Tourism Exit Survey 2013

An analysis of the Travel Activities, Satisfaction, Expenditure and General Demographics of Visitors to St. Maarten.

MAAGICAL ST. MAARTEN

STAT DEPARTMENT OF STATISTICS

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Background

Introduction

Tourism has become the main economic driver of St. Maarten and its respective industries. Thus, it is imperative that recent and reliable data is compiled from both public and private sectors in order to assess tourism's impact on them. The Tourism Exit Survey (TES), is one such instrument used by STAT to gather information about our visiting guests and various aspects of their short-term stay on St. Maarten. The TES collects expenditure, satisfaction, demographic and travel-purpose statistics from visitors. These statistics are used for a variety of purposes namely to assist policy makers with product enhancement, and with developing, supporting, and implementing of new marketing strategies to better promote the St. Maarten Vacation-Experience.

Tourism on St. Maarten primarily consists of 3 main segments, Stay-over (over-night) Cruise and Marine Industries. At present the focus of the TES is on the Stay-over & Cruise segments.

Historical Development

Tourism-based reports were last produced by the Central Bureau of Statistics (former Neth.-Antilles) during the Winter of 1997-1998 and later in 2002/2003 via a collaborative effort of the St. Maarten Tourist Bureau (STB), St. Maarten Hospitality Trade Association (SHTA) and Caribbean Tourism Organization (CTO).

In 2013, following a lengthy hiatus, the Tourism Exit Survey(TES) was launched as a joint collaboration between the Department of Statistics (STAT) and STB.

Objectives

Key Objectives of the Tourism Exit Survey include:

1. Collect data from visiting tourists to determine:

- Social characteristics
- Expenditure patterns
- Travel planning & on-island activities
- Experience & Satisfaction levels while on St. Maarten

2. Generate useful tourism-related statistics, to support policy development & marketing programs for the tourism market.

3. Enable STAT to provide detailed tourist expenditure data as input for the Macro-Economic model & trend analysis for economic monitoring.

Coverage

The TES 2013 covers a sample of all tourists visiting St. Maarten and departing by either cruise vessel or aircraft. 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. Individuals that are residing on St. Maarten / St. Martin one year or longer will be excluded from the survey. Due to the geographical location and size of St. Maarten / St. Martin, in this report all tourists are viewed as international visitors. These international visitors also include nationals residing permanently abroad.

Methodology

The Tourism Exit Survey is a quarterly survey conducted during the final month of each quarter. The survey period lasts for 8 days, starting on the third Saturday until the last Saturday within that month.

During 2013, data-collection was carried out in March, June & December, representing both the High & Low tourist-seasons. Due to organizational constraints, no fieldwork took place in September of 2013.

Survey Organization

The survey's target group is approached at both the Port of St. Maarten and at departure gates of the Princess Juliana International Airport (PJIA).

Questionnaires were filled-in either directly by respondents or by an interviewer. Interviewers were tasked with reviewing all collected questionnaires for correctness and possible non-response. Prior to the execution of the survey, interviewers received intensive training by STAT staff. The training included how to identify and make contact with tourists, as well as how to record responses and terminate the interview. Above all, interviewers were trained on the importance of following instructions and procedures for the interviews.

Measurement Scales and Surveys

This study employed a casual research design using several questions, which have been utilized by prior Tourists Expenditure Surveys on the island and within the region. STAT together with colleagues from St. Maarten's Tourism Bureau and the Economic Policy Department evaluated the questions and made relevant adjustments for a final questionnaire. During 2013 the questionnaire was available only in the English Language.

It consists of four sections pertaining to visitor Travel activities, Satisfaction ratings, Travel expenditures, and General (demographic) information. Prior to the first field conduct the questionnaire was tested during a pilot survey and necessary revisions were made. For training purposes, a manual was prepared for interviewers on survey procedures.

Concepts and Definitions

The aim of the following section is to provide a list of the most used tourist-related definitions as provided by the World Tourism Organization and used in this study.

Tourism

Tourism is defined as the activities of person(s) (referred to as visitors) 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 (WTO, 2001)

Thus persons working on St. Maarten and receiving remuneration from within the island have been excluded. Convention visitors, business people, shopping tourists, excursionists were all included in the population.

Prior to the dissolution of the Netherlands Antilles, individuals visiting from islands within the Federation were considered domestic tourists. However, within this survey these former "so called domestic tourists" are treated as regional tourists.

Purpose of the visit

The main purpose of a visit refers to the reasons for which the trip was taken, or the destination was visited. Tourists are individuals who travel for leisure, recreation and holidays. Therefore it follows that these individuals often leave the usual environment where they live and work. As a consequence, a business or commercial traveler may or may not be a tourist, according to the place from where he/she is paid and how he/she undertakes his/her activity. Determining the purpose of visit or the reason upon which the trip was taken to the given destination(s), distinguishes the type of visitor and what attracted them to the destination.

Accommodation

The available space for occupants in a facility, such as a room, group of rooms, or building in which someone may live or stay. In reference to tourism, these facilities provide lodging for overnight occupants.

Expenditures

Included in this survey were expenditure made by a visitor or on behalf of a visitor for and during the trip while on the island of St. Maarten. Prepaid package costs were included in the data for both cruise and air travelers.

In this survey, tourism consumption encompasses all visitor consumption transactions excluding:

- Purchases for commercial purposes
- Capital investments or transactions
- Non-payment transactions that does not represent the transfer of money for goods or services, such as financial gifts and loans to family or friends, and donations.

Tourist Satisfaction

Tourist satisfaction is defined as the tourist's emotional state after experiencing the trip (Baker and Crompton, 2000). Customer satisfaction is significant to achieve loyalty not only in physical products, but also in tourism context when visitors intend to revisit the same destination, or another within the same country.

It is generally known in tourism that a high quality of service would result in tourist satisfaction, create a positive word-of-mouth and lead to repeat visits. This in turn affects suppliers' financial performance in the tourism industry (A.P. Mat Som & M. Bader Badarneh, 2011).

Non-response

Non-response refers to a tourist who declines to participate in the survey or does not complete the survey sufficiently. The degree of non-response bias depends essentially on two factors: the percentage of the sample not responding and the extent to which non-responders differ systematically from the study population (S. Barclay, C. Todd, I. Finlay, G. Grande, and P. Wyatt; 2002). Purpose for not successfully participating in the survey may arise due to the following reasons:

- The perceived salience of the subject matter is a strong predictor of response.

- Many potential respondents perceive a rising tide of questions that they are too busy to complete.
- Communication problems with the potential participant.

Sampling Methodology

Sampling Design

A goal of this survey is to accumulate data on various segments within St. Maarten's tourism market. In regards to this particular survey it aims to segment the air and cruise passenger tourism market. This suggests, the use of a stratified sampling procedure, would be appropriate in gathering data. Daniel (2012) defines stratified sampling as a probability sampling procedure in which it 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. This sampling procedure is also sometimes referred to as "quota random sampling" (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 is implemented. This research will utilize the within-strata sub-type sampling method for TES 2013.

During the surveying period proportionate allocation may not yield a sufficient number of cases for such detailed analyses. Thus, within-strata sub-type sampling method offers 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. However, there may still be a sufficient number of cases to carry out the within-strata analyses required by the study's objectives.

The following steps are made:

A. Identify the target population. The targeted population is tourists visiting by cruise for at least 1 hour and via air transport for at least one day (24hrs); but will be on-island for less than 1 year. Respondents must be 18 or older.

B. Stratums are determined by grouping countries into regions by using the proportional population of visitors distributed over the five most-popular source markets. Example is the North American region (consisting of the USA and Canada) which hold 60 % market share.
C. The sample of visitors per stratum is randomly selected.

Sample Size

Sampling is a strategy used to select elements from a population. 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.

A confidence interval is an estimate + or - the margin of error. The margin of error shows how accurate we believe our guess is, based on the variability of the estimate. For a confidence interval, the margin of error is: $z_{\alpha/2} * \sigma/\sqrt{n}$. The expression has $\mathbf{z_{\alpha/2}}$ and σ in the numerator $\sqrt{\mathbf{n}}$ in the denominator.

So the margin of error gets smaller when:

- z gets smaller
- σ gets smaller
- n gets larger

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

Sample size formula: $\boldsymbol{n} = (\frac{z_{\alpha/2} * \boldsymbol{\sigma}}{\boldsymbol{E}})^{\mathbf{2}}$; for the maximum error E of estimate where $\boldsymbol{\sigma}$ is known. When $\boldsymbol{\sigma}$ is unknown we replace it with $\mathbf{p} * \mathbf{q}$ and population is known $\mathbf{N}$. Then the Sample Size formula is (Krejcie & Morgen, 1970) (see Appendix 4.2 B).

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

Using the above method TES sample size was calculated where the standard deviation was set at 1.96 with a 97% level of confidence. An extremely high level of confidence was used to combat the chances of not meeting the sample quota, particularly during the low tourism season (May – October). The sample size for this report was based on the below calculations used to determine the sample size for the cruise and stay-over tourism where:

P = confidence level

d = degree of accuracy

N = target Population of 2012.

Stay-Over tourism sample calculation

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

$p = \quad 0.5$

$q = \quad 1 - p$

$d = \quad 0.03$

$N = \quad 456{,}720 \ (\boldsymbol{target\ population\ of}\ 2012)$

$X^2 = 3.84\ (.03\ \boldsymbol{level} = 97\%\ \boldsymbol{confidence\ level})$ **Chi-square @ d.f.= 1**

$n = 1066\ \boldsymbol{total\ AT}$

Cruise tourism arrivals sample calculation

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

$$p = \quad 0.5$$
$$q = \quad 1 - p$$
$$d = \quad degree\ of\ accuracy = 0.03$$
$$N = \quad 1,753,215\ (target\ population\ of\ 2012)$$

$X^2 = 3.84\ (.03\ level = 97\%\ confidence\ level)$ `Chi-square @ d.f.= 1`

$$n = 4233\ total\ AT$$

Response Rate

During the 2012 tourism season it was estimated that 2,209,935 tourists visited the island of St. Maarten through cruise and air transportation. Of which, there were 1,753,215 cruise visitors and 456,720 visitors by air. Using the total number of tourists in 2012, as the population from which to calculate the sample size for the survey, it was estimated that at a 3% significance level, the sample size for the cruise and air tourism surveys were 1065 and 1066 respectively per quarter. The 2013 surveying periods yielded 3235 complete & valid responses. (see table 1).

Table 1

Items	Population Size 2012	Sample Size per quarter	Total Completed Survey Forms 2013	Representing Total # of Individuals	Significance Level at 5%
Airport Exit Survey	456,720	1,065	2,403	6,718	0.019
Cruise Exit Survey	1,753,215	1,066	832	3,900	0.03

*Sample size is calculated at 0.03 significance level

Based on the responses, shown in table 2, it is clear that on an aggregated level the survey was able to achieve a response-rate that is an adequate representation of the tourist population for 2013, more so than on a quarterly basis. Throughout the surveying periods response rates for the cruise survey lagged behind that of the Stay-over visitor survey significantly.

Table 2

Quarterly	Cruise survey		Stay-Over Visitor survey	
	Survey response	Response rate	Survey response	Response rate
1	509	48%	714	67%
2	113	11%	973	91%
4	210	20%	743	70%

Limitations

This research provided insight into the tourism market of St. Maarten in relations to the development of a tourist profile, their activities and expenditures. However, these results are not without the following limitations.

First, although the study was scheduled to be administered every last week of every quarter within 2013, during the third quarter no data-collection was conducted; as such the results does not reflect patterns during the second half of the low season specifically.

Secondly, the required sample size for both airport and cruise arrivals was not always met per quarter, particularly for cruise tourism. This was due mainly to the fact that cruise passengers allocated very limited time whilst on their way back to the ships, to stop and participate. Other factors such as limited seating at the Cruise Terminal and length of the questionnaire were cited as reasons for non-willingness.

Development of an online version of the survey is being considered to accommodate cruise visitors with lack of time.

Results of Tourism Exit Survey 2013

Visitors Departing by Cruise Vessel

By Shannon Richardson

Summary of Results

Majority of respondents were reached during the high season (86%) as compared to the low season (14%). The largest group of respondents were from North America (56%), 47% United States and 9% Canada.

More than half (52%) were 1st time Caribbean cruise visitors. Moreover, 67% of respondents indicated this trip was their first to St. Maarten. Further analysis revealed that 68% of the first time St. Maarten visitors were also 1st time Caribbean cruise visitors.

Approximately, 92% of respondents indicated they will most likely recommend the island and 88% were likely to return.

Most respondents were married (54%) or single (33%), traveling within groups consisting of 'Family and Friends' (34%), consisting on average of 4 persons, and with most members within the age range of 15 – 29 (28%) and 30 – 39 (20%).

When respondents were asked what were their main source of influence in taking a cruise, the bulk responded with 'Friends / Relatives' (37%), followed by 'Travel Agents' (22.5%). The presence of St. Maarten on the cruise itinerary interestingly did have an influence on 58% of respondents to take the cruise.

26% of respondents, have a household income of $100,000 and above. Of these responses, 34% were 'North Americans' followed by 'Europeans' (20%) and 'Other' nations (20%).

Respondents indicated Philipsburg to be the most visited area (46%). The second and third most visited locations were Marigot (19%) and Orient Beach (14%).

As for activities, going to the 'Beaches' was their most favorite activity (68%). Following were 'Shopping' (61%) and Sightseeing (60%).

Average daily expenses (ADE) for responding cruise visitors were $155.04. Respondents residing in the Caribbean were the largest spenders of all regions with an ADE per person of $168.56. In general 30% of all respondents' expenditures were spent on transportation services (30%). Car Rentals were the primary source of transportation expenditures (14%). 'Shopping' and 'Tours & Excursions' were the *second and third largest expense categories, 14% and 13% respectively. It was further observed that during the high season respondents residing in Central America had the largest expenditures with an ADE of $159.13. Whereas, during the low season Europeans were the highest spenders with an ADE of $287.30.*

Majority of respondents (72%) used traveler's cheques for their purchases, whereas the three major credit cards American Express (68%), Master Card (61%), and Visa (56%) were also a significant source of funds.

As a final gauge of tourists' satisfaction, respondents were polled to assess their expectation levels. 57% indicated their expectations matched experience, 37% stated their experience were above expectations, and only 3% pointed to an experience that was below their expectations.

Demographic Characteristics

Global Tourism Developments

Worldwide, international tourist arrivals grew by 5% in 2013, reaching a record 1,087 million arrivals, according to the UNWTO World Tourism Barometer. Despite global economic challenges, international tourism results were well above expectations, with an additional 52 million international tourists travelling the world in 2013. For 2014, UNWTO forecasts 4 to 4.5% growth - again, above the long-term projections.

In 2013 the Americas saw an increase of six million arrivals (+4%), reaching a total of 169 million. Leading growth were destinations in North and Central America (+4% each), while South America (+2%) and the Caribbean (+1%) showed some slowdown as compared to 2012.[1]

This section seeks to conceptualize the tourist profile by viewing the TES results. During the 2013 cruise season, data from the St. Maarten Port Authority indicated that 631 cruise vessels called at St. Maarten of which 1,785,670 cruise passengers entered the port (Table A1). The results for 2013 show a slight increase in cruise tourism with 5.5% growth in cruise vessel arrivals and 1.5% growth in cruise passengers disembarking unto the island.

The 2012 – 2013 data indicates an increase in cruise vessel arrivals of 4.9% and 7.5% in high and low seasons respectively. A comparison between the cruise passenger arrivals for 2012 – 2013 also showed a gradual increase of 1.2% and 2.2% in high and low seasons respectively.

[1] *http://media.unwto.org/press-release/2013-12-12/international-tourism-engine-economic-recovery*

TABLES A1

CRUISE PASSENGER ARRIVALS

Cruise Passenger arrivals	2012	2013	% change 2013/2012
Quarter 1	733,528	683,457	-6.83%
Quarter 2	337,963	335,601	-0.70%
Half year	***1,071,491***	***1,019,058***	***-4.89%***
Quarter 3	216,861	235,551	8.62%
Third quarter developments	1,288,352	*1,254,609*	-2.62%
Quarter 4	464,863	531,061	14.24%
Year	***1,753,215***	***1,785,670***	***1.85%***
High Season	***1,198,391***	***1,214,139***	***1.15%***
Low Season	***554,824***	***571,152***	***2.94%***

TABLE A2

CRUISE VESSELS ARRIVALS

Cruise vessel arrivals	2012	2013	% change 2013/2012
Quarter 1	266	276	3.76%
Quarter 2	99	100	1.01%
Half year	***365***	***376***	***3.01%***
Quarter 3	47	58	23.40%
Third quarter developments	412	*434*	*5.34%*
Quarter 4	184	197	7.07%
Year	***596***	***631***	***5.87%***
High Season	***450***	***473***	***4.88%***
Low Season	***146***	***158***	***7.54%***

Of the 1,785,670 cruise passengers arriving through the Port of St. Maarten in 2013, 832 Tourism-Exit forms were completed which accounted for 3,900 tourists (<1% of cruise arrival population). Evident from previous years North Americans represented the majority of sampled tourists, completing 462 (56%) forms, which represents 2,059 individuals. 'USA' accounted for 47% and 'Canada' 9% of respondents. 'Europeans' are the second highest ranked responders, representing 20% of forms and 16% of individuals, in 'Latin America' 11% (combining Central and South America) representing 14% of individuals, with the

'Caribbean' and 'Other' regions representing 10% of forms and 11% individuals (see table A3 and A4). Chart A1 indicates the vessels from which most tourists were surveyed.

TABLE A3

COMPLETED FORMS BY REGION

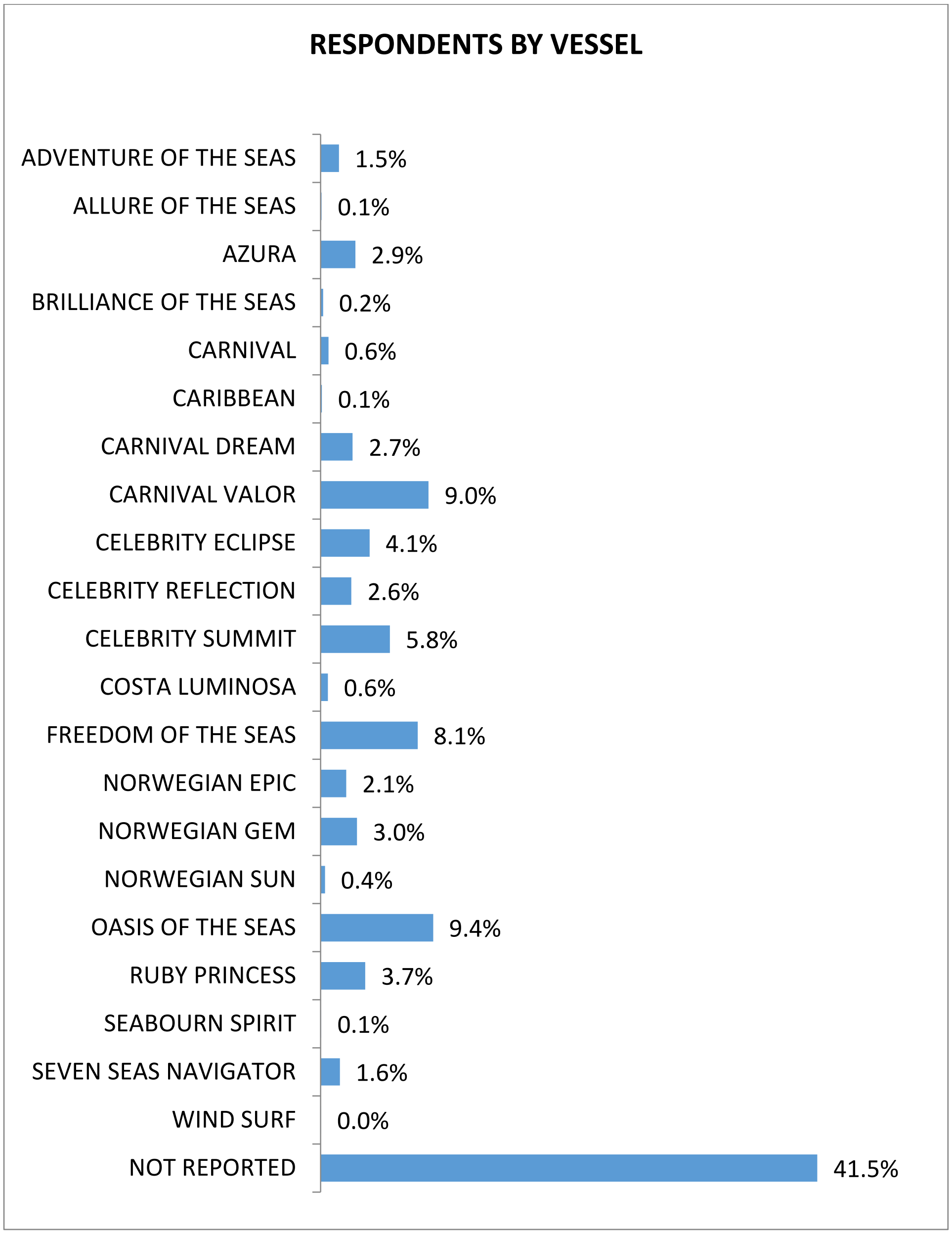
Region	RANK	% of Respondents	Number of Respondents
United States	1	47%	389
Europe	2	20%	164
Caribbean	3	10%	81
Canada	4	9%	73
South America	5	6%	48
Central America	6	5%	45
Other	7	1%	10
Not reported		3%	22
Grand Total		**100%**	**832**

