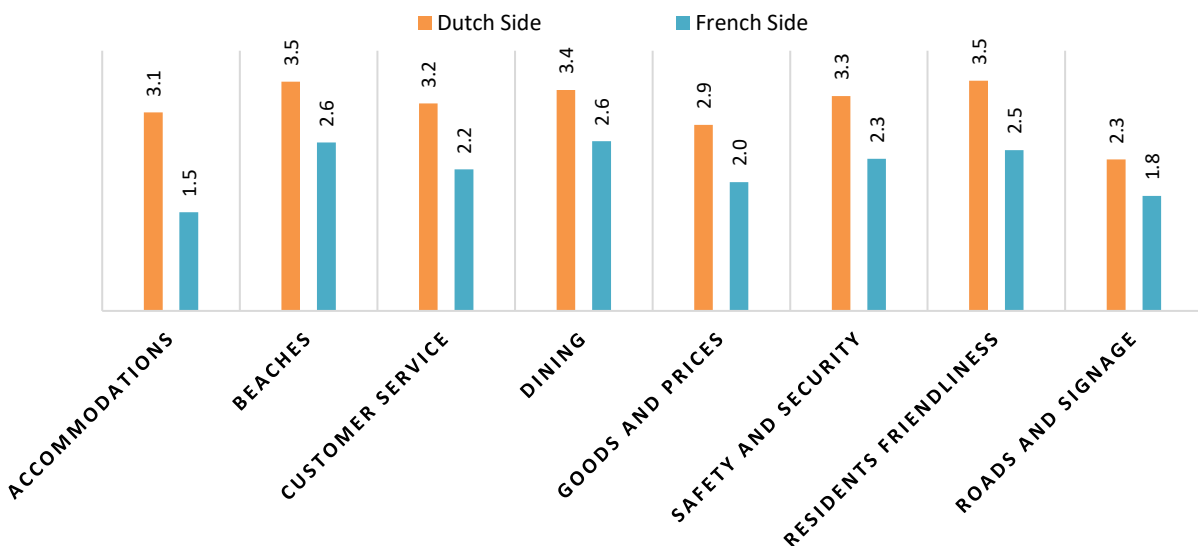
Figure 8. Comparison of satisfaction ratings.

The survey also captured to what extent visitors' expectations were met during their visit to the island. Over 94% of respondents' expectations were positively satisfied – 60% indicated their expectations were met, and 34% indicated that their experience exceeded their expectations. 4% of respondents' experience on the island was below their expectations, while 2% were non-responses (see Figure 9).
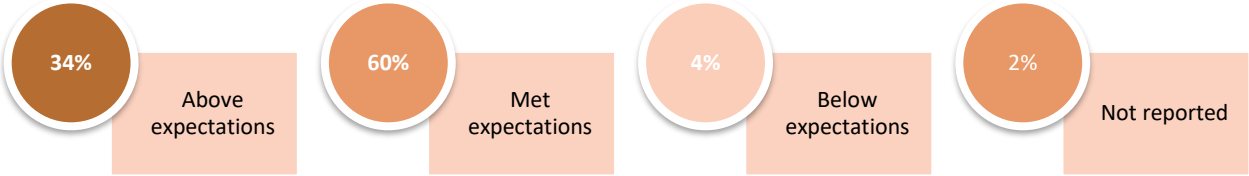
34% Above expectations   **60%** Met expectations   **4%** Below expectations   **2%** Not reported

Figure 9. Visitor expectations

Many respondents were quite optimistic 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 over 60% overall. The rate with a positive response for both "definitely or probably return" and recommend intentions were well above 80%. In contrast, 4% and 2% were negative returns and recommendations, respectively (see Figure 10 and Figure 11).

63% Definitely   **23%** Probably   **8%** Unsure   **3%** Probably not   **1%** Definitely not   **2%** Not reported
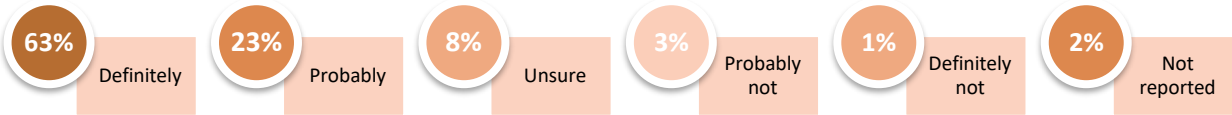
Figure 10. Intentions of return.

66% Definitely   **23%** Probably   **6%** Unsure   **1%** Probably not   **1%** Definitely not   **4%** Not reported

Figure 11. Recommend to others.

4. Expenditures

The Average Daily Expenditure (ADE) amongst visitors surveyed in 2022 was $142.62 per person per day (see Figure 12). Figure 13 shows the average daily expenditure by region. Visitors from Other (British Indian Ocean Territory, India, Israel, Japan, South Africa) had the largest ADE at $257.58 per person, followed by visitors from the Caribbean and North America at $160.62 per person (USA and Canada, $164.47 and $115.12, respectively). The lowest ADE was European visitors, with $163.55 per person daily. Upon further analysis it was observed that when comparing 2019 with 2021 for St. Maarten/St. Martin main tourism markets, average daily expenditure grew tremendously for both North American and Caribbean tourists but decreased for Europeans.

Whereas, in 2022 it decreased for all three regions when compared to the previous year (see Figure 14). Additionally, respondents appeared to conduct 76% of their expenditures on the Dutch side in comparison to 24% on the French side of the island.

