

# **Tourism Exit Survey 2014**

Main results of the Travel Activities, Satisfaction, Expenditure and General Demographics of Visitors to Sint Maarten









# Contents

| 3  |
|----|
| 4  |
| 5  |
| 6  |
| 7  |
| 8  |
| 9  |
| 11 |
| 12 |
| 12 |
| 12 |
| 13 |
| 14 |
| 15 |
| 17 |
| 18 |
|    |

# Summary of Cruise Results

In 2014, data from the Sint Maarten Harbour group showed a total of 2,001,996 cruise visitor arrivals to St. Maarten. Throughout the year the Department of Statistics in collaboration with the St. Maarten Tourist Bureau conducted its second annual Tourism Exit Survey amongst a sample of departing tourists; this was carried out quarterly<sup>1</sup>. A total of 1,393 forms were completed, representing 10,032 cruise passengers. Persons residing in North America (United States 70% & Canada 6%) accounted for 76% of the overall response. Whereas those residing in Europe and the Caribbean represented 9% each. All other regions represented a combined 6% of the total response.

**Table 1. Overall Response by Region** 

| Regions            | Completed surveys (%) | Travel Party (%) |
|--------------------|-----------------------|------------------|
| North America      | 76                    | 84               |
| Caribbean          | 9                     | 6                |
| Europe             | 9                     | 4                |
| Other              | 6                     | 6                |
| <b>Grand Total</b> | 100%                  | 100%             |

Table 2. St. Maarten Cruise-year summary results

| Cruise Arrivals<br>2014 | Cruise passenger arrivals | Cruise vessel arrivals | Quarterly passenger arrivals (%) |
|-------------------------|---------------------------|------------------------|----------------------------------|
| Quarter 1               | 736,045                   | 295                    | 37                               |
| Quarter 2               | 406,100                   | 119                    | 20                               |
| Quarter 3               | 317,088                   | 80                     | 16                               |
| Quarter 4               | 542,763                   | 198                    | 27                               |
| Year                    | 2,001,996                 | 692                    | 100                              |

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<sup>&</sup>lt;sup>1</sup> With exception of Q3

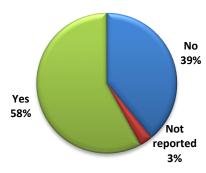
#### **Travel Activities**

The 2014 results show that within travel activities, amongst 1393 respondents representing 10,032 individuals, 58% were visiting St. Maarten/St. Martin for the first time, 39% were return visitors, while 3% did not respond. Of the return cruisers 12% had visited the island at least twice before.

# Of those indicating "Yes"

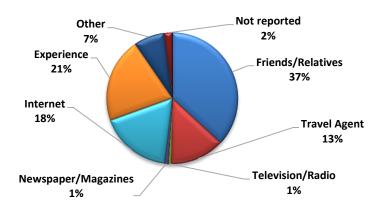
• 60% reported the presence of St. Maarten / St. Martin on the itinerary positively influenced their decision to take the cruise, whereas 37% were indifferent, and 3% not reported.

Chart 1: Is this your 1st visit to St. Maarten / St. Martin?



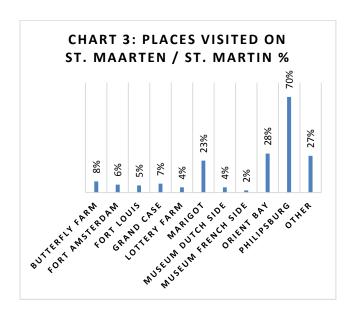
The most important sources when deciding to take their cruise, were found to be Friends/ Relatives (36%), previous Experience (21%), the Internet (17%), and travel agents (13%).

