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DEPARTMENT OF STATISTICS

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Topics:

Results of
Sint Maarten
Tourism
Exit Survey

Stay-over Q1 2013
&
Cruise Q1 2013

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Preface

The Department of Statistics (STAT) is pleased to present the fourth issue of its statistical magazine – FACTors. FACTors comprises of articles written by STAT researchers, on varying topics linked to our latest available results. This edition has been split in 2 separate booklet publications.

Vol. 4-1 contains interesting facts about persons' views on their consumption priorities, poverty within our society, and other aspects influencing a 'balanced life'. Additionally, the issue covers results of the 2013 half-year Business-cycle Survey as it relates to companies within the Non-financial sector.

Vol. 4-2 contains 1st Quarter results of the 2013 Tourism Exit Survey. After a period of 10 years, this survey was recommenced in March 2013 at our port of entries (Cruise Facility & Princess Juliana International Airport).

STAT looks forward to the continued support on this and upcoming publications concerning general, economic & social statistics of St. Maarten.

Makini K. Hickinson
Department Head

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Results of Cruise Tourism Exit Survey Q1 2013

By Shannon Richardson

Introduction

In the last few years, tourism has become one of the most economic thriving markets in the world and a popular global leisure activity. International tourist arrivals surpassed the milestone 1 billion tourists globally for first time in history in 2012.[2] This comes in the wake of slow recovery from recession slowdowns from the second half of 2008 through the end of 2009. According to the United Nations World Tourism Organization (UNWTO), international tourism receipts (the travel item of the balance of payments) grew to US$1.03 trillion (€740 billion) in 2011, corresponding to an increase in real terms of 3.8% from 2010.[3]

Tourism in the Caribbean region as a whole, has regained lost ground in the heat of the global economic depression in 2008/2009. The Caribbean Tourism Organization (CTO) recorded that in 2012 the Caribbean welcomed nearly 25 million tourists. However, some Caribbean countries are performing better than others, particularly those that rely heavily on the British market.[4] In cruise tourism, the industry's success is headlined by the Caribbean, which continues to rank as the dominant cruise destination, accounting for 37.3% of all global itineraries in 2013. The Caribbean continues to have the leading share of cruise industry capacity, although there has been growth in all global cruise regions[5].

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[2] "UNWTO World Tourism Barometer". UNWTO World Tourism Barometer (World Tourism Organization) 11 (1). January 2013. Retrieved 2013-04-09.

[3] "International tourism receipts surpass US$ 1 trillion in 2011" (Press release). UNWTO. 7 May 2012. Retrieved 15 June 2012.

St. Maarten in particular has seen an increase in cruise arrivals for 2012 (5.86%), with an increase of 11.26% during the 1st quarter of 2012 over 2011. However, during the first quarter 2013, cruise tourism retracted by 7.15% compared to 2012. This Tourism Exit Survey (TES) report, with a focus on cruise tourism, is a sequel to 2002 Cruise Passenger Survey conducted by St. Maarten's Tourism Bureau in corporation with the CTO.

TES is scheduled four times per year, with the purpose of collecting up-to-date statistical information within cruise tourism. The results give information about tourists' travel arrangements and activities, satisfaction and expectations, along with demographic characteristics. The survey is conducted during one week every three months among cruise tourists disembarking on St. Maarten. This article reports the 1st quarter results of the TES 2013. This report is based on a total of 509 respondents representing over 2,000 cruise passengers.
The results presented in this article are related to opinions and expectations of cruise tourists visiting St. Maarten during March of 2013.

Summary of Results

Latest results indicate that 54 percent of cruise respondents, predominantly reside in North America (USA 43%, Canadian 10%), travel groups have an average size of 3.5 persons and largely consist of family and friends. 68% of individuals are in the age range of 15 – 49. Respondents spent an average $199.11 per person on various miscellaneous activities followed by shopping and entertainment activities.

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[4] http://www.onecaribbean.org/content/files/StateofIndustryFeb2013.pdf

[5] http://www.f-cca.com/downloads/2013-cruise-industry-overview.pdf

Cruise Passenger Profile

This section seeks to conceptualize a tourist profile by viewing the demographic information elicited from the analysis results. According to St. Maarten Ports Authority, in the first quarter of 2013 a total of 681,078 cruise tourists arrived on St. Maarten. During the final week of March 2013, 509 exit forms were completed, representing 2445 cruise passengers. Persons residing in North America completed 67% of forms, USA accounts for 43% and Canada 10%, in which they represent 54% of participating tourists. Persons residing in Europe completed 24% of forms representing 19% of individuals, in Latin America 16% (both South and Central America) representing 21% of individuals (see table A1). Over half of the respondents primarily vacationed on four cruise vessels (See table A2).

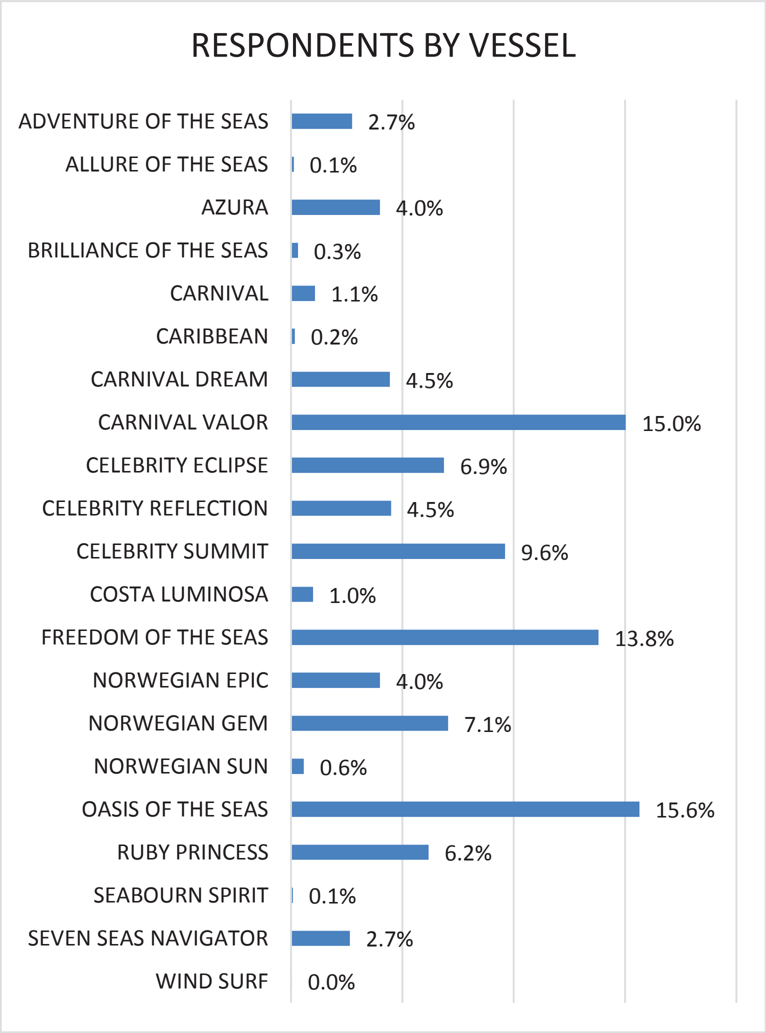
TABLE A1

Region of Permanent Residence	RANK	Number of completed surveys	%
United States	1	218	42.8%
Europe	2	123	24.2%
Canada	3	53	10.4%
South America	4	42	8.3%
Central America	5	40	7.9%
Caribbean	6	21	4.1%
Other Countries	8	4	0.8%
Not reported	7	8	1.6%
Grand Total		**509**	**100%**

TABLE A2

Respondents by Region Of Permanent Residence	%	Number of Respondents
United States	45%	1,100
Canada	9%	219
North America	54%	1,320
Europe	19%	462
Central America	11%	280
South America	10%	236
Latin America	21%	516
Caribbean	3%	76
Other Countries	3%	70
TOTAL	**100%**	**2,445**

CHART A2



Cruise Visitor Profile

The global economic climate still remains volatile with global growth remaining in low gear, averaging only 2½ percent during the first half of 2013.[6] Within the survey period, twenty-seven different cruise vessels made calls to the port of St. Maarten. Visitors from twenty-one of those vessels responded to the exit-survey. Cruise passengers disembarking on St. Maarten primarily indicated that their main purpose for a Caribbean cruise was for vacation.

The degree of familiarity with a destination like St. Maarten, or Caribbean region as a whole; within the various market segments influences visitor behavioural patterns and consequently determines the impact of various marketing strategies. Repeat business often bears a positive relationship to knowledge of the market and level of satisfaction (Cruise survey report 2001/2002). Of the responding cruise visitors in quarter 1 2013, slightly more than half indicated this trip as their first Caribbean tour (53%) (see chart B1). Of the returning cruisers 21% indicates to have cruised once before, 27% twice, 19% three times, followed by 30% representing four or more previous Caribbean cruise visits (see chart B2).

CHART: B1

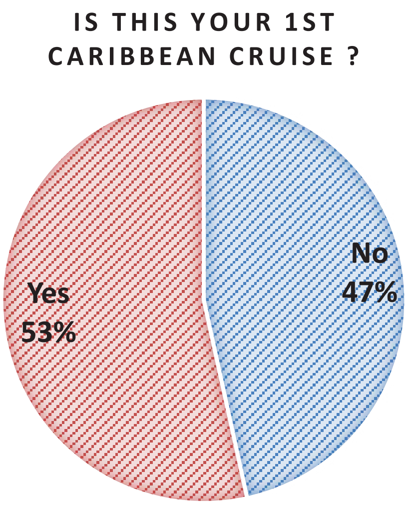
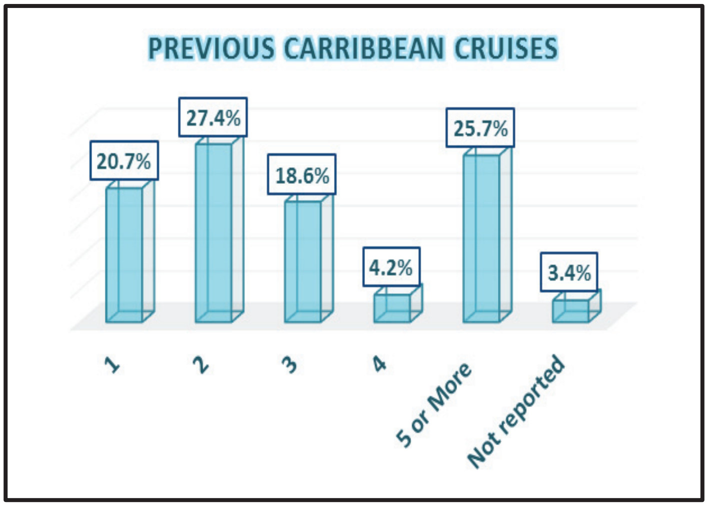
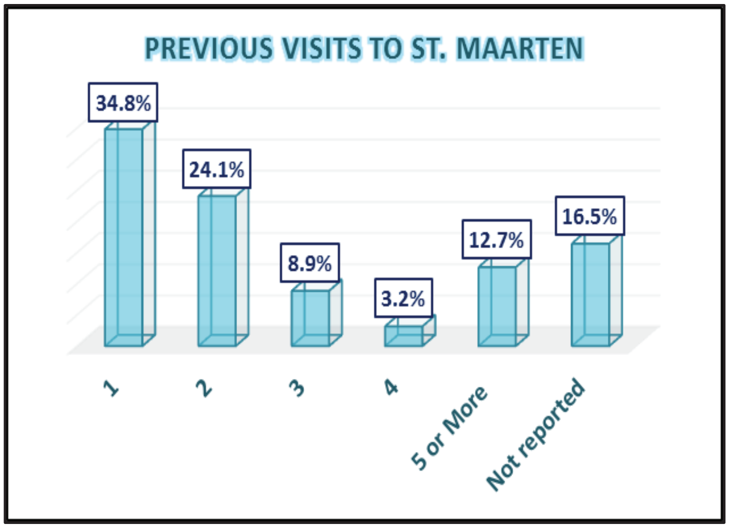


CHART:B2



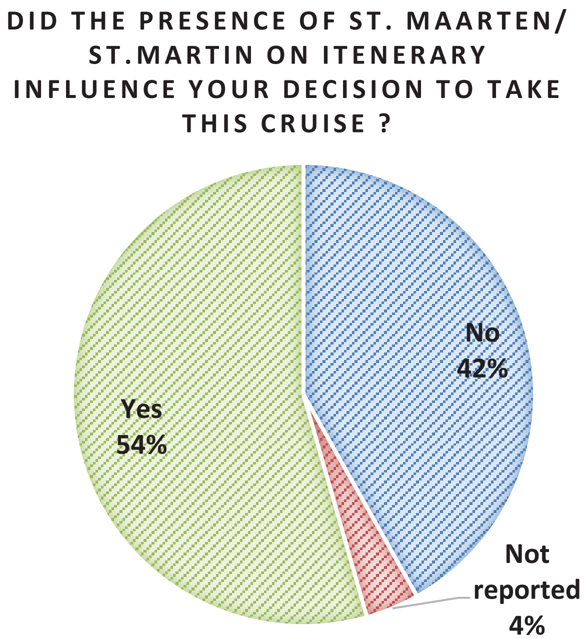
[6] International Monetary Fund, "World Economic and Financial Surveys, World Economic outlook," October 2013, Transitions and Tensions

CHART: B3



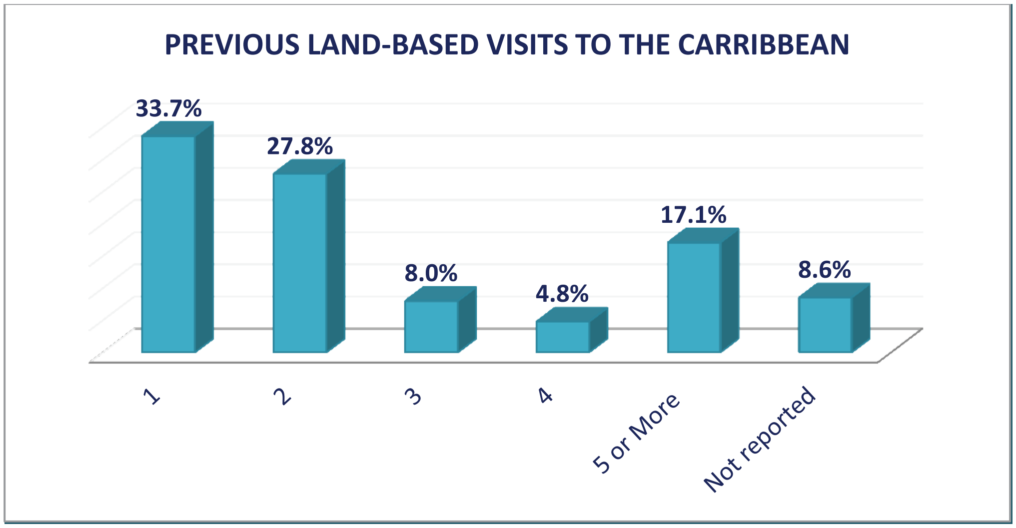
When respondents were questioned as to whether they are returning visitors to the island of St. Maarten, 68% of them indicated not having visited St. Maarten prior to the cruise, whereas 31% were returning visitors. Of the latter, the majority had visited St. Maarten /St. Martin once (35%), followed by twice (24%), and five or more times (13%) (Chart B3). To further understand visitors' attraction to St. Maarten, it was identified that approximately half (54%) of total respondents insist that the presence of St. Maarten on the cruise itinerary had an influence on their purchase decision compared to 42% indicating the opposite (see chart B4).

CHART: B4



Lastly, 37% of respondents indicated to have previously visited the Caribbean via airline carriers. Of these, seventy percent have visited the Caribbean between one to three times (see chart B5).