Figure 12. Average daily expenditure annually
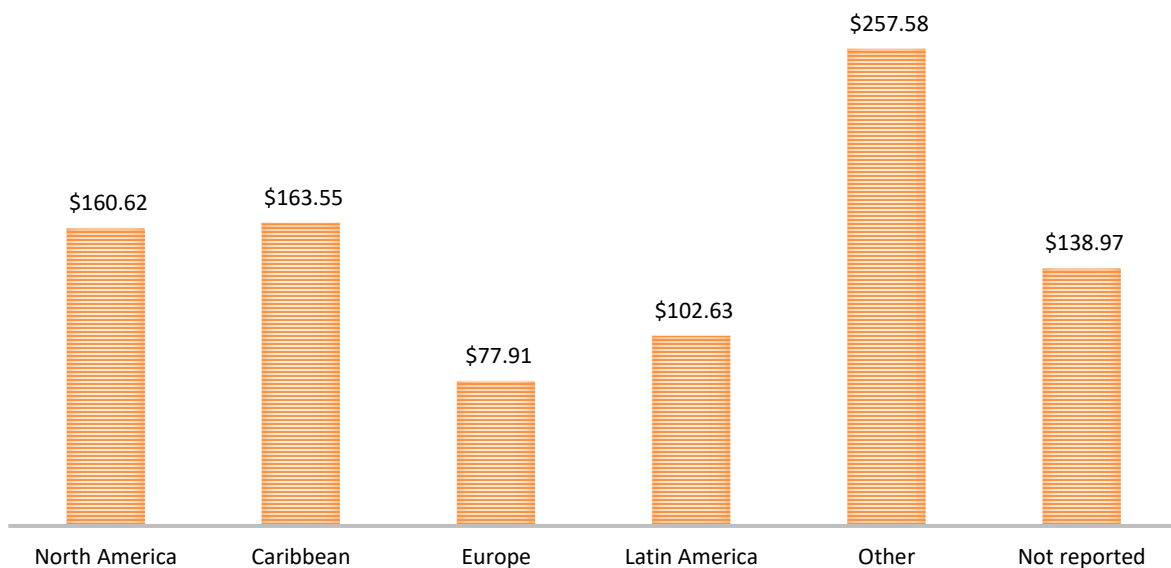
Figure 13. Average daily expenditure by region
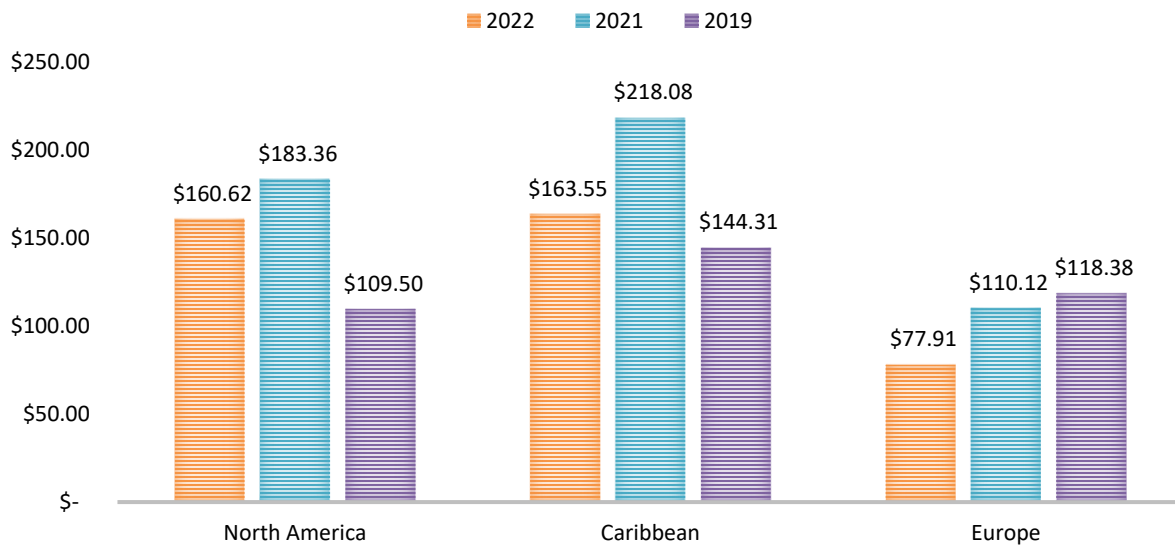
Figure 14. Stay-Over Average daily expenditure by main markets

Further analysis of the average daily expenditure, when matched by household, showed that respondents with a yearly household income of over $100,001 spent over $150 per day. Moreover, respondents with an annual household income of over $125,000 had the highest ADE of $165.88 daily (see Figure 15).
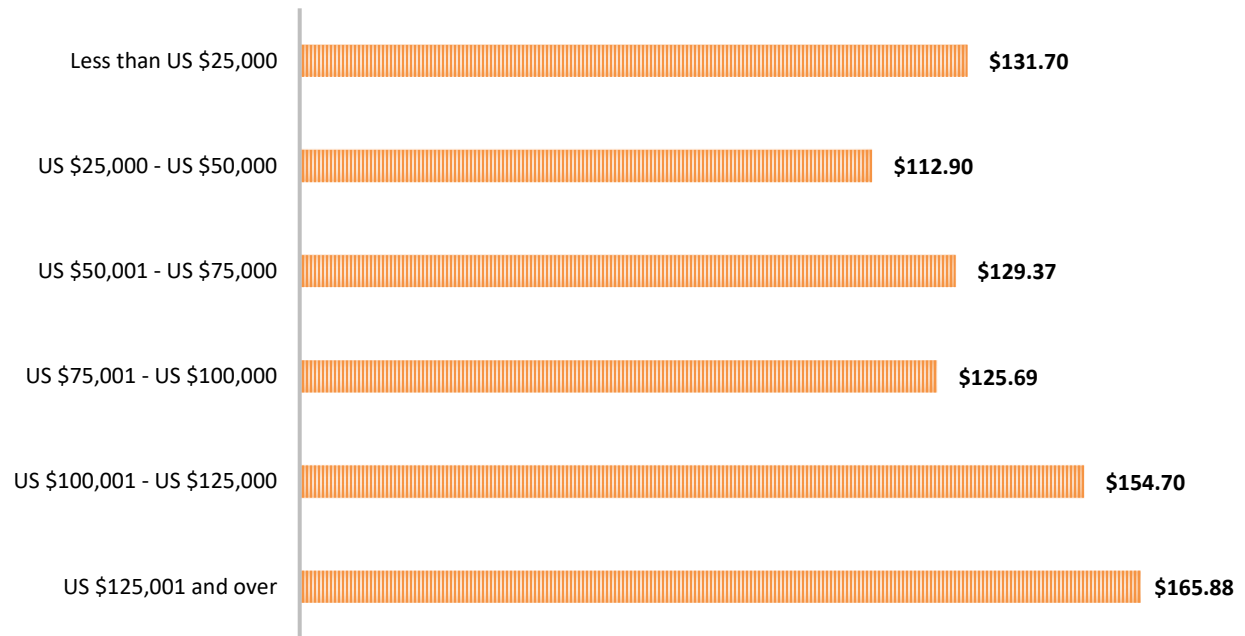
Figure 15. Average daily expenditure by income

The most significant percentage of visitors' budget was spent on accommodations, accounting for 54% of total expenditures. Food and beverages consumed outside the visitor's accommodation (restaurants) accounted for the second highest expenditure, 18% (see Table 13).