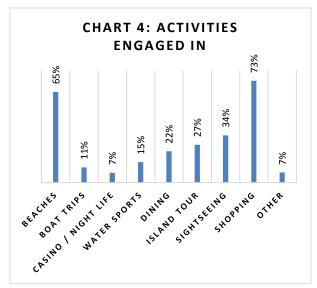
Chart 2: Sources of information when taking cruise



### **Places Visited / Engaging Activities**

Places visited during the short stay on St. Maarten showed a typical ranking in which the capitals Philipsburg and Marigot, were in the top 5 areas, 69% and 23% respectively. Orient Bay remains popular amongst cruise guests (28%), while the butterfly farm and Grand Case were visited by 8% and 7% of guests respectively (see chart 3)





Respondents were also polled on the activities engaged in while visiting St. Maarten / St. Martin. These activities were then ranked by percentage of responses, in which the top 5 were shopping (73%), visiting beaches (65 %), sightseeing (34%), Island tours (27%) and Dining (22%), see chart 4. Below table 3 illustrates the sources which influenced the various activities engaged in by cruise tourists.

**Table 3. Sources Influencing your Activities** 

| Influences                   | Very<br>important<br>(%) | Important<br>(%) | Average<br>(%) | Somewhat important (%) | Unimportant<br>(%) | Not<br>applicable<br>(%) | Not<br>reported<br>(%) |
|------------------------------|--------------------------|------------------|----------------|------------------------|--------------------|--------------------------|------------------------|
| On-Shore<br>Information Desk | 20                       | 18               | 8              | 4                      | 15                 | 30                       | 4                      |
| Friends / Relatives          | 29                       | 18               | 5              | 3                      | 13                 | 29                       | 5                      |
| <b>Cruise Director</b>       | 18                       | 19               | 11             | 4                      | 18                 | 26                       | 4                      |
| Taxi Drivers                 | 20                       | 18               | 6              | 3                      | 12                 | 35                       | 6                      |
| Walking around               | 20                       | 18               | 6              | 3                      | 12                 | 35                       | 6                      |
| Internet                     | 31                       | 22               | 8              | 3                      | 6                  | 24                       | 5                      |
| Other                        | 12                       | 4                | 2              | 1                      | 6                  | 57                       | 18                     |

#### **Satisfaction**

Table 4 provides a list of the aspects or factors that most cruise tourists incur while visiting St. Maarten / St. Martin. These factors have been rated on a 6 point Likert scale. The island received an overall 1.7 satisfaction rating from respondents. Results display that questions related to the Cruise terminal facilities and Safety & Security received the highest significance ratings. Whereas Island's Cleanliness, Dutch Beaches, Port & Immigration Services, Sightseeing & Attractions, Duty-free shopping and Prices of Goods on the Dutch side received excellent ratings on the scale.

Table 4. Satisfaction with various St. Maarten / St. Martin attributes

|                               | Excellent<br>(%) | Good<br>(%) | Average<br>(%) | Poor<br>(%) | Terrible<br>(%) | Not<br>applicable<br>(%) | AVERAGE<br>SCORE |
|-------------------------------|------------------|-------------|----------------|-------------|-----------------|--------------------------|------------------|
| Port & Immigration Services   | 48               | 32          | 5              | 1           | 0               | 12                       | 1.5*             |
| Cruise terminal facilities    | 63               | 29          | 3              | 0           | 0               | 2                        | 1.4*             |
| Safety & Security             | 60               | 30          | 3              | 0           | 0               | 3                        | 1.4*             |
| Taxis / Rentals               | 36               | 22          | 6              | 2           | 1               | 28                       | 1.6              |
| <b>Tours &amp; Excursions</b> | 31               | 14          | 4              | 1           | 1               | 45                       | 1.5              |
| Telephone / Internet          | 11               | 7           | 6              | 3           | 2               | 63                       | 2.3              |
| Sightseeing & Attractions     | 39               | 20          | 4              | 1           | 0               | 31                       | 1.5              |
| Island's Cleanliness          | 56               | 27          | 7              | 2           | 0               | 4                        | 1.5*             |
| Club / Casino                 | 9                | 5           | 2              | 1           | 2               | 72                       | 2.1              |
| <b>Dutch Side</b>             |                  |             |                |             |                 |                          |                  |
| Beaches                       | 50               | 12          | 2              | 0           | 0               | 31                       | 1.3              |
| Dining                        | 23               | 12          | 4              | 0           | 0               | 55                       | 1.6              |
| Price of Goods                | 33               | 29          | 16             | 1           | 1               | 16                       | 1.8*             |
| <b>Duty-free Shopping</b>     | 36               | 27          | 8              | 1           | 1               | 22                       | 1.7              |
| Roads                         | 21               | 24          | 18             | 4           | 2               | 26                       | 2.2              |
| Flow of Traffic               | 18               | 22          | 16             | 5           | 3               | 30                       | 2.3              |
| French Side                   |                  |             |                |             |                 |                          |                  |
| Beaches                       | 24               | 7           | 2              | 1           | 0               | 60                       | 1.4              |
| Dining                        | 10               | 7           | 3              | 0           | 0               | 73                       | 1.7              |
| Price of Goods                | 9                | 9           | 9              | 2           | 1               | 63                       | 2.2              |
| <b>Duty-free Shopping</b>     | 9                | 7           | 7              | 1           | 0               | 69                       | 2.1              |
| Roads                         | 11               | 16          | 10             | 3           | 1               | 53                       | 2.2              |
| Flow of Traffic               | 9                | 14          | 11             | 3           | 2               | 53                       | 2.4              |
| 0                             |                  |             |                |             |                 |                          | 4 -              |
| Overall Rating                |                  |             |                |             |                 |                          | 1.7              |