CHART: B5

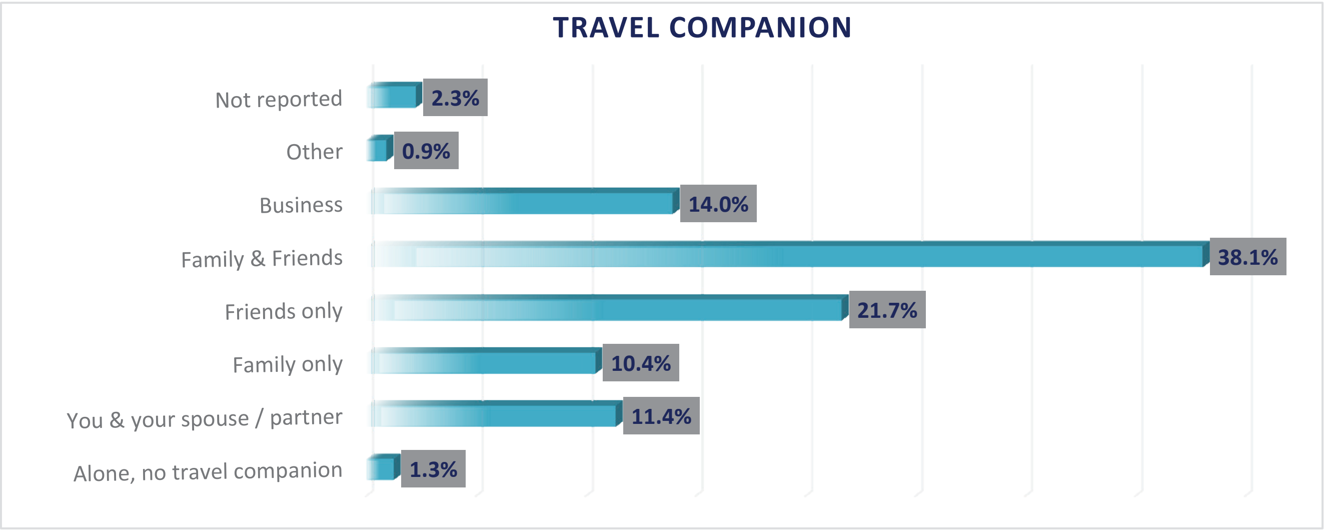


Travel Companions

Overall, groups that consist of 'Family and Friends' or 'Friends only' featured strongly in the structure of travelling parties disembarking on St. Maarten. While 38% of tourist respondents travelled in a mix group of family and friends, 21% travelled with friends only, and 14% travelled with business associates (see chart C1 and table C1). Table C1 displays the results of 2002 'Cruise Passenger Survey'. The structure of travelling parties have changed, where Family only parties are now the fourth largest category compared to previously holding the number one position. The possibility holds that in the 2002 report the category 'Family/Children' used to capture both 'Family only ' and 'Family and Friends' categories.

After ranking travel parties according to their region of residence the results show that the majority of cruisers, residing particularly in North America and Europe, prefer to travel with a spouse. Whereas, Latin Americans lean towards groups consisting of family and friends. Latin American countries are culturally collectivist[7], which tends to lend some understanding to why they prefer to travel in large groups. For the second highest ranking North & Latin Americans chose Friends only, whereas Europeans indicated Family and Friends. All regions are similar for majority of the remaining (see chart C2). These results are further corroborated by the marital status of respondents indicating that the majority were married 53% or single 34%.

CHART: C1



As expected the age dispersion of cruise travellers varies greatly in range, largely due to mixed groups of families, friends, or a combination of both. Chart C4 gives an indication of the gender and age range of respondents' travel groups. It is quite visible that the majority of respondents fall within the age-group 15 -29 years.[8] Nonetheless this group, is strongly followed by 30-39 year olds, suggesting that the bulk of cruise visitors may be persons considered in the range of young adults till thirty year olds.

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[7] Geert Hofstede (1983), "The Cultural Relativity of Organizational Practices and Theories", Journal of International Business Studies, Vol. 14, No. 2, Special Issue on Cross- Cultural Management (Autumn, 1983), pp. 75-89

[8] This particular age interval is larger than the other age groups.

CHART: C2

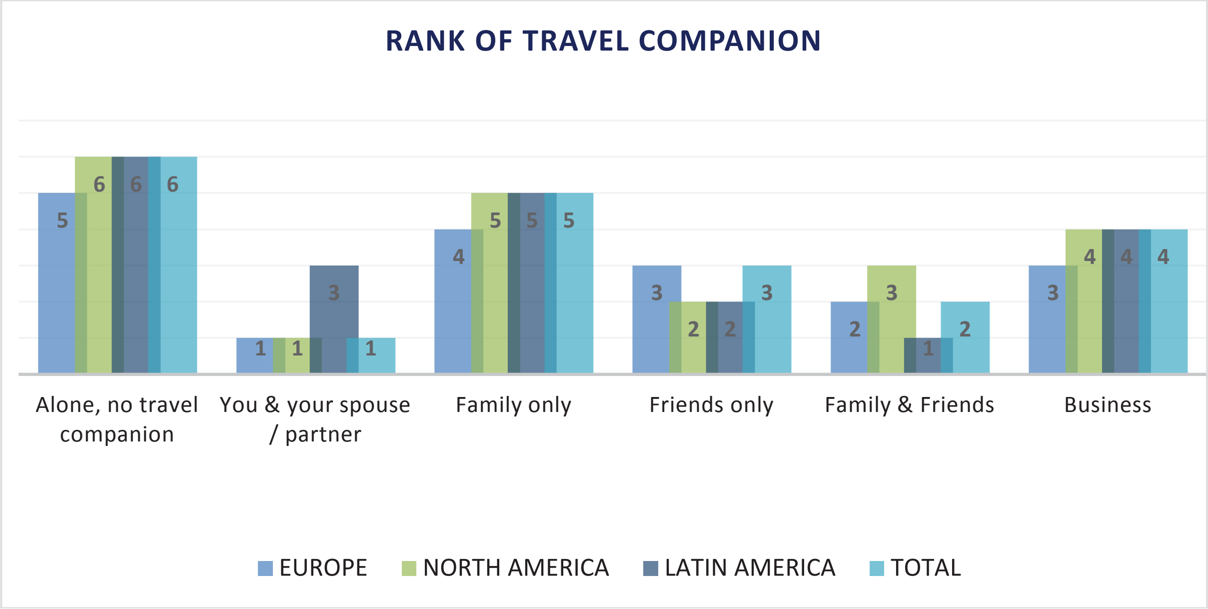


Table C1

Travel Companion	United States	Other Countries	Total
Alone	3.0%	15.0%	4.8%
Spouse/Partner	24.5%	31.6%	25.6%
Family/Children	60.6%	42.4%	57.8%
Group/Friends	9.4%	5.3%	8.8%
Other	2.5%	5.8%	3.0%
	100%	**100%**	**100%**
*** St. Maarten Cruise Passenger Survey (July – September 2002)**			

CHART: C3

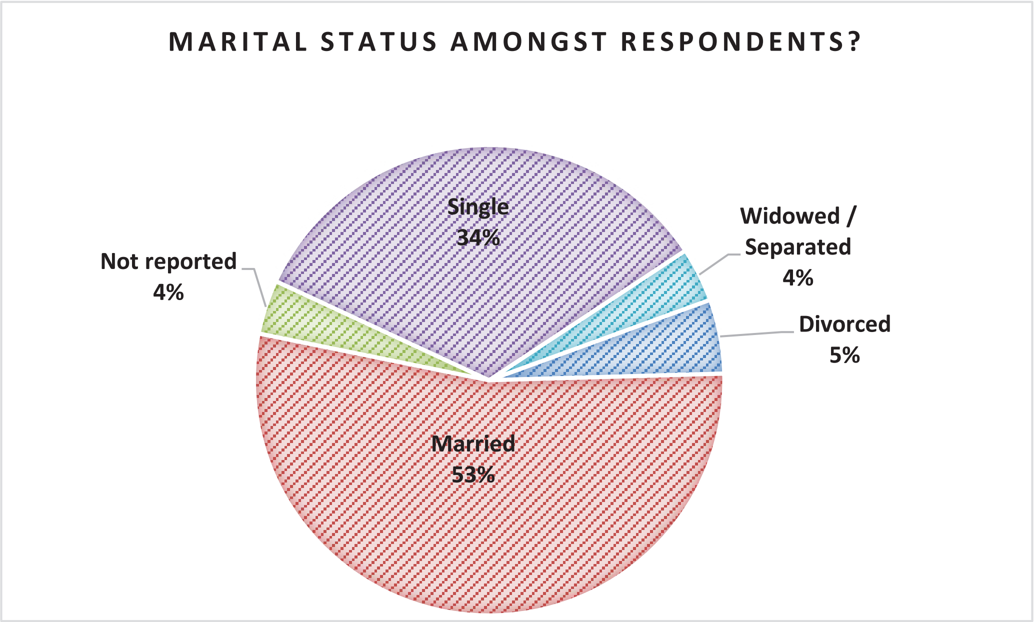
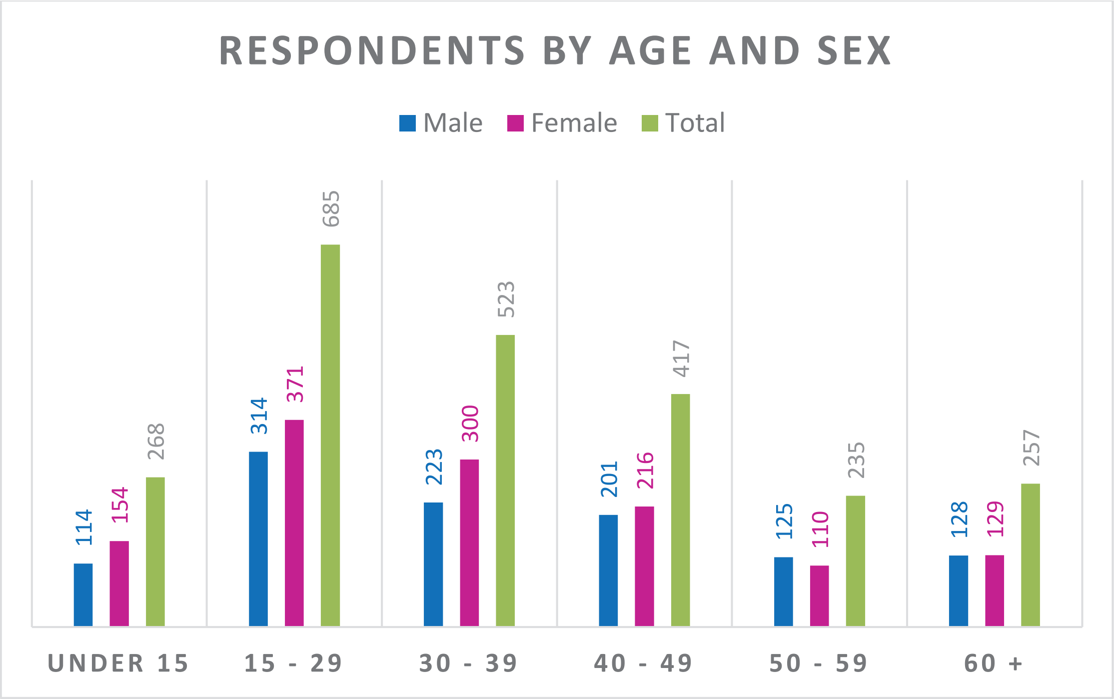


CHART: C4



Household Income

Household income is reflective of the respondent's personal household income rather than that of the entire travel group. Based on cruise passengers' responses, individuals in households earning an annual income of US$ 100,000 and greater, represent a quarter of respondents (see chart C5). Over a fifth of North Americans followed by Europeans are within the group of households earning an annual income of US$ 100,000 and greater. The second and third largest household income groups are households earning US$ 30,001 – US$ 50,000 (16%) and US$ 50,001 – US$ 75,000 (12%) (see chart C6).

CHART: C5

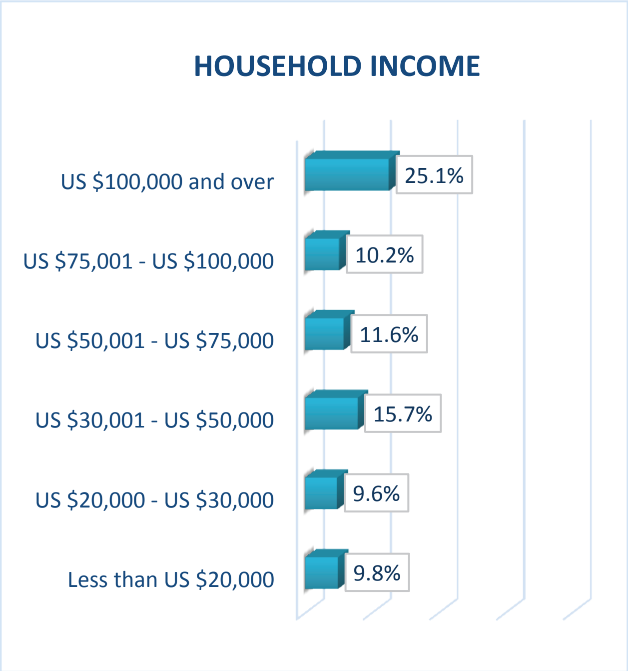
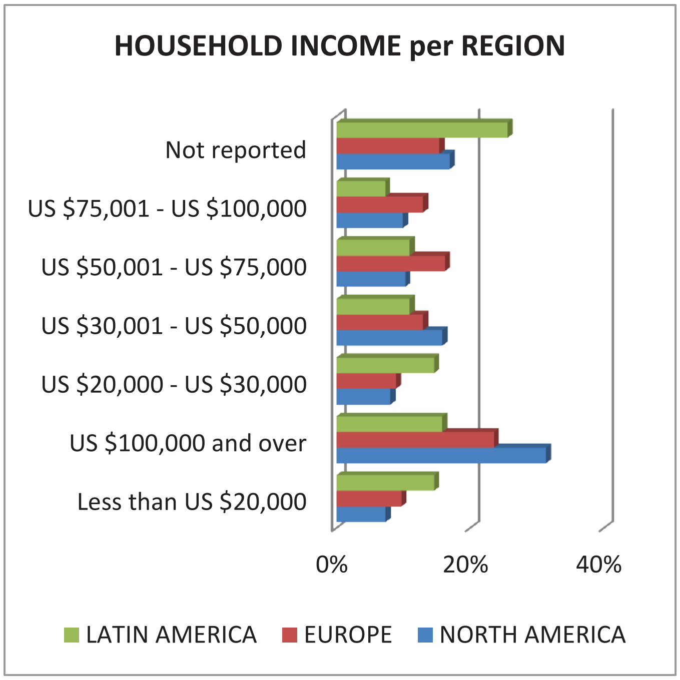


CHART: C6



Travel Planning and Behaviour

Interest and Activities

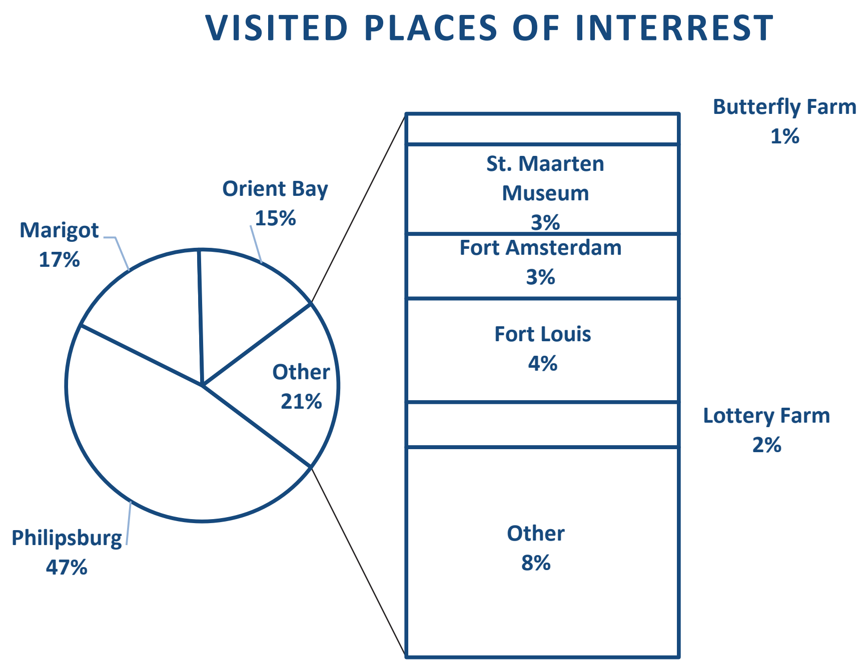
Visitors were questioned on the activities performed and places visited while on the island. With regards to 'places of interest' a majority of the respondents disembarking on St. Maarten primarily visited the capitals of both sides of the island, Philipsburg (47%) and Marigot (17%).