Table 13: Percentage of daily expenditure per category						
	United States of America	Canada	Caribbean	Europe	Latin America	Other	Not reported
Accommodations	57%	50%	32%	41%	55%	56%	59%
Room	17%	14%	12%	19%	39%	11%	33%
Food/Beverages	6%	4%	3%	5%	9%	11%	10%
Groceries	4%	7%	9%	8%	12%	11%	4%
Restaurants	11%	12%	16%	21%	6%	7%	13%
Night club	2%	2%	3%	4%	2%	5%	0%
Casinos	2%	2%	1%	1%	0%	0%	0%
Land Attractions	1%	1%	0%	1%	1%	0%	0%
Water Attractions	2%	3%	1%	2%	1%	0%	2%
Sports	2%	1%	1%	4%	0%	0%	1%
Special events	0%	0%	1%	0%	0%	0%	0%
Adult entertainment	0%	1%	0%	2%	0%	3%	0%
Taxi	2%	2%	2%	2%	3%	1%	1%

Table 12. Percentage of daily expenditure per category (cont'd)							
	United States of America	Canada	Caribbean	Europe	Latin America	Other	Not reported
Car rental	5%	7%	6%	6%	10%	5%	9%
Public bus	0%	0%	0%	0%	0%	0%	0%
Scooters / Atvs / etc.	0%	0%	0%	0%	0%	0%	0%
Boat Charters	1%	0%	0%	1%	0%	0%	0%
Clothing	2%	3%	9%	3%	8%	4%	3%
Jewelry	4%	5%	7%	1%	0%	5%	1%
Electronics	0%	0%	7%	1%	1%	0%	0%
Alcohol	1%	2%	1%	2%	0%	1%	0%
Tobacco	0%	1%	0%	1%	0%	0%	0%
Other goods	1%	1%	1%	1%	1%	0%	2%
Other services	1%	1%	2%	0%	1%	0%	3%

Cruise Tourism

Part 2: Cruise visitors

Cruise arrivals 2022

Displayed in Figure 16 are the total number of cruise passengers and cruise vessels in absolute numbers decade. In 2014, St. Maarten reached its peak cruise visitor arrivals as 2,001,996 persons arrived at its port via 692 cruise vessels. However, that number steadily declined in the following years except for the year post hurricane Irma, which saw a sharp increase in 2018 and a further slight increase in 2019. Another steep decline followed this during the height of the pandemic in 2020. Figure 16 and 17 show decreases in both cruise passenger numbers and vessel arrivals during 2020, as well as the gradual increase of cruise vessel arrivals yet a further decline in passenger arrivals during 2021. However, in 2022 there is a sharp recovery of 263% in passenger arrivals and a 119% increase in cruise vessel visits from 2021 lows (see Figure 17 and Figure 18).
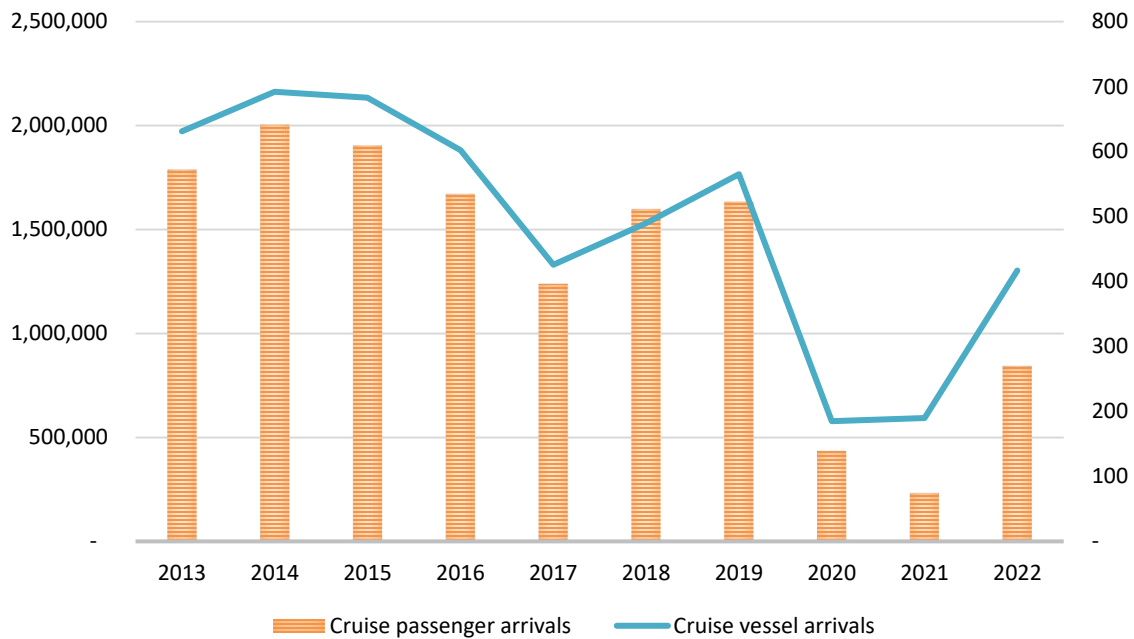
Figure 16. Total number of cruise passengers (yearly)
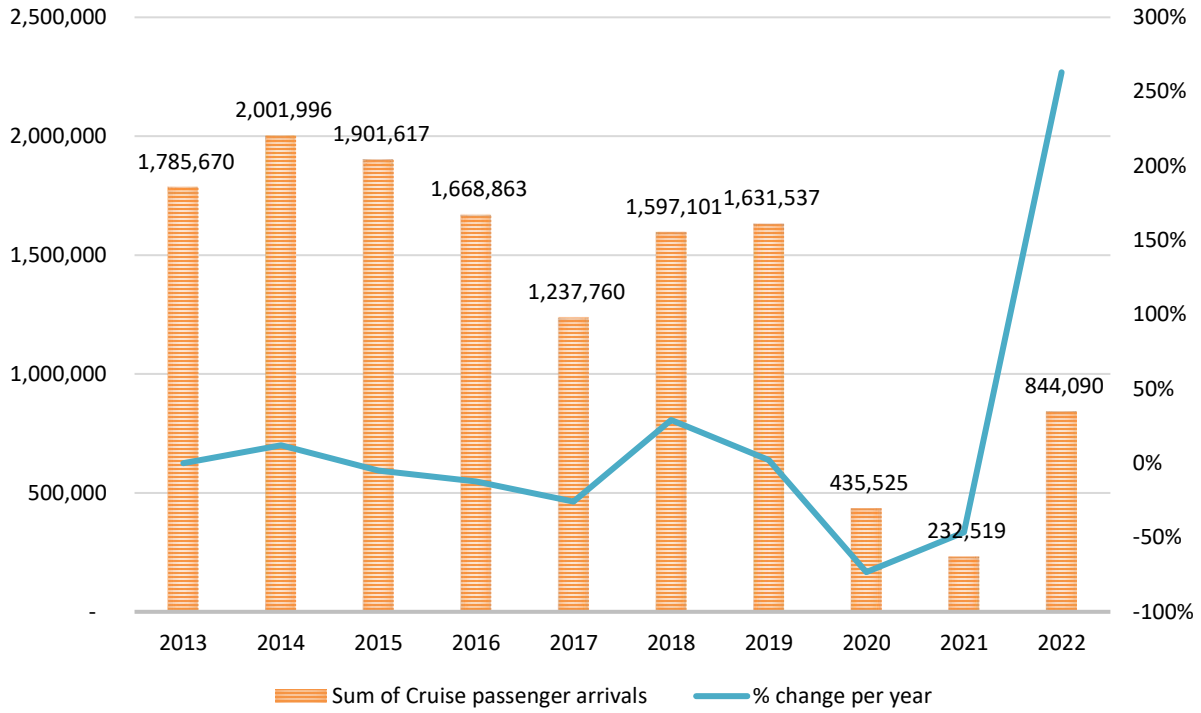
Figure 17. Total number of cruise passengers and percentage of change
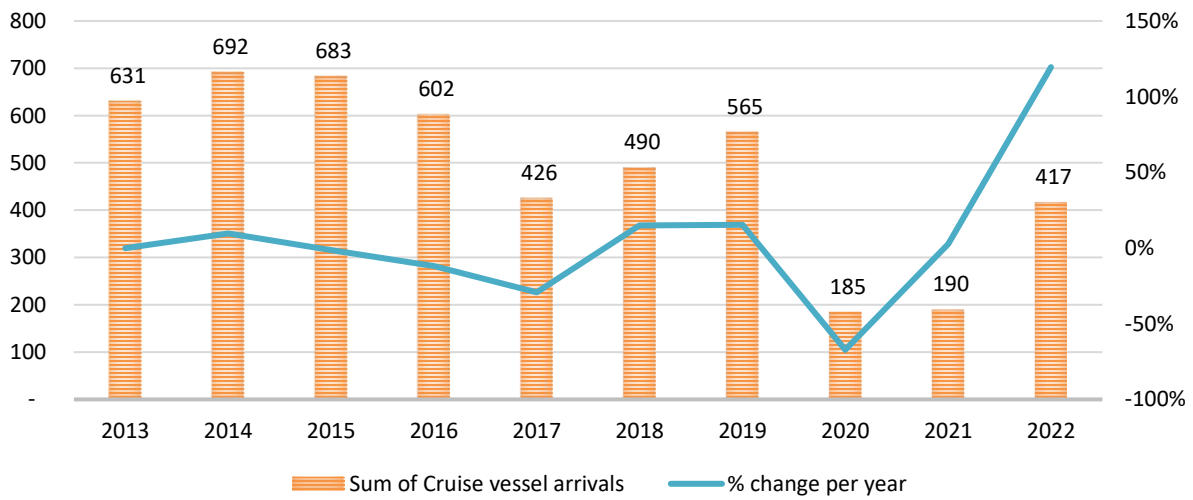
Figure 18. Total number of cruise vessels and percentage of change