TABLE A4

REPRESENTED INDIVIDUALS BY REGION

Region	RANK	% of Individuals	Number of Individuals
United States	1	45%	1769
Europe	2	16%	626
Caribbean	3	11%	425
Central America	4	8%	300
Canada	5	7%	290
South America	6	7%	254
Other	7	1%	57
Not reported		5%	180
Grand Total		**100%**	**3900**

Chart A1



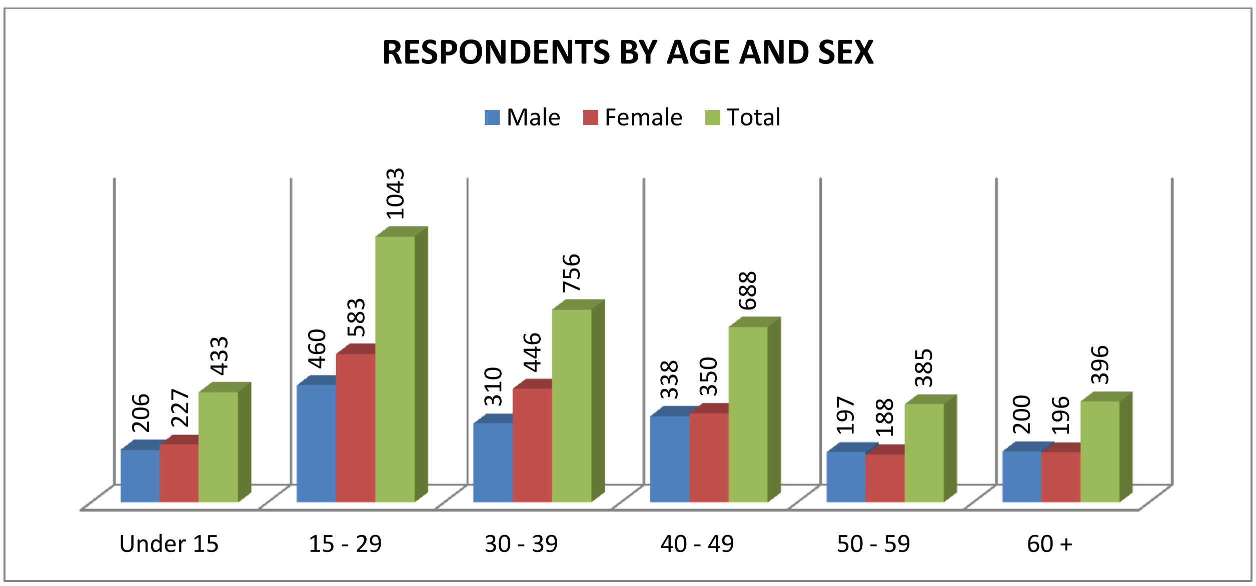
RESPONDENTS BY VESSEL
ADVENTURE OF THE SEAS 1.5%
ALLURE OF THE SEAS 0.1%
AZURA 2.9%
BRILLIANCE OF THE SEAS 0.2%
CARNIVAL 0.6%
CARIBBEAN 0.1%
CARNIVAL DREAM 2.7%
CARNIVAL VALOR 9.0%
CELEBRITY ECLIPSE 4.1%
CELEBRITY REFLECTION 2.6%
CELEBRITY SUMMIT 5.8%
COSTA LUMINOSA 0.6%
FREEDOM OF THE SEAS 8.1%
NORWEGIAN EPIC 2.1%
NORWEGIAN GEM 3.0%
NORWEGIAN SUN 0.4%
OASIS OF THE SEAS 9.4%
RUBY PRINCESS 3.7%
SEABOURN SPIRIT 0.1%
SEVEN SEAS NAVIGATOR 1.6%
WIND SURF 0.0%
NOT REPORTED 41.5%

Cruise Visitor Profile

In 2013, a record 21.3 million passengers are estimated to have cruised globally[2]. During the 2013 cruising year, 631 different cruise vessels made a stop at the Port of St. Maarten harbor, from which survey respondents where gathered from twenty-one of these vessels. Cruise passengers disembarking on St. Maarten primarily indicated that their main purpose for a Caribbean cruise was for vacation.

As expected the age dispersion of cruise travelers varies greatly, largely due to mixed groups of families, friends, or a combination of both. Chart A2 gives an indication of the gender and age range of respondents. It is quite visible that the majority of respondents fall within the age-group 15 -29 years. Nonetheless, this group is followed by 30-39 year olds and persons aged 40-49.

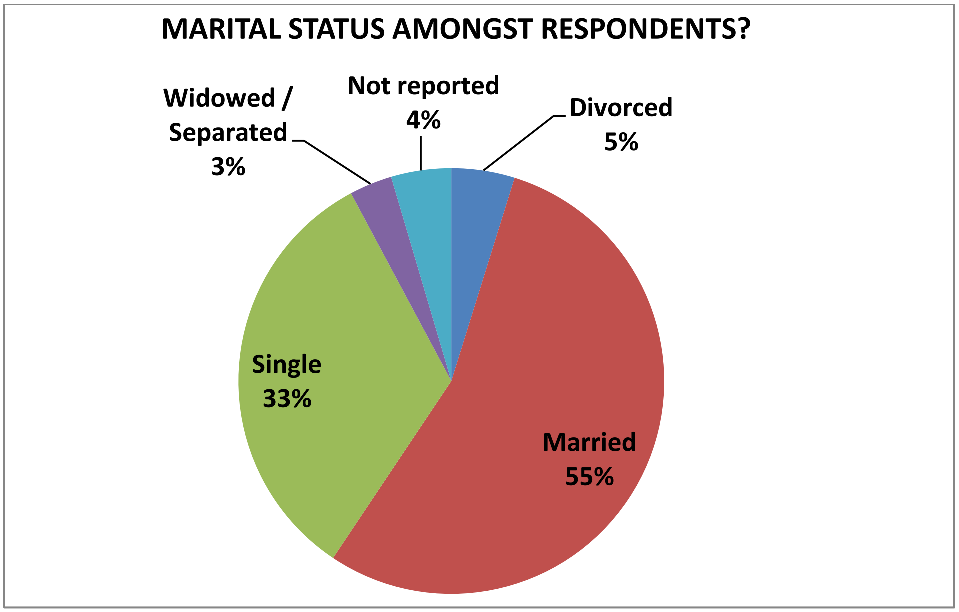
Chart A2



[2] http://www.f-cca.com/downloads/2014-Cruise-Industry-Overview-and-Statistics.pdf

As it regards marital status, 88% of respondents were either married (55%) or single (33%). While the remaining 12% were split between Divorced (5%), Widowed/separated (4%), and non-response (3%) (see Chart A3).

Chart A3



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 more than a quarter of respondents (see chart A4).

The second largest household income group is households earning US$ 30,001 – US$ 50,000 (16%). Interestingly, there are two categories considered the third largest household income group namely US$ 50,001 – US$ 75,000 and US$ 75,001 – US$ 100,000 . Both representing 13%. This suggests that 26% of respondents has an annual household income between US$ 50,001 and US$ 100,000.

It is noteworthy to mention that majority of the respondents who had an annual income of US$ 100,000 and greater were North Americans (35%) followed by Europeans (21%) (see chart A5).

Chart A4

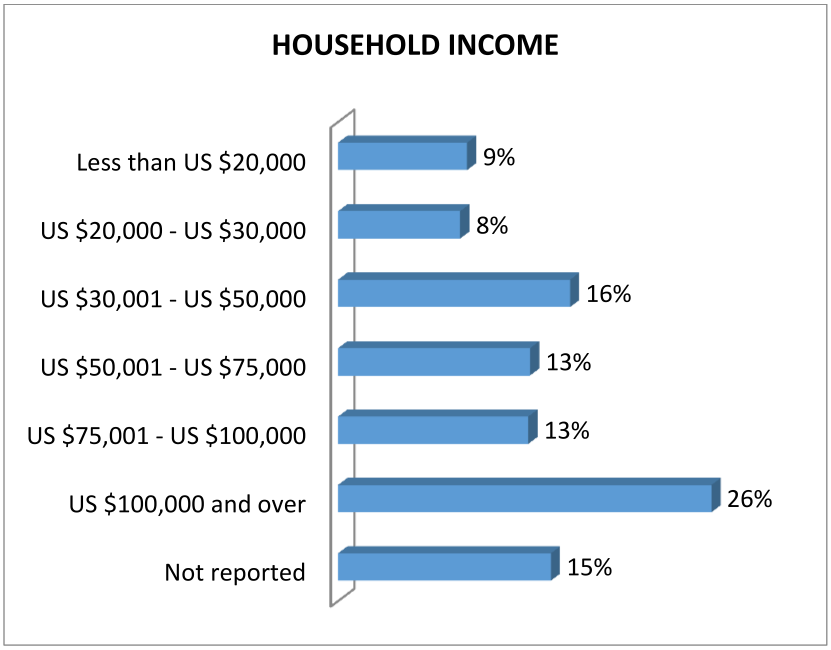
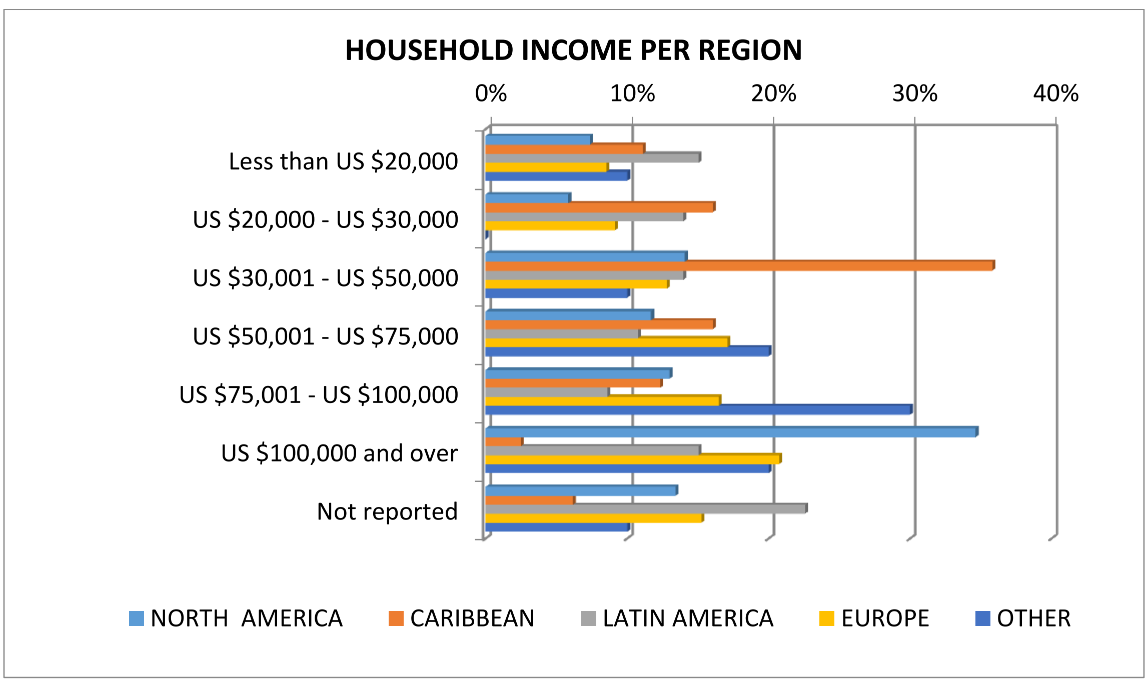


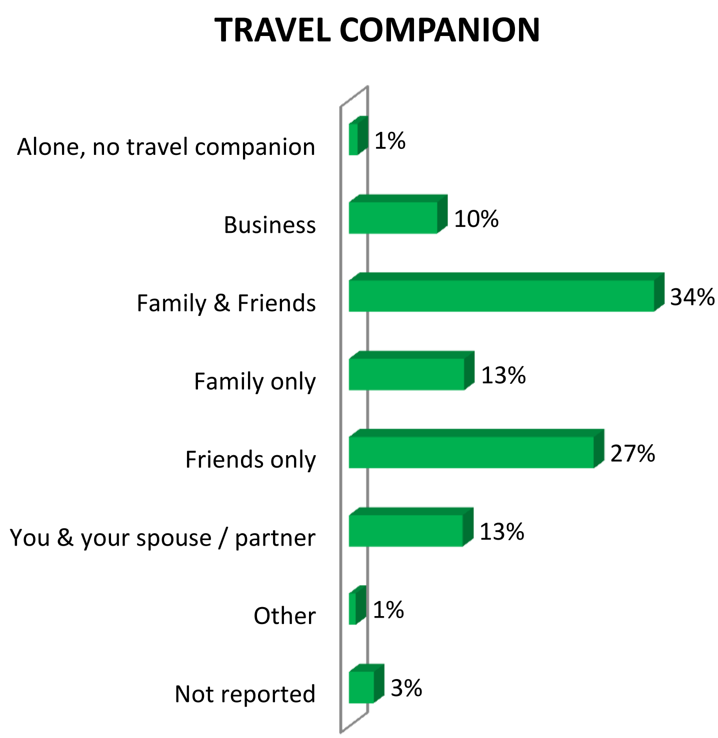
Chart A5



Travel companion

Recent trends show that cruise passengers often travel largely in groups of family, friends, or both. The results indicate that respondents travelled mainly in groups that consist of 'Family and Friends' (34%) or 'Friends' (27%). While 34% of respondents travelled in a mix group of family and friends, 13% travelled with their significant other or family only, and 10% travelled with business colleagues (see chart A6).

Chart A6



After ranking travel parties according to their region of residence the results show that most cruise tourists residing particularly in North America, Latin America and Europe, travel primarily with family and friends. Individuals from the Caribbean usually travel with friends.

Responses were further segmented to identify possible patterns due to seasonality within the 2013 tourism year. The results indicate that during the high season (December – April) cruise tourists were likely to travel in groups consisting of family and friends primarily, whereas during the low season (April – November) most passenger groups embarking on St. Maarten were Friends only (see table A5).

Table A5

TRAVEL GROUP ARRANGEMENT

	HIGH SEASON			LOW SEASON		
	NORTH AMERICA	OTHER COUNTRIES	TOTAL	NORTH AMERICA	OTHER COUNTRIES	TOTAL
Alone, no travel companion	1%	1%	1%	0%	0%	0%
Business	10%	12%	11%	2%	7%	7%
Family & Friends	**37%**	**37%**	**37%**	**25%**	**18%**	**18%**
Family only	12%	10%	11%	9%	6%	7%
Friends only	**24%**	**26%**	**25%**	**47%**	**48%**	**50%**
You & your spouse / partner	2%	2%	2%	1%	5%	2%
Other	1%	1%	1%	0%	1%	1%
Not reported	13%	12%	13%	16%	15%	15%
Grand Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Visits

Majority of the respondents (52%) indicated that this was their first Caribbean cruise, which means that 48% have been on a cruise prior. Moreover, 19% indicated to have been on a cruise once prior to this, 26% indicated twice, 16% three times and 33% of the respondents have been on four or more Caribbean cruises (see chart A8).

Both high and low seasons showed similar patterns except for persons indicating five or more previous visits.

Chart A7

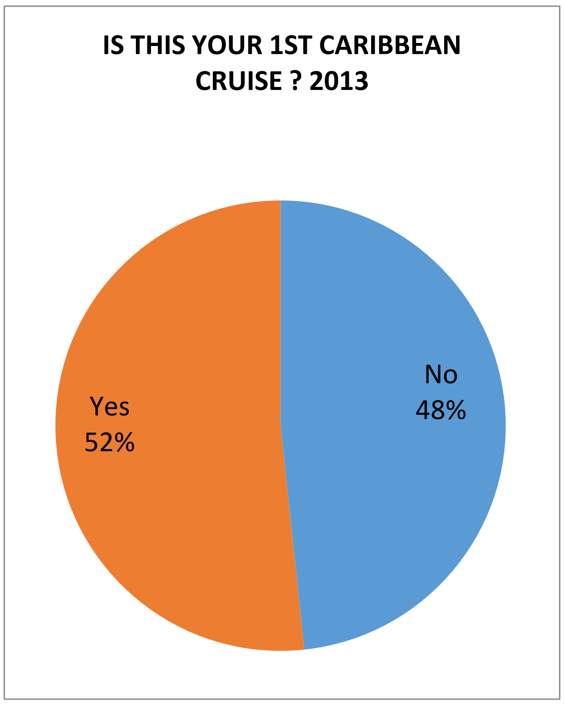
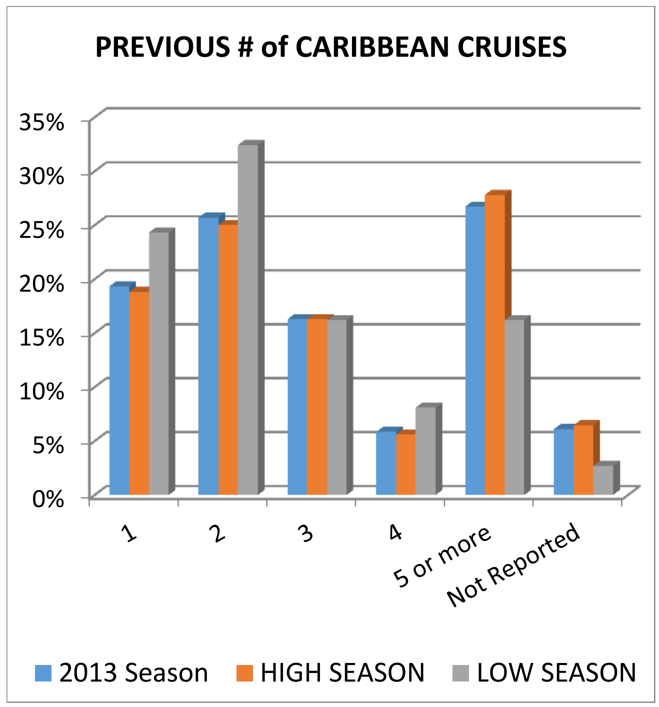
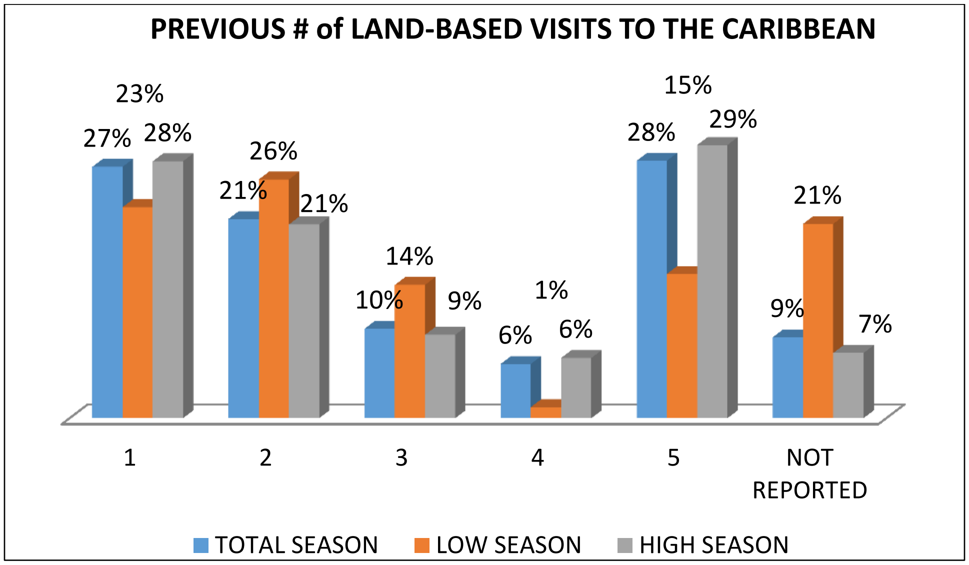


Chart A8



Apart from cruising, 33% of respondents indicated to have previously visited the Caribbean via airline carriers. Of these, 70% have visited the Caribbean between one to three times. Chart A9 displays the seasonal variations in their responses to this question.

Chart A9



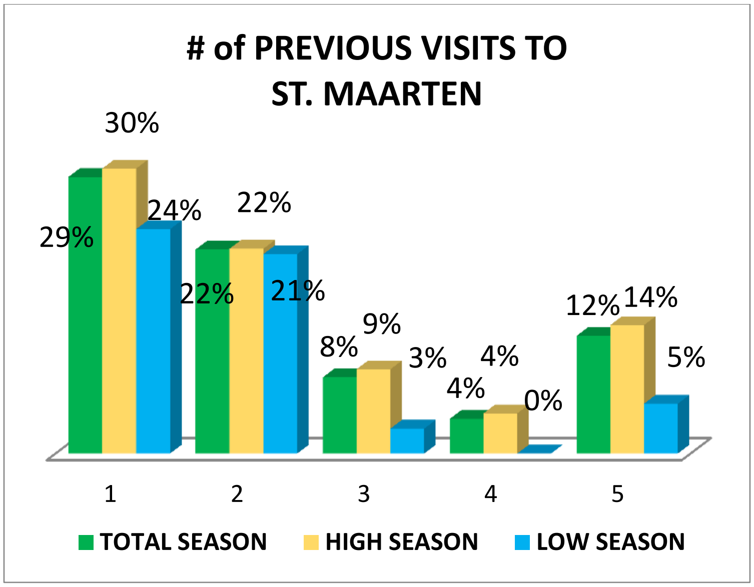
To determine the degree to which cruise tourism brings new tourists to St. Maarten, respondents were also asked on whether they have previously visited St. Maarten. Table A7 displays a crosstab between responses of first time Caribbean cruisers and first time St. Maarten visitors.

Table A7

1st CARIBBEAN vs. 1st ST.MAARTEN CRUISE

	1st CARIBBEAN CRUISE		
1st ST. MAARTEN CRUISE	**No**	**Yes**	**Grand Total**
No	212.0	48.0	260.0
Not reported	9.0	5.0	14.0
Yes	181.0	377.0	558.0
Grand Total	**402.0**	**430.0**	**832.0**

Chart A10



The results show that for 67% of respondents, this was their first visit to St. Maarten, whereas 31% were returning visitors. Of the latter, the majority had visited St. Maarten/St. Martin once (29%), followed by twice (8%), four and five or more times (16%), with the least returning visitors at 3 times (8%) (chart A10). Additionally, 68% were also new visitors to the Caribbean.