Capital cities are largely the economic center of countries which can usually attract visitors for various activities such as shopping and dining. In St. Maarten the majority of cruise passengers' shopping are performed within the Philipsburg capital, due to its variety of stores and close proximity to the Cruise port. Orient Bay ranked the third most visited area, with 15% of respondents indicating visiting this popular beach. Followed by a composite of options which provides 21% of responses (see chart D1).

Table: D1

PLACE OF INTEREST	RANK
Philipsburg	1
Marigot	2
Orient Bay	3
Other[9]	4
Fort Louis	5
St. Maarten Museum	6
Fort Amsterdam	7
Lottery Farm	8
Butterfly Farm	9

CHART: D1



[9] Other refers to several responses given,; Simpson bay, Lucky Stable; Oyster Pond are a few notable areas mentioned.

Throughout the years a number of activities have become available on the island for tourists and locals alike to enjoy. The majority of cruise respondents indicated to have visited the island's beaches, which received the highest ranking score. Beaches were followed by sight-seeing, shopping, and dinning. Gaming activities, such as gambling at local casinos, and boat trips were the least attractive to respondents.

TABLE: D2

ACTIVITIES	RANK	PERCENTAGE %
Beaches	1	65%
Sightseeing	2	64%
Shopping	3	62%
Dining	4	27%
Island Tour	5	22%
Water Sports	6	22%
Boats Trips	7	8%
Casino Gaming	8	8%
Other	9	6%

OPINIONS AND REACTIONS

Satisfaction And Experience Rating of St. Maarten

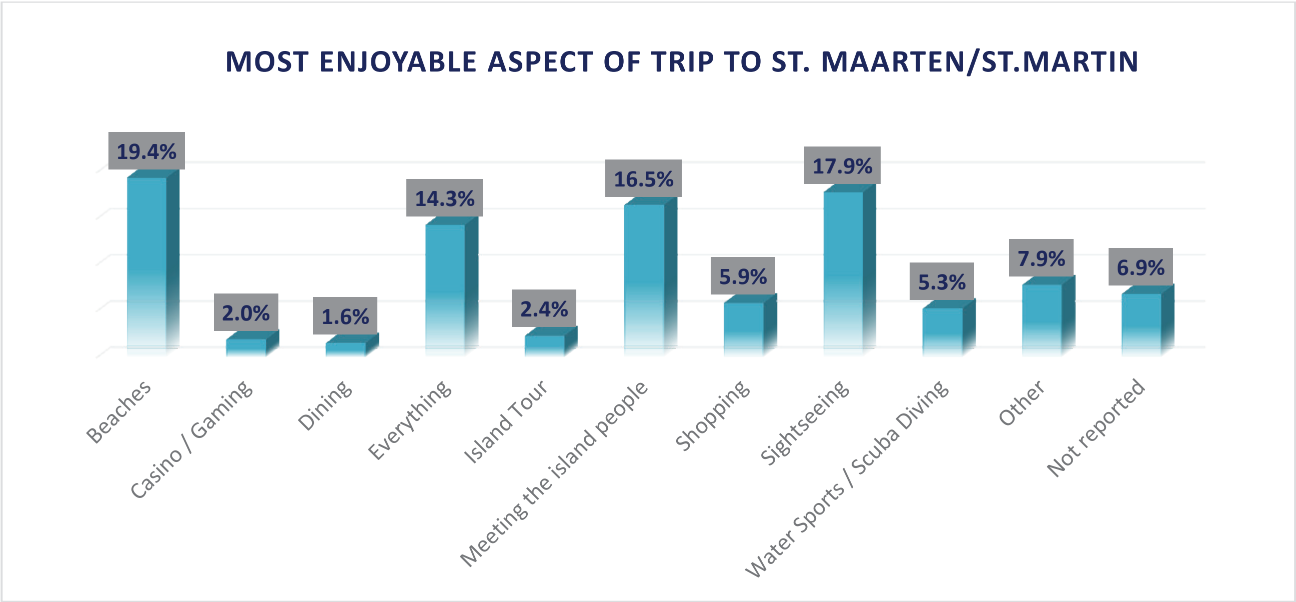
What do tourists enjoy about our island's marketed product? In fact which aspects of their trip are seen as the most enjoyable or memorable? Service industry research shows that service cues indicated throughout a customers' purchase journey, and in particular satisfaction with the purchased product, strongly affect repurchase intention and word of mouth.[10] [11] To gauge the cruise tourists' satisfaction with St. Maarten's marketable aspects, respondents were asked to select the most enjoyable aspect of their visit.

[10] Petrick, J. F. (2004). The roles of quality, perceived value and satisfaction in predicting cruise passengers' behavioral intentions. Journal of Travel Research, 42(4), 397–407.

[11] Chen, C., Tsai, D. (2007), How destination image and evaluative factors affect behavioral intentions? Tourism Management, Issue 28, 1115–1122

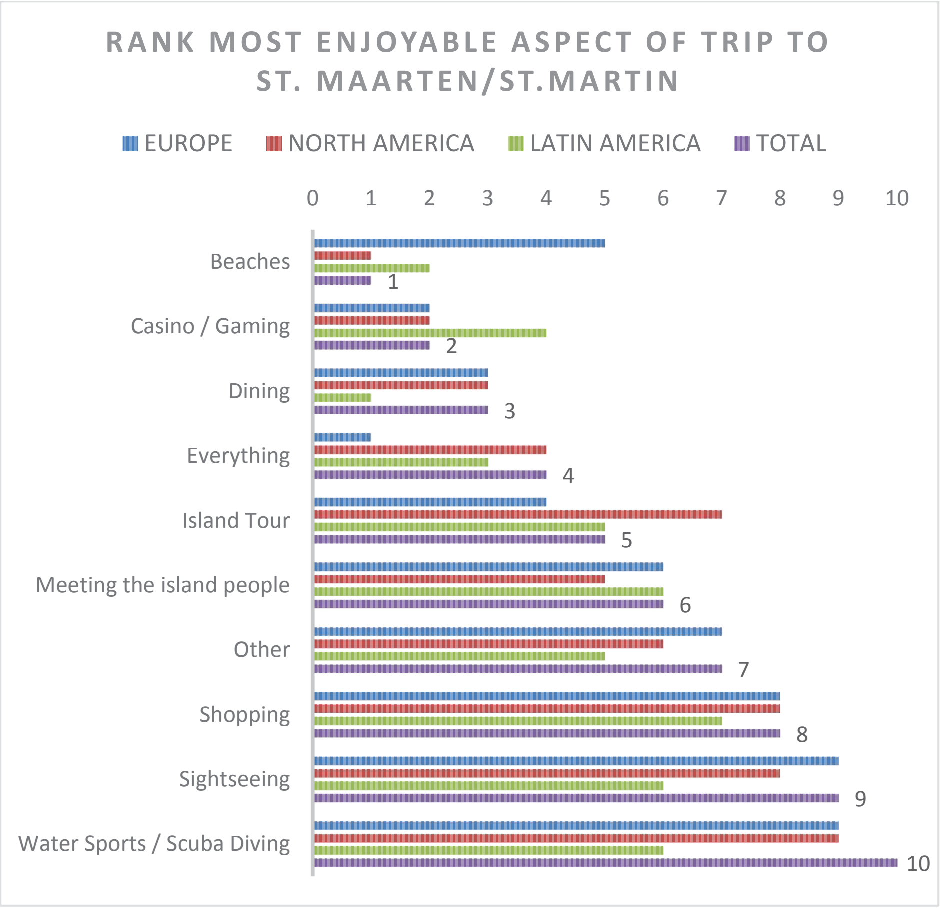
Similar to previous reports[12], beaches (19.4%) took the number one spot followed by sightseeing (18%), and socializing with the local population (17%). Fourteen percent of respondents enjoyed their entire experience on the island. Dining had the lowest percentage (1.6%) of respondents. Although this may be considered odd, in view that St. Maarten / St. Martin is seen as the culinary capital of the Caribbean, this result should be viewed with the perspective that cruise tourists have limited time per on-land visit and enjoy meals on-board the cruise vessels which are included in their purchase price.

CHART: E1



[12] St. Maarten Cruise Passenger Survey (2002); St. Maarten Tourist Bureau & the Caribbean Tourism Organization

CHART: E2



Most cruise tourists simply did not respond to the question on the ‘Least enjoyable aspect’ of their visit (74%). There is a probability that most cruise tourists found nothing significantly unfavourable about their visit to St. Maarten. Shopping experience followed by Casinos / Gambling were the first (10%) and second (5%) least enjoyable aspects of respondents visit. Chart E2 indicates the ranking of ‘Least enjoyable aspect’ by region. All major regions for the first three rankings followed a similar trend with shopping, casinos / gaming, and beaches appearing.

CHART: E3

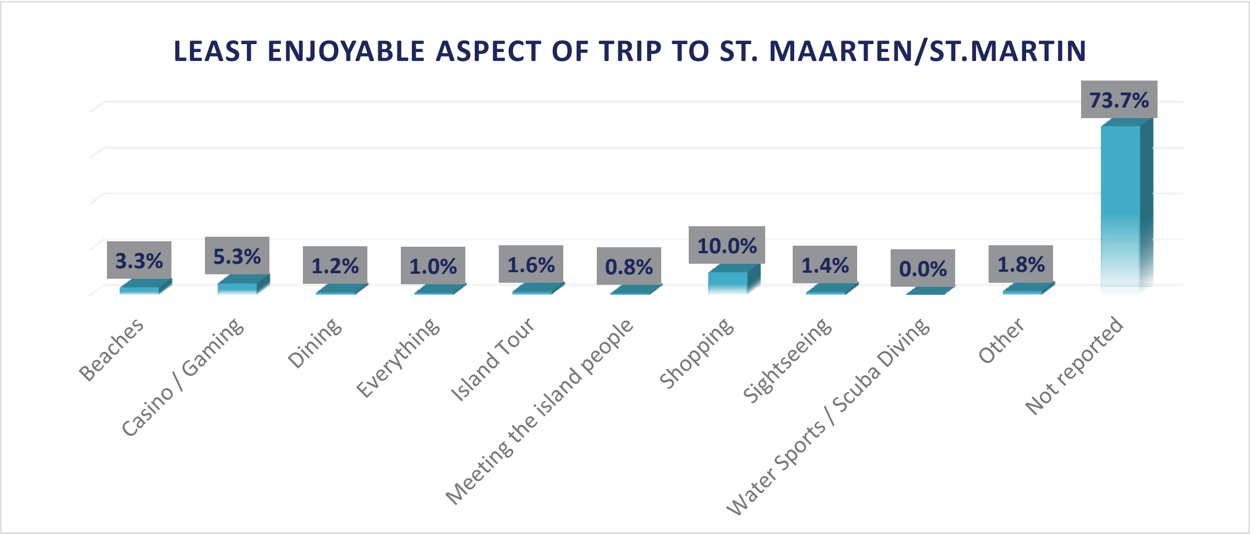
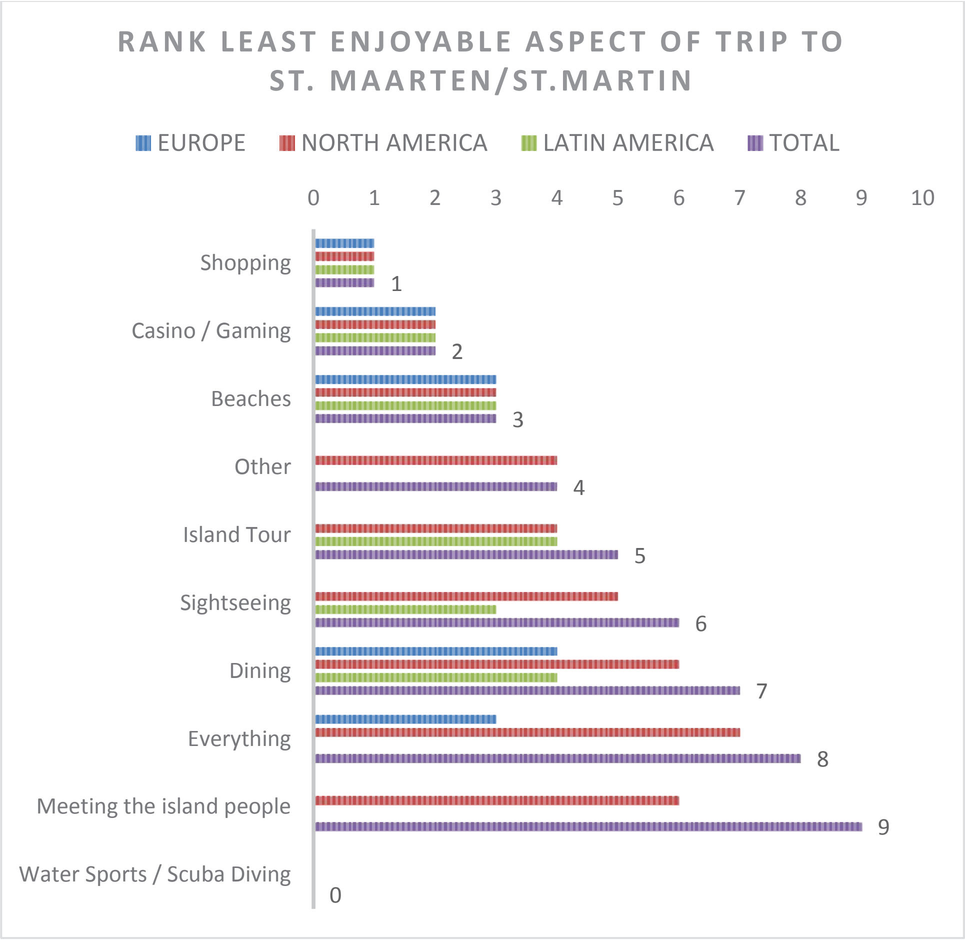


CHART: E4

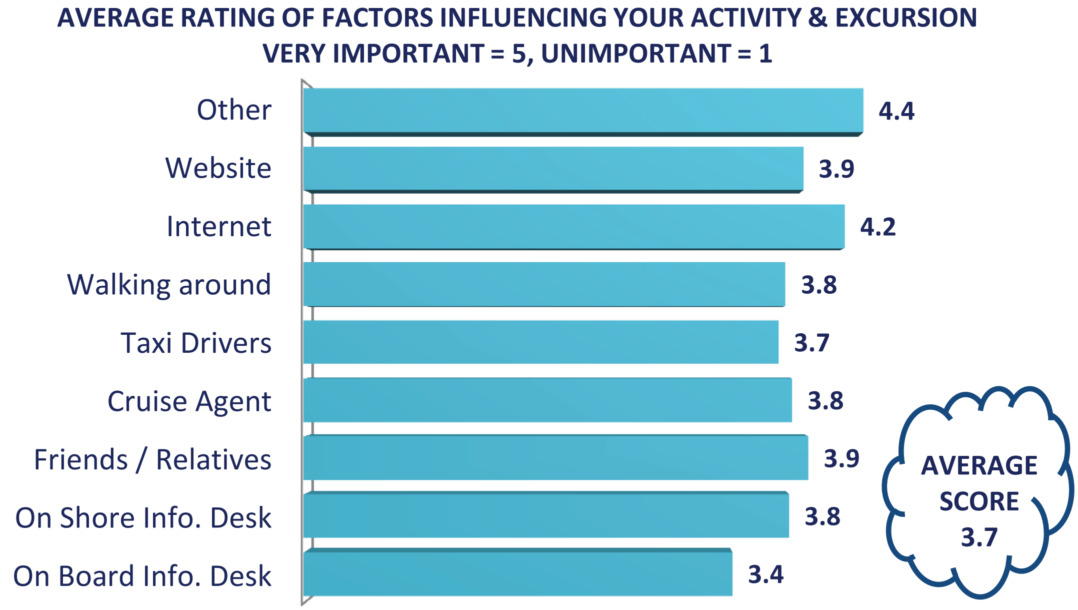


OPINIONS AND REACTIONS

Factors of Influence

To gain a better understanding of places visited and activities performed, the survey also elicits the importance of influential sources in their decisions. Average ratings on a scale of 1 'very important' to 5 'Unimportant' for each option were calculated and presented. The majority of cruise respondents attributed the highest rating of 1.6 to the option of 'Other'. 'Other' refers to options not included in the survey's consideration list. Following the highest rating are the Internet (particularly Google search engine), Friends and Relatives, Cruise Agents and On-shore information desk. The least influential factor was the information desk on-board cruise vessels.