Results of 2022 Cruise Tourism Exit Survey

1. Visitor profile

Number of visits

Figure 19 displays the percentage of cruise passengers that visited St. Maarten for the first time. The number of first-time visitors has steadily declined over the years. Most cruise visitors have been to the island previously via cruise or stay-over and have returned anywhere between 2 to 5 times (see Figure 20).
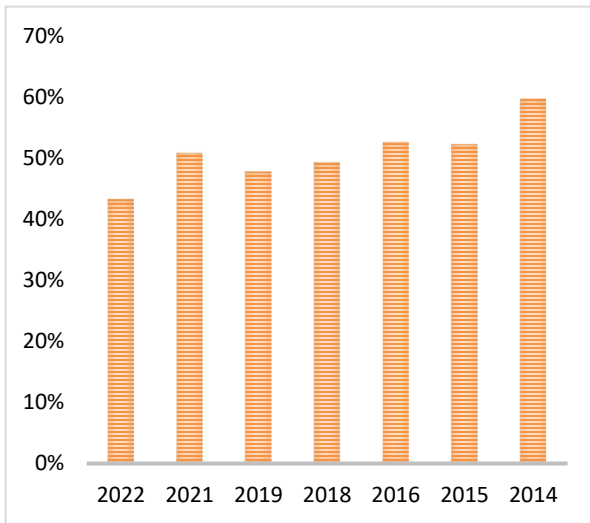
Figure 19. Number of returns
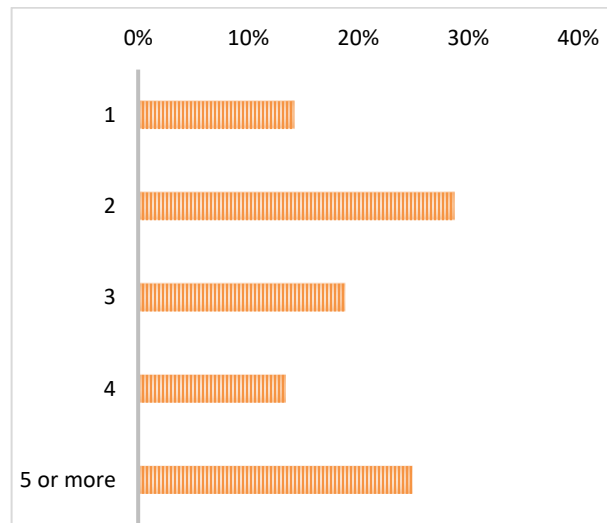
Figure 20. Previous visits to St. Maarten/St. Martin

Age and gender

Table 14 indicates the age and gender of the sampled cruise visitors. Seemingly many cruise visitors, approximately 43%, are 50+. Seniors ages 65+ have the largest percentage representation amongst cruise visitors for both genders. The remaining age groups are similar in representation, except for persons under 18.

Table 14: Age and Gender			
	Male	**Female**	**Total**
Under 18	5%	6%	5%
18 - 24	4%	5%	5%
25 - 34	13%	9%	11%
35 - 44	12%	13%	13%
45 - 54	15%	17%	16%
55 - 64	22%	23%	23%
65 +	29%	27%	28%
Average Age (2022)	**49**	**49**	**49**
Average Age (2021)	**46**	**46**	**46**

Travel Party Size

The average travel party size was three persons. Visitors from the Caribbean had the largest travel party size, with an average of 4.8. They were followed by visitors from North America and South America, which had reasonably little difference in group size (see Table 15).