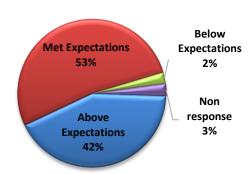
\* indicates the highest significance rating, based on the number of respondents answering the question in comparison to the total respondents.

# **Expectations**

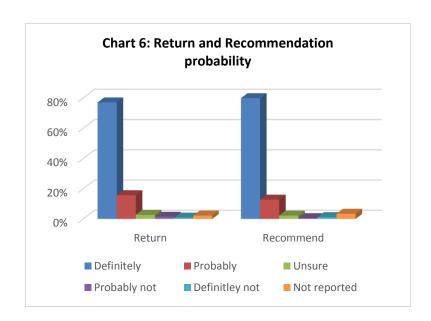
On departure, respondents were asked whether the visit had met their expectations.

- Majority of visitors (53%) reported their expectations were met during the visit.
- 42% said their expectations were exceeded. Less than 2% had experiences that were below their expectations.

**Chart 5: Expectations** 



77% said they would definitely return and 80% were definitely willing to recommend the island to
others. Whereas 16% were likely to return and 13% recommend the island. The remainder were
unsure or less likely to return or recommend the island to others.



# **Expenditure**

Table 6 provides the average total expenditure per person in each expense category, grouped by region of residence. Average total expenditure per cruise passenger in 2014 is \$170.85, approximately 10% greater than in 2013 when it was \$155. Table 5 displays the average travel-party size by region. With the previous statement in mind the grand total for table 7 shows that a cruise party spends on average a total of \$505.24 in St. Maarten/St. Martin.

| T | a | b | le | 5 |
|---|---|---|----|---|
|   |   |   |    |   |

| Region             | Average Travel Party Size by Region |
|--------------------|-------------------------------------|
| North America      | 3.0                                 |
| Latin America      | 3.1                                 |
| Caribbean          | 3.2                                 |
| Europe             | 2.4                                 |
| Other              | 3.6                                 |
| Not reported       | 2.9                                 |
| <b>Grand Total</b> | 3.0                                 |
|                    |                                     |

<sup>\*</sup>Averages has been rounded to the close  $10^{\text{th}}$ .