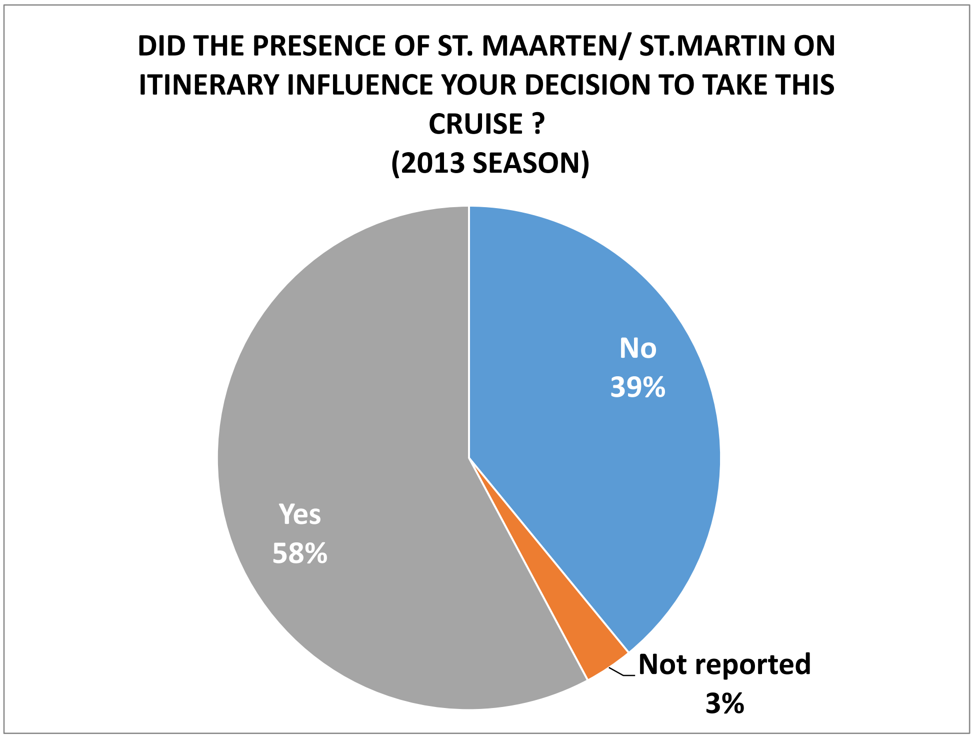
The results were further segmented based on returning visitors' region of residency. The Table A8 below displays that of the respondents, Canadians (44%) were the largest number of returning visitors to St. Maarten. Although lesser in absolute number, South Americans (31%) followed, as well as Caribbean (30%), United States and Europeans (29%).

Table A8

Region	Return cruiser	Total	Weighted % of respondents	RANK
Canada	32	73	**44%**	1
United States	114	389	29%	4
Caribbean	24	81	30%	3
Europe	48	164	29%	5
South America	15	48	31%	2
Central America	6	45	13%	7
Not reported	5	22	23%	6
Other	1	10	10%	8
Grand Total	**245**	**832**	**29%**	

To further understand visitors' attraction to St. Maarten, it was identified that approximately 58% of respondents insist that the presence of St. Maarten on the cruise itinerary had an influence on their purchase decision compared to 39% indicating the opposite (chart A11). Of the 832 respondents, results show 60% were influenced by St. Maarten on the itinerary, whereas 40% indicated to have not been influenced.

Chart A11

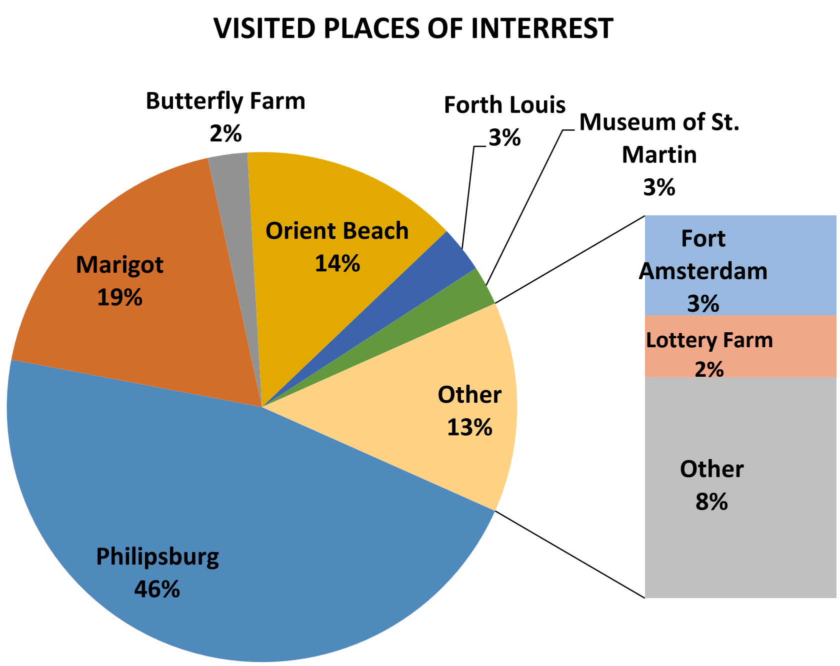


Travel Activities

Interest and Activities

With regards to 'places of interest' visited, majority indicated primarily visiting the capitals of both sides of the island, Philipsburg (46%) and Marigot (19%). Orient Bay ranked the third most visited area, with 14% of respondents indicating visiting this popular beach. Followed by a composite of options which provides 21% of responses (see chart B1).

Chart B1



The majority of cruise respondents indicated to have visited the island's beaches, which received the highest ranking score. Beaches were followed by shopping, sight-seeing, island tours, and dining. Gaming activities, such as gambling at local casinos, and boat trips were the least attractive to cruise respondents.

Table B2

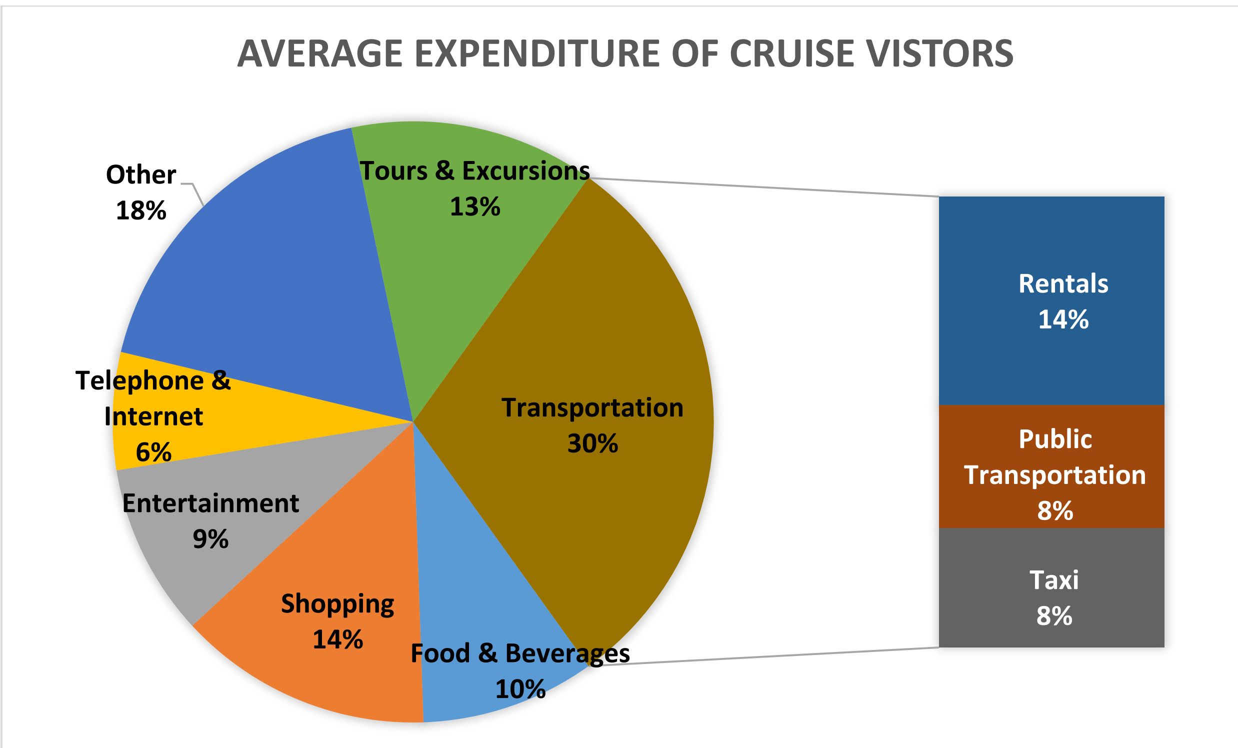
ACTIVITIES	RANK	PERCENTAGE %
Beaches	1	68%
Shopping	2	61%
Sightseeing	3	60%
Island Tour	4	24%
Dining	5	23%
Water Sports	6	22%
Boats Trips	7	11%
Casino Gaming	8	8%
Other	9	5%

Expenditure

Average Expenditure per Cruise Visitor

Average total expenditure per cruise passenger to St. Maarten during the cruise year of 2013 was calculated at US$ 155.04. "Other" purchases, accounted for the largest share of this expenditure (18.0%) [3]. Following was Shopping (14%), rental vehicles (14%), Tours/Excursions (13%), Food & Beverages (10%), Entertainment (9%) and Taxi (8%), Public transportation (8%), and Telephone & Internet access (6%), see chart C1.

Chart C1



Tables C1 and C2 display responses by region based on their average daily expenditures. Caribbean cruise visitors spent $168.56 per person with 61% of their expenses going towards Other Services ($31.15, 18%), Rentals ($28.56, 17%), Tours/Excursions ($25.59, 15%), and Food & Beverages ($16.74, 10%). In addition, Caribbean respondents had the highest expenditures in the latter three of the categories mentioned.

[3] Other purchases include expenditure on for example: Water sport activities, hotels

North America had the second highest average daily expenditure[4] (ADE) of $159.26 per person. North America consisted of both United States and Canada, which had an ADE of $162.91 and $140.66 respectively Their highest expenditures were in the category 'Other services'[5] ($31.90, 20%). In addition, North Americans also had leading expenditures in the categories of 'Other services'[6] ($31.90, 20%), followed by Telephone & Internet ($11.33, 7%).

Latin Americans spent an average of $157.16 with the bulk of their expenses attributed to shopping ($23.10, 15%). They had however the highest expenditures in the category of Transportation. With public transportation and car rental expenses averaging $18.13 and $19.19 respectively. European respondents ADE was $120.14 per person with the bulk of their purchases in the category of shopping ($22.39, 19%).

Table C1

Average Daily Expenditure (US $) per Visitor by Region

	United States	Canada	North America	Europe	Latin America	Caribbean	Total
Food & Beverages	$ 14.99	$ 13.22	$ 14.59	$ 12.61	$ 17.91	*$ 16.74*	$ 14.52
Shopping	$ 21.03	$ 22.10	$ 21.01	**$ 22.39**	*$ 23.10*	$ 20.50	$ 21.22
Tours & Excursions	$ 21.51	$ 17.26	$ 20.65	$ 20.54	$ 20.71	*$ 25.59*	$ 20.48
Rentals	$ 23.29	$ 16.92	$ 22.37	$ 8.63	$ 19.19	*$ 28.56*	$ 21.68
Public Transportation	$ 12.31	$ 8.46	$ 11.77	$ 8.63	*$ 18.13*	$ 15.58	$ 12.73
Taxi	$ 12.59	$ 12.54	$ 12.45	$ 12.14	*$ 13.81*	$ 12.04	$ 12.38
Entertainment	$ 12.43	$ 16.32	$ 13.18	$ 17.95	**$ 20.32**	$ 10.62	$ 14.39
Telephone & Internet	$ 12.07	$ 8.46	**$ 11.33**	$ 8.63	$ 9.60	$ 7.79	$ 9.80
Other	**$ 32.68**	**$ 25.38**	**$ 31.90**	$ 8.63	$ 14.39	**$ 31.15**	$ 27.84
Total	**$ 162.91**	**$ 140.66**	**$ 159.26**	**$ 120.14**	**$ 157.16**	**$ 168.56**	**$ 155.04**

[4] Average daily expenditure from here forth will be referred to ADE.
[5] Other represents a combination of activities not mentioned in the list presented
[6] Other represents a combination of activities not mentioned in the list presented

Table C2

Regions	Number of Forms	Number of Persons	Percentage
Canada	73	290	7%
United States	389	1769	45%
NORTH AMERICA	**462**	**2059**	**53%**
Caribbean	**81**	**425**	**11%**
Europe	**164**	**626**	**16%**
Central America	45	300	8%
South America	48	254	7%
LATIN AMERICA	**93**	**554**	**14%**
Other	10	57	1%
Not reported	22	180	5%
Grand Total	**832**	**3900**	**100%**

Average Daily Expenditure per Cruise Party

The average daily expenditure per travel party follows with a total average of 3.5 persons. The leading daily expenditure per party ($674.26) were Caribbean respondents, with an average party size of 4 persons. Following were respondents from the Latin American region with $630.69 ADE per party and an average of 4 persons. Third highest were North Americans with an average of $545.44 per party (United States $555.55 and Canada $492.32), and fourth were Europe ($419.76) (Table C3).

Table C3

Average Total Expenditure (US $) per Visit / per party by Region

	United States	*Canada*	North America	Europe	Latin America	Caribbean	Total	Total %
Food & Beverages	$ 51.13	$ 46.27	$ 49.98	$ 44.07	$ 71.88	$ 66.98	$ 51.38	9%
Shopping	$ 71.73	$ 77.35	$ 71.95	$ 78.21	$ 92.71	$ 82.01	$ 75.11	14%
Tours & Excursions	$ 73.36	$ 60.41	$ 70.71	$ 71.76	$ 83.10	$ 102.36	$ 72.49	13%
Rentals	$ 79.43	$ 59.22	$ 76.63	$ 30.15	$ 77.02	$ 114.22	$ 76.71	14%
Public Transportation	$ 41.99	$ 29.61	$ 40.32	$ 30.15	$ 72.74	$ 62.30	$ 45.03	8%
Taxi	$ 42.93	$ 43.91	$ 42.63	$ 42.40	$ 55.42	$ 48.14	$ 43.83	8%
Entertainment	$ 42.37	$ 57.11	$ 45.15	$ 62.71	$ 81.55	$ 42.48	$ 50.91	9%
Telephone & Internet	$ 41.16	$ 29.61	$ 38.80	$ 30.15	$ 38.51	$ 31.15	$ 34.69	6%
Other	$ 111.45	$ 88.83	$ 109.27	$ 30.15	$ 57.76	$ 124.61	$ 98.51	18%
Total	**$ 555.55**	**$ 492.32**	**$ 545.44**	**$ 419.76**	**$ 630.69**	**$ 674.26**	**$ 548.68**	**100%**

Table C4

Region	Average Party Size
United States	3.4
Canada	3.5
North America	3.4
Europe	3.5
Latin America	4.0
Caribbean	4.0
Total	**3.5**

Preferred Methods of Payments

Understanding consumer's payment preference is helpful in simplifying the purchasing process. Chart C2 indicates with a rating of '1.0' Traveler's cheques was the most widely used medium of payment, followed by the major credit card carriers such as American Express (rating 1.1), Master Card (rating 1.2), Visa (rating 1.4) and lastly cash.

Chart C2

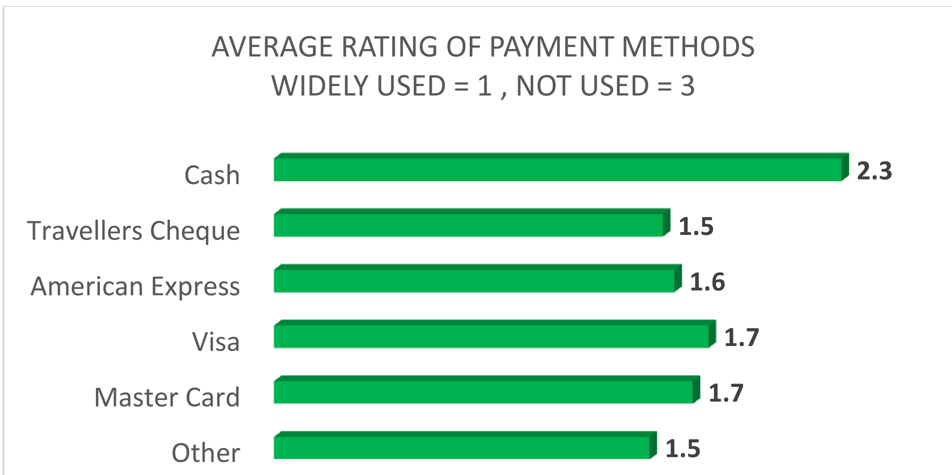


Table C5

	AVERAGE SCORE	Widely used	Sometimes used	Not used	RESPONSE SIGNIFICANCE
Cash	2.3	30%	15%	55%	96%
Travelers Cheque	1.5	72%	2%	26%	90%
American Express	1.6	68%	5%	27%	90%
Visa	1.7	56%	15%	29%	93%
MasterCard	1.7	61%	12%	27%	91%
Others	1.5	75%	1%	24%	16%

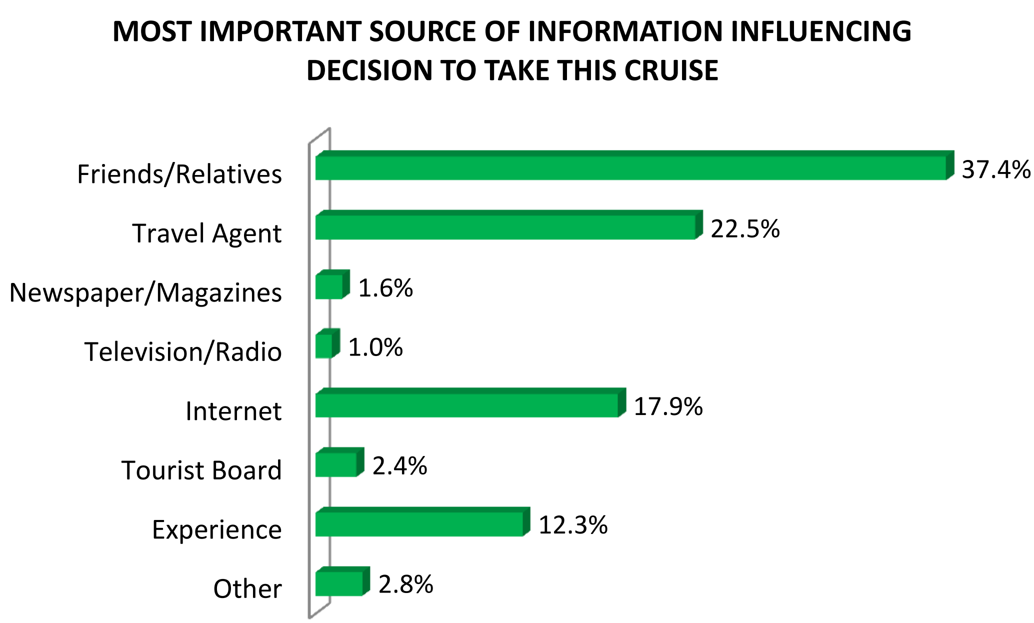
Satisfaction

Factors of Influence

Deciding to take a cruise is often a planned rather than an impulsive purchase. The survey aimed to identify the significant sources that influence respondents to take a cruise. A Likert scale of 1 'very important' to 5 'Unimportant' for each option was used, and the average for each category was calculated and presented.

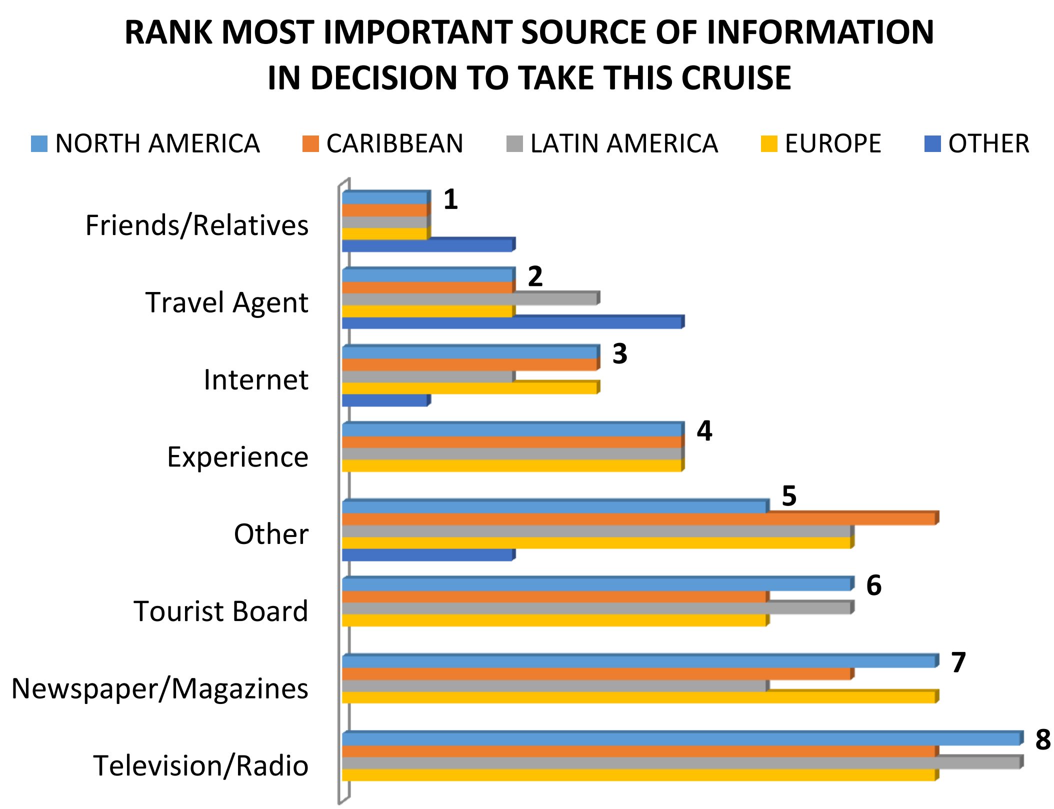
Furthermore cruise visitors were asked to rate the most influencing factor in deciding to take the cruise. Chart D1 illustrates Friends / Relatives (37%) was the most influential source of information. Travel agents (22.5%) shortly follows, Internet (17.9%), and personal experience (12.3%). However, the two least important factors were Television / Radio (1%) and Newspaper / Magazines (1.6%).