Table 15: Travel party size

	2022	2021
United States	3	2
Canada	2	2
Caribbean	5	3
Europe	2	2
Central America	1	2
South America	3	1
Other	2	3
Not reported	2	2
Grand Total	**3**	**2**

Travel party composition

Most cruisers traveled as intimate groups of spouses/partners. Therefore, the island may be seen as a couple's getaway or mini honeymoon. Table 16 displays the travel party categories and the percentage of cruise visitors in each group.

Table 16: Travel party composition		
	2022	**2021**
Alone, no travel companion	5%	15%
You & your spouse/partner	49%	45%
Family only	8%	11%
Friends only	17%	15%
Family & Friends	20%	12%
Business associates	0%	0%
Other	0%	1%
Not reported	2%	0%
Total	**100%**	

Country/Region

Figure 21. Country/region of permanent residence
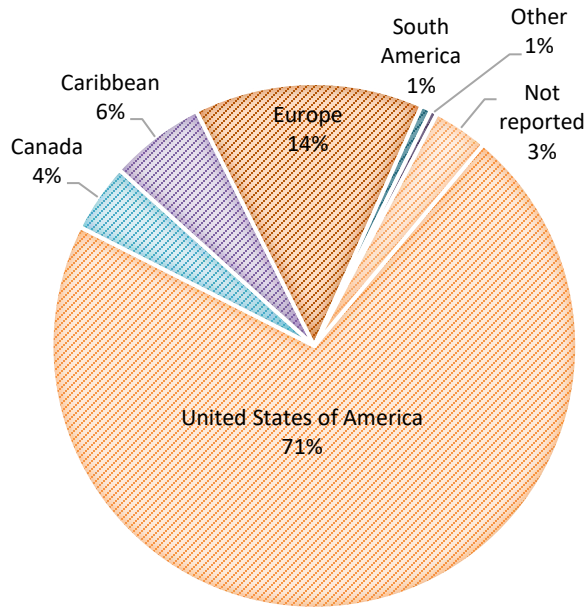
Figure 21 shows the country/region of permanent residence of the visitors surveyed. The majority of the respondents, 71%, were from the United States. The second largest group of respondents was from Europe (14%). The remaining regions cumulatively represented 15% of the responses.

The United States respondents were from Florida, New York, California, Pennsylvania, and Texas. The top respondents from the Caribbean were from the British Virgin Islands, the Cayman Islands, Guadeloupe, and Puerto Rico. In that order, the top five European respondents were from the United Kingdom, Germany, France, the Netherlands, and Switzerland.

Income

In 2022, the percentage of visitors increased as annual household income increased. Figure 22 shows that persons with household incomes of $ 125,001 and greater were the most represented, with 24% percent. The remainder fell in ranges of $75,001 - $100,000 (18%), $50,001 - $75,000 (16%), $100,001 - $125,000 (15%), $25,001 - $50,000 (10%), and below $25,000 (2%).
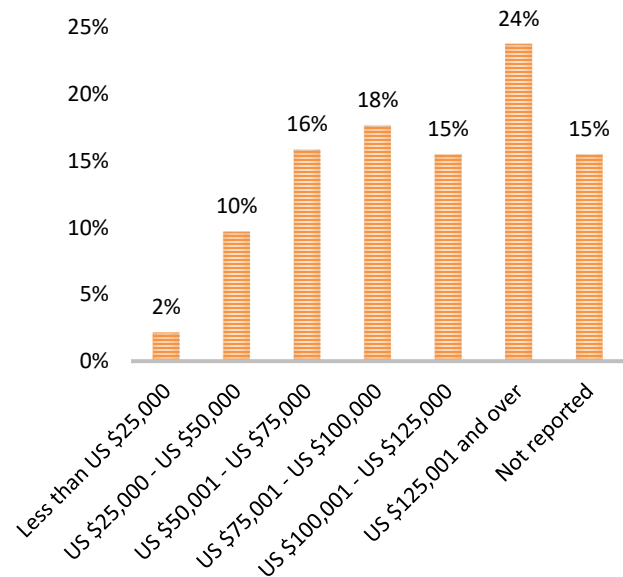
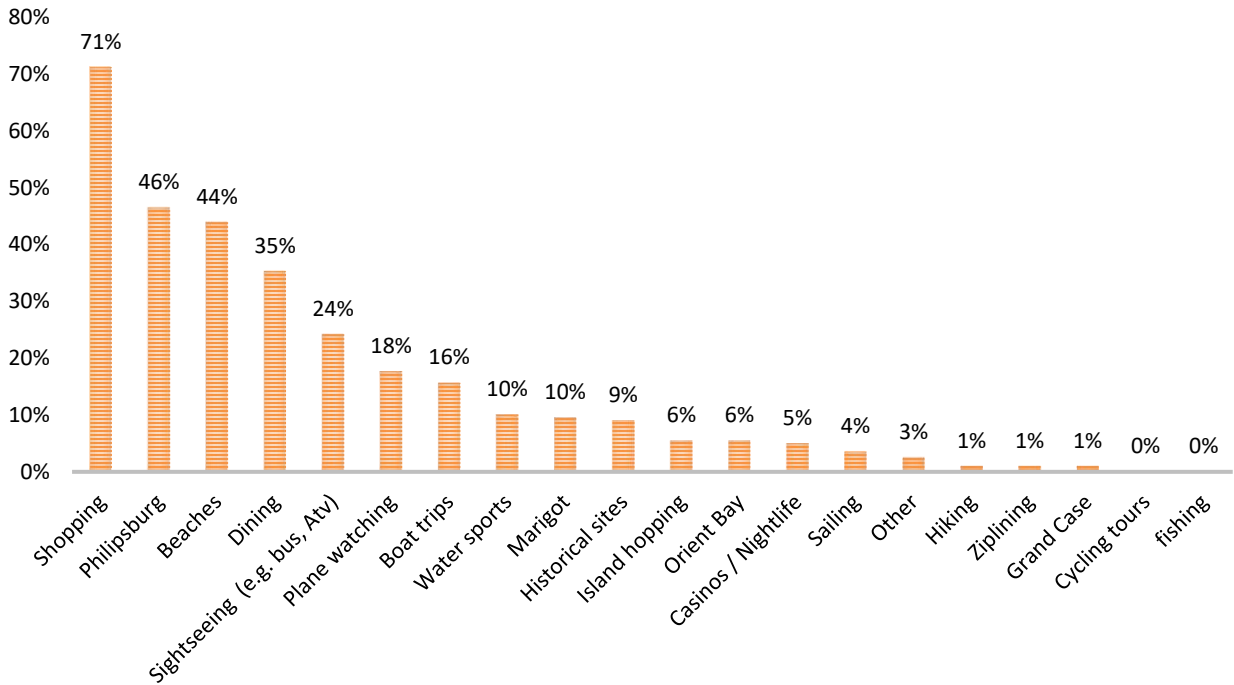*Figure 22. Household income of visitors*