Table 6. Average Total Expenditure per Person per Category

|                       | United   |          | North    |           |          | Latin    |          |
|-----------------------|----------|----------|----------|-----------|----------|----------|----------|
|                       | States   | Canada   | America  | Caribbean | Europe   | America  | Total    |
| Food & Beverages      | \$26.84  | \$33.28  | \$27.21  | \$30.47   | \$37.90  | \$34.04  | \$28.71  |
| Shopping              | \$59.86  | \$84.64  | \$61.23  | \$68.23   | \$74.58  | \$66.14  | \$63.53  |
| Tours / Excursions    | \$25.79  | \$20.69  | \$25.55  | \$12.32   | \$17.62  | \$22.25  | \$23.75  |
| Car Rental            | \$5.90   | \$1.48   | \$5.68   | \$6.16    | \$10.74  | \$15.72  | \$6.84   |
| Public Transportation | \$5.96   | \$2.22   | \$5.77   | \$4.27    | \$9.31   | \$14.41  | \$6.55   |
| Taxi                  | \$17.99  | \$18.49  | \$18.04  | \$18.49   | \$27.41  | \$24.88  | \$19.28  |
| Entertainment         | \$8.39   | \$6.28   | \$8.29   | \$11.21   | \$21.46  | \$32.09  | \$10.43  |
| Telephone / Internet  | \$5.60   | \$3.70   | \$5.50   | \$7.75    | \$10.50  | \$17.03  | \$6.63   |
| Other Services        | \$4.62   | \$0.74   | \$4.42   | \$3.16    | \$5.49   | \$20.96  | \$5.13   |
| Total per Region      | \$160.95 | \$171.50 | \$161.69 | \$162.06  | \$215.01 | \$247.52 | \$170.85 |

Table 7. Average Total Expenditure per Party by Region

|                              | United   |          | North    |           |          | Latin    | Total    |
|------------------------------|----------|----------|----------|-----------|----------|----------|----------|
|                              | States   | Canada   | America  | Caribbean | Europe   | America  | Product  |
| Food & Beverages             | \$80.38  | \$93.35  | \$81.10  | \$97.36   | \$91.78  | \$104.17 | \$84.90  |
| Shopping                     | \$179.27 | \$237.43 | \$182.50 | \$218.00  | \$180.61 | \$202.43 | \$187.88 |
| Tours / Excursions           | \$77.23  | \$58.03  | \$76.16  | \$39.35   | \$42.67  | \$68.10  | \$70.25  |
| Car Rental                   | \$17.68  | \$4.15   | \$16.92  | \$19.69   | \$26.00  | \$48.11  | \$20.22  |
| <b>Public Transportation</b> | \$17.86  | \$6.22   | \$17.21  | \$13.63   | \$22.53  | \$44.10  | \$19.37  |
| Taxi                         | \$53.87  | \$51.86  | \$53.76  | \$59.06   | \$66.37  | \$76.14  | \$57.02  |
| Entertainment                | \$25.13  | \$17.61  | \$24.71  | \$35.83   | \$51.97  | \$98.21  | \$30.85  |
| Telephone / Internet         | \$16.76  | \$10.37  | \$16.41  | \$24.75   | \$25.42  | \$52.13  | \$19.60  |
| Other Services               | \$13.82  | \$2.08   | \$13.17  | \$10.08   | \$13.29  | \$64.17  | \$15.16  |
| Total per Region             | \$482.00 | \$481.10 | \$481.93 | \$517.76  | \$520.64 | \$757.56 | \$505.24 |

# **Cruisers' Profile**

Table 8 below gives an overview of cruise visitors by age groups and sex. Up until ages 50 and over, there is basically an even distribution between both sexes, with a slightly higher percentage of male cruisers. The majority (33%) of cruise visitors in 2014 however were in the age group of 60+ years of age. This may account also for the largest number of cruisers indicating to be married couples (Table 9).

Table 8. Visitors by Age & Sex

|              | 7 0      |            |           |                     |
|--------------|----------|------------|-----------|---------------------|
| Age Category | Male (%) | Female (%) | Total (%) | # of<br>Respondents |
| Under 15     | 10       | 10         | 10        | 642                 |
| 15 - 29      | 17       | 12         | 14        | 919                 |
| 30 - 39      | 16       | 13         | 14        | 951                 |
| 40 - 49      | 18       | 12         | 14        | 940                 |
| 50 - 59      | 21       | 12         | 16        | 1037                |
| 60 +         | 19       | 42         | 33        | 2167*               |
| Total        | 100%     | 100%       | 100%      |                     |
|              |          |            |           |                     |

**Table 9. Visitors by Marital Status** 

| <b>Marital Status</b> | # of responses | %   |
|-----------------------|----------------|-----|
| Single                | 305            | 22  |
| Married               | 933            | 67  |
| Widowed/Separated     | 36             | 3   |
| Divorced              | 57             | 4   |
| Not reported          | 62             | 4   |
| <b>Grand Total</b>    | 1393           | 100 |
|                       |                |     |