Chart D1



Persons residing in all regions besides the composite region of 'Other' relied on 'Friends and Relatives' for the bulk of support in the decision making process. Following were travel agents as the second most important information source for North Americans, Europeans, and Caribbean respondents. Latin Americans gravitate towards the internet for advice regarding their cruising decisions. The least attractive source for the North Americans, Latin American, and Caribbean regions were the Television / Radio, whereas Europeans ranked Television / Radio and Newspapers / Magazines as their least attractive choices.

Chart D2



Respondents were also asked to rate the importance of sources that may have influenced their activities while visiting St. Maarten/St. Martin. Chart D3 provides the average rating for each source. It shows that Friends / Relatives again played a significant role in behaviors of respondents. In addition, prior internet research also largely influenced the activities respondents performed while on-island.

Chart D3

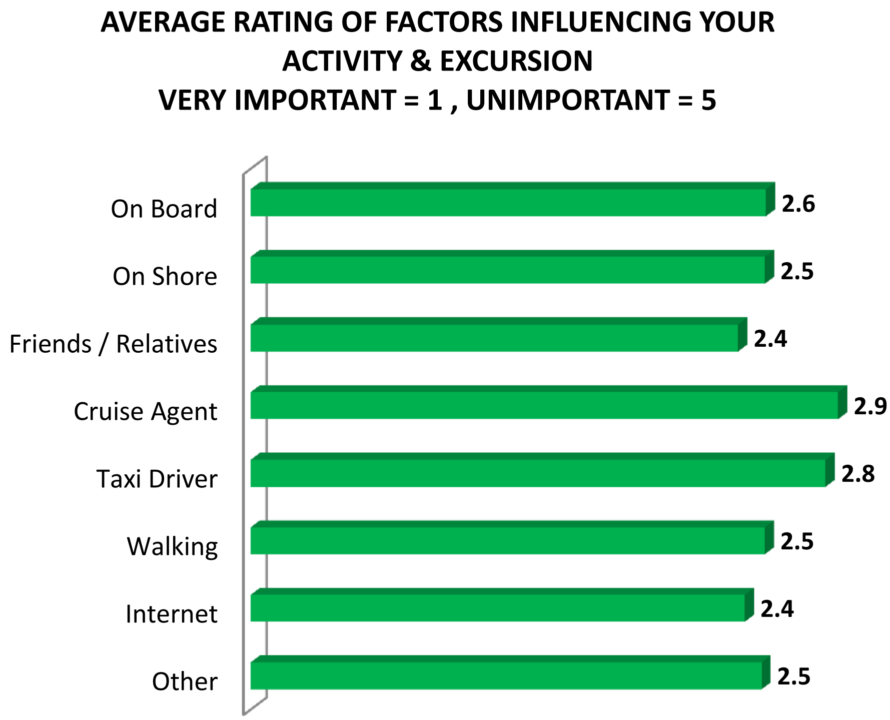


Table D1

AVERAGE RATING OF FACTORS INFLUENCING YOUR ACTIVITY & EXCURSION

VERY IMPORTANT = 100% , UNIMPORTANT = 0%

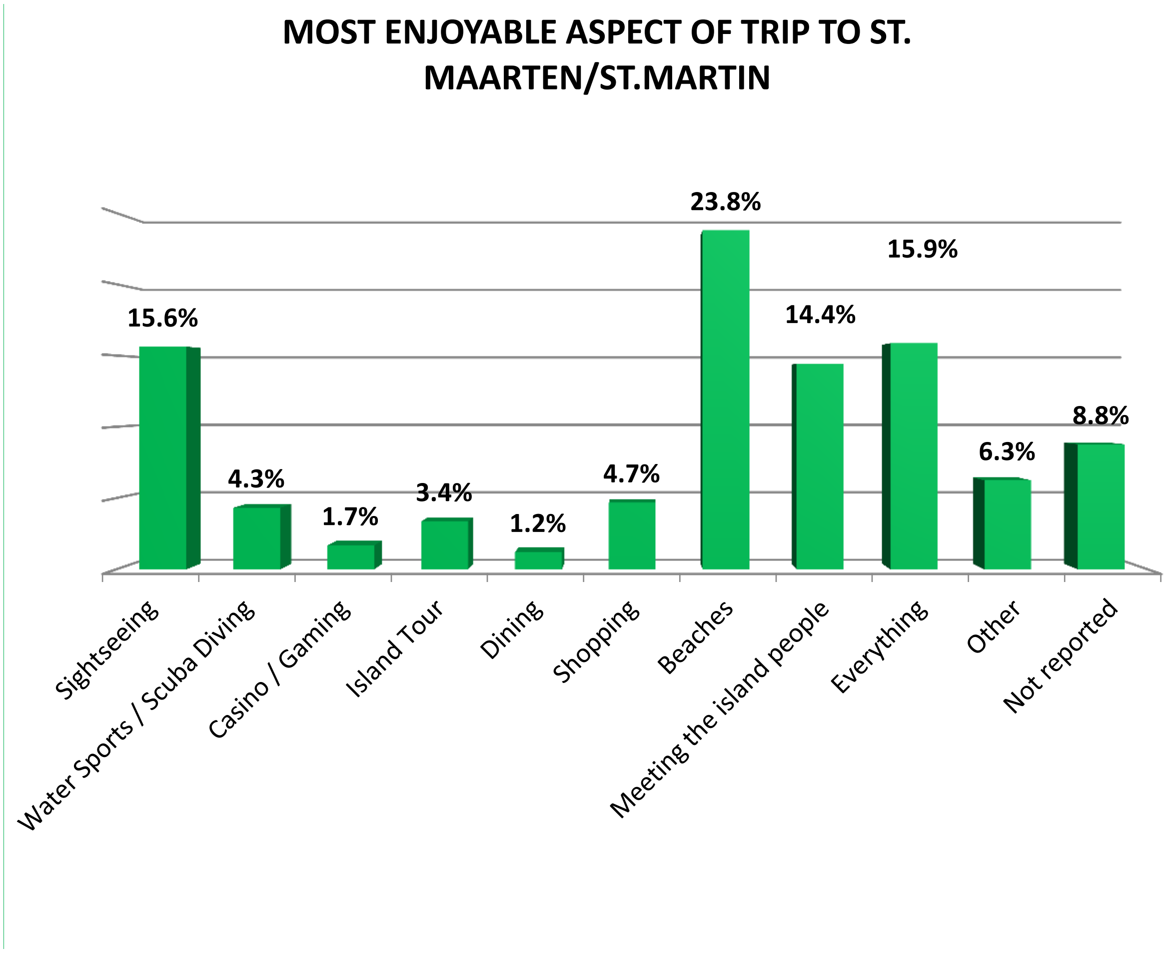
FACTORS	*RATING	SIGNIFICANCE %
On Board	2.6	78%
Walking	2.5	77%
On Shore	2.5	70%
Friends / Relatives	2.4	68%
Taxi Driver	2.8	64%
Cruise Agent	2.9	61%
Internet	2.4	16%
Other	2.5	4%

**The closer the rating is too 1 the more important respondents rated an option.*

Satisfaction and Experience ratings

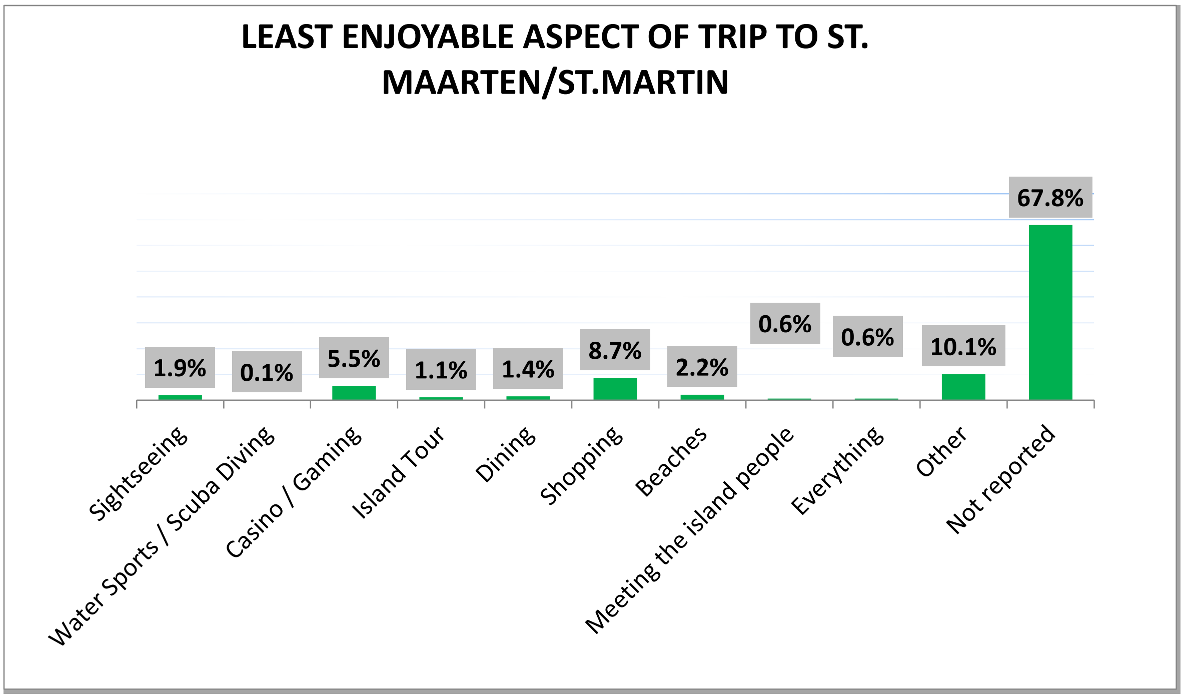
To determine cruise tourists' satisfaction level with St. Maarten's marketable aspects, respondents were asked to select the most enjoyable aspect of their visit. 'Beaches' (23.8%) took the number one spot, followed by the category labeled 'Everything' (15.9%), and 'Sightseeing' (15.6%). Living up to the St. Maarten slogan of "The Friendly Island", 14% of respondents enjoyed socializing with residents. Dining and Gambling had the lowest percentages at 1.2% and 1.7% respectively (chart D4).

Chart D4



Respondents were also asked to select the least enjoyable aspect of their visit. Given the majority of respondents leaving this category blank (67.8%), it is assumed that these visitors were well satisfied with their trip to St. Maarten. The categories "Other", "Shopping", and Casinos / Gambling were the highest rated 'least enjoyable aspects' by tourists.

Chart D5



The following charts show the Most and Least enjoyable aspects of respondents broken down by Region of Residence.

Chart D6

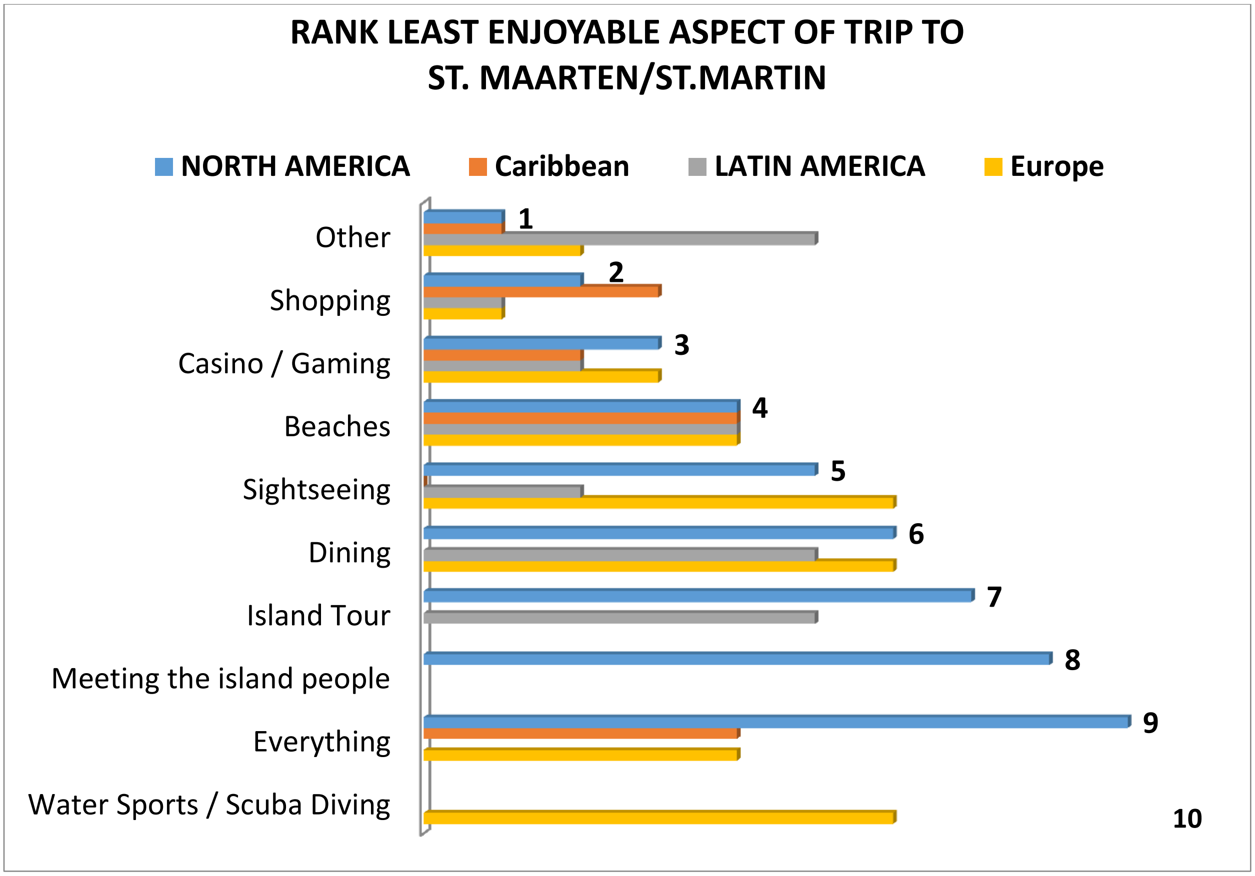
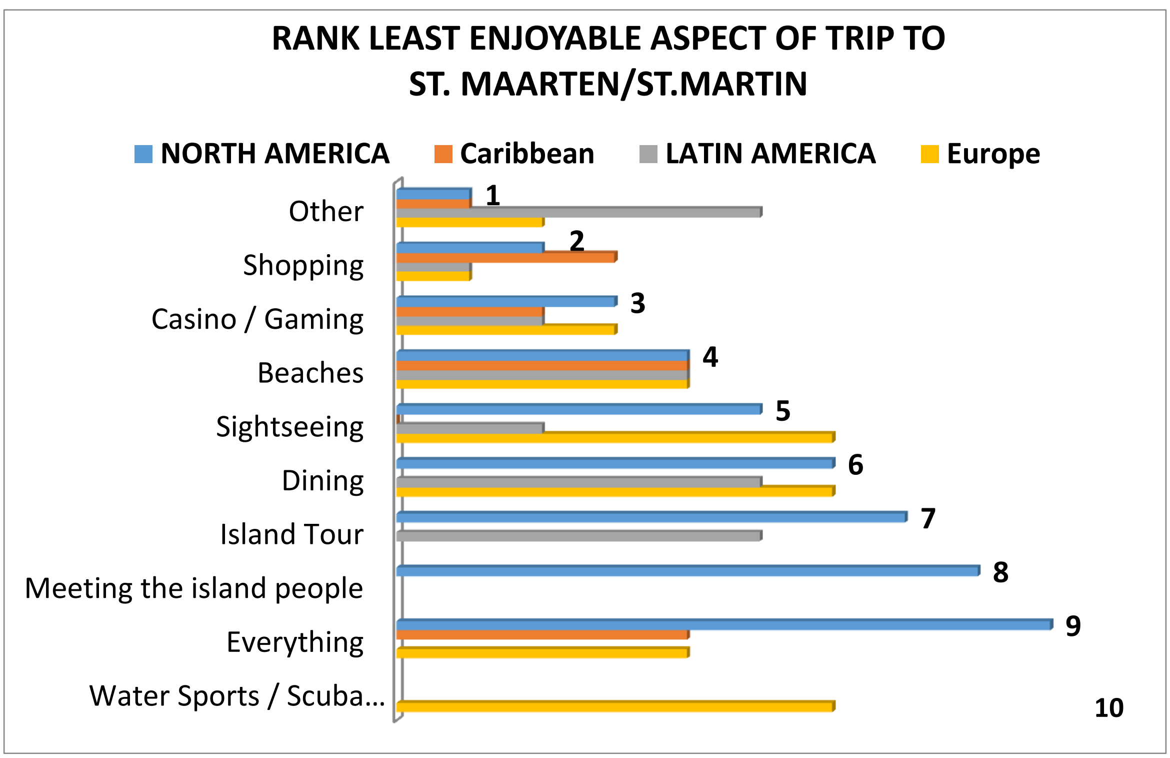


Chart D7



Satisfaction with Tourism Product

The difference between tourists' perceptions and expectations is one of the largest identifiers of their experience. The closer their positive perceptions matches their expectations, the more they are satisfied and likely to return. Based on the scores St. Maarten received an overall average rating of 2.0 for the categories provided in Table D2.

'Beaches' received the highest rating of all product components with 1.4 and 1.6 rating for both Dutch and French sides of the island respectively.

Table D2

Factors of Importance

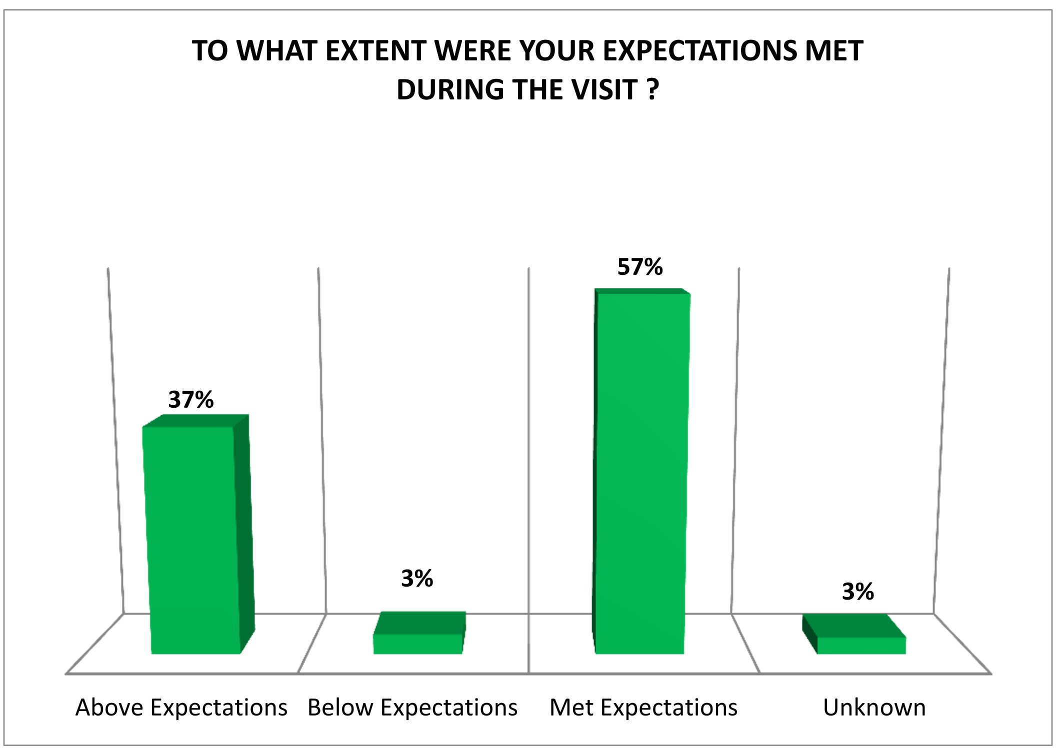
	Average score VERY IMPORTANT = 1 UNIMPORTANT = 5	Excellent	Good	Average	Poor	Terrible	SIGNIFICANCE %
Immigration services	2.0	24%	36%	12%	3%	2%	**77%**
Cruise Terminal	1.9	28%	50%	10%	1%	1%	**91%**
Time in Port	2.1	23%	51%	15%	4%	2%	**96%**
Souvenirs (Dutch side)	2.1	14%	38%	14%	3%	1%	69%
Souvenirs (French side)	2.1	4%	8%	4%	1%	0%	17%
Attractions	2.1	22%	26%	14%	4%	1%	68%
Beaches (Dutch side)	1.4	48%	20%	4%	1%	1%	**74%**
Beaches (French side)	1.6	20%	10%	2%	1%	0%	34%
Island's Cleanliness	2.0	25%	50%	15%	3%	1%	**93%**
Clubs / Gamming	2.5	6%	8%	5%	2%	3%	24%
Dining (Dutch side)	2.1	10%	21%	7%	2%	1%	41%
Dining (French side)	2.1	6%	8%	3%	1%	0%	18%
Prices of Goods (Dutch side)	2.3	13%	39%	20%	3%	3%	**79%**
Prices of Goods (French side)	2.4	5%	13%	6%	2%	2%	28%
Duty-Free Shopping (Dutch side)	2.1	15%	35%	15%	1%	2%	68%
Duty-Free Shopping (French side)	2.2	5%	13%	5%	1%	1%	24%
Safety	2.0	21%	59%	8%	2%	2%	**92%**
Roads (Dutch side)	2.5	8%	40%	20%	7%	3%	**78%**
Roads (French side)	2.4	5%	21%	9%	3%	2%	40%
Taxis / Rentals	2.1	13%	31%	10%	2%	1%	58%
Tours & Excursions	1.8	17%	19%	5%	0%	1%	43%
OVERALL AVERAGE SCORE	2.0						

All product components received good ratings from cruise visitors, with an average rating of important (2.0). Ratings indicate that, for the most part, passengers were almost equally complimentary of features on either side of the island. With the worst ratings attributed to 'Casino and Gaming', followed by the road condition and prices of goods on both sides of the island.