CHART: F1



Furthermore cruise visitors were asked to rate the most influencing factor in deciding to take the cruise. Graph F2 illustrates Friends / Relatives (37%) was the most influential source of information. Travel agents (21%) shortly follows, Internet (19%), and personal experience (13%). However, the two least important factors were Television / Radio (1.2%) and Newspaper / Magazines (1.6%).

Additionally, individuals were grouped by region of residence and their responses ranked. Results clearly indicate most regions follow a slightly similar pattern(see chart F3). Where persons residing in North and Latin America tend to rely on Friends and relatives for the bulk of support in the decision making process, Europeans seem to gravitate towards professional sources of information before consulting friends and relatives. In chart F3, North America further ranks travel agents as second highest source of information, followed by the internet. Respondents residing in Latin America follows in reverse, ranking the internet as the second highest important source of information followed by travel agents. The least attractive information source for the North and Latin American regions were the Television / Radio, whereas the Newspapers / Magazines was the least attractive for the Europeans.

CHART: F2

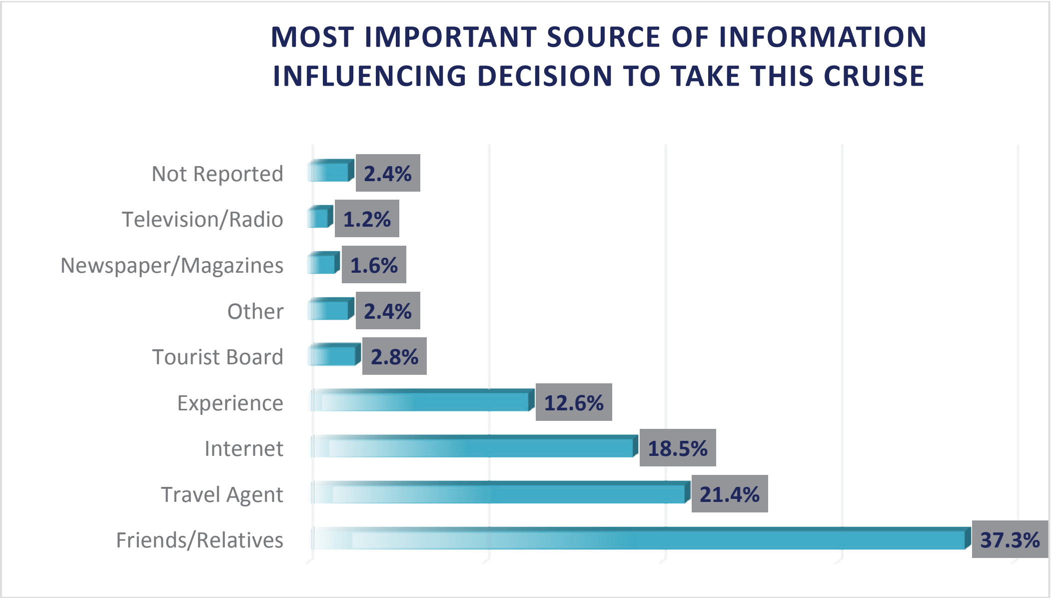
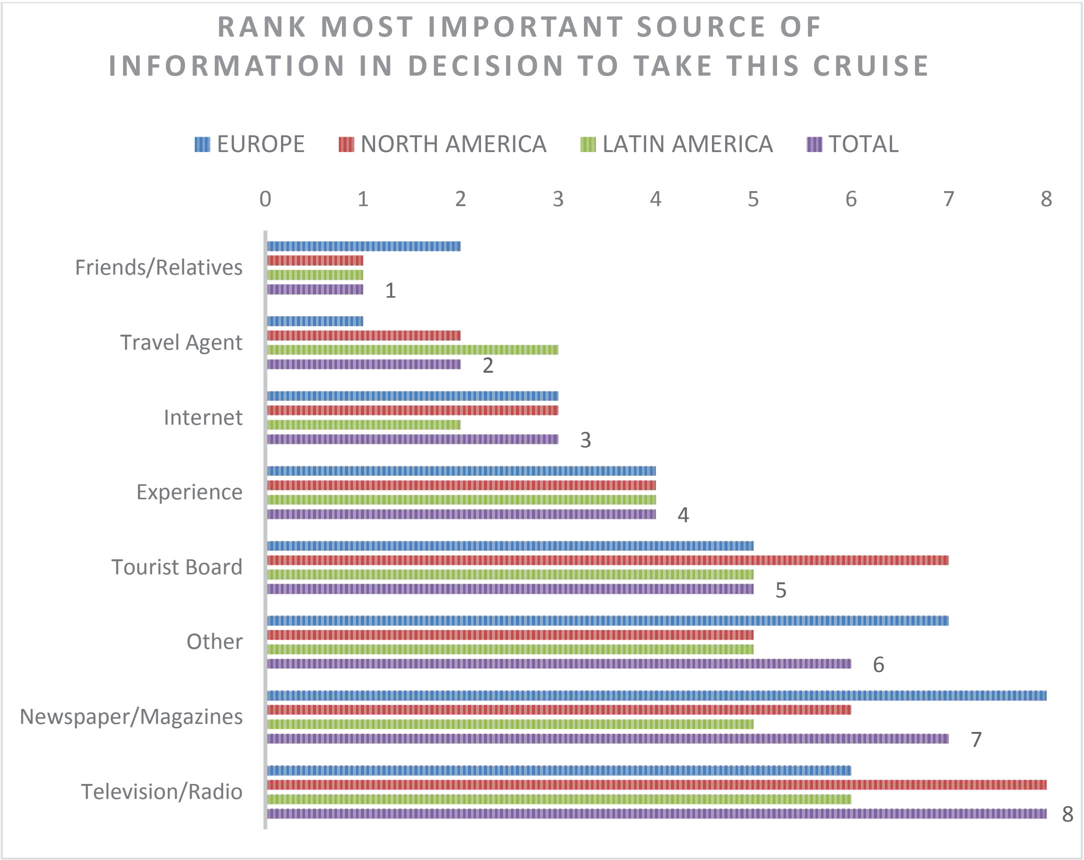


CHART: F3



Satisfaction with the Product

Regardless of what might have motivated a visitor to come to a destination, visitors arrive with certain perceptions and expectations, which after experiencing the visit, determined their satisfaction level. Satisfaction levels depend on the extent to which tourists' expectations have been met, and can be assessed by the ratings of essential product components. Table G1 displays that 'Beaches' received the highest rating of all product components, an excellent rating by 60% of visitors and a 'good' rating from another 33%. It is noted that not all components obtained ratings , at least 38% of the cruise visitors ratings of individual product components were significant.

Table G1

	Average score	Excellent	Good	Average	Poor	Terrible	*SIGNIFICANCE* [13]
Immigration Service	**3.9**	27%	50%	16%	4%	3%	*71%*
Cruise Terminal	**4.1**	26%	58%	14%	2%	1%	*89%*
Time in Port	**4.0**	20%	59%	14%	4%	2%	*97%*
Attractions	**4.0**	31%	40%	22%	6%	1%	*63%*
Island's Cleanliness	**4.0**	22%	60%	13%	4%	1%	*95%*
Clubs / Gamming	**4.0**	27%	37%	20%	7%	10%	*18%*
Safety	**4.1**	21%	67%	7%	3%	2%	*96%*
Taxis / Rentals	**4.0**	22%	58%	16%	3%	1%	*50%*
Tours & Excursions	**4.3**	38%	47%	11%	1%	2%	*35%*
Beaches (Dutch side)	**4.5**	60%	33%	6%	1%	0%	*68%*
Beaches (French side)	**4.5**	58%	31%	8%	2%	1%	*30%*
Dining (Dutch side)	**4.1**	26%	54%	14%	4%	2%	*40%*
Dining (French side)	**4.0**	35%	37%	18%	9%	1%	*13%*
Souvenirs (Dutch side)	**3.9**	17%	57%	21%	4%	1%	*70%*
Souvenirs French side)	**3.8**	21%	45%	28%	6%	0%	*13%*
Duty-free Shopping (Dutch side)	**4.0**	24%	50%	22%	2%	2%	*67%*
Duty-free Shopping French side)	**3.9**	21%	46%	23%	7%	3%	*18%*
Price of Goods (Dutch side)	**3.9**	19%	52%	21%	4%	4%	*83%*
Price of Goods (French side)	**4.1**	21%	46%	14%	7%	12%	*22%*
Roads (Dutch side)	**3.8**	8%	59%	21%	6%	5%	*77%*
Roads (French side)	**3.8**	10%	59%	18%	8%	4%	*36%*

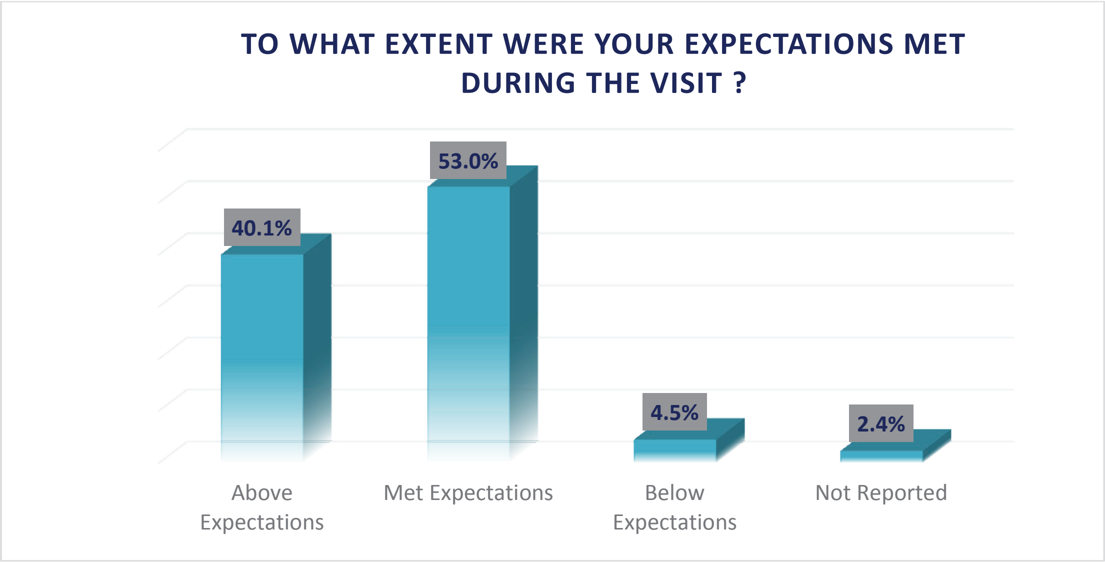
Ratings also indicate that visitors were very satisfied with the beaches on both sides of the island, receiving the highest rating overall (1.5). All product components received good ratings from cruise visitors. Ratings indicate that, for the most part, passengers were almost equally complimentary of features on either side of the island. With the last ratings attributed to ‘souvenir shopping’ and the island’s ‘roadways’.

The difference between a customers’ expectation and experience determines their satisfaction level for a product. Expectations are formed based on advertisements of the product, both planned marketing and word-of-mouth reference. The closer a customer’s experience matches their expectations, the higher their individual level of satisfaction. Over 90% of cruise respondents visiting St. Maarten experienced a highly satisfying experience.

[13] Significance equals the percentage of respondents that found the aspect applicable and thus rated it.

Results indicate that 40% of tourists experience were above their expectations and 53% experience equalling their expectations. Only 5% indicated having had an experience that were below their expectations, and 2% did not answer the question (see chart G1).

CHART: G1



Satisfied visitors will often return as well as be positive word of mouth ambassadors of the destination among their acquaintances upon returning home. This positive word of mouth advertising is a desirable marketing result for the viability of any product.[14] The fact that a large proportion of cruise visitors is willing to return for a longer stay is therefore a matter of great significance to those planning the development of tourism.

A large proportion of cruise visitors to St. Maarten were positive (90%) about the likelihood of returning to the island (see table G2). More than 65% of visitors stated definite intentions to return while 25% were less positive, yet above average (5.9%). Only 2% of respondents were not likely to return, with 2 % non-response. Additional, 92% respondents indicated they will recommend the island to acquaintances. With 74% indicating definite intentions to recommend the island and 19% stating probable intentions. Only 1% indicated no intentions of recommending the island to acquaintances, with 2% non-response.

[14] Anderson, E. W. (1998). Customer satisfaction and word of mouth. Journal of service research, 1(1), 5-17.