Information regarding visitors' annual household income was also collected, in the table below a cross-tab is shown with marital status. The results reveal that single households primarily earned less than \$25,000 (27%), whereas US \$50,001 - US \$75,000 earning households were primarily Widowed/Separated (22%) or Divorced (26%). The highest income earning households were married, with incomes US \$75,001 - US \$100,000 and greater. The overall average annual income of cruisers were in the range of US \$75,001 - US \$100,000.

Table 10. Marital Status by Household Income

|                             | Single (%) | Married (%) | Widowed/Separated (%) | Divorced (%) | Grand Total (%) |
|-----------------------------|------------|-------------|-----------------------|--------------|-----------------|
| Less than US \$25,000       | 10         | 4           | 6                     | 7            | 5               |
| US \$25,000 - US \$50,000   | 27         | 12          | 17                    | 19           | 16              |
| US \$50,001 - US \$75,000   | 19         | 14          | 22                    | 26           | 16              |
| US \$75,001 - US \$100,000  | 15         | 18          | 14                    | 14           | 17              |
| US \$100,001 - US \$125,000 | 8          | 15          | 6                     | 11           | 13              |
| US \$125,000 and over       | 7          | 19          | 3                     | 9            | 15              |
| Not reported                | 14         | 18          | 33                    | 14           | 18              |
| <b>Grand Total</b>          | 100%       | 100%        | 100%                  | 100%         | 100%            |

<sup>-</sup> Figures in red highlights the highest percentage rating per marital status.

North American households usually held an income level of \$75'001 - \$100'001 or \$125'000 and greater. With United States residents indicating the same amounts as the overall North America, while Canadians indicated household incomes of mostly \$75'001 - \$100'000. Caribbean and European residents indicated household incomes of mostly \$25'001 - \$50'000. Latin Americans held an average household income of between \$50'001 - \$75'000.

<sup>\*</sup> indicates that ages 60+ had the largest number of respondents.

Table 11. Annual Household Income by Region

|                             | United |        | North   |        |           | Latin   |           |
|-----------------------------|--------|--------|---------|--------|-----------|---------|-----------|
|                             | States | Canada | America | Europe | Caribbean | America | Grand     |
| Annual Income               | (%)    | (%)    | (%)     | (%)    | (%)       | (%)     | Total (%) |
| Less than US \$25,000       | 5      | 3      | 4       | 2      | 15        | 15      | 5         |
| US \$25,000 - US \$50,000   | 14     | 18     | 14      | 20     | 31        | 15      | 16        |
| US \$50,001 - US \$75,000   | 17     | 14     | 17      | 16     | 14        | 21      | 16        |
| US \$75,001 - US \$100,000  | 18     | 20     | 18      | 17     | 7         | 9       | 17        |
| US \$100,001 - US \$125,000 | 13     | 9      | 12      | 17     | 12        | 18      | 13        |
| US \$125,000 and over       | 18     | 15     | 18      | 7      | 7         | 9       | 15        |
| Not reported                | 17     | 23     | 17      | 21     | 15        | 15      | 18        |
| <b>Grand Total</b>          | 100%   | 100%   | 100%    | 100%   | 100%      | 100%    | 100%      |

<sup>-</sup> Figures in red highlights the highest percentage rating that is 40% and greater for each category (rows). \* indicates that ages US \$75,001 - US \$100,000had the largest number of respondents. With

# **Summary of Airport Results**

According to data collected at the Princess Juliana International Airport, a total of 499,921 Stay-over tourists visited St. Maarten in 2014. Via the quarterly Tourism Exit Survey in the same year, some 3,273 forms were completed in total, which represented a sum of 9,885 departing tourists. Topics covered included planning behavior, interests and activities, satisfaction with various aspects of the island, average daily expenditure as well as demographic information.