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. Of responding cruise passengers 94% visiting St. Maarten had a satisfying experience.

Results indicate that 37% of tourists' experience were above their expectations and 57% had experiences equaling their expectations. Only 3% indicated having had an experience that were below their expectations, and 3% did not answer the question (see chart D7).

Chart D7



In regards to respondents' intent to return too and recommend the island of St. Maarten it is shown that 93% indicated a high probability of recommending the island, compared to 6% negative response. Academia has often related the constructs of willingness to recommend with that of willingness to return. This theory was tested within the research using SPSS Pearson correlation two-tail test. The results indicate that there is a strong relationship between the two constructs of 0.907 correlation which is significant at 0.01 level. Therefore, not only will respondents provide free word-of-mouth, but are also likely to return themselves (table D4).

Table D3

Recommendation & Return

	RECOMMEND	RETURN
Definitely	71%	60%
Probably	22%	29%
Probably not	1%	1%
Definitely not	1%	2%
Unsure	4%	7%
Not reported	2%	2%
AVERAGE SCORE	**1.8**	**2.1**

Table D4

Recommendation & Return correlations

		Recommendation	Return Yourself
Recommendation	Pearson Correlation	1	.907**
	Sig. (2-tailed)		.000
	N	831	831
Return Yourself	Pearson Correlation	.907**	1
	Sig. (2-tailed)	.000	
	N	831	832

**. Correlation is significant at the 0.01 level (2-tailed).

Results of Airport Tourism Exit Survey 2013

Visitors Departing by Aircraft

By Saskia Thomas-Salomons

Summary of Results

Largest group of respondents reside in the North American region (60%). 56.4 percent of Total Respondents were captured during the 'High Season' whilst 43.6 percent in the 'Low Season'.

The average age amongst all respondents was 53.1 years. Whilst the majority of respondents residing in North America were amongst the 50 plus, Caribbean and European based respondents were largely represented by respondents younger than 50 years. 63 percent of all respondents indicated they were married; 28 percent were single and the remainder were either widowed, divorced or did not indicate their marital status.

Striking is that almost half (46%) of respondents indicated this was their 1st visit to the island. Amongst the 'repeat visitors' 24 percent indicated to have visited the island previously via a cruise. The majority (59.1%) of 'repeat visitors' indicated to have visited 4 or more times.

When respondents were asked to indicate their household income 56.7 percent said their annual household income exceeded $75,000.

Significant is that 34 percent of respondents indicated they had stayed only at a 'Hotel' during their visit, whilst 19 percent indicated to have stayed at 'Timeshare' only. The majority (30%) of respondents were travelling with their spouse/partner to St. Maarten and 23.8% were travelling with Friends & Family.

Noteworthy is that 79 percent of total nights (6,718) stayed by respondents where on the Dutch side of the island. The average 'length of stay' amongst total respondents was 9.4 nights. Notable is that the average length of stay was higher for respondents that stayed in 'Timeshare' only(9.5 nights) and 'Condo' only (10.5 nights) than those that stayed at a 'Hotel' only (7.4 nights) during their visit. Prominent is that Caribbean respondents that stayed at a 'Condo' only stayed on average the longest (19.0 nights) compared to other regions.

When respondents were asked to make known the size of their immediate travel party, it was observed that the majority (52%) of respondents' travel party composed of two. Striking also is that almost a quarter (23%) of respondents indicated to have a party size of 4 or more. The average party size amongst all respondents was 2.8 persons.

Respondents were asked what the most important source of information was to influence their decision to visit; 47.1 percent of respondents said that 'Friends/Relatives' was the most important source of information. When asked what the top reason for visiting the island was; respondents indicated 'Vacation/ Leisure' to be the main reason for visiting. Respondents were asked about the lead-time for advance booking, the largest percentage (38%) said to have booked '3 months or more' in advance.

The top activity amongst respondents was visiting 'Beaches', whilst the top' place of interest' visited was 'Philipsburg'. The large majority (57%) of respondents had rented a vehicle during their visit.

Respondents were further asked about their expenditure behavior. The average daily expenditure (ADE) per person was $122.60. Notable is that respondents that stayed in a 'Condo' only had the highest ADE per person at $144.55. ADE was $124.95 per person in the 'High season' and lower at $119.04 per person during 'Low season'. Note that respondents spent approximately 22 percent of their money on transport (transportation, public buses and taxi) while collectively spending 26 percent on 'shopping' and 'entertainment'.

13 percent of respondents travelled to the island on a 'Pre-Paid Package' versus 81 percent who did not. Respondents indicated to have used 'Travel Cheque', 'American Express' and 'Master Card' equally, while utilizing 'Cash' and 'Visa' less frequently.

Respondents were asked about various factors of their visit and to rate their level of satisfaction. The top 5 factors rated between 'Very Important' and 'Important' were Beaches, Clubs, Dining, Safety and Other. The top 5 aspects which respondents rated between 'Excellent' and 'Good' were Beaches (Dutch side), Beaches (French side), Accommodations (Dutch side), Accommodations (French side) and Immigration Service.

When respondents were asked to what extent their expectations were met during the visit, 67.5 percent said their expectations were met while 26.5 percent indicated that it was above expectations. 68 percent of respondents said that they would definitely return whilst 70.3 percent would definitely recommend St. Maarten / Saint Martin.

Demographic Characteristics

Visitor Profile

In Table 1 below, it is noted that the largest group of respondents reside in the United States (47%) whilst; 12 percent reside in Canada and 10 percent reside in Europe and Caribbean respectively. Other regions (20%), were not represented in large enough quantities as to present significant sub-region results.

Table 1: Individuals by Region

Region	Weight (%)	Individuals (#)
United States	*47%*	*3,188*
Canada	*12%*	*839*
North America	60%	4,027
Europe	10%	691
Caribbean	10%	675
Other countries	*20%*	1,326
Total	**100%**	**6,718**

Table 2 below further highlights respondents who visited in the 'Low' and 'High' Seasons. 'Low season' spans from Mid-April until Mid-November of the year; 'High season' occupies the remaining months of the year. Note that a total of 958 respondents, representing 2,929 individuals within their immediate travel party were captured during the 'Low season' whilst; a total of 1,445 respondents, representing 3,789 individuals within their immediate travel party were captured during the 'High season'.

There was a significantly larger percentage of respondents residing in North America that were captured during the 'High season' (70%) than during 'Low season' (47%); this is indicative of the travel patterns of visitors from this region. Whereas respondents residing in Europe have less of a seasonal travel pattern where it is noted a slightly larger number of respondents were captured during the 'High season' (11%) than during 'Low season' (10%).

Table 2: Individuals by Region (*Low Season vs. High Season*)

LOW SEASON

Region	**Weight (%)**	**Individuals (#)**
United States	*39%*	*1,142*
Canada	*8%*	*225*
North America	47%	1,367
Europe	10%	292
Other countries	*43%*	*1,270*
Total	**100%**	**2,929**

HIGH SEASON

Region	**Weight (%)**	**Individuals (#)**
United States	*54%*	*2,046*
Canada	*16%*	*614*
North America	70%	2,660
Europe	11%	399
Other countries	*19%*	*730*
Total	**100%**	**3,789**

Figures 1 and 2 below depict the age and sex of total respondents; note that the largest group of respondents was amongst the 60 plus; whereas the larger group of female respondents were amongst the age group 15-29.

Figure 1: Respondents by Age and Sex

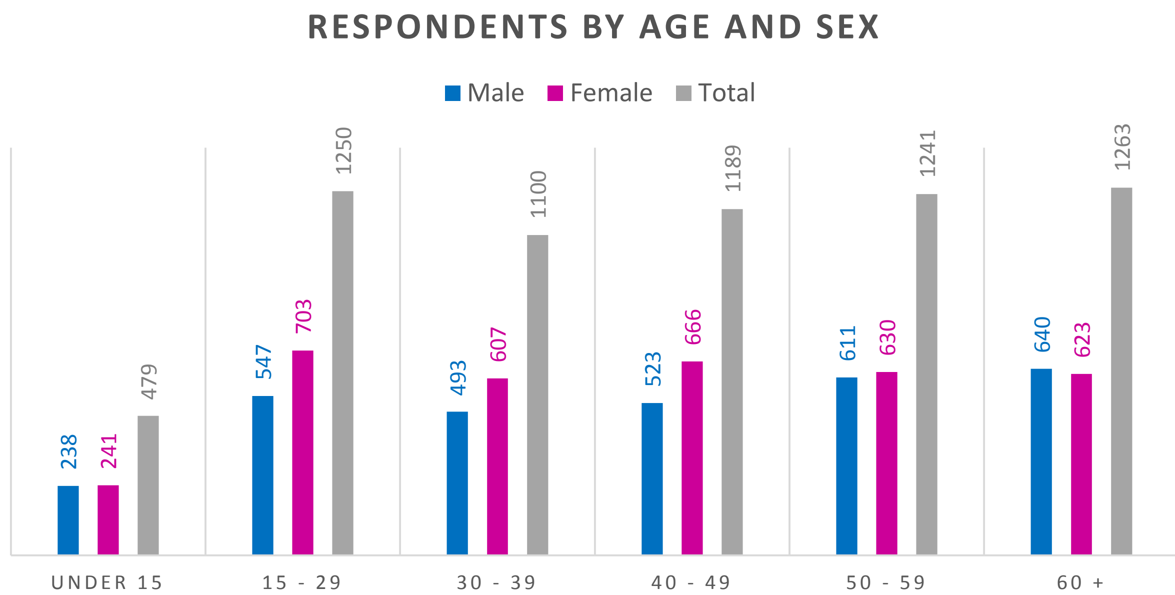


Figure 2: Respondents by Age

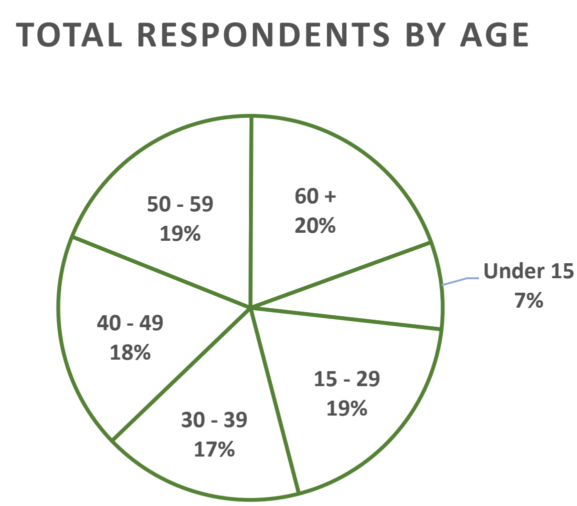


Table 3 below shows the respondents by age and region; note that 47 percent of respondents residing in North America were amongst the age range 50 plus. Whereas 49 percent of respondents residing in Europe were amongst the age range 15 – 39; indicative of younger visitors from this region. 72 percent of the respondents residing in the Caribbean region were amongst the age range 15 – 49. Figure 3 below depicts the average age per region of the respondents. Note the average age amongst all respondents is 53.1 years whilst the average age amongst respondents from the Caribbean region was 47.5 years. The average age of respondents residing in North America and Europe was 55.5 years and 50.2 years respectively. The youngest respondents were females from the Caribbean region with an average age of 46.1 years.

Table 3: Respondents by Age and Region

Age Category	Total Individuals	North America	Europe	Caribbean
Under 15	479	248	50	79
15 - 29	1,250	642	165	145
30 - 39	1,100	508	172	172
40 - 49	1,189	678	91	160
50 - 59	1,241	872	118	68
60 +	1,263	988	92	41
Average Age	**53.1**	**55.5**	**50.2**	**47.5**

Figure 3: Average Age of the Respondents by Region and Sex

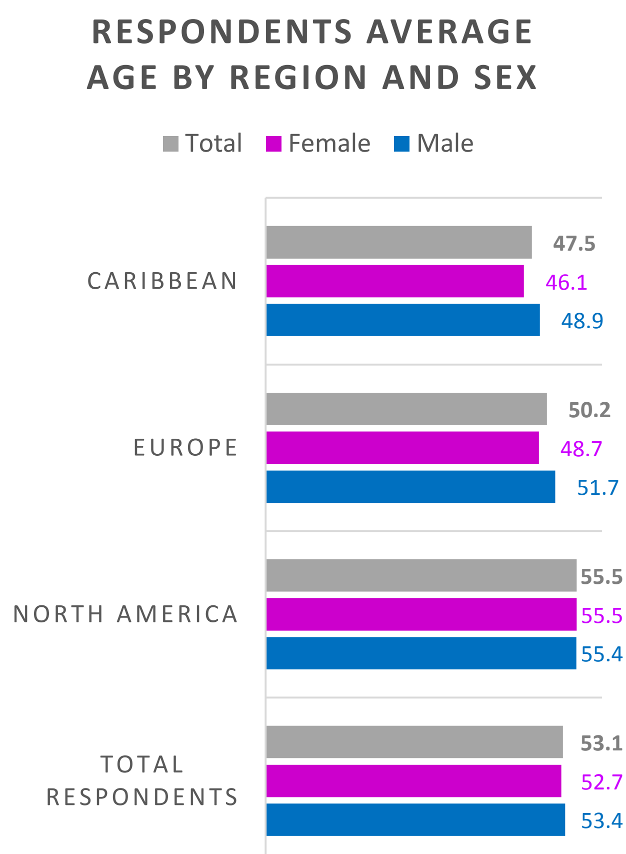
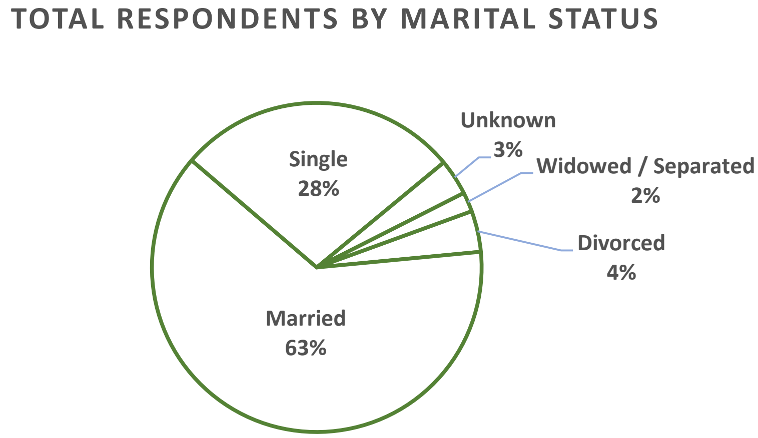
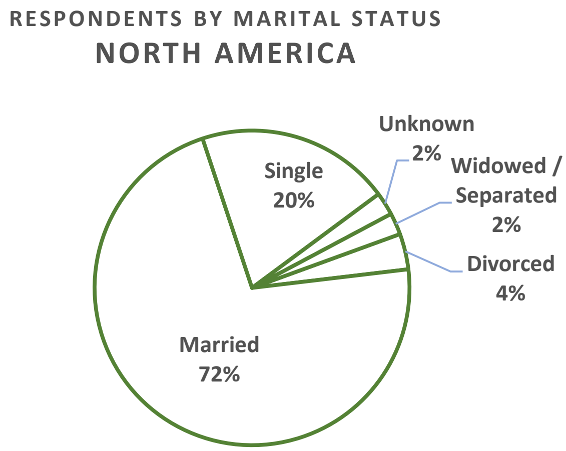
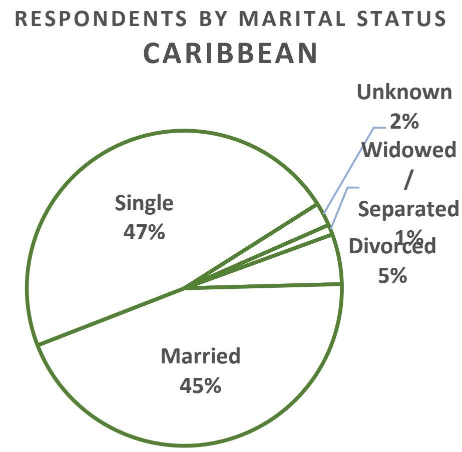


Figure 4: Respondents by Martial Status and Region







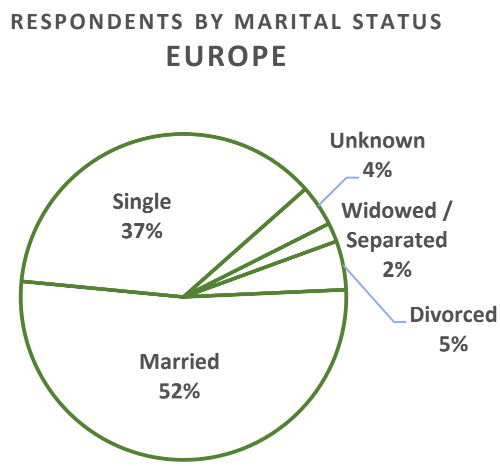


Figure 4 above depicts the total respondents by marital status and region; 63 percent of all respondents indicated they were married. Striking is that amongst the Caribbean visitors the majority (47%) indicated they were single.

When respondents were asked if they have ever visited St. Maarten / Saint Martin; 46 percent indicated this was their 1st visit to the island. Figure 6 below shows that 24 percent of respondents had previously visited the island via a cruise. Striking is that a larger percentage of respondents residing in North America (54%) and the Caribbean (77%) indicated to be repeat visitors to the island whilst; 59 percent of European respondents indicated it was their 1st visit.

Figure 5: Was this your 1st visit to St. Maarten / Saint Martin?

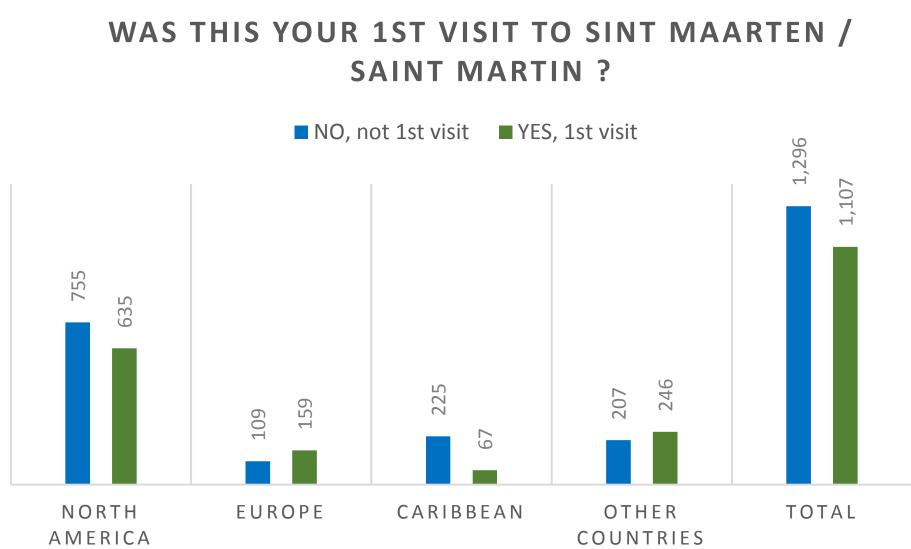
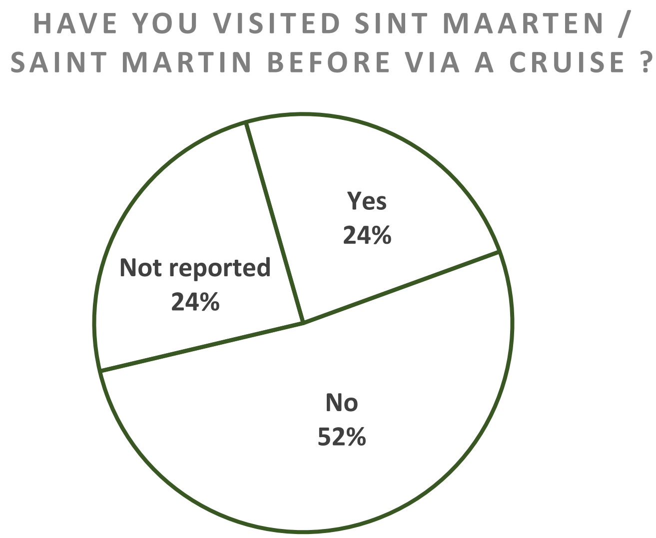


Figure 6: Have you ever visited St. Maarten / Saint Martin via a Cruise?



Illustrated in figure 7 below it is observed that 59.1 percent of the respondents that had previously visited the island has done so 4 or more times.