Table G2

	RETURN	RECOMMEND
Definitely	65.0%	73.7%
Probably	25.3%	18.5%
Unsure	5.9%	4.3%
Probably not	1.2%	0.8%
Definitely not	0.8%	0.6%
Not reported	1.8%	2.2%
Average Score	**1.4%**	**1.3%**

CHART:G2

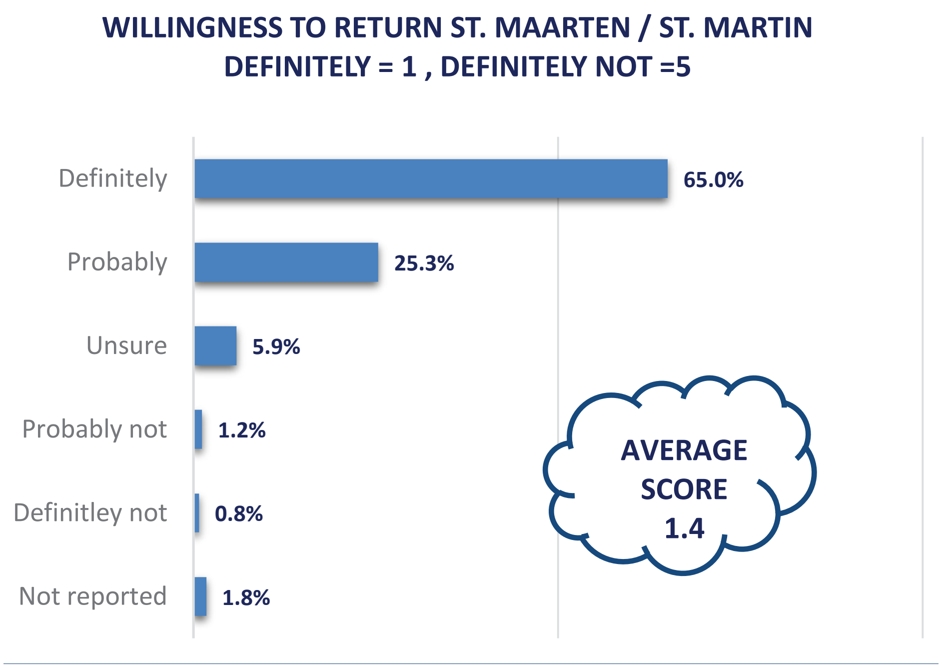
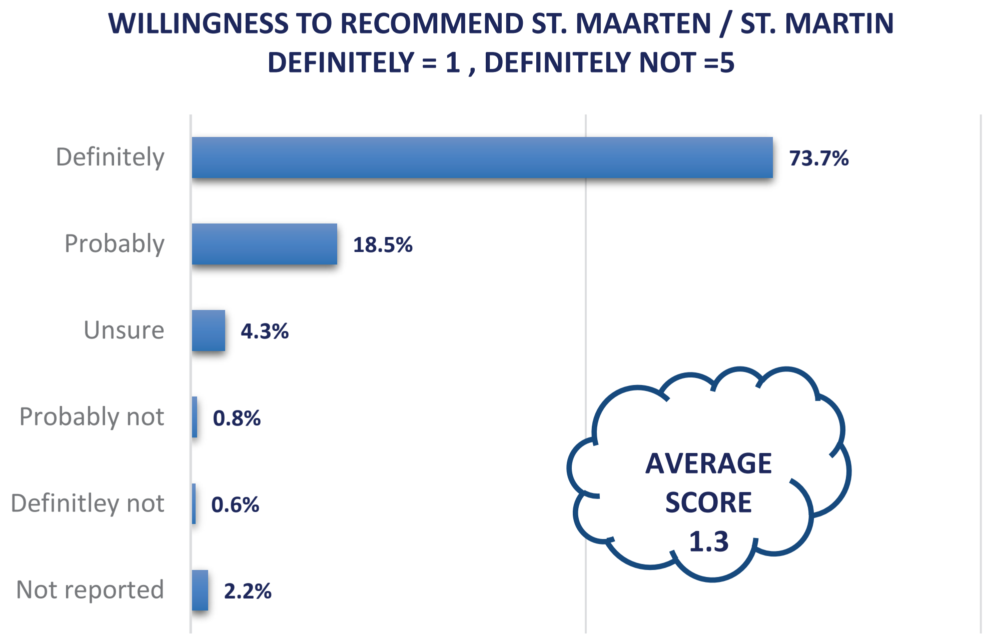


CHART:G3



EXPENDITURE

The contribution of the cruise industry to a destination is measured through the total expenses of the passengers onshore. The total cruise tourism spending by passengers, crew and cruise lines is the source of the economic contribution of the cruise industry in each destination. Expenditure per destination port within cruise tourism are composed of a broad range of spending, however this report focuses on onshore expenditure by passengers which tend to be concentrated in consumer goods and services (e.g. Retail purchases, tours, entertainment).

Data obtained from St. Maarten Port Authorities indicates that in 2012/2011 an estimated 1.75 million cruise passengers arrived aboard cruise ships. Of these, an estimated 1.59 million passengers (90 percent) disembarked and visited St. Maarten. During the first half of the present survey year (Jan – June 2013) 1.01 million cruise passengers arrived to St. Maarten aboard cruise ships. The expenditures of these passengers for the first quarter of the year are discussed below.

Expenditure of cruise ship passengers during their brief stay in the country is one of the important aggregates needed to determine the contribution of the sector to the economy, as well as to provide the basic information required by planners in shaping policies for the development and sustainability of the tourism sector.

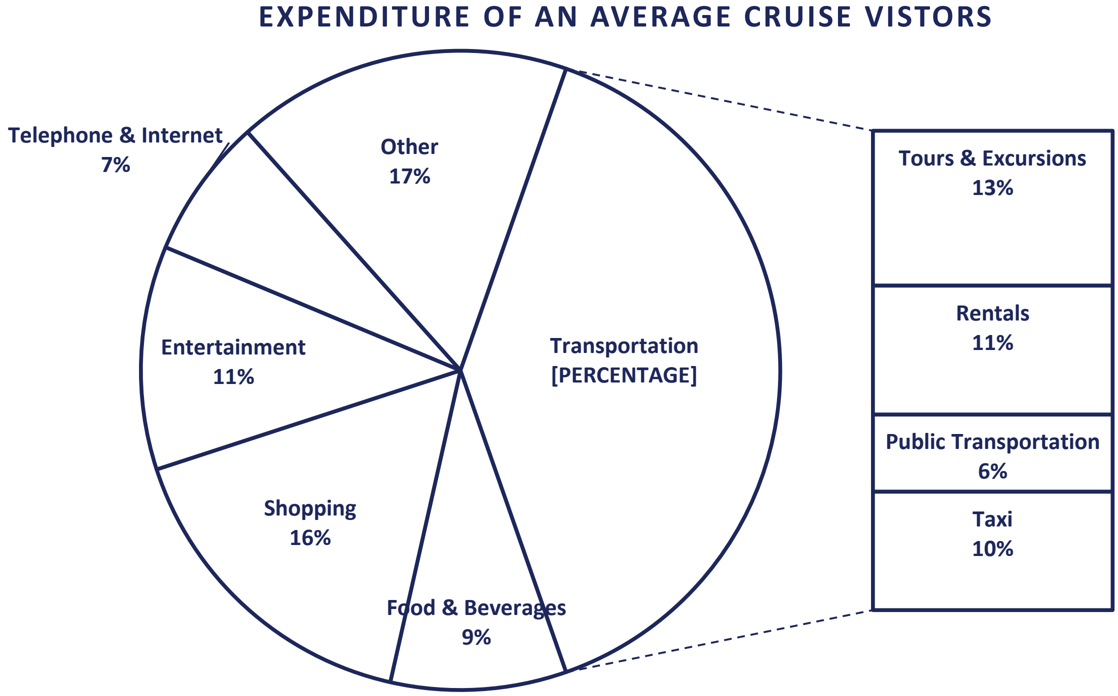
The collection of such expenditure data is not easy although the problems are of a different nature from those encountered in attempting to gather the same information from stay-over visitors. Many more respondents are able to provide accurate accounts of their transactions during the few hours that they spent ashore, unlike the case of the longer stay visitors who are likely to have more problems of recall, the longer the stay. The real difficulty arises when visitors rush back to the vessel for a particular reason, such as lunch or simply departure, and there is little or no time to complete the questionnaire satisfactorily. Per passenger spending were derived from 509 completed forms, representing over 2400 passengers that came ashore during the survey period.

Average Expenditure per Cruise Visitor

Average total expenditure per cruise passenger to St. Maarten during the first quarter of 2013 was calculated at US$ 199.11, an increase of 7.39% when compared to 2012/2011 FCCA report. Other purchases[15] accounted for the largest share of this expenditure (17.0%). Following was Shopping (16%), Tours/Excursions (13%), Entertainment (11%) and rental vehicles (11%), Taxi (10%), Food & Beverages (9%), Telephone & Internet access (7%) and Public transportation (6%).

[15] Unfortunately, although responses were recorded for this option, there was however a low indication of the other services respondents consumed.

CHART: H1



Due to response size during the first quarter's survey, the expenditure results could not yet be segmented on a regional basis (except for United States and Europe), as the sample size is too small to make inferences. United States and Europe represents 64% of respondents. Table H1 and H2 indicates that responding cruise passengers from the United States spent an average of $210.88 daily per person during their visit to St. Maarten, with 61% of their spending on a group of Other services[16] ($41.91, 20%) followed by shopping ($34.27, 16%), Tours & Excursions ($27.29, 13%), and Rentals ($24.84, 12%). Respondents from the European region spent $187.17 daily per person with 61% of their purchases in the category of shopping ($35.38, 19%), Entertainment ($30.96,17%), Tours & Excursions ($27.09, 14%), Taxi services ($21.20, 11%).

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[16] Unfortunately, although responses were recorded for this option, there was however a low indication of the other services respondents consumed.

However, to gain a possible understanding of every region's contribution to the cruise passenger income of St. Maarten, respondents were segmented into macro-regions[17]. Respondents residing in North America which contributed to 54% of those who spent the highest daily per person ($205.13), followed by the European region ($187.17, 19% respondents) and Latin Americans ($175.66, 21% respondents). When segmenting the respondents' expenditures among region of residence, the 'Caribbean and Others' had the highest purchasing average ($230.47) at 16% higher than total average. However, 'Caribbean and Others' regions represented only 4% of respondents. Thus, it is challenging to suggest that the average expenditure per visitor is representative of this group.

TABLE: H1

Average Daily Expenditure (US $) per Visitor by Region

	United States	Canada	North America	Europe	Latin America	Caribbean & Other	Total	%
Food & Beverages	$ 19.11	$ 18.05	$ 18.28	$ 16.01	$ 16.52	$ 30.06	**$ 17.70**	9%
Shopping	$ 34.27	$ 35.63	$ 33.57	$ 35.38	$ 26.07	$ 56.10	**$ 32.77**	16%
Tours & Excursions	$ 27.29	$ 20.17	$ 25.23	$ 27.09	$ 23.70	$ 20.57	**$ 25.30**	13%
Rentals	$ 24.84	-	$ 23.56	$ 13.54	$ 22.25	-	**$ 21.01**	11%
Public Transportation	$ 13.38	$ 11.77	$ 12.68	$ 13.54	$ 11.12	$ 20.57	**$ 12.61**	6%
Taxi	$ 18.67	$ 22.00	$ 18.87	$ 21.20	$ 16.68	$ 33.23	**$ 19.30**	10%
Entertainment	$ 15.81	$ 25.01	$ 18.18	$ 30.96	$ 22.25	$ 28.80	**$ 22.52**	11%
Telephone & Internet	$ 15.61	$ 15.13	$ 15.14	$ 15.90	$ 11.12	$ 20.57	**$ 14.12**	7%
Other	$ 41.91	$ 35.31	$ 39.64	$ 13.54	$ 25.95	$ 20.57	**$ 33.78**	17%
Total	**$ 210.88**	**$183.07**	**$ 205.13**	**$ 187.17**	**$ 175.66**	**$ 230.47**	**$ 199.11**	**100%**

[17] Macro-regions were based on the UN's Composition of macro geographical (continental) regions, geographical sub-regions, and selected economic and other groupings.

TABLE: H2

Regions	Number of Persons	Percentage
United States	1,100	45%
Canada	219	9%
North America	**1,320**	**54%**
Europe	**462**	**19%**
Central America	280	11%
South America	236	10%
Latin America	**516**	**21%**
Caribbean	76	3%
Other Countries	30	1%
Caribbean & Other	**106**	**4%**
Not Reported	*40*	*2%*
Grand Total	2,445	100%

Average Daily Expenditure per Cruise Party

The Average Daily Expenditure per Party follows a similar trend as average daily expenditure per visitor. With the highest daily expenditure per party ($721.46) from the Caribbean & miscellaneous regions, with the exception of Latin America ($721.26) which took the second highest expenditure position. Latin America's expenditure per party is strongly due to their large average party size per cruise respondents (4.1 persons). North America follows with an average of $688.99 per party (United States $701.09 and Canada $638.87), and Europe ($652.70).

Total Expenditure per Party

The total expenditure results are thus far similar to that echoed by the FCCA findings in their 2009 report[18]. The FCCA total expenditure per cruise visitor was $185.40 and per party $389.34, whereas the present report's findings are $199.11 and $695.03 respectively. Although the per party expenditure of the present report is 1 ¾ times larger than that of FCCA, this is chiefly skewed by the party size of Latin Americans. If the average party size of the FCCA (2.1) and the present report (3.5) are made similar, then the differences between both reports average daily expenditure per party are much smaller ($28.79).

[18] Business Research & Economic Advisors 92012), Economic Contribution Of Cruise Tourism to the Destination Economies: "A Survey-based Analysis of the Impacts of Passenger, Crew and Cruise Line Spending, Volume II, Destination Reports, Vol 2, pg 158 – 165.

TABLE: H3

Average Daily Expenditure (US $) per Party by Region

	United States	*Canada*	North America	Europe	Latin America	Caribbean & Other	Total	Total %
Food & Beverages	$ 63.53	$ 62.97	$ 61.39	$ 55.82	$ 67.82	$ 94.11	**$ 61.77**	9%
Shopping	$ 113.92	$ 124.35	$ 112.74	$ 123.39	$ 107.04	$ 175.61	**$ 114.39**	16%
Tours & Excursions	$ 90.72	$ 70.41	$ 84.73	$ 94.46	$ 97.30	$ 64.39	**$ 88.30**	13%
Rentals	$ 82.59	-	$ 79.12	$ 47.23	$ 91.34	-	**$ 73.34**	11%
Public Transportation	$ 44.47	$ 41.07	$ 42.60	$ 47.23	$ 45.67	$ 64.39	**$ 44.00**	6%
Taxi	$ 62.07	$ 76.78	$ 63.37	$ 73.93	$ 68.51	$ 104.02	**$ 67.37**	10%
Entertainment	$ 52.56	$ 87.27	$ 61.06	$ 107.96	$ 91.34	$ 90.15	**$ 78.62**	11%
Telephone & Internet	$ 51.88	$ 52.80	$ 50.85	$ 55.45	$ 45.67	$ 64.39	**$ 49.31**	7%
Other	$ 139.34	$ 123.21	$ 133.13	$ 47.23	$ 106.57	$ 64.39	**$ 117.93**	17%
Total	**$ 701.09**	**$ 638.87**	**$ 688.99**	**$ 652.70**	**$ 721.26**	**$ 721.46**	**$ 695.03**	**100%**

Preferred Methods of Payments

In light of the expenditure patterns of cruise tourists, it is advantageous to know the preferred medium of payment. Understanding consumer's payment preference is helpful in simplifying the purchasing process. Chart I1 clearly indicates with a rating of '1.0' Travelers cheque was the most widely used medium of payment by Cruise respondents. Following are the major credit card carriers such as American Express (rating 1.1), Master Card (rating 1.2), Visa (rating 1.4) and lastly cash (see chart I1). These results are significant with over 90% participant response. With the exception of option for "Other methods of payment" not indicated, with 19% response rate, which subsequently was removed from further analysis. Other options of payments were primarily indicated as ATM debit card withdrawals and the use of various credit cards, primarily Diners credit card.