Table 1. Overall response by Region

| Regions              | Completed surveys (%) | Travel Party (%) |
|----------------------|-----------------------|------------------|
| <b>North America</b> | 78                    | 78               |
| Latin America        | 3                     | 2                |
| Caribbean            | 11                    | 11               |
| Europe               | 7                     | 6                |
| Other                | 2                     | 3                |
| <b>Grand Total</b>   | 100%                  | 100%             |

Table 2. St. Maarten Stay-over arrival summary results

| Stay-over Arrivals | Tourist arrivals | North   | South   |         |           | Rest of the |
|--------------------|------------------|---------|---------|---------|-----------|-------------|
| 2014               | Of which:        | America | America | Europe  | Caribbean | World       |
| Quarter 1          | 158,032          | 107,526 | 4,147   | 33,019  | 6,331     | 7,009       |
| Quarter 2          | 121,139          | 80,642  | 4,088   | 22,754  | 6,272     | 7,383       |
| Quarter 3          | 98,171           | 54,320  | 3,785   | 23,734  | 7,331     | 9,001       |
| Quarter 4          | 122,579          | 75,269  | 4,685   | 27,341  | 6,456     | 8,828       |
| Year               | 499,921          | 317,757 | 16,705  | 106,848 | 26,390    | 32,221      |

### **Travel Activities**

### **Number of Visits to St. Maarten**

Chart 1: First Visit to St. Maarten / St. Martin (%)



Chart 2: Number of visits to St. Maarten/ St. Martin (%)

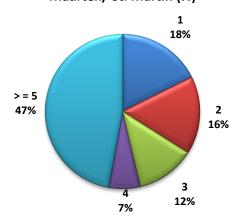
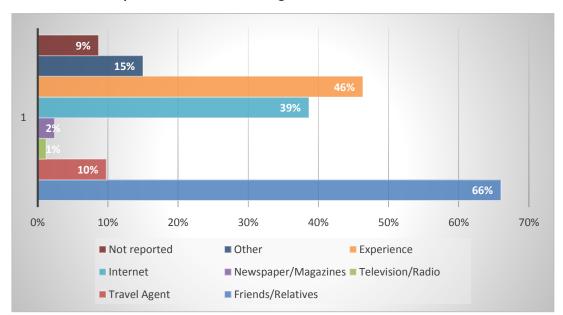


Chart 1 indicates the percentage of first-time visitors to St. Maarten / St. Martin, whereas for previous visitors Chart 2 indicates the number of returned visits.

- 43% reported this as their first visit to St. Maarten / St. Martin
- 53% were 'repeat visitors'
- 4% not reported
- The majority of repeat visitors have returned to St. Maarten / St. Martin five or more times.

# Most Important Source of Information influencing decision to visit

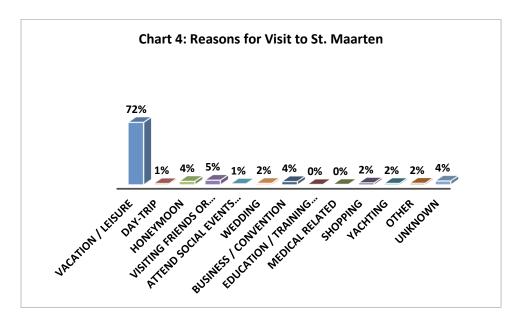
- Friends/Relatives remain the leading source of information when visitors decide to visit St. Maarten (66%)
- Visitors' previous experience on the island also contribute heavily in their decision-making to return (46%)
- While the Internet more than doubled in importance (39%) compared to in 2013
- Travel agents were the highest factor for about 10% of visitors

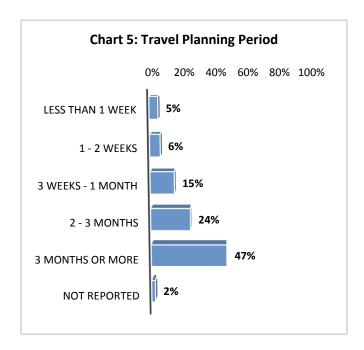


**Chart 3: Most important Source influencing decision to visit** 

# **Purpose of Visit**

The top reason for visiting St. Maarten / St. Martin was found to be "Vacation and Leisure" (72%), followed by 'visit friends or relatives' (5%). Honeymoons and Business trips were among the other main reasons, see Chart 4 below.