Figure 7: Respondents by number of previous visits to St. Maarten / Saint Martin

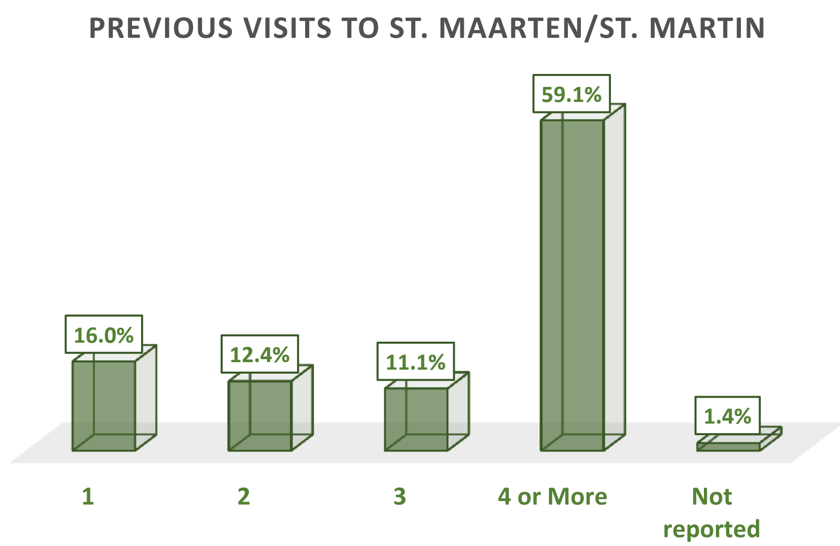
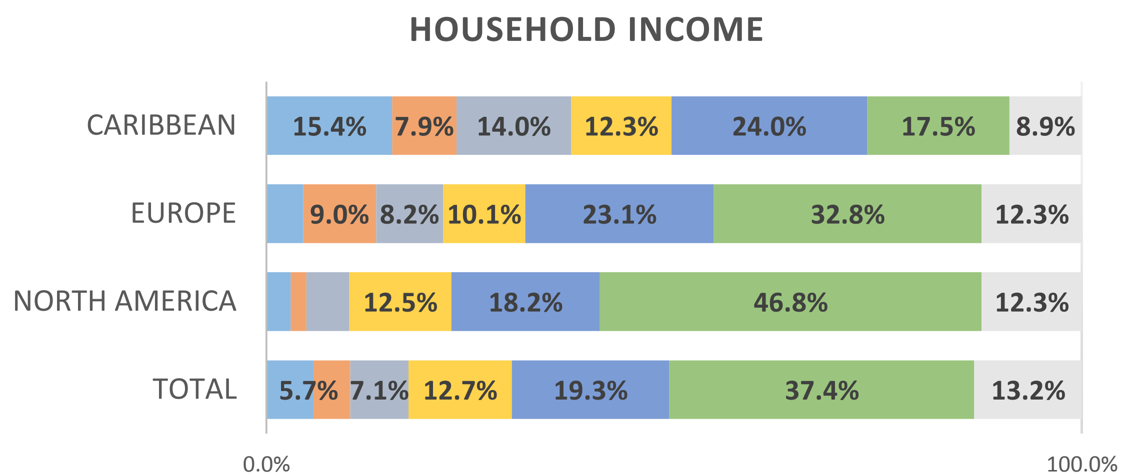


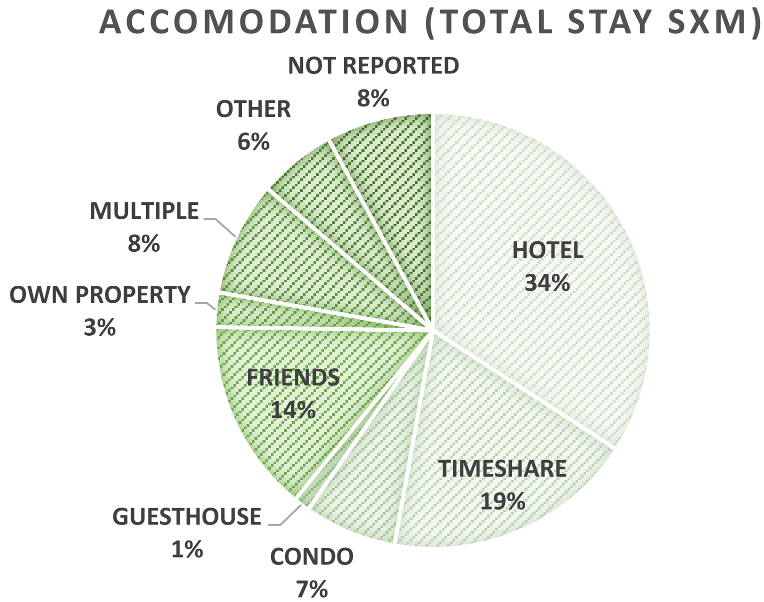
Figure 8: Respondents by Household Income and Region



	TOTAL	NORTH AMERICA	EUROPE	CARIBBEAN
Less than US $20,000	5.7%	2.9%	4.5%	15.4%
US $20,000 - US $30,000	4.5%	1.9%	9.0%	7.9%
US $30,001 - US $50,000	7.1%	5.3%	8.2%	14.0%
US $50,001 - US $75,000	12.7%	12.5%	10.1%	12.3%
US $75,001 - US $100,000	19.3%	18.2%	23.1%	24.0%
US $100,000 and over	37.4%	46.8%	32.8%	17.5%
Not reported	13.2%	12.3%	12.3%	8.9%

Respondents were further asked about their annual household income; this is shown in figure 8 above. The largest group of respondents residing in North America (46.8%) reported an annual household income of $100,000 and above. Yet amongst respondents residing in the Caribbean (24%) the largest group indicated their annual household income ranged between $75,000 and $100,000. Overall 56.7 percent of all respondents indicated an annual household income which exceeds $75,000.

Figure 9: Respondents by Type of Accommodation

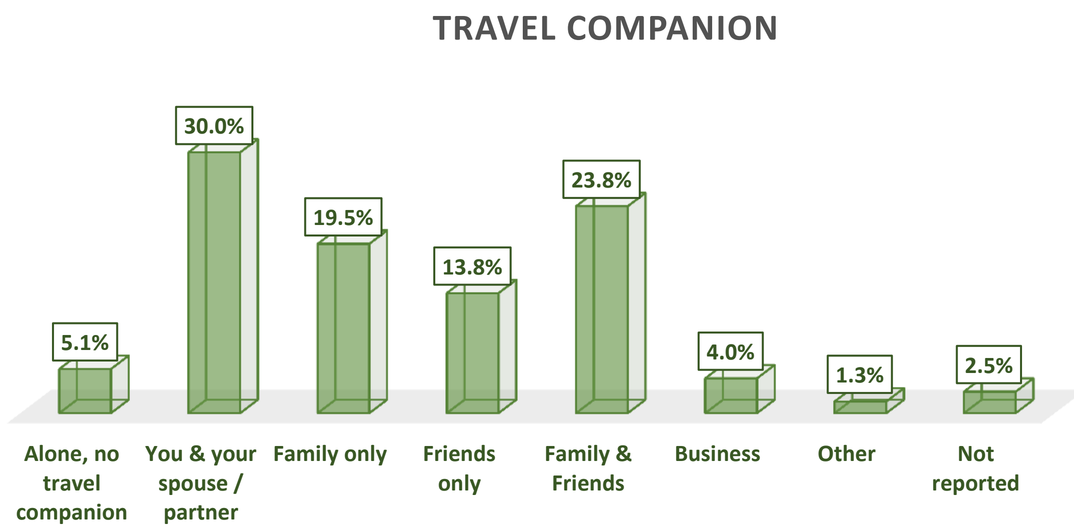


Respondents were asked to indicate the type of accommodation they occupied during their stay on St. Maarten / Saint Martin. 34 percent stayed only at a 'Hotel', 19 percent indicated 'Timeshare' only, whilst 17 percent collectively had stayed in either 'Own Property' or at 'Friends'. Noteworthy is that 8 percent of all respondents indicated they had stayed in 'Multiple' types of accommodations during their visit.

Travel companion

Figure 10 below shows the travel composition of respondents who visited the island during 2013. The majority were composed of two persons; travelling with a spouse/partner (30%). The second popular way to travel was with 'family & friends' reported by 23.8 percent of respondents. Yet traveling with 'family only' and 'friends only' was also significant; 19.5 percent and 13.8 percent respectively.

Figure 10: Travel Companion



When the travel composition was observed by region, it is noted that though the North American, European and overall average consisted of a 2-person party (you & your spouse / partner); the respondents from the Caribbean region, indicated their main travel companions were 'friends only'. Figure 11 and Table 4 below presents the travel companion by region; notable is that travel companion 'business' was more prominent amongst the European respondents (9%) than other regions. Striking also is that more respondents from the Caribbean region (14%) indicated to have travelled alone than from the other regions, whilst less from this region indicated to have travelled 'family only' compared to other regions.

Figure 11: Rank of Travel Companion

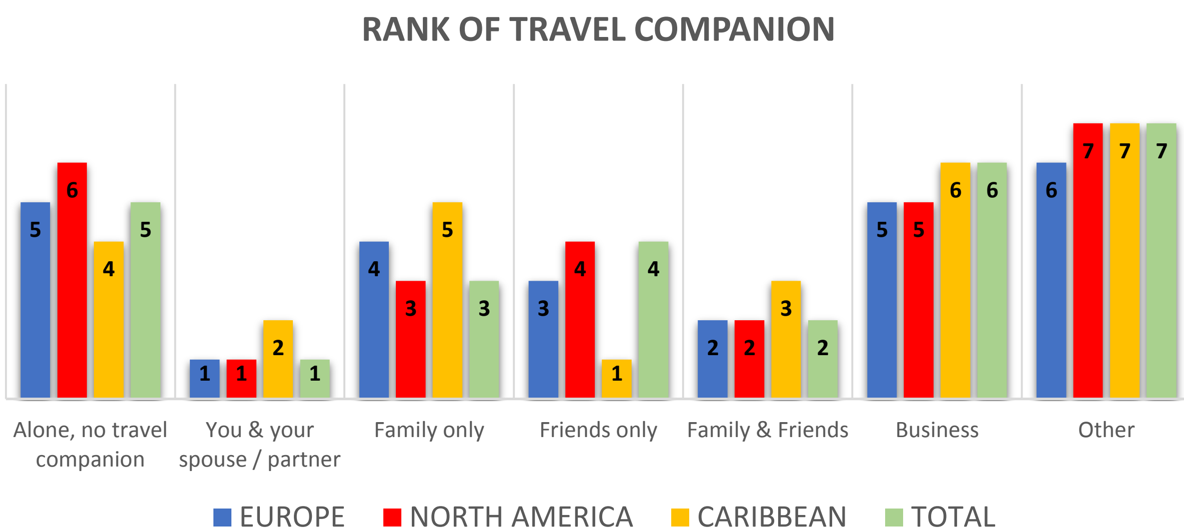


Table 4: Travel Companion by Region

	North America	Europe	Caribbean
Alone, no travel companion	3%	7.1%	14%
You & your spouse / partner	33%	30%	22%
Business	3%	7%	4%
Family & Friends	26%	20%	20%
Family only	20%	15%	9%
Friends only	12%	15%	27%
Other	0%	2%	2%
Not reported	2%	3%	3%

Average length of stay

Respondents were asked to indicate total nights spent on St. Maarten, both on the Dutch and French sides of the island. This is depicted in Figures 12 and 13 below. Note the average length of stay was 9.4 nights, yet the majority (50.9%) of respondents indicated to have stayed between 4 to 7 nights. Significant also is that the majority (79%) of total nights stayed (6,718) where on the Dutch side.

Figure 12: Total Respondents by Total Nights on St. Maarten / Saint Martin

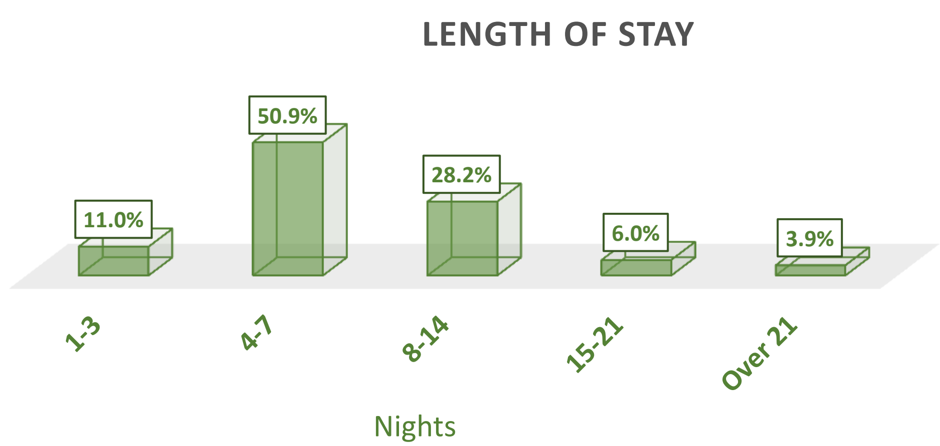


Figure 13: Total Respondents by Total Stay on St. Maarten / Saint Martin

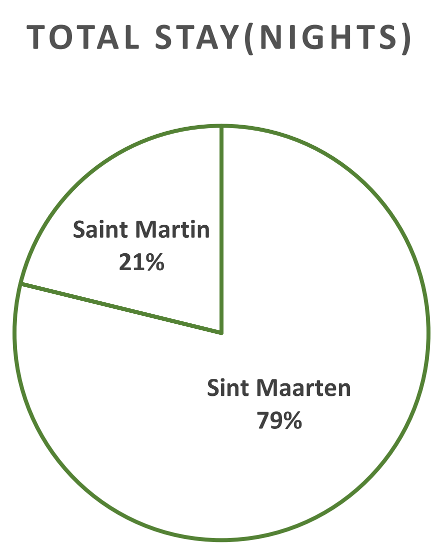


Table 5 below shows the total nights by type of accommodation. Note the majority of respondents indicated to have stayed at a 'Hotel' (51.7%), 'Timeshare' (61.4%), and 'Condo' (67.2%) and stayed between 4 – 7 nights.

Table 5: Individuals by Total Nights on St. Maarten / Saint Martin and Type of Accommodation

HOTEL		
Nights	**Individuals(#)**	**Weight (%)**
1-3	447	15.9%
4-7	1,452	51.7%
8-14	647	23.0%
15-21	209	7.4%
Over 21	56	2.0%
Total	**2,810**	**100%**
TIMESHARE		
Nights	**Individuals (#)**	**Weight (%)**
1-3	22	1.7%
4-7	790	61.4%
8-14	410	31.9%
15-21	45	3.5%
Over 21	20	1.6%
Total	**1,287**	**100.0%**
CONDO		
Nights	**Individuals (#)**	**Weight (%)**
1-3	16	2.8%
4-7	378	67.2%
8-14	132	23.5%
15-21	27	4.8%
Over 21	10	1.8%
Total	**563**	**100.0%**

Table 6 below further shows average length of stay by Region, 'High season' versus 'Low season' and the Dutch side versus the French side. Notable is that the average length of stay on the French side (10.0 nights) is higher than that of the Dutch side (8.9 nights). Striking also is that the average length of stay increased in the 'Low season' from 9.7 to 10.5 nights for the French side whilst decreased from 9.1 to 8.5 nights during this period for the Dutch side.

When we consider region, it is noted the average length of stay is highest amongst European respondents with 13.2 nights. Additional, the European respondents stayed on average the longest when comparing French and Dutch side; 15.1 versus 11.1 nights respectively.

Respondents from Canada had the second highest (10.1 nights) average length of stay; they also stayed longer on average while on the French side compared to the Dutch side; 11.5 versus 9.3 nights respectively. Yet it is significant to mention that only 22 percent of respondents collectively were from Europe (10%) and Canada (12%) whilst 47 percent were from the United States. Respondents from the United States unlike that of Europe and Canada had a higher average length of stay on Dutch side compared to the French side; 8.4 versus 6.9 nights respectively. Whilst respondents from the Caribbean showed a similar behavior, with a higher average length of stay on Dutch side compared to the French side; 8.3 versus 6.5 nights respectively.

Table 6: Average Length of Stay on St. Maarten / Saint Martin by Region and Low/ High Season

	Ave. Length of Stay (nights)		
	Total Stay	**Total Stay : St. Maarten**	**Total Stay : Saint Martin**
HIGH SEASON	9.5	9.1	9.7
LOW SEASON	9.3	8.5	10.5
United States	8.2	8.4	6.9
Canada	10.1	9.3	11.5
North America	8.6	8.6	7.8
Europe	13.2	11.1	15.1
Caribbean	8.3	8.3	6.5
Total Respondents	**9.4**	**8.9**	**10.0**

Table 7 below further shows average length of stay by Region, 'High season' versus 'Low season', the Type of accommodation and the Dutch side versus the French side. Notable is that the average length of stay is highest (10.5 nights) amongst respondents that indicated to have stayed in 'condo' only during their visit. Respondents staying at a 'condo- only' stayed on average longest on the Dutch side compared to the French side; 11.0 versus 9.2 nights respectively.

Respondents that stayed on the Dutch side stayed on average longest (13.0 nights) during the 'High season' and indicated to have stayed in 'Condo' only. Respondents that stayed on the Dutch side in 'Hotel' only stayed on average longest (8.1 nights) during the 'Low season'. Whilst respondents that stayed on the Dutch side in 'Timeshare' only stayed on average longest (9.9 nights) during the 'High season'.

Respondents that stayed on the French side stayed on average longest (11.0 nights) during the 'Low season' and indicated to have stayed in 'Timeshare' only. Respondents that stayed on the French side in 'Hotel' only stayed on average longest (7.1 nights) during the 'Low season'. Whilst respondents that stayed on the Dutch side in 'Condo' only stayed on average longest (10.4 nights) during the 'High season'.

Caribbean respondents stayed on average the longest (19.0 nights) compared to other regions. Whilst both the Caribbean (16.9 nights) and European (16.3 nights) respondents indicated to have their highest average length of stay in 'Condo' accommodation however on opposite sides of the island.

Table 7: Average Length of Stay on St. Maarten / Saint Martin by Region, Type of Accommodation and Low/ High Season

TOTAL STAY

Type of Accommodation	Total	North America	Europe	Caribbean	HIGH SEASON	LOW SEASON
HOTEL	7.4	6.9	10.1	5.4	6.9	8.0
TIMESHARE	9.5	9.5	11.1	9.8	9.8	8.3
CONDO	10.5	9.9	13.5	19.0	12.2	7.6

ST. MAARTEN

Type of Accommodation	Total	North America	Europe	Caribbean	HIGH SEASON	LOW SEASON
HOTEL	7.3	7.0	9.8	5.4	6.7	**8.1**
TIMESHARE	9.5	9.4	**11.8**	10.0	**9.9**	8.1
CONDO	**11.0**	**10.5**	10.3	**16.9**	**13.0**	7.1

SAINT MARTIN

Type of Accommodation	Total	North America	Europe	Caribbean	HIGH SEASON	LOW SEASON
HOTEL	6.9	6.2	9.6	5.3	6.8	**7.1**
TIMESHARE	8.8	**15.5**	6.0	6.0	7.3	**11.0**
CONDO	9.2	8.7	**16.3**	-	**10.4**	7.3

Average party size

Respondents were asked to indicate the size of their immediate travel party. Note that a travel party composed of two was indicated most (52 %) amongst respondents; this is evident in figure 14 below. Nearly a quarter (23%) of respondents indicated to have a party size of 4 or more, this has influenced average travel party size amongst all respondents to be 2.8 persons.

Table 8 shows that average travel party size increased in the 'Low season' compared to the 'High season; 3.1 versus 2.6 persons respectively. Noteworthy is that the North American respondents had the highest (2.9 persons) average travel party size compared to the other regions.

Figure 14: Total Respondents by Travel Party Size

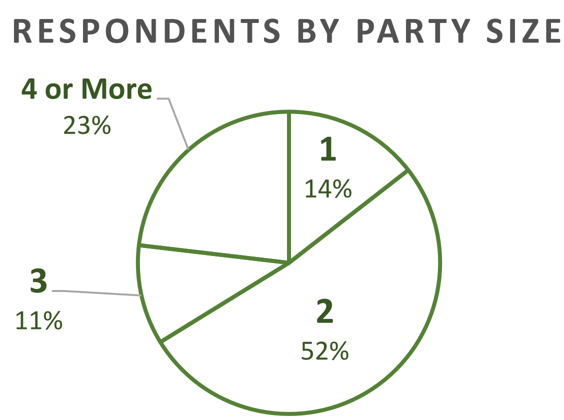


Table 8: Average Travel Party Size by Region and Low/ High Season

Region	Ave. Travel Party Size
HIGH SEASON	**2.6**
LOW SEASON	**3.1**
United States	2.9
Canada	2.9
North America	2.9
Europe	2.6
Caribbean	2.3
Total Respondents	**2.8**

Expenditure

Average Expenditure per day

Table 10 below, shows the average daily expenditure (ADE) per person by region. European respondents had the highest ADE per person at $141.01. Canadian respondents had the second highest ADE per person at $124.90. Both European and Canadian respondents were above the ADE of total respondents which was $122.60 per person.

Table 10: Average Expenditure per day by Region

Region	**Ave. of Per Day / Per Person Exp.**
United States	$ 119.86
Canada	$ 124.90
North America	$ 120.92
Europe	$ 141.01
Caribbean	$ 113.81
Total Respondents	**$ 122.60**

Table 11 below further shows the ADE per person by region and type of accommodation. Note that respondents that stayed in a 'Condo' only, had the highest ADE per person at $144.55. When comparing the regions, European respondents that stayed in a 'Condo' only had the highest ADE per person at $241.33. Noticeable is that European respondents had the highest ADE per person regardless of the type of accommodation they used.