2. Activities

Figure 23 shows the respondents' activities during their stay on the island. More than one-half of the respondents were Shopping (71%). Of the four districts noticeably advertised to visitors, Philipsburg was the most visited, followed by Marigot, Orient Bay, and Grand Case. Plane spotting/watching, and Boat trips were also highly attended during their stay.
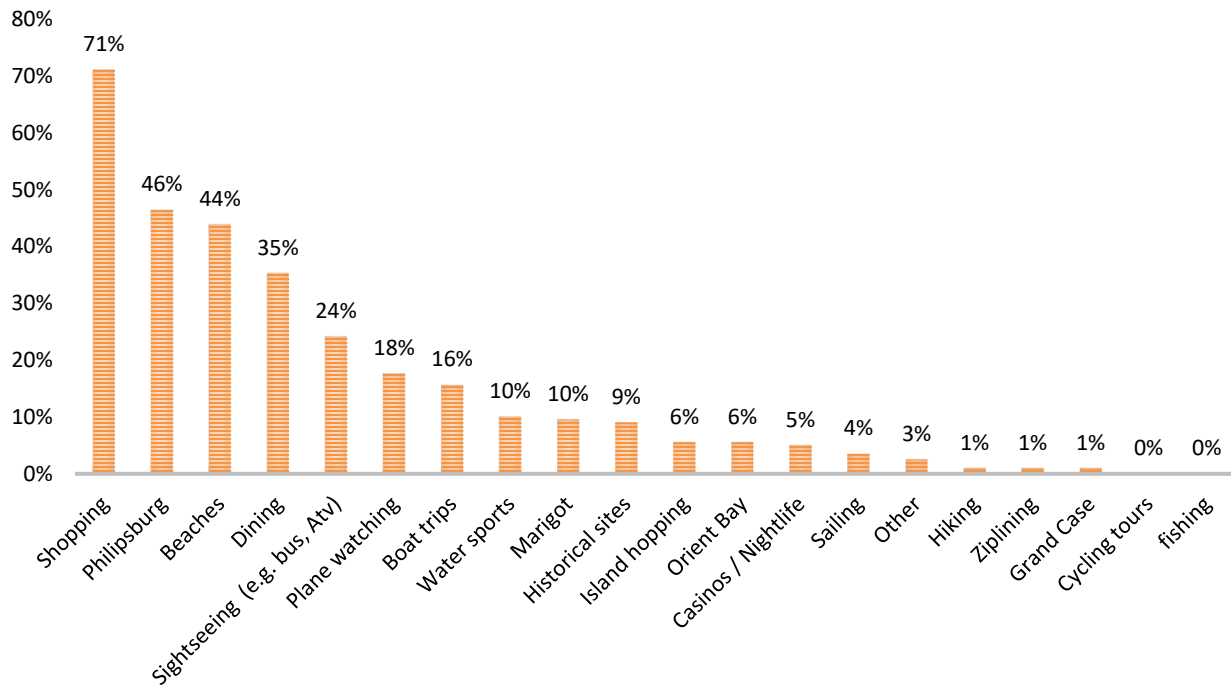
Figure 23. Activity participation

3. Satisfaction

Respondents were asked to rate specific aspects of the island, with '1' being 'Very poor' and '5' being 'Excellent' (see Figure 24). For the ratings of the entire island, the top scores were considered above 3.0. The aspects rated above a 3.0, from highest to lowest, were sightseeing, port facility, island's cleanliness, tours, taxis, rental vehicles, and clubs/casinos. Communication services are slightly below average, with ratings of 2.
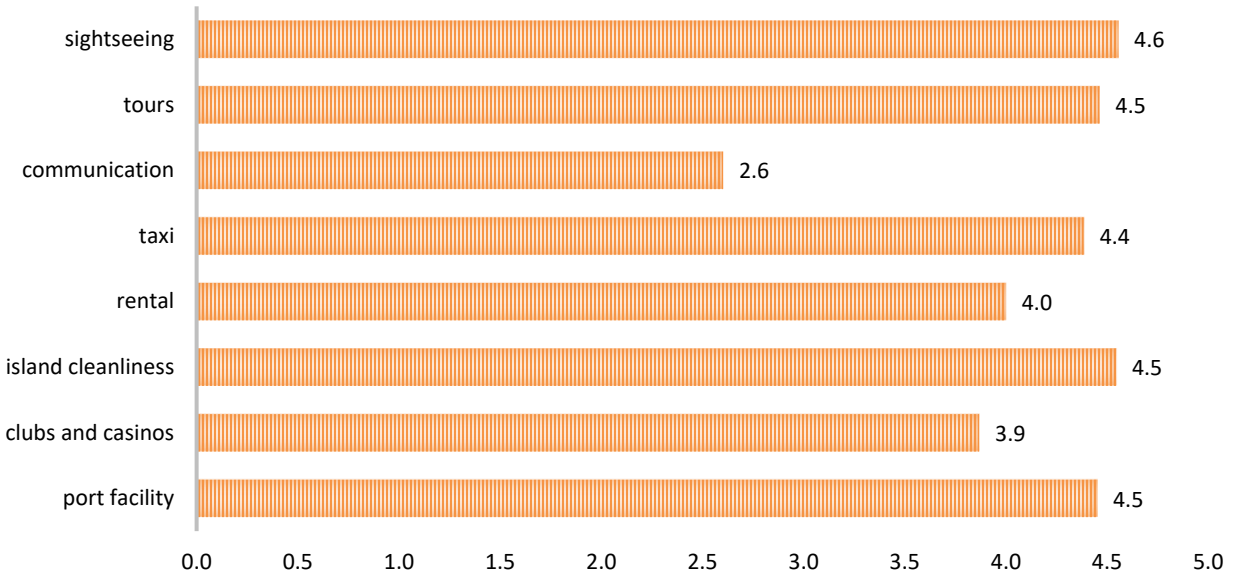
Figure 24. Island-wide satisfaction ratings