CHART: I1

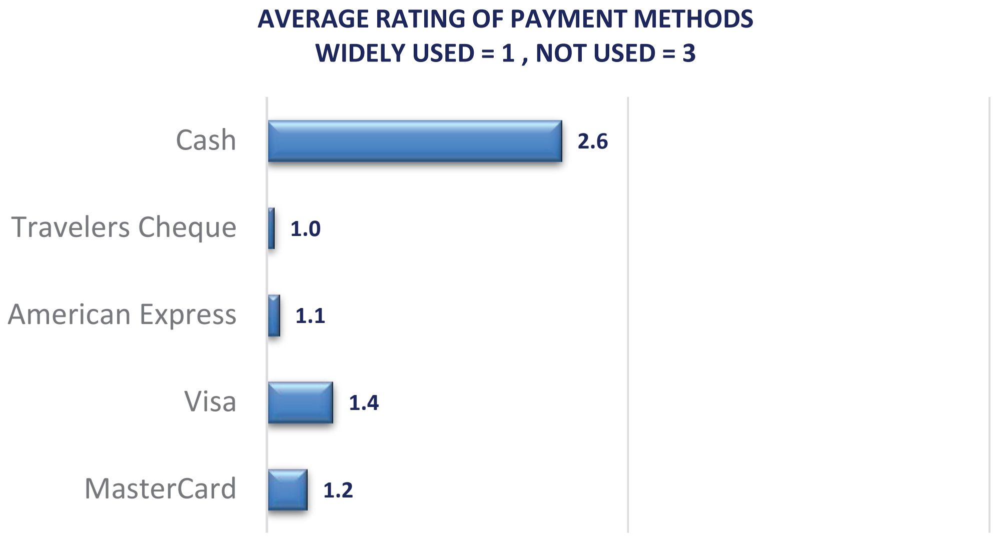


Table I1

	AVERAGE SCORE	Widely used	Sometimes used	Not used	RESPONSE SIGNIFICANCE[19]
Cash	**2.6**	10%	17%	73%	97%
Travelers Cheque	**1.0**	97%	2%	1%	91%
American Express	**1.1**	95%	4%	2%	91%
Visa	**1.4**	74%	15%	10%	94%
MasterCard	**1.2**	100%	0%	0%	92%
Others	**1.0**	100%	0%	0%	19%

[19] Significance equals the percentage of respondents that found the aspect applicable and thus rated it.

Results of Tourism Exit Survey Q1 2013

By Saskia Thomas-Salomons

The Department of Statistics (STAT) in collaboration with the Sint Maarten Bureau of Tourism has executed a Tourism Exit Survey in March 2013. These results are representative of the 1st quarter 2013 which is considered part of the high season. The exit-survey was completed by a total of 714 respondents, representing 1,847 individuals within their travel party. The exit-survey was conducted at departure gates at the Princess Juliana International Airport. The following results will discuss the demographic characteristics, travel activities, expenditure and satisfaction amongst the respondents.

Demographic Characteristics

Table 1 below shows that 68 percent of respondents reside in the United States whilst; 11 percent reside in Canada and 10 percent in Europe. Other regions were not represented in large enough quantities as to present significant sub-region results.

Table 1: Respondents by Region

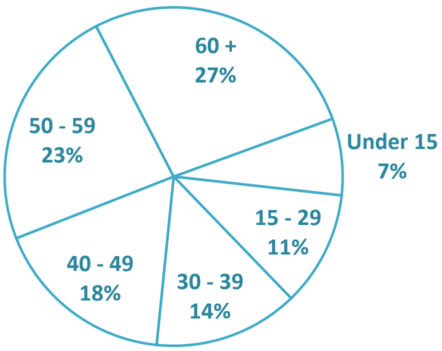
Region	Weight (%)	Respondents (#)
United States	68%	1,252
Canada	11%	207
North America	79%	1,459
Europe	10%	190
Other countries	11%	198
Total	100%	1,847

Table 2: Respondents by Age and Sex

Age Category	Male	Female	Total
Under 15	72	62	134
15 - 29	94	107	201
30 - 39	117	136	253
40 - 49	144	175	319
50 - 59	230	197	427
60 +	269	225	494
Total	926	902	1,828

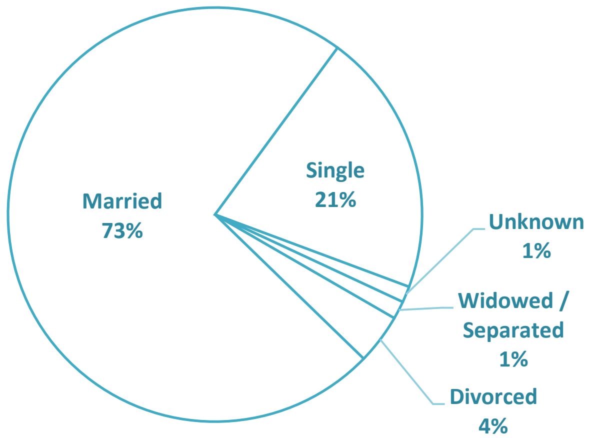
**1% of respondents (age or sex) not reported.*

Figure 1: Respondents by Age



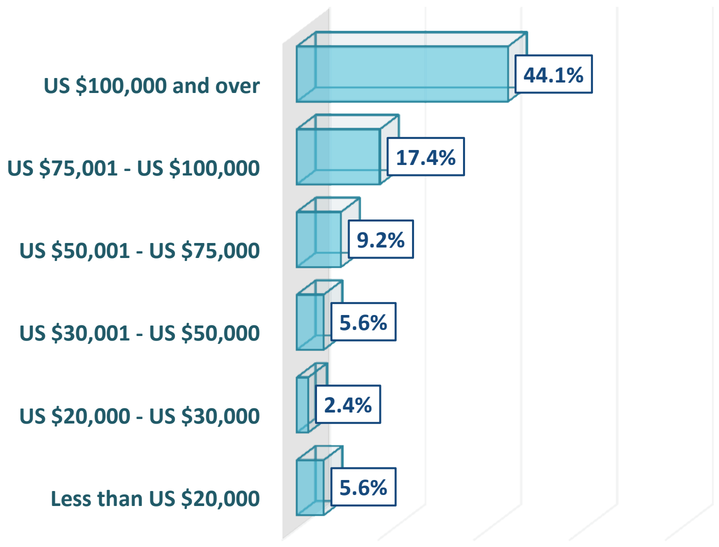
Notable is that 50 percent of total respondents are age 50 plus; 47% of female respondents and 54% of male respondents are within this age group. With the age category 15 – 49 there were more female respondents(~54%) than male respondents(~50%). Figure 2 below shows that 73 percent of respondents are married and 21 percent are single.

Figure 2: Respondents by Marital Status



Notable, the majority (44.1%) of respondents indicated having an annual household income of $100,000 and over. Significant also, over a quarter of respondents (26.6%) indicated that their annual household income ranged between $50,000 - $100,000; this is evident in figure 3 below.

Figure 3: Household Income



When respondents were asked how their travel party was composed, we noted that the top 2 travel companions were either their spouse/partner or friends & family; evident in figure 4 below. In figure 5 below, the travel composition of the European and North American regions is compared to total respondents; notable are the respondents from Europe where a party composition 'Family only' was more significant than traveling with 'Family & Friends' whilst none indicated to be traveling with 'Business Associates'. Additionally the respondents from North America with a party composition 'Friends only' was more significant than traveling 'Alone', yet respondents from other regions whom travelled 'Alone' was more significant.

Figure 4: Travel Companion

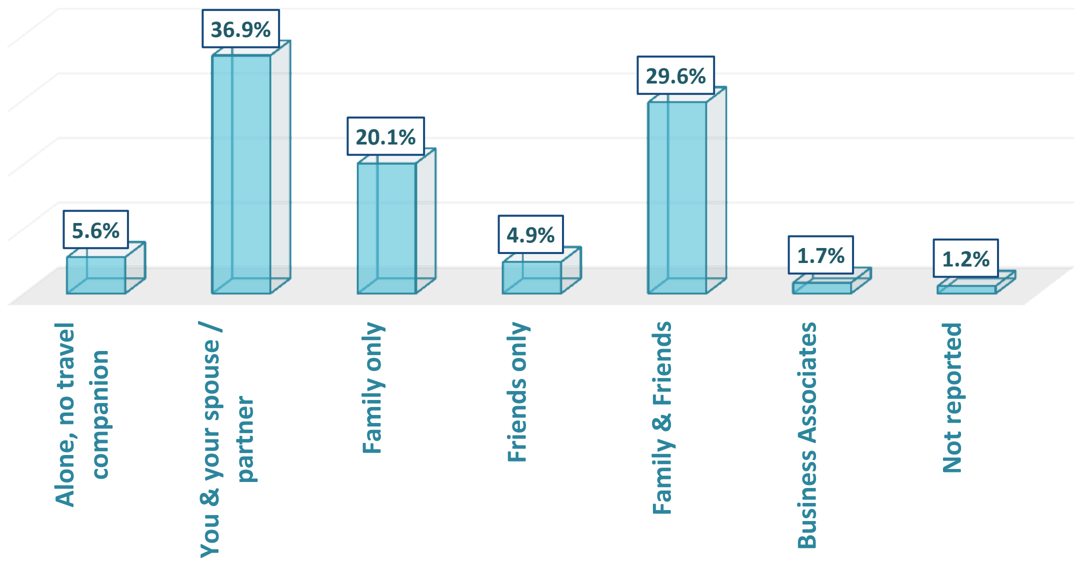


Figure 5: Rank of Travel Companion

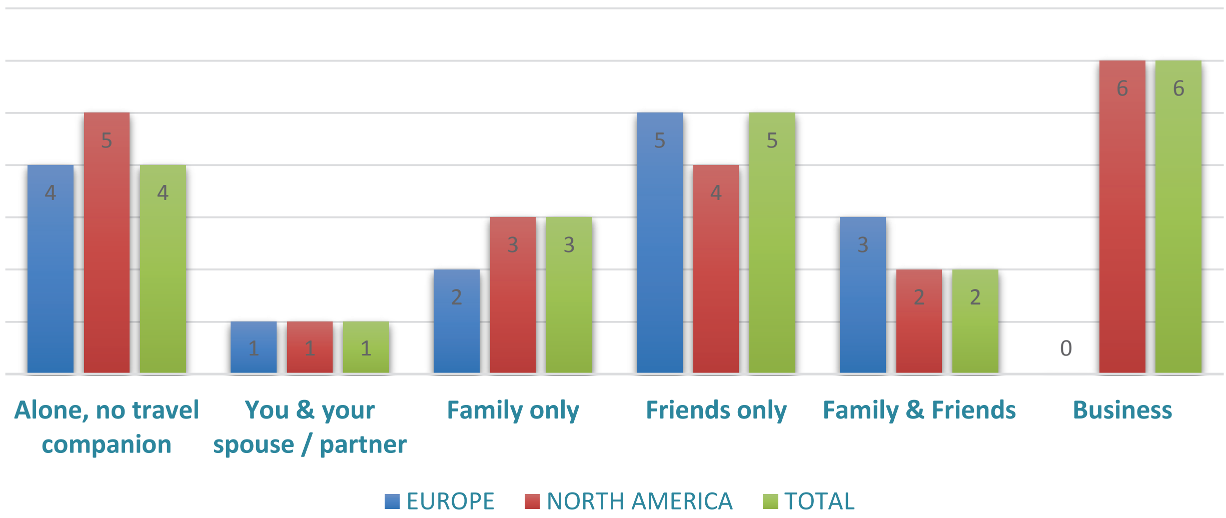


Table 3 below shows that 50 percent of respondents stayed for 4 – 7 nights on St. Maarten / St. Martin, whilst 30 percent indicated that they stay for 8 – 14 nights. Figure 6 below shows that respondents that stayed in a hotel predominately (55.8%) visited for 4 – 7 nights. The majority of respondents(91.8%) that stayed in timeshare visited for 4-14 nights; this is evident in figure 7.

Table 3: Respondents by Total nights on St. Maarten/St. Martin

Nights	Respondents(#)	Weight(%)
1-3	226	12.2%
4-7	924	50.1%
8-14	554	30.0%
15-21	77	4.2%
Over 21	65	3.5%
Total	**1,847**	**100%**

Figure 6: Length of Stay (HOTEL)

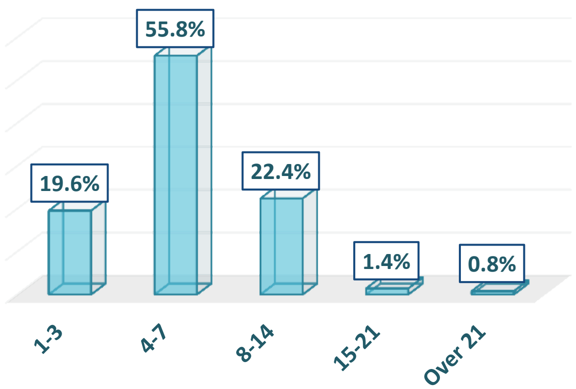


Figure 7: Length of Stay (TIMESHARE)

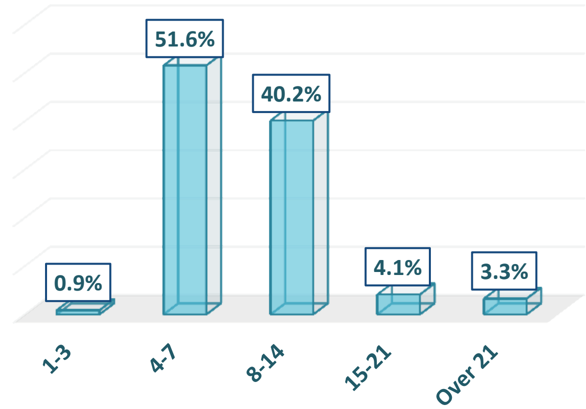


Table 4 below indicates the average length of stay by region and type of accommodation. The overall average length of stay amongst 'total respondents' was 9.3 nights. Notable, is the average length of stay amongst the respondents that stayed in a hotel is 6.4 nights whilst timeshare visitors stayed for 11.2 nights on average. Significant is that respondents from Europe stayed on average longer than the North American respondents. Yet the respondents from Canada has the longest average length of stay (12.1 nights). Striking is that the longest average stay for Hotel is the Canadian respondents (7.7 nights), yet the longest average stay for Timeshare is the European respondents(12.3 nights).

Table 4: Respondents by Average Length of Stay and type of Accommodation

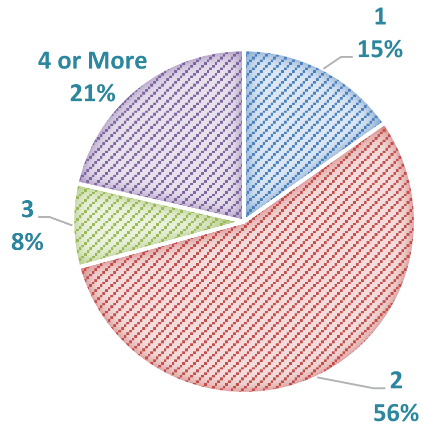
Ave. Length of Stay (days)			
	Hotel	**Timeshare**	**Total Respondents**
United States	6.5	11.2	8.8
Canada	7.7	10.9	12.1
North America	6.7	11.2	9.4
Europe	7.1	12.3	11.0
Total respondents	**6.4**	**11.2**	**9.3**

Respondents were asked about their party size; table 5 shows average party size by region. Notable is that the United States has the largest average party size (2.8 persons). Average party size amongst total respondents is 2.6 persons. Figure 8 depicts the party size amongst all respondents, note a party size of 2 persons account for the majority (56%), whilst the party size ‘4 or more’ is the second largest group of respondents (21%). These results correlate well with party composition depicted in figures 4 and 5 above, which indicate that the top 2 travel companions were either their spouse/partner or friends & family.

Table 5: Respondents by Average party size

Region	Ave. Party Size
United States	2.8
Canada	2.4
North America	2.7
Europe	2.2
Total	**2.6**

Figure 8: Respondents Party size



When respondents were asked what their most important source of information in influencing their decision to visit St. Maarten / St. Martin; 47.8 percent indicated that their friends and or relatives influenced them. Notable is that 16.4 percent were influenced by the internet and 22.7 percent were influenced through other sources, this is evident in figure 9 below.