Table 11: Average Expenditure per day by Region and Type of Accommodation

	Ave. of Per Day / Per Person Exp.			
Region	**Hotel**	**Timeshare**	**Condo**	**Friends**
United States	$ 128.44	$ 116.83	$ 121.60	$ 95.30
Canada	$ 117.03	$ 116.44	$ 199.13	$ 113.77
North America	$ 124.78	$ 116.80	$ 135.76	$ 98.73
Europe	$ 144.18	$ 142.99	$ 241.33	$ 128.56
Caribbean	$ 115.53	$ 130.92	$ 159.16	$ 109.51
Total Respondents	**$ 127.26**	**$ 119.32**	**$ 144.55**	**$ 109.00**

Table 12: Average Expenditure per day by Low/ High Season

	Ave. of Per Day / Per Person Exp.
HIGH SEASON	$ 124.95
LOW SEASON	$ 119.04

Table 12 above compares ADE per person of the 'High season' versus 'Low season', note that ADE is $124.95 per person in the 'High season' and lower at $119.04 per person during 'Low season'.

Average Total Expenditure per category

Table 13 below, shows the way respondents indicated to have distributed their total cost during their visit. Note that respondents spent approximately 22 percent of their money on transport (transportation, public buses and taxi) while collectively spending 26 percent on 'shopping' and 'entertainment'.

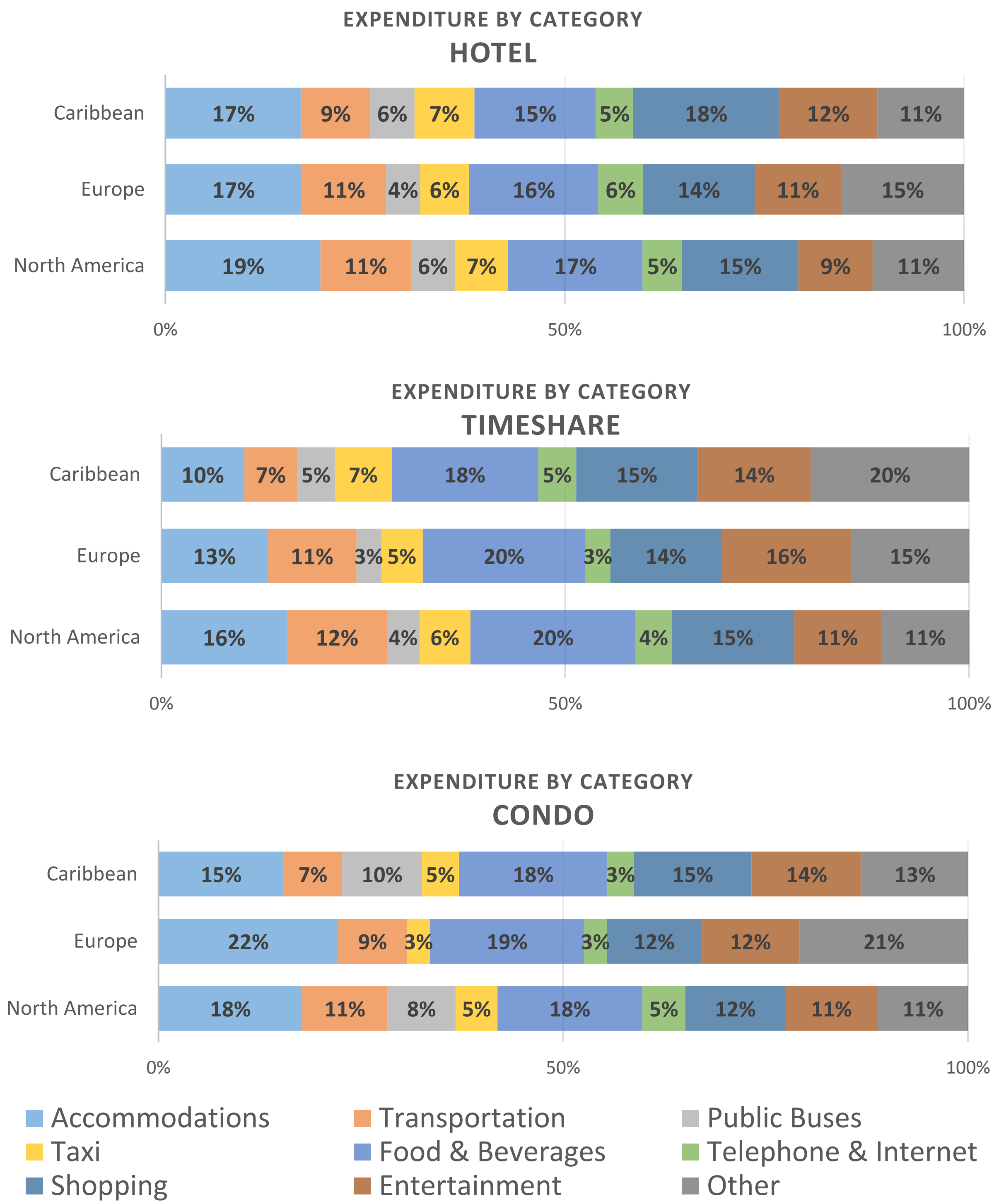
Table 13: Expenditure per category by Region

Average Daily Expenditure (%) per Visitor by Region

	United States	*Canada*	**North America**	**Europe**	**Caribbean**	**Total Respondents**
Accommodations	18%	17%	18%	16%	17%	17%
Transportation	12%	12%	12%	11%	12%	11%
Public Buses	5%	5%	5%	4%	5%	5%
Taxi	6%	7%	6%	6%	7%	6%
Food & Beverages	19%	17%	18%	16%	17%	17%
Telephone & Internet	5%	5%	5%	5%	5%	5%
Shopping	14%	16%	14%	14%	16%	15%
Entertainment	11%	11%	11%	12%	11%	11%
Other	12%	11%	12%	16%	11%	12%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure 20 below shows the way respondents distributed money spent during their visit by the type of accommodation used. Noteworthy is that respondents that stayed in 'Timeshare' only during their visit allocated a larger percent of their money on 'Food & Beverages' compared to those that stayed in a 'Condo' or ' Hotel'. Striking also is that European respondents that stayed in 'Condo' only indicated to have allocated 22 percent on 'Accommodation'.

Figure 20: Expenditure per category by Type of Accommodation



Average Total Expenditure per visit

Table 14 below shows Total Expenditure per visit based on ADE, Average Travel Party Size and Average Length of Stay by Region and comparing the 'High season' versus 'Low season'. Noteworthy is that European respondents spent the most ($4,779.24) during their visit to the island, this is directly related to the high ADE per person ($141.01) and high Average Length of Stay (13.2 nights).

Noticeable in comparing the 'High season' and 'Low season' is that Total Expenditure per visit is higher in the 'Low season' ($3,386.17), this is directly related to the higher Average Travel Party Size; 3.1 versus 2.6 persons.

Table 14: Expenditure per Visit by Region and Low/ High Season

Region	Ave. of Per Day / Per Person Exp.	Ave. Travel Party Size	Ave. Length of Stay (nights)	Ave. Total Expenditure per Party
HIGH SEASON	$ 124.95	2.6	9.5	$ 3,100.65
LOW SEASON	$ 119.04	3.1	9.3	$ 3,386.17
United States	$ 119.86	2.9	8.2	$ 2,861.35
Canada	$ 124.90	2.9	10.1	$ 3,665.29
North America	$ 120.92	2.9	8.6	$ 3,024.00
Europe	$ 141.01	2.6	13.2	$ 4,779.24
Caribbean	$ 113.81	2.3	8.3	$ 2,191.07
Total Respondents	**$ 122.60**	**2.8**	**9.4**	**$ 3,221.92**

Table 15 below further shows Total Expenditure per visit by region and type of accommodation used. Noteworthy is that amongst the respondents indicated to have stayed in 'Hotel' only the European respondents spent the most ($3,763.60) during their visit to the island, this is directly related to the high ADE per person ($144.18) and high Average Length of Stay (10.1 nights).

Amongst the respondents indicated to have stayed in 'Timeshare' only the European respondents spent the most ($4,099.96) during their visit to the island, this is directly related to the high ADE per person ($142.99) and high Average Length of Stay (11.1 nights).

Once again the European respondents spent the most ($8,425.08) amongst the respondents indicated to have stayed in 'Condo' only during their visit to the island, this is directly related to the high ADE per person ($241.33) and high Average Length of Stay (13.5 nights).

Striking also is that Caribbean respondents that stayed in 'Condo' only spent $6,990.52 during their visit to the island, this is directly related to the high ADE per person ($159.16) and high Average Length of Stay (19.0 nights).

Overall respondents that stayed in 'Condo' only, spent the most ($4,230.13) compared to those that stay in 'Timeshare' or 'Hotel', this is directly related to the higher ADE per person ($144.55) and higher Average Length of Stay (10.5 nights).

Table 15: Expenditure per Visit by Region and Type of Accommodation

Hotel

Region	Ave. of Per Day / Per Person Exp.	Ave. Travel Party Size	Ave. Length of Stay (nights)	Ave. Total Expenditure per Party
North America	$ 124.78	2.9	6.9	$ 2,508.40
Europe	$ 144.18	2.6	10.1	$ 3,763.60
Caribbean	$ 115.53	2.3	5.4	$ 1,445.09
Total Respondents	**$ 127.26**	**2.8**	**7.4**	**$ 2,627.80**

Timeshare

Region	Ave. of Per Day / Per Person Exp.	Ave. Travel Party Size	Ave. Length of Stay (nights)	Ave. Total Expenditure per Party
North America	$ 116.80	2.9	9.5	$ 3,207.64
Europe	$ 142.99	2.6	11.1	$ 4,099.96
Caribbean	$ 130.92	2.3	9.8	$ 2,959.19
Total Respondents	**$ 119.32**	**2.8**	**9.5**	**$ 3,166.79**

Condo

Region	Ave. of Per Day / Per Person Exp.	Ave. Travel Party Size	Ave. Length of Stay (nights)	Ave. Total Expenditure per Party
North America	$ 135.76	2.9	9.9	$ 3,888.65
Europe	$ 241.33	2.6	13.5	$ 8,425.08
Caribbean	$ 159.16	2.3	19.0	$ 6,990.52
Total Respondents	**$ 144.55**	**2.8**	**10.5**	**$ 4,230.13**

Prepaid Package and Payment Methods

When respondents were asked if they travelled to the island on a 'Pre-Paid Package', 13 percent indicated they had whilst 81 percent did not and 6 percent did not respond to the question.

Figure 21: Did you travel to St. Maarten / Saint Martin on a 'Prepaid Package'?

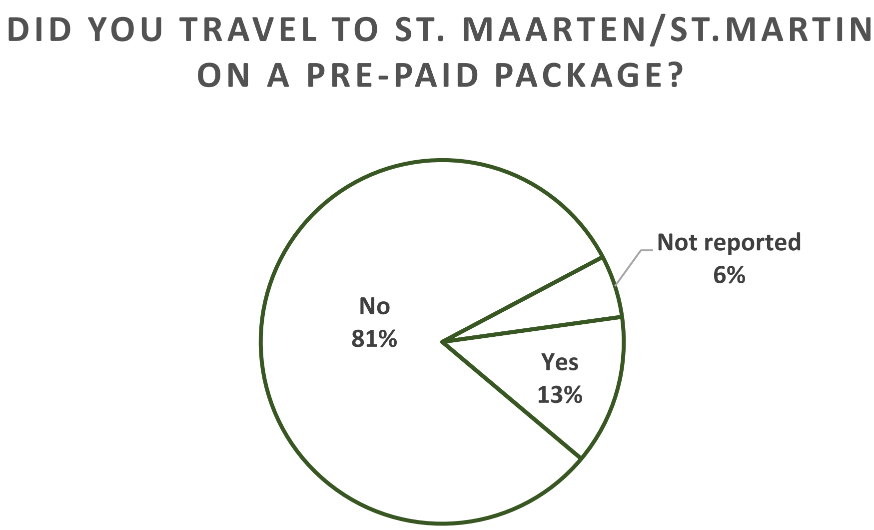
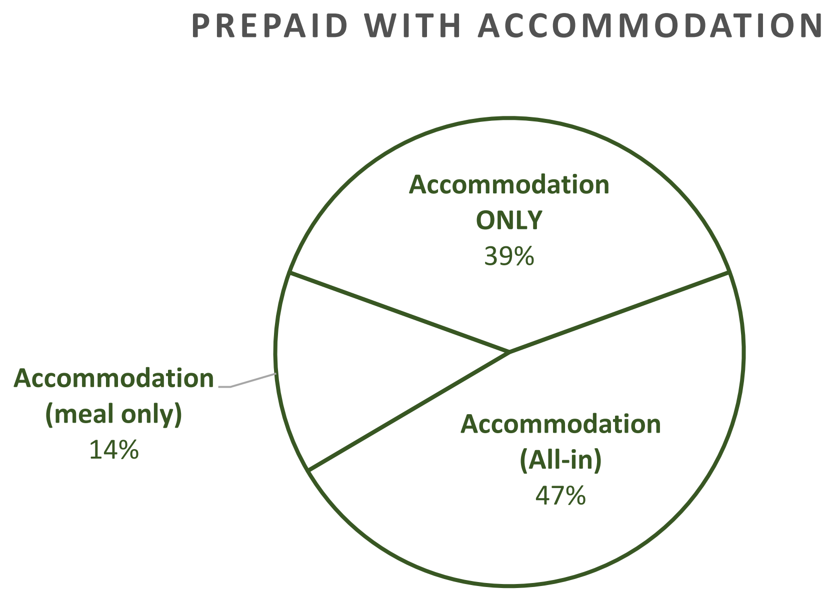


Figure 22 illustrates what respondents indicated was included in their 'Pre-Paid Package'; 78.8 percent indicated that their airfare was included, whilst 88 percent indicated that accommodation was included. Amongst those where accommodation was included, 47 percent was an all-inclusive accommodation and 14 percent where meals were included.

Figure 22: If you travelled to St. Maarten / Saint Martin on a 'Prepaid Package', what did this package include?



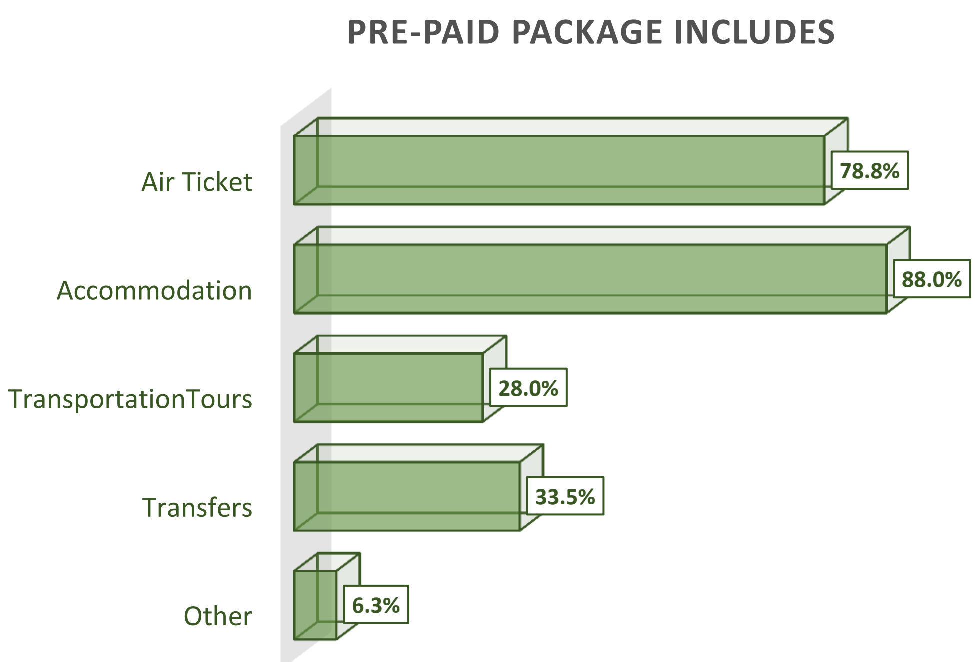
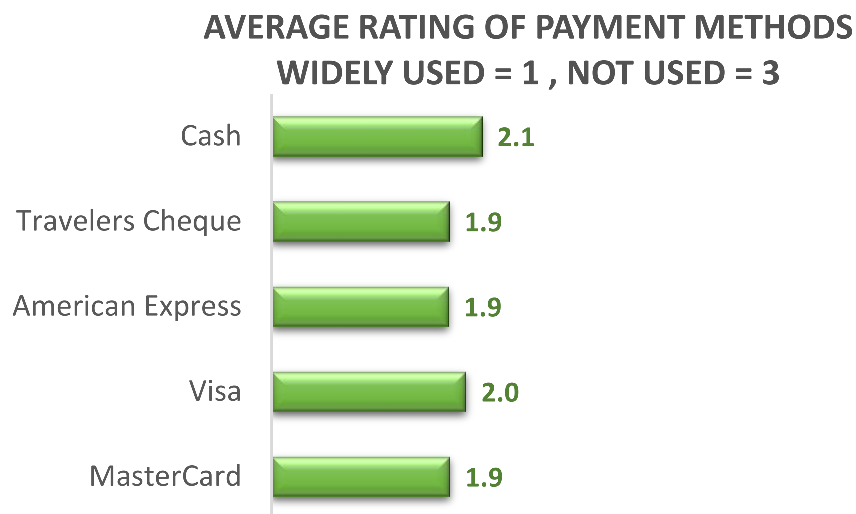


Figure 23: Rating of Payment Methods Used



Respondents indicated to have used 'Travel Cheque', 'American Express' and 'Master Card' equally while utilized 'Cash' and 'Visa' less frequently; this is depicted in Figure 23 above.

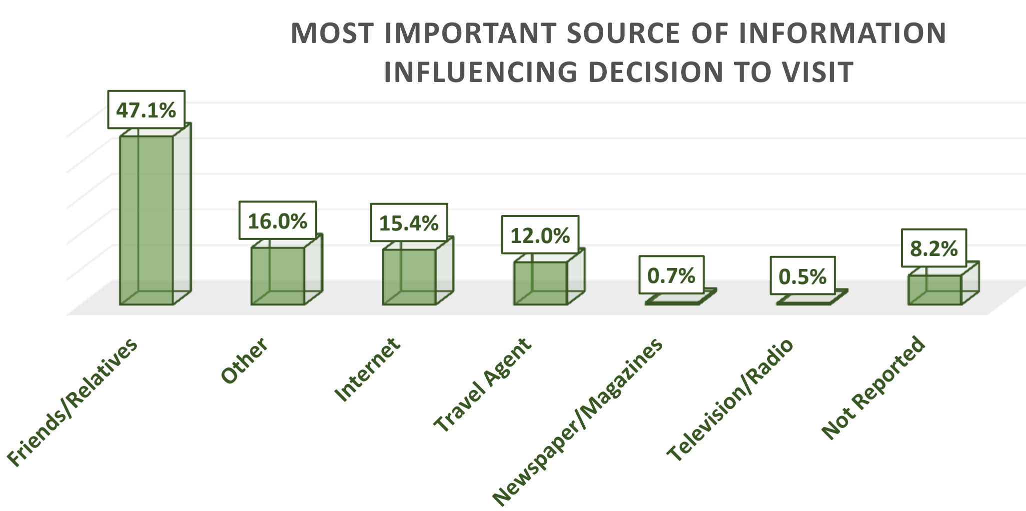
Cash and Visa cards were the least used payment methods among respondents, whilst Travelers Cheque, American Express, and Master Card were equally amongst the most popular forms of payments.

Travel Activities

Planning Behavior

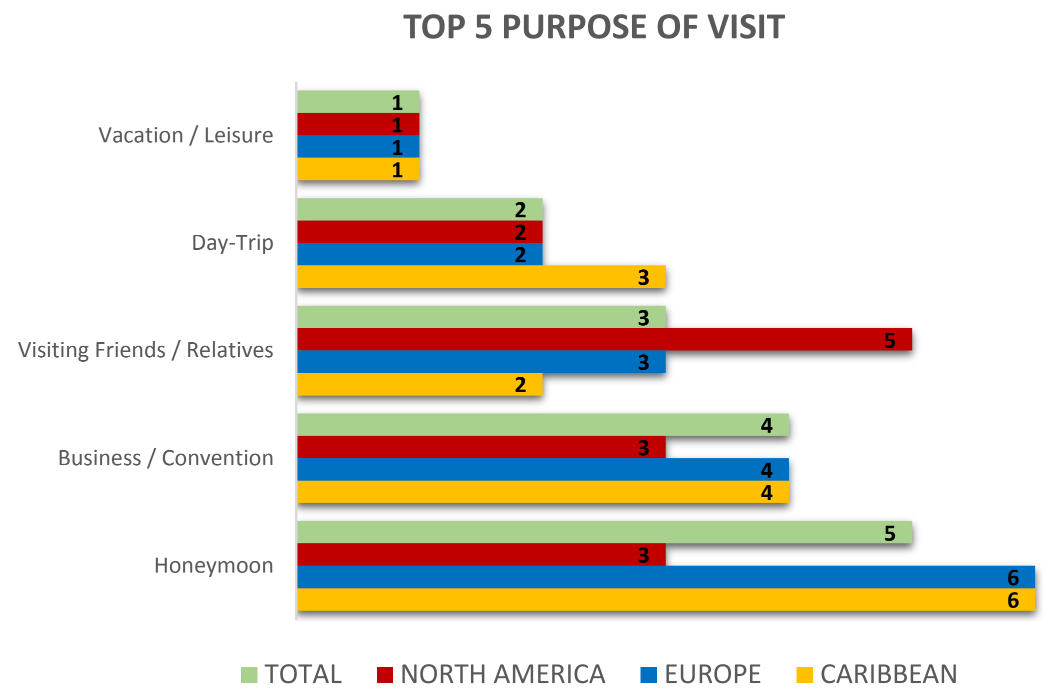
Respondents were asked about the most important source of information in deciding to visit St. Maarten; see Figure 15 below. Striking is that 47.1 percent of respondents said that 'Friends/Relatives' was the most important source of information. Significant also is that collectively 43.4 percent of respondents indicated 'Travel Agent'(12.0%), 'Internet' (15.4%) and 'Other' (16.0%) were the most important sources in influencing their decision to visit.