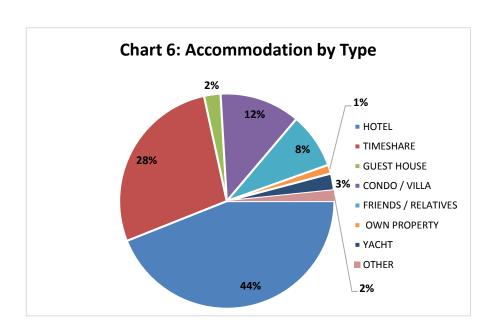




When asked how long in advance respondents planned their vacation to the island, majority (47%) indicated 3 months or more (see Chart 5).

# **Place & Length of Stay**

The tourist industry on St. Maarten / St. Martin offers various accommodation options. Amongst these are seven primary choices, seen in Chart 6. The largest percentage of respondents choose hotels (44%) as their primary accommodation choice, of which, the United States region represents 26%. Overall, 28% of visitors stay at Timeshare units, while Condoniums/Villas represented an overall share of 12% and 8% of respondents stayed with Friends or relatives.



**Table 3. Average Length of Stay (nights)** 

| 1 4.0.0 01711 014.00 201.0411 |            |             |
|-------------------------------|------------|-------------|
|                               | Dutch side | French side |
| United States                 | 8.1        | 7.9         |
| Canada                        | 8.8        | 11.0        |
| NORTH AMERICA                 | 8.5        | 8.2         |
| Caribbean                     | 6.7        | 9.8         |
| Europe                        | 11.2       | 10.3        |
| <b>Total Respondents</b>      | 8.2        | 8.7         |

Furthermore, the average length of stay was calculated, as well as by the major regions for both sides of the island. Table 3 indicates that the average stay of tourists is about equal for both the Dutch and French parts of the island, with a combined average of 8.2 nights per tourist. Table 4 below, shows the length of stay based on hotels, timeshare, and guesthouses.

Table 4. Average Length of Stay by accommodation (nights)

| Ü                    | Total Length<br>of stay | Hotel | Timeshare | Guesthouse |
|----------------------|-------------------------|-------|-----------|------------|
| <b>North America</b> | 8.1                     | 6.3   | 9.3       | 7.1        |
| Caribbean            | 7.0                     | 5.1   | 7.1       | 6.3        |
| Europe               | 10.3                    | 7.8   | 12.3      | 10.6       |
| Total                | 8.2                     | 6.2   | 9.3       | 7.8        |

### **Satisfaction ratings**

Table 5 provides a list of the aspects or factors that most stay-over tourists incur while visiting St. Maarten / St. Martin. These factors have been rated on a 6 point Likert scale with an added significance rating, 1 indicates the highest significance rating provided, based on the number of respondents answering the question in comparison to the total respondents. The results display that factors related to immigration and airport services and facilities received the highest ratings<sup>2</sup>. Whereas beaches and dining on both sides of the island also received high ratings and average scoring on the scale.

Table 5. St. Maarten / St. Martin Attributes Satisfaction Rating

|                             | Excellent<br>(%) | Good<br>(%) | Average<br>(%) | Poor<br>(%) | Terrible<br>(%) | Average<br>Score |
|-----------------------------|------------------|-------------|----------------|-------------|-----------------|------------------|
| <b>Immigration Services</b> | 47               | 37          | 12             | 2           | 1               | 1.7              |
| Airport facilities          | 41               | 41          | 13             | 3           | 1               | 1.8              |
| Island Cleanliness          | 20               | 32          | 32             | 12          | 4               | 2.5              |
| Clubs/Casinos               | 18               | 33          | 35             | 9           | 5               | 2.5              |
| Taxis / Rentals             | 22               | 41          | 28             | 6           | 2               | 2.3              |
| Tours / Excursions          | 30               | 42          | 22             | 3           | 3               | 2.1              |
| Telephone / Internet        | 11               | 24          | 33             | 21          | 12              | 3.0              |

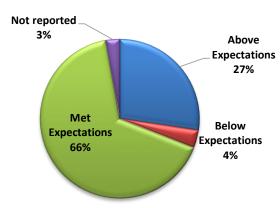
<sup>&</sup>lt;sup>2</sup> Ratings are arranged in the order of highest = 1 and lowest = 5.