Figure 9: Most Important Source of Information Influencing Decision to Visit

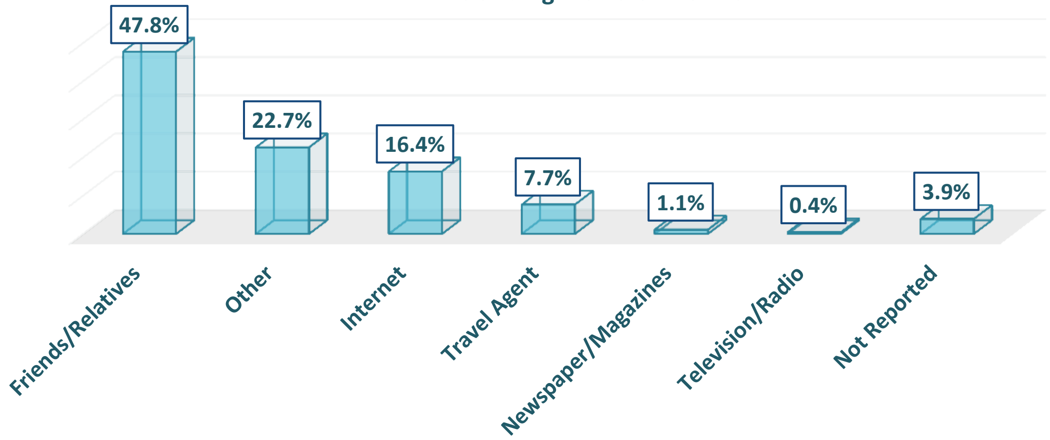
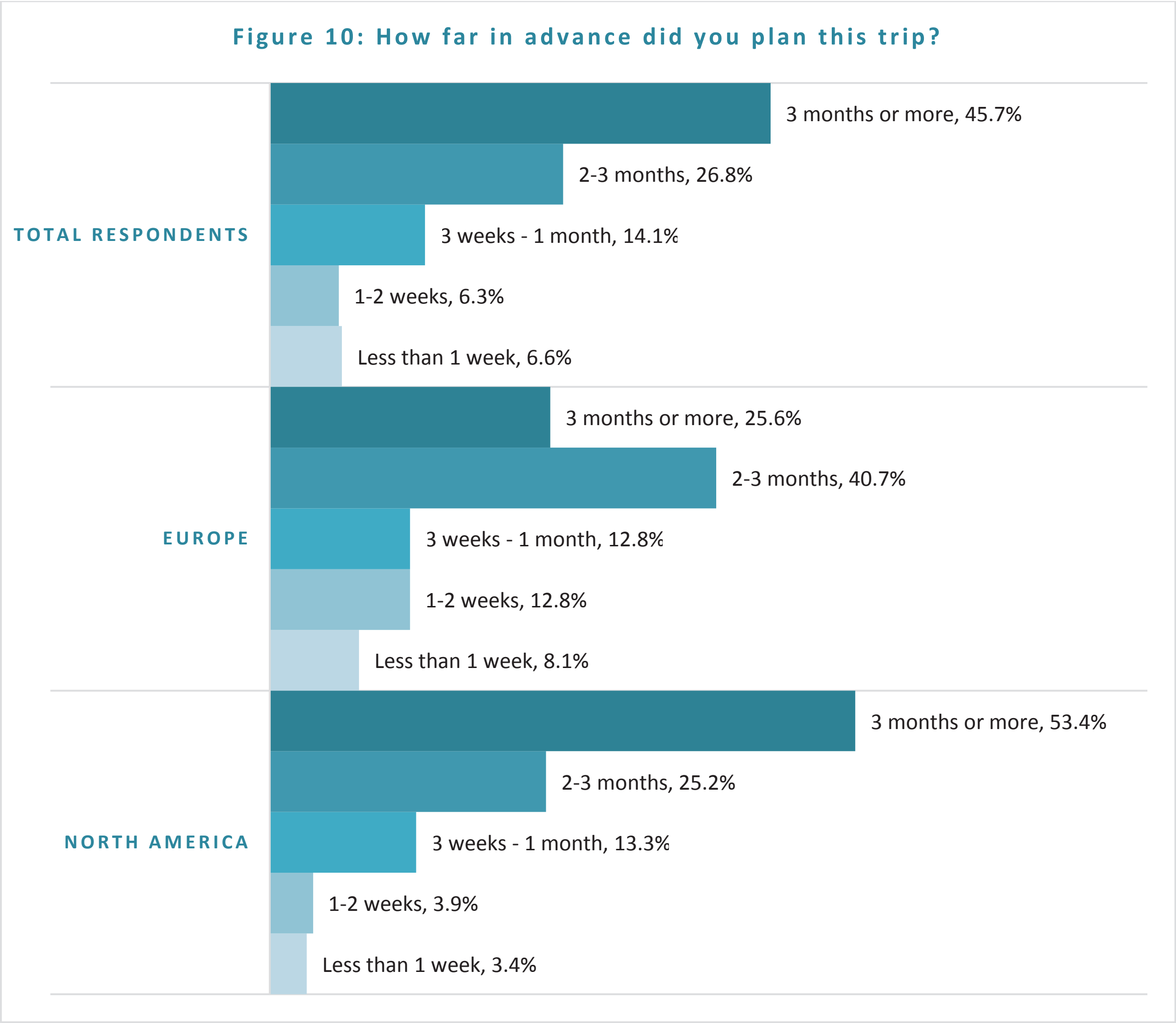


Table 6 below shows that respondents indicated the number one reason for their visit to St. Maarten / St. Martin was 'Vacation / Leisure'. Striking is that European respondents indicated their number two reason for visiting was 'Yachting', whilst North American respondents ranked 'visiting Friends / Relatives' as their number two.

Table 6: Respondents main purpose of visit ranked.

	Total Respondents	EUROPE	NORTH AMERICA
Vacation / Leisure	1	1	1
Business / Convention	2	3	3
Visiting Friends / Relatives	3	3	2
Yachting	4	2	4
Other	5	-	5
Day-Trip	6	4	6
Wedding	6	5	6
Honeymoon	7	5	7
Shopping	8	-	-
Medical	8	-	7
Events / Festivals	9	-	7

Figure 10 below, illustrates the response to the question, "how far in advance did you plan this trip?"; 45.7 percent of total respondents indicated that they had planned 3 months or more in advance. Notable is that the majority (40.7%) of European respondents indicated that they had planned 2-3 months in advance. Additionally above 20 percent of European respondents planned their trip 2 weeks or less before travel, whilst this was less significant amongst respondents from other regions.



Respondents were asked about their previous visits to St. Maarten / St. Martin; 28 percent had previously visited via a cruise, while 38 percent of respondents said it was their first visit. Figure 11 below shows that 61.7 percent of respondents that had previously visited indicated they had 4 or more visits.

Figure 11: Previous visits to St. Maarten/St. Martin

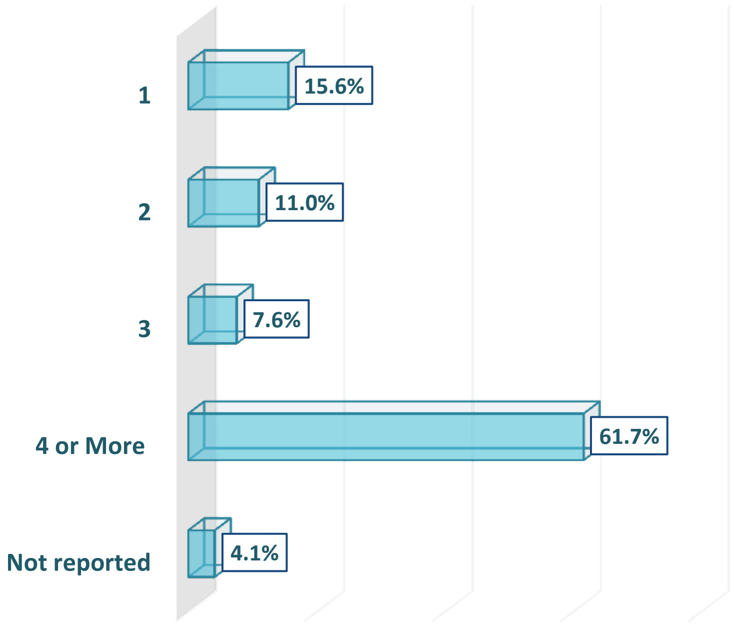
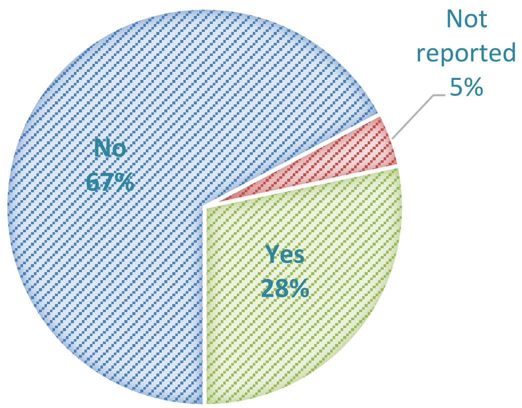


Figure 12: Have you visited St. Maarten/St. Martin before via a cruise ?



Travel Activities

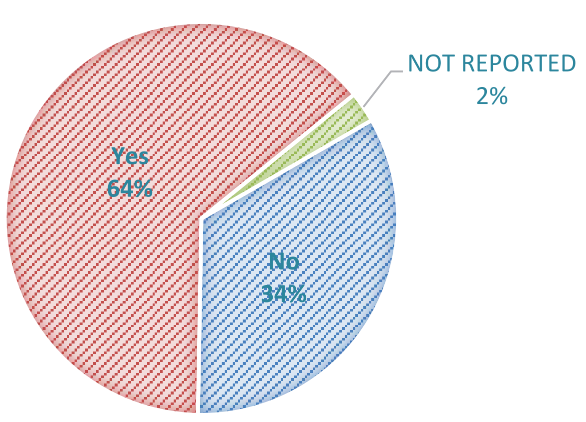
Table 7 below has ranked the 'places of interest visited' and activities that the respondents has engaged in; Philipsburg is the number one place visited and beaches is the number one activity amongst total respondents. Striking is that more respondents indicated to have visited 'Fort Amsterdam' than 'Fort Louis'. Notable is that Orient Bay and Grand Case have ranked position 3 and 4 respectively in places visited, which are known for their beaches and dining; this correlates with the top 2 activities engaged in; beaches and dining. When respondents were asked if they rented a vehicle, 64 percent indicated yes; this is illustrated in figure13 below.

Table 7: Respondents by place of interest visited and activities engaged in.

PLACE OF INTEREST	RANK
Philipsburg	1
Marigot	2
Orient Bay	3
Grand Case	4
Other	5
Fort Amsterdam	6
Fort Louis	7
St. Maarten Museum	8
Museum Sint Martin	9

ACTIVITIES	RANK
Beaches	1
Dining	2
Shopping	3
Boat Trip	4
Casino Gaming	5
Water Sports	6
Island Tour	7
Scuba Diving	8
Other	9

Figure 13: Did you rent a vehicle ?



Expenditure

Respondents were asked about their total expenditure and estimated expense per expenditure category during their visit on St. Maarten / St. Martin; table 8 below shows how their total expenditure was spent. Notable is that respondents indicated to have spent 17 percent of their total expenditure on 'Accommodation' and 'Food & Beverage' each and approximately 37 percent on 'Entertainment', 'Tours & Excursions', and 'Shopping'. European respondents allocated more of their total expenditure towards 'Entertainment', 'Tours & Excursions' and 'Accommodation' than respondents from other regions.

Table 8: Respondent's expenditure share(%) per expenditure category

	Average Daily Expenditure (%) per Visitor by Region				
	United States	*Canada*	**North America**	**Europe**	**Total Respondents**
Accommodations	18%	17%	**17%**	**19%**	**17%**
Entertainment	10%	10%	**10%**	**13%**	**10%**
Food & Beverages	18%	16%	**18%**	**17%**	**17%**
Tours & Excursions	12%	11%	**12%**	**13%**	**12%**
Public Buses	5%	5%	**5%**	**4%**	**5%**
Taxi	6%	6%	**6%**	**6%**	**6%**
Shopping	14%	15%	**15%**	**15%**	**15%**
Telephone & Internet	5%	5%	**5%**	**5%**	**5%**
Other	13%	15%	**13%**	**7%**	**13%**
Total	**100%**	**100%**	**100%**	**100%**	**100%**

Table 9 below shows the average daily per person and per party expenditure by region. Note that European respondents have the highest daily per person expenditure ($173.35), whilst United States has the highest daily per party expenditure ($403.75) because, they have the largest average party size. Noteworthy is that the Canadian respondents have the highest total expenditure ($3,945.79) attributable to their average length of stay.

Table 9: Respondents by average expenditure, average party size and region

Region	Ave. Length of Stay (days)	Ave. party size	Ave. Daily Expenditure (US $) per person	Ave. Daily Expenditure (US $) per party	Total Expenditure (US $)
United States	8.8	2.8	$ 143.53	$ 403.75	$ 3,572.15
Canada	12.1	2.4	$ 137.54	$ 327.25	$ 3,945.79
North America	9.4	2.7	$ 142.54	$ 390.87	$ 3,663.38
Europe	11.0	2.2	$ 173.35	$ 380.98	$ 4,203.89
Total Respondents	**9.3**	**2.6**	**$ 159.91**	**$ 413.57**	**$ 3,832.21**

Noteworthy is that respondents who stayed in a 'Hotel' spent more on average than respondents that stayed in a 'Timeshare' unit , this is apparent from table 10. Prominent is that European respondents that stayed in a 'Hotel' spent on average per day significantly more than other regions and 'Timeshare' respondents. Noteworthy is that Canadian respondents that stayed in a 'Hotel' ($182.48) have an average daily expenditure that was almost double that of the Canadian respondents that stayed in 'Timeshare'($95.84).

Table 10: Respondents average daily expenditure by type of accommodation and region

Average of Per Day / Per person Exp.

	Hotel	Timeshare	Total Respondents
United States	$ 176.18	$ 109.80	$143.53
Canada	$ 182.48	$ 95.84	$137.54
North America	**$ 177.41**	**$ 108.86**	**$142.54**
Europe	**$ 201.44**	**$ 142.82**	**$173.35**
Total Respondents	**$ 197.74**	**$ 110.81**	**$159.91**

Tables 11, 12 and 13 below present average total party expenditure of 'Total respondents', broken down by hotel & timeshare accommodation and region.

A comparison of these tables reveal that European respondents have the highest average total party expenditure. Notable is that Canadian respondents that stayed in a ‘Hotel’($3,344.37) for an average stay of 7.7 nights have a higher average total party expenditure than those that stayed in at ‘Timeshare’($2,485.56) for on average 10.9 nights. Whereas, respondents from the United States and Europe that stayed in a ‘Timeshare’ spent more than those who stayed in a ‘Hotel’.