In all the categories shown in Figure 25, the Dutch side (Dutch) scored slightly higher on average than the French side (French). The Dutch obtained the highest scores in the categories of friendliness and beaches. The Dutch side was rated higher than the French side in every aspect except for customer service and safety/security, where they scored the same.
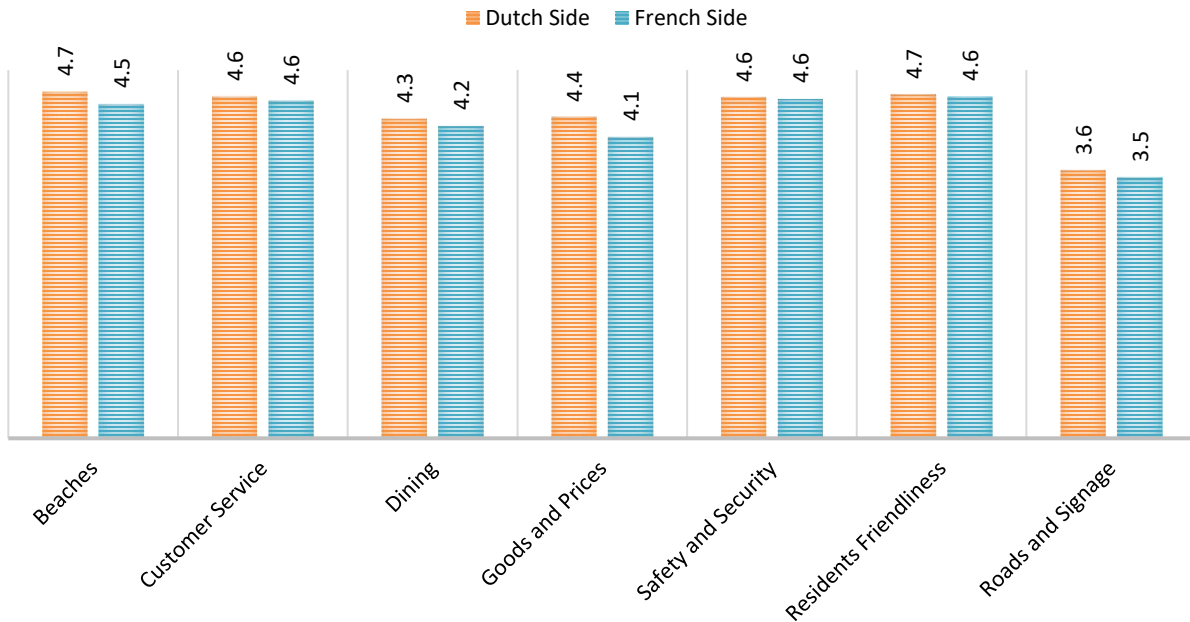

Figure 25. Comparison of satisfaction ratings

The survey also captured to what extent visitors' expectations were met during their visit to the island. Over 92% of respondents' expectations were positively satisfied – 44% indicated their expectations were met, and 48% indicated that their experience exceeded their expectations. 1% of respondents experience on the island was below their expectations. At the same time, 6% were non-responses (see Figure 26).
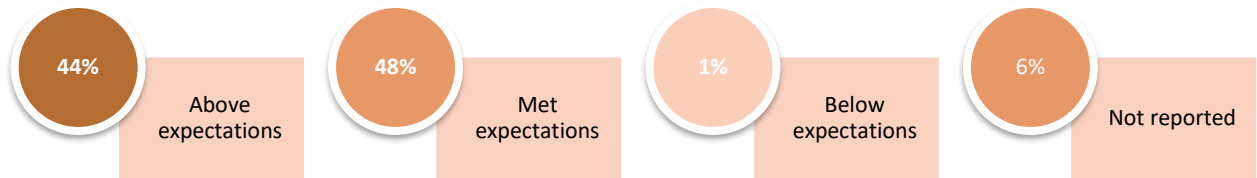
| 44% Above expectations | 48% Met expectations | 1% Below expectations | 6% Not reported |

Figure 26. Visitor expectations

Many respondents were quite optimistic 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 over 60% overall. The rate with a positive response for both "definitely or probably return" and recommend intentions were well above 90%. At the same time, 5% and 11% were negative returns and recommendations, respectively (see Figure 27 and Figure 28).

| 73% Definitely | 13% Probably | 6% Unsure | 1% Probably not | 4% Definitely not | 2% Not reported |

Figure 27. Intentions of return

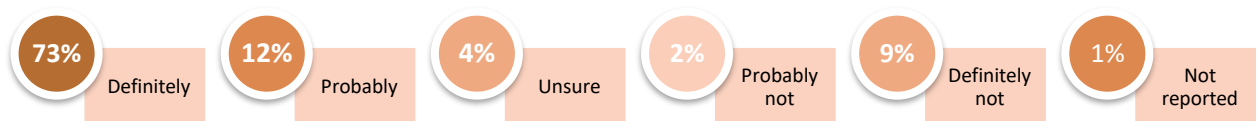| 73% Definitely | 12% Probably | 4% Unsure | 2% Probably not | 9% Definitely not | 1% Not reported |

Figure 28. Recommend to others

4. Expenditures

This section will cover tourism-related expenditure indicators, significant markers in this industry upon which our economy is heavily reliant. The indicators include the average daily expenditures of $170.40 in 2022 per cruise visitor (see Figure 30). In Figure 29, the ADE by region of residence is presented by primarily the five significant 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" and grouped in a category labeled as "Other." Additionally, respondents appeared to conduct 93% of their expenditures on the Dutch side in comparison to 7% on the French side of the island. When comparing 2019 with 2021 for St. Maarten/St. Martin's main tourism markets, average daily expenditure grew tremendously for both North American and European cruise tourists but decreased for the Caribbean. Whereas, in 2022 the decrease appeared for all three regions when compared to the previous year (see Figure 31).
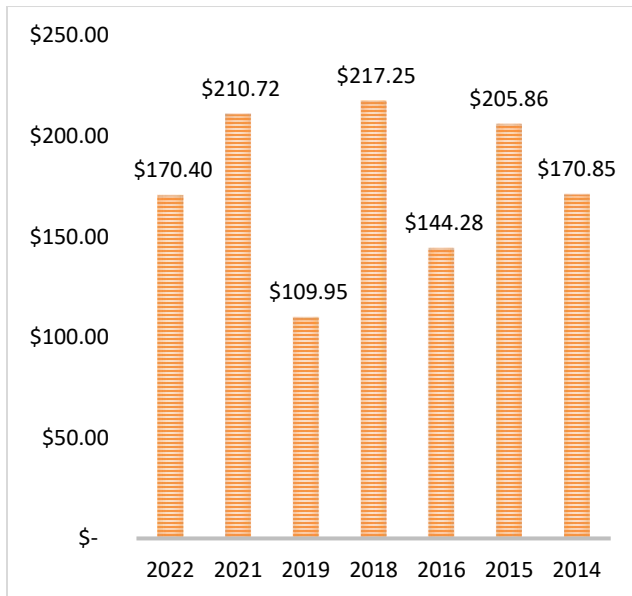