Figure 15: Most Important Source of Information Influencing Decision to Visit



When asked what the top reason for visiting the island was; respondents indicated 'Vacation/ Leisure' to be the main reason for visiting. Figure 14 below further shows that amongst Caribbean respondents 'Visiting Friends/Relatives' ranked higher compared to other regions; whilst North American respondents reported 'Honeymoon' and 'Business/Convention' to rank higher as compared with other regions.

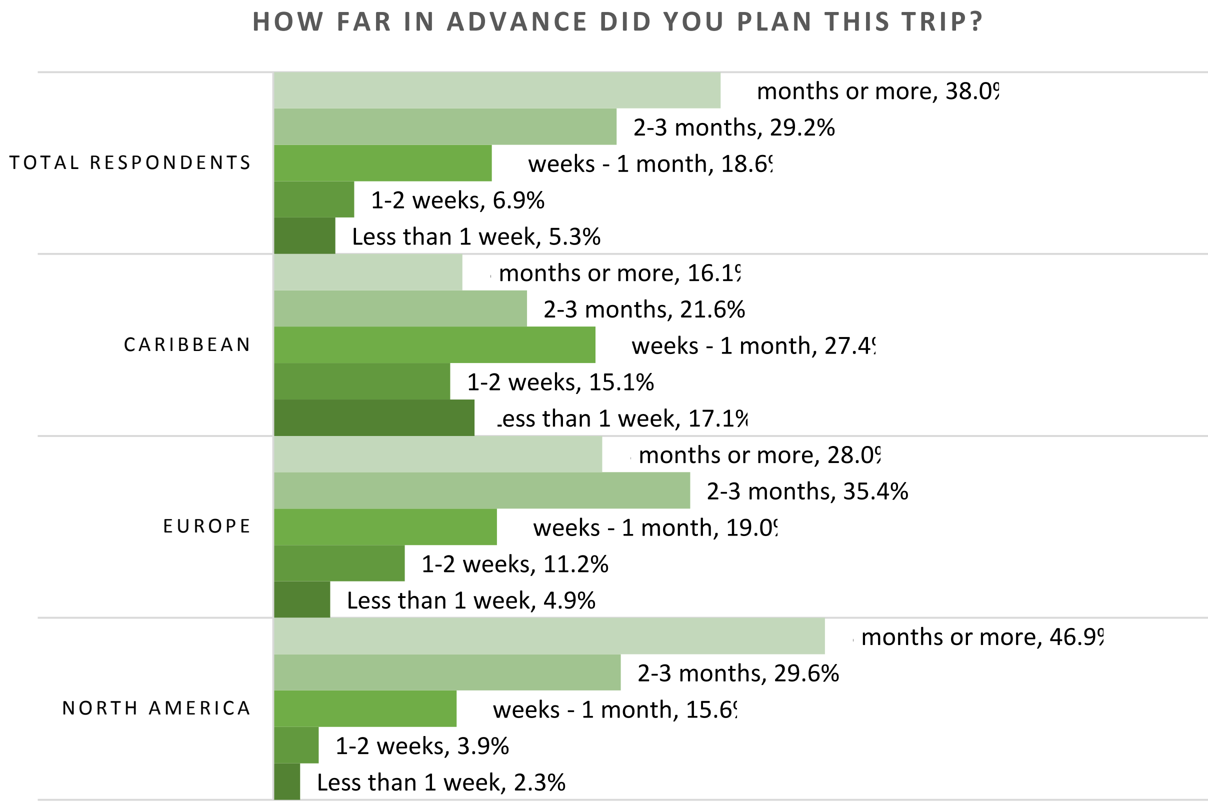
Figure 16: Top 5 Reasons for their Visit to St. Maarten / Saint Martin

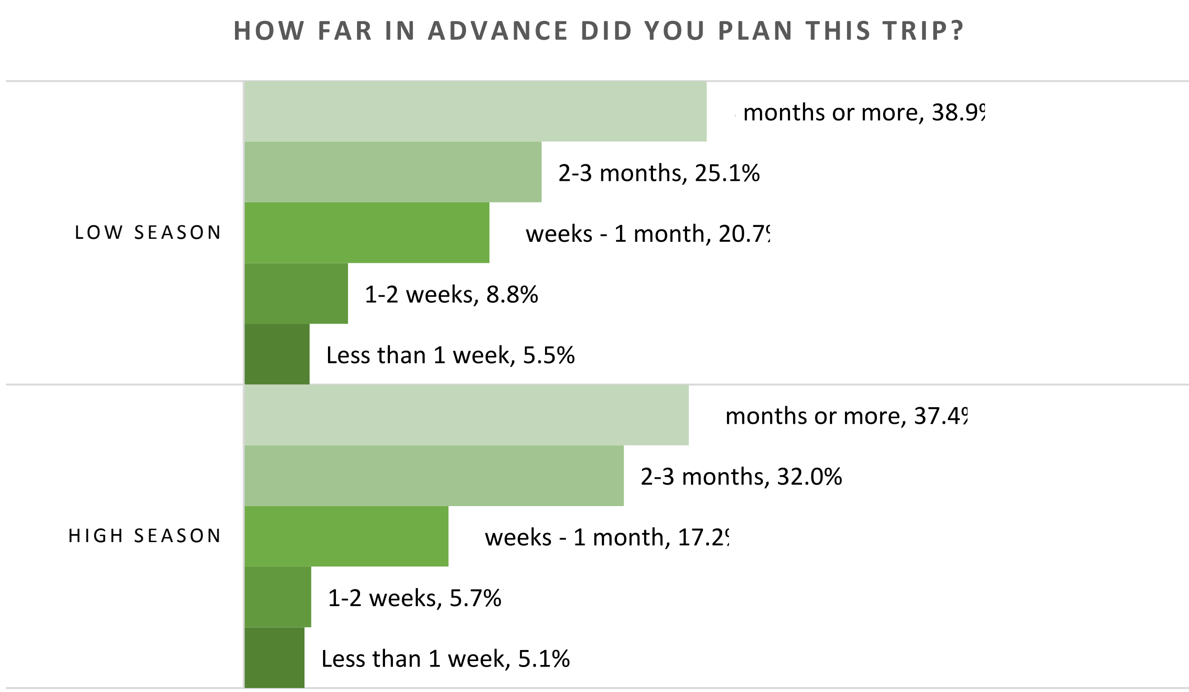


Respondents were asked how far in advance they planned their trip to the island; Figure 17 below illustrates the results by Region and 'High season' versus 'Low season'. The largest percentage (38.0%) of total respondents indicted to have booked '3 months or more' in advance. Similarly 46.9 percent of North American respondents indicated to have booked '3 months or more' in advance. However the majority of respondents from Europe (35.4%) and the Caribbean (27.4%) have indicated shorter booking times; '2 – 3 months' and '3 weeks – 1 month' in advance respectively.

When comparing 'High season' behavior versus 'Low season' behavior, both indicated to have the largest percentage of respondents that booked '3 months or more' in advance. Though it is noticeable that in the 'Low season' (35%) more respondents booked '1 month or less' in advance compare to those that travelled in the 'High season' (28%).

Figure 17: How far in advance did you plan this trip? By Region and Low/ High Season





Interests and Activities

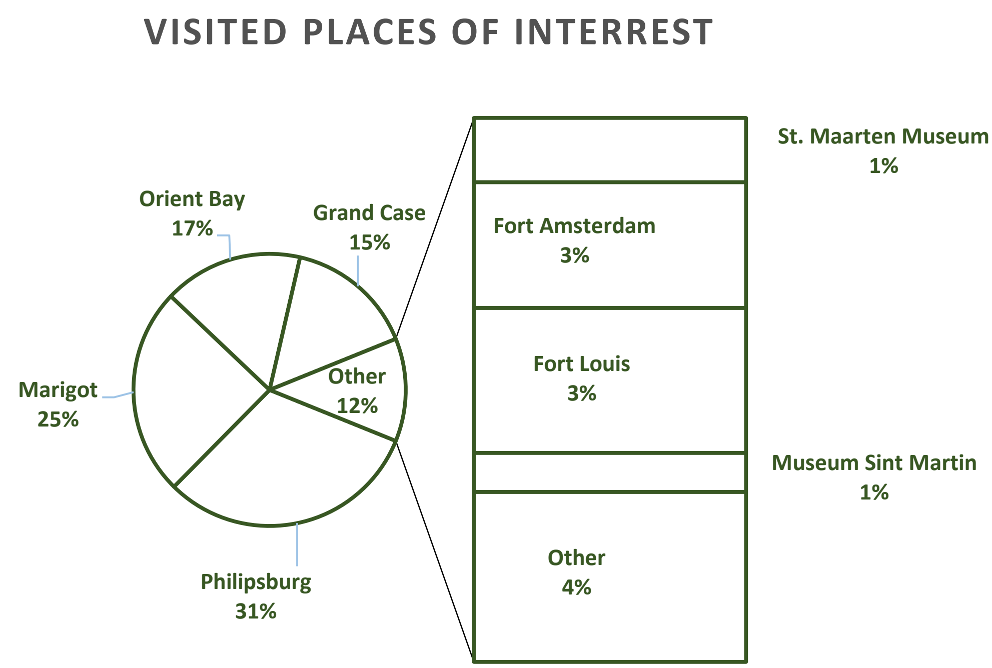
Table 9 below ranks the responses to activities engaged in and places of interest visited. The Top activity was 'Beaches' whilst the top place of interest visited was 'Philipsburg'. 31 percent of respondents visited 'Philipsburg' while 25 percent visited 'Marigot'; this is evident from figure 18 below.

Table 9: Respondents by place of interest visited and activities engaged in.

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

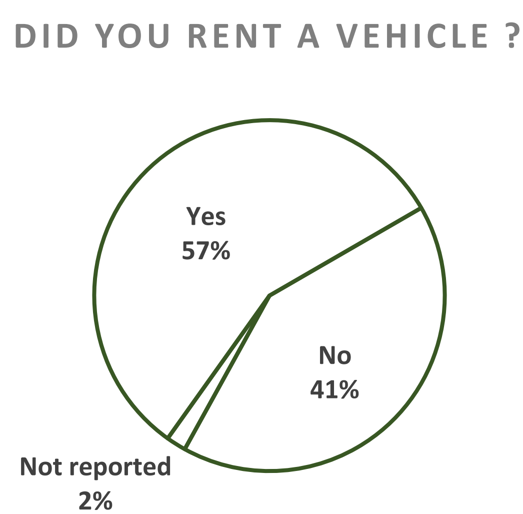
PLACE OF INTEREST	RANK
Philipsburg	1
Marigot	2
Orient Bay	3
Grand Case	4
Other	5
Fort Louis	6
Fort Amsterdam	7
St. Maarten Museum	8
Museum St. Martin	9

Figure 18: Respondents by place of interest visited



When respondents were asked if they rented a vehicle during their visit, 57 percent indicated they had, whilst 41 percent had not rented and 2 percent did not respond to the question.

Figure 19: Did you rent a vehicle during your visit to St. Maarten / Saint Martin?

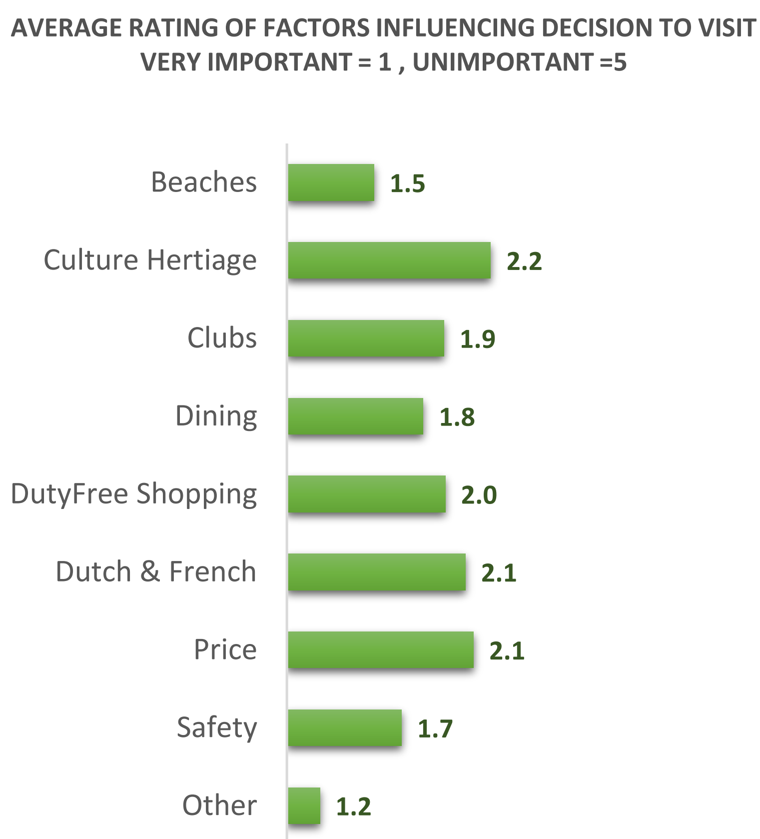


Satisfaction

Factors of Influence

Respondents were asked to rate the importance of various factors which influenced their decision to visit the island. A five-point Likert scale was used were 'Very Important' was 1 and 'Unimportant' was 5. The top 5 factors rated between 'Very Important' and 'Important' were Beaches, Clubs, Dining, Safety and Other.

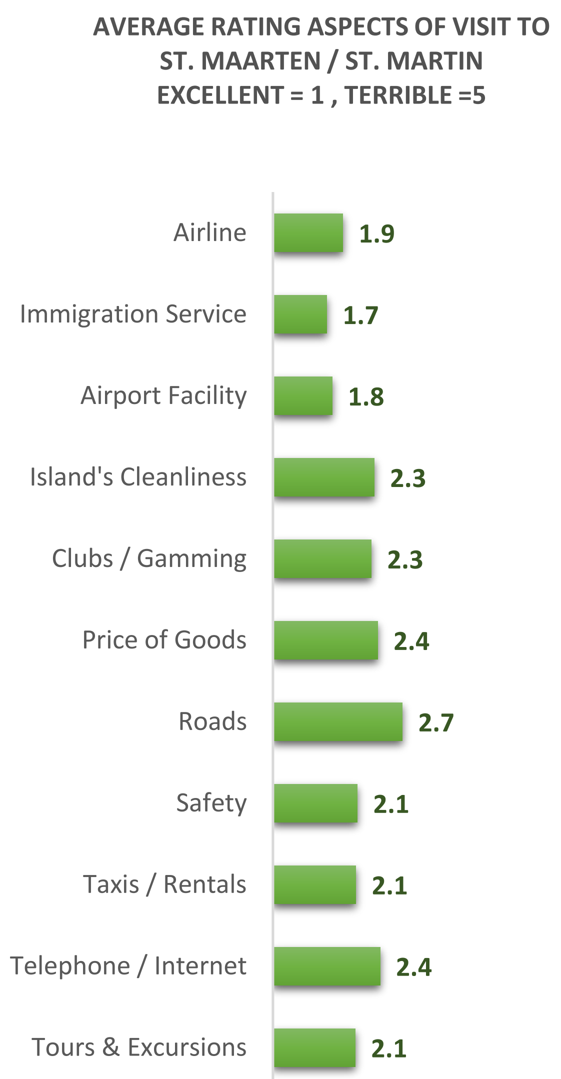
Figure 24: Average Rating of Factors Influencing Decision to Visit

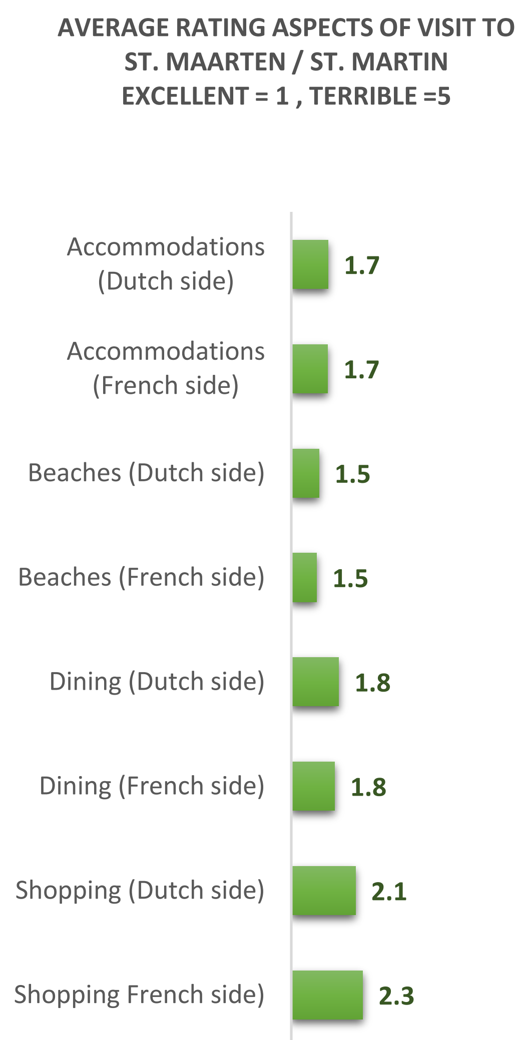


Satisfaction with the Product

Respondents were asked to rate their satisfaction with various aspects of their visit to the island. A five-point Likert scale was used where 'Excellent' was 1 and 'Terrible' was 5. The top 5 aspects which respondents rated between 'Excellent' and 'Good' were Beaches (Dutch side), Beaches (French side), Accommodations (Dutch side), Accommodations (French side) and Immigration Service.

Figure 25: Average Rating of Aspects of Visit to St. Maarten / Saint Martin





When respondents were asked to what extent their expectations were met during the visit, 67.5 percent said their expectations were met while 26.5 percent indicated that it was above expectations, this is evident in figure 26 below.

Figure 26: To what extent were your expectations met during the visit ?

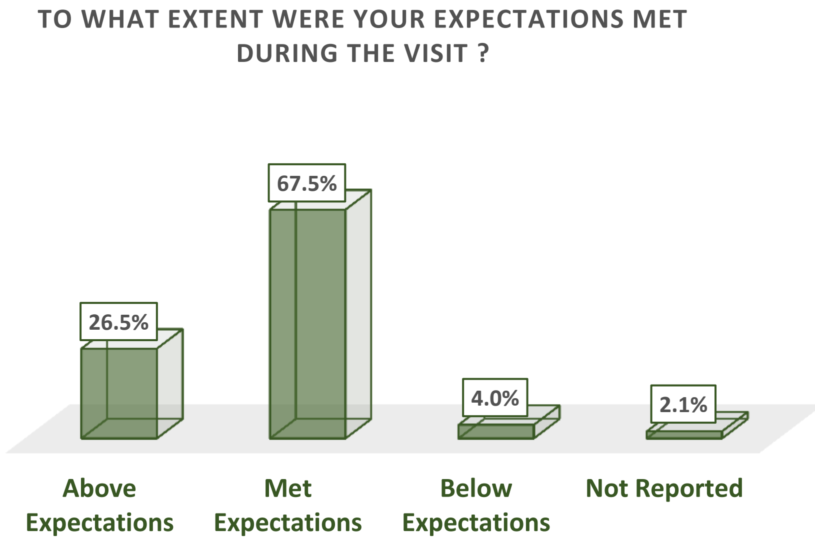
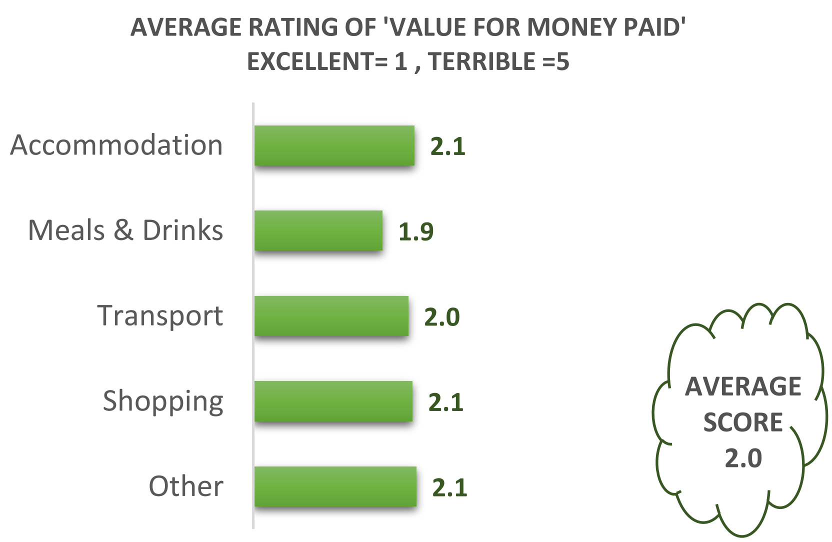


Figure 27: Average Rating of Value for Money Paid



Willingness to Recommend and Return

Respondents were asked about their willingness to recommend and willingness to return to the island. A five-point Likert scale was used were 'Definitely' was 1 and 'Definitely not' was 5; 68 percent of respondents said that they would definitely return whilst 70.3 percent said they would definitely recommend St. Maarten / Saint Martin, this is illustrated in figures 28 and 29 below.

Figure 28: Willingness to Recommend or Return to St. Maarten / Saint Martin