Table 11: Total Respondents by average total party expenditure and region

	Average Total Expenditure (US $) per Visit / per party by Region				
	United States	*Canada*	**North America**	**Europe**	**Total Respondents**
Accommodations	$ 629.36	$ 663.37	$ 640.74	$ 782.93	$ 666.95
Entertainment	$ 346.51	$ 405.16	$ 358.69	$ 559.05	$ 390.16
Food & Beverages	$ 657.18	$ 636.67	$ 660.16	$ 733.00	$ 668.39
Other	$ 423.06	$ 449.73	$ 431.04	$ 542.03	$ 446.22
Public Buses	$ 161.30	$ 196.79	$ 169.84	$ 180.99	$ 176.51
Shopping	$ 209.92	$ 224.35	$ 214.06	$ 252.54	$ 227.91
Taxi	$ 517.48	$ 594.23	$ 534.35	$ 619.88	$ 569.38
Telephone & Internet	$ 177.48	$ 197.59	$ 182.18	$ 223.22	$ 194.50
Tours & Excursions	$ 449.86	$ 577.90	$ 472.31	$ 310.26	$ 492.18
Total	$ **3,572.15**	$ **3,945.79**	$ **3,663.38**	$ **4,203.89**	$ **3,832.21**

Table 12: Respondents (Hotel) by average total party expenditure and region

	Average Total Expenditure (US $) per Visit / per party by Region				
	United States	*Canada*	**North America**	**Europe**	**Total Respondents**
Accommodations	$ 566.42	$ 562.26	$ 572.21	$ 585.38	$ 570.59
Entertainment	$ 311.86	$ 343.40	$ 320.33	$ 417.99	$ 333.79
Food & Beverages	$ 591.45	$ 539.63	$ 589.55	$ 548.05	$ 571.82
Other	$ 380.75	$ 381.18	$ 384.94	$ 405.27	$ 381.75
Public Buses	$ 145.17	$ 166.79	$ 151.68	$ 135.32	$ 151.00
Shopping	$ 188.93	$ 190.16	$ 191.17	$ 188.82	$ 194.99
Taxi	$ 465.73	$ 503.65	$ 477.20	$ 463.47	$ 487.11
Telephone & Internet	$ 159.73	$ 167.47	$ 162.69	$ 166.89	$ 166.40
Tours & Excursions	$ 404.87	$ 489.82	$ 421.80	$ 231.98	$ 421.07
Total	$ **3,214.90**	**$ 3,344.37**	$ **3,271.58**	**$ 3,143.16**	**$ 3,278.52**

Table 13: Respondents (Timeshare) by average total party expenditure and region

	Average Total Expenditure (US $) per Visit / per party by Region				
	United States	*Canada*	**North America**	**Europe**	**Total Respondents**
Accommodations	$ 611.26	$ 417.88	$ 585.28	$ 716.09	$ 557.71
Entertainment	$ 336.54	$ 255.22	$ 327.65	$ 511.32	$ 326.26
Food & Beverages	$ 638.27	$ 401.06	$ 603.02	$ 670.41	$ 558.92
Other	$ 410.89	$ 283.30	$ 393.73	$ 495.75	$ 373.14
Public Buses	$ 156.66	$ 123.96	$ 155.14	$ 165.53	$ 147.60
Shopping	$ 203.88	$ 141.32	$ 195.53	$ 230.98	$ 190.59
Taxi	$ 502.60	$ 374.32	$ 488.10	$ 566.95	$ 476.12
Telephone & Internet	$ 172.37	$ 124.47	$ 166.41	$ 204.16	$ 162.64
Tours & Excursions	$ 436.92	$ 364.04	$ 431.43	$ 283.77	$ 411.57
Total	**$ 3,469.40**	**$ 2,485.56**	**$ 3,346.29**	**$ 3,844.97**	**$ 3,204.54**

Respondents were asked if they had traveled to St. Maarten / St. Martin on a Pre-paid package, 12.1 percent said yes; amongst European respondents this was less significant (10.5%). Those that said yes were further asked to indicate what the package had included and its total cost. Figure 13 below shows that the top 2 items that was included in the pre-paid package was ‘Air Ticket’ and ‘Accommodation’. It is apparent from figure 14 that pre-paid packages that included accommodation predominantly (47%) was ‘All-in’ *(all inclusive)*, whilst some 15 percent also included meals.

Noteworthy is that ‘Total respondents’ spent on average $ 3,107.08 for their pre-paid package where North American respondents spent on average $ 3,276.86 and European respondents spent on average $4060.00. The total cost spent on average by respondents whom traveled to St. Maarten / St. Martin on a Pre-paid package was $4,734.02 ***($ 3,107.08 for the package plus an additional expenditure of $1,626.94)***. Striking is that an European respondent whom traveled to St. Maarten / St. Martin on a Pre-paid package spent on average $6,815.00 ($ 4,060 for the package plus an additional expenditure of $2,755).

Figure 13: Pre-paid Package Includes

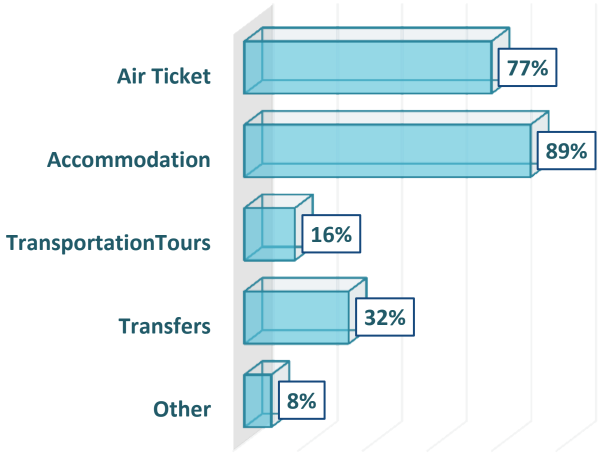
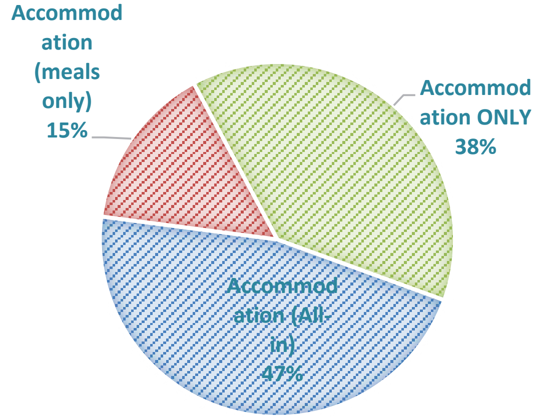
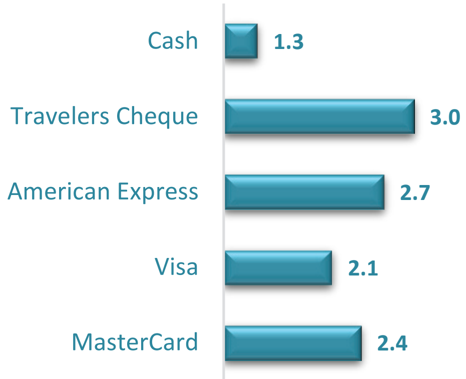


Figure 14: Prepaid With Accommodation



Respondents were asked to indicate to what extent they utilized various methods of payment, this is illustrated in figure 15. Cash was used most amongst respondents, Visa was used more frequently than Master Card or American Express; whilst Travelers Cheque was not used.

Figure 15: Average Rating Of Payment Methods
Widely Used = 1 , Not Used = 3



Satisfaction

Respondents were asked how satisfied they were with various aspects of their visit to St. Maarten / St. Martin as well as the importance of various factors in their decision-making process to visit our destination. Figure 18 below presents the average rate given by respondents on a number of factors that may have influenced their decision to visit. The scale ranged from 'Very important' to 'Unimportant'; notable is that 'Beaches' rated highest amongst all factors on its level of importance as an influencing factor. Salient is that though both 'Culture Heritage' and 'Price' are rated by the respondents as relatively important influencing factors they are less important than other factors.

Figure 16: Average Rating of Factors Influencing Decision to Visit
Very Important = 1 , Unimportant =5

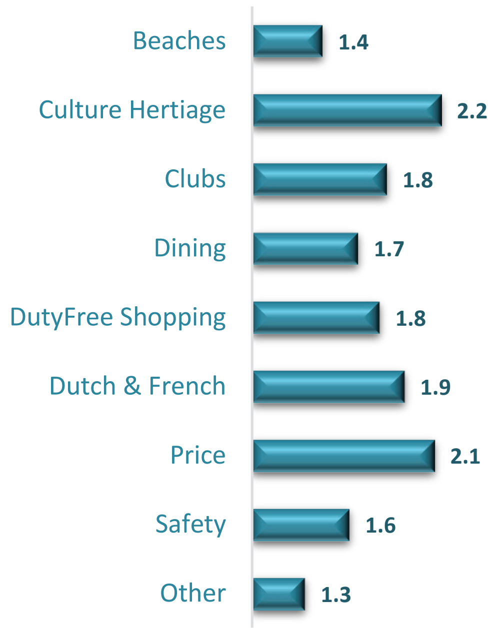


Figure 17: Average Rating Aspects of Visit to St. Maarten / St. Martin Excellent = 1 , Terrible =5

Figure 18: Average Rating Aspects of Visit to St. Maarten / St. Martin Excellent = 1 , Terrible =5

Figures 17 and 18 above present the average satisfaction rating given by respondents on various aspects of their visit to St. Maarten / St. Martin. The scale ranged from 'Excellent' to 'Terrible'; notable is that the majority of aspects were rated between 'Good' and 'Average', whilst the 'Airport Facility', 'Immigration service' and 'Airline' received an average rate between 'Good' and 'Excellent'. When respondents were asked to rate various comparable aspects of the Dutch side and French side of the island, an overall average rate(1.7) between 'Good' and 'Excellent' was given. Notable is that 'Dining' and 'Beaches' received a higher rating on the French side while, the Dutch side received a higher rating for 'Shopping'.

Table 13: Respondents average rating for various aspects of visit to St. Maarten / St. Martin

		1	2	3	4	5	
	AVERAGE SCORE	Excellent	Good	Average	Poor	Terrible	Significance*
Airline	**1.8**	48%	33%	13%	4%	2%	94%
Immigration Service	**1.6**	51%	37%	10%	2%	0%	96%
Airport Facility	**1.6**	49%	38%	10%	2%	0%	98%
Island's Cleanliness	**2.4**	18%	36%	33%	12%	2%	98%
Clubs / Gamming	**2.3**	13%	36%	37%	5%	8%	36%
Price of Goods	**2.4**	13%	39%	38%	8%	3%	92%
Roads	**2.7**	4%	19%	35%	28%	14%	96%
Safety	**2.1**	27%	38%	28%	5%	2%	96%
Taxis / Rentals	**2.1**	25%	41%	27%	5%	2%	81%
Telephone / Internet	**2.4**	11%	33%	29%	18%	9%	80%
Tours & Excursions	**2.1**	27%	39%	25%	7%	2%	41%
Accommodations (Dutch side)	**1.6**	52%	34%	10%	2%	1%	74%
Accommodations (French side)	**1.6**	48%	39%	10%	2%	1%	30%
Beaches (Dutch side)	**1.5**	58%	32%	7%	1%	1%	80%
Beaches (French side)	**1.4**	70%	25%	3%	1%	0%	56%
Dining (Dutch side)	**1.8**	42%	42%	14%	3%	0%	82%
Dining (French side)	**1.6**	54%	37%	7%	2%	1%	61%
Shopping (Dutch side)	**2.0**	27%	43%	25%	3%	2%	77%
Shopping French side)	**2.3**	17%	39%	34%	8%	3%	42%

**significance equals the percentage of respondents that found the aspect applicable and thus rated it.*

Respondents were also asked to rate value for money paid on ‘Accommodation’, ’Meals & Drinks’, ‘Transport’, ‘Shopping’ and ‘Other’ aspects of their visit; an overall rating of ‘Good’ was given. Notable is that ’Meals & Drinks’ received the highest rating amongst respondents as it relates to the value for money paid.

Figure 19: Average Rating of Value for Money Paid
Excellent= 1 , Terrible =5

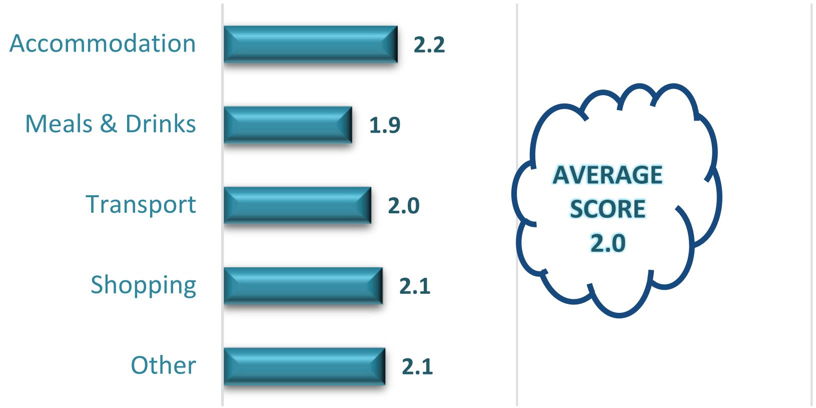
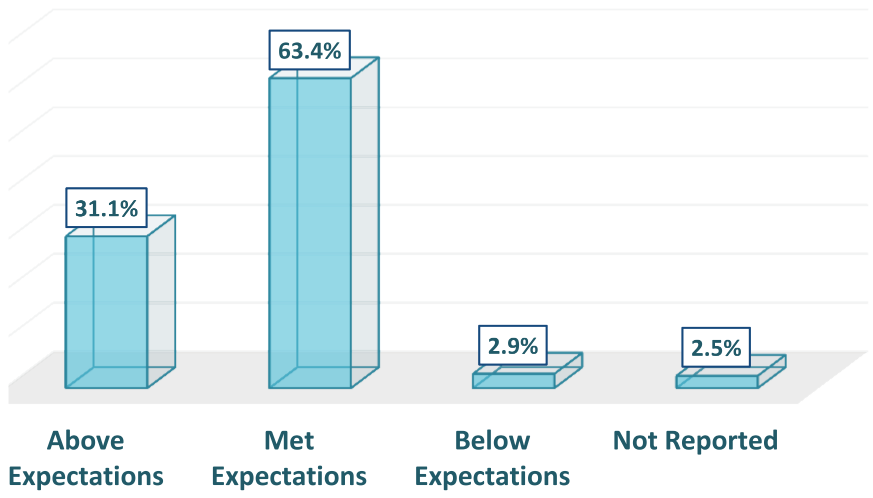


Figure 20: To what extent were your expectations met
During the visit ?



The majority (63.4%) of respondents indicated that their expectations were met, while 31.1 percent of respondents said their expectations were exceeded. When asked if they would be willing to return and/or recommend St. Maarten / St. Martin approximately 90.4 percent will probably to definitely return while 91.8 percent will probably to definitely recommend. Overall average score indicated that respondents were very likely to recommend and return to St. Maarten / St. Martin, this is apparent in figures 21 and 22.

Figure 21: Willingness to Return
St. Maarten / St. Martin
Definitely = 1 , Definitely Not =5

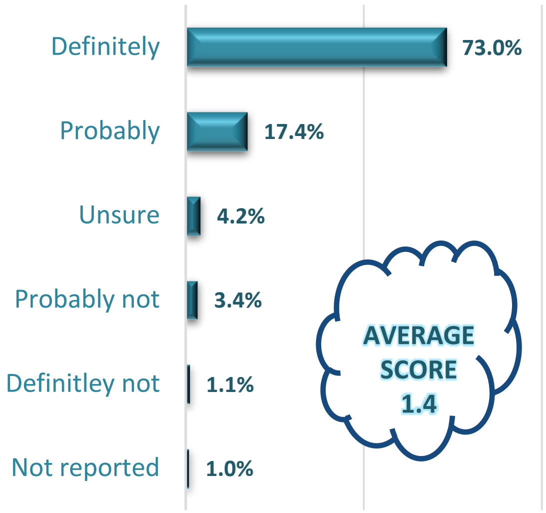
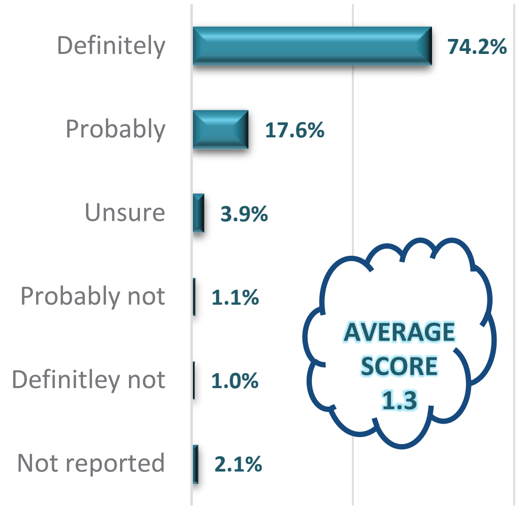


Figure 22: Willingness to Recommend
St. Maarten / St. Martin
Definitely = 1 , Definitely Not =5



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