Figure 29. Average daily expenditure by region of residence
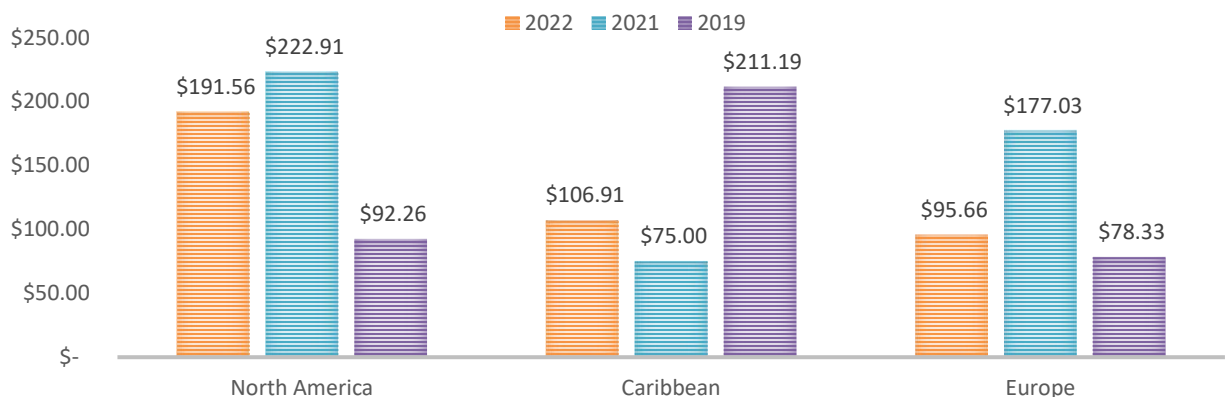

Figure 30. Average daily expenditure by year

Figure 31. Cruise Average daily expenditure by main markets

American visitors, on average, contributed to the largest amount of daily expenditure per person for goods and services provided while visiting the island. Europeans were the second largest cruise spenders, followed by the Caribbean. Lastly, Canadian visitors spent the least onshore (see Table 17).

Table 17: Cruise Visitors Per Region	
United States	71%
Canada	4%
Caribbean	6%
Europe	14%
Latin America	1%
Other	1%
Not reported	3%
Grand Total	**100%**

Figure 32. Average daily expenditure by the number of visits presents the cruise passengers' ADE based on their number of visits. Visits ranged from one time before the present trip and up to five or more previous visits. The bar chart indicates that as visitors returned to the island (loyal or retained visitors), they were more likely to have higher expenditures per person than on previous trips. Although not always linear, in most years, tourists' expenditures continued to increase upon the fourth visit. However, people that visited twice also significantly spent during the two past years. This chart complements literature that indicates patronizing customers are more profitable over the life of a business or product (Babu & Kumar, 2010; Reinart & Kumar, 2000). With the combination of this concept and the results displayed in Figure 32, it may be suggested that increased focus should not be placed solely on returning customers but must also include an effort to retain those within a particular income bracket.
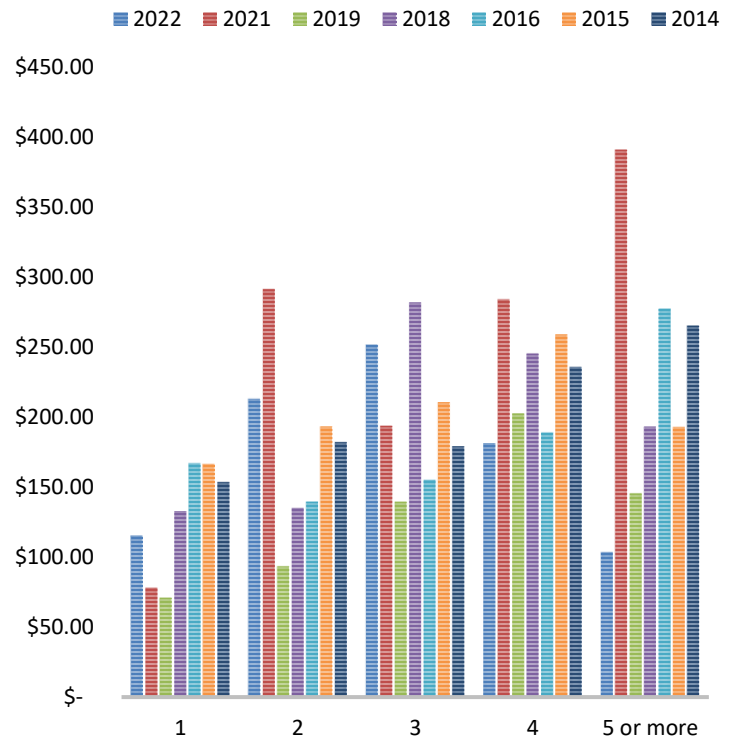

Figure 32. Average daily expenditure by the number of visits

Based on their average household income ranges, during their disembarkment on St. Maarten, higher household income earners displayed more expenditures on the island than their counterparts. On average, they spent slightly above $250 per person per day, 39% less than the previous year's estimates. However, there is no concise annual trend concerning the value of their total expenditures with household earnings (see Figure 33).
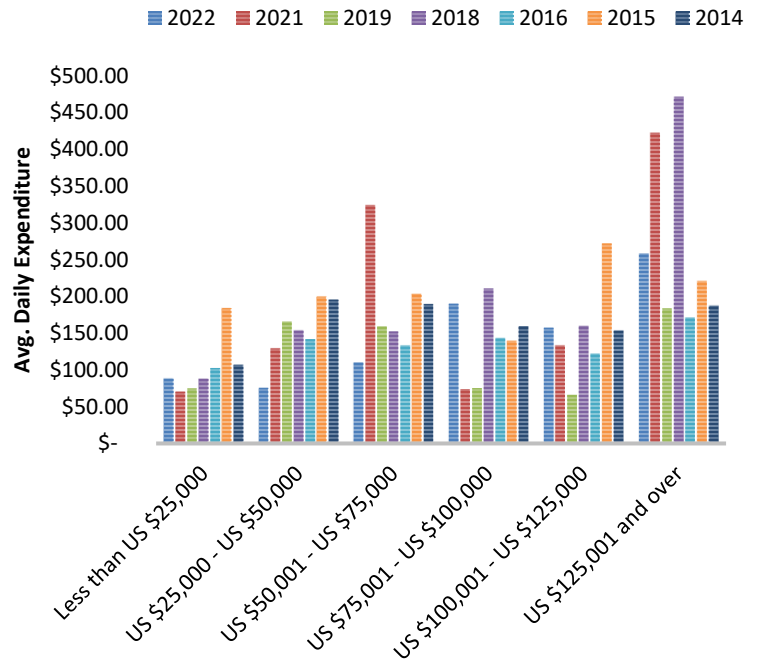

Figure 33. Average daily expenditure by income

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