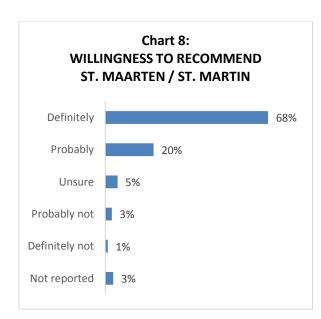
| Sightseeing                              | 28 | 43 | 24 | 4  | 1  | 2.1 |
|--|----|----|----|----|----|-----|
| Prices of Goods                          | 12 | 31 | 41 | 11 | 4  | 2.6 |
| <u>Dutch Side</u>                        |    |    |    |    |    |     |
| <b>Dutch Beaches</b>                     | 62 | 29 | 7  | 1  | 1  | 1.5 |
| <b>Dutch Dining</b>                      | 44 | 40 | 12 | 3  | 1  | 1.8 |
| Dutch Prices of Goods<br>Dutch Duty-Free | 20 | 36 | 33 | 8  | 3  | 2.4 |
| Shopping                                 | 30 | 39 | 24 | 6  | 1  | 2.1 |
| Dutch Roads                              | 10 | 22 | 35 | 22 | 11 | 3.0 |
| French Side                              |    |    |    |    |    |     |
| French Beaches                           | 68 | 25 | 5  | 1  | 1  | 1.4 |
| French Dining                            | 50 | 36 | 11 | 2  | 1  | 1.7 |
| French Prices of Goods French Duty-Free  | 9  | 25 | 39 | 17 | 10 | 2.9 |
| Shopping                                 | 15 | 29 | 36 | 14 | 6  | 2.7 |
| French Roads                             | 8  | 21 | 36 | 23 | 12 | 3.1 |
|  |    |    |    |    |    |     |

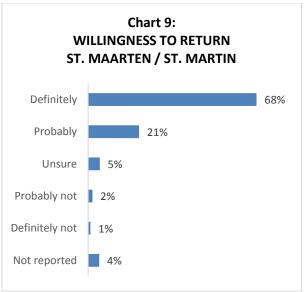
<sup>-</sup> Figures in red highlight the highest percentage per category (rows).

In terms of respondents overall experience in St. Maarten / St. Martin, Chart 7 indicates that most respondents felt their experience in St. Maarten / St. Martin either met or surpassed their expectations. Therefore, the corresponding percentage rating for respondents' willingness to return and recommend the island is high. (See Charts 8 and 9).

**Chart 7: Expectations** 







# **Expenditure**

Table 6 shows that on average in 2014, stay-over visitors traveled in groups of approximately 3 persons. Average daily expenditure is estimated at \$94.36 per person. Tables 7 & 8 show, the amounts spent daily per individual (and per party) among several key categories. Noticeable is that Food & Beverages, Shopping, and Car rental expenses are the three largest expense categories among respondents. Table 10, aggregates the total expense per category based on the average travel party size per region.

Table 6.

| Region             | Average Travel party size |
|--------------------|---------------------------|
| North America      | 2.9                       |
| Caribbean          | 2.9                       |
| Europe             | 2.5                       |
| <b>Grand Total</b> | 2.8                       |

**Table 7. Average Daily Expenditure for Person per Category** 

|                               | United    |          | North    |           |          | Latin     | Total       |
|-------------------------------|-----------|----------|----------|-----------|----------|-----------|-------------|
|                               | States    | Canada   | America  | Caribbean | Europe   | America   | Respondents |
| Accommodations                | \$ 33.19  | \$ 30.27 | \$ 32.72 | \$ 8.78   | \$ 13.24 | \$ 14.32  | \$ 28.75    |
| Entertainment                 | \$ 8.30   | \$ 5.73  | \$ 7.89  | \$ 10.11  | \$ 8.32  | \$ 11.88  | \$ 8.11     |
| Food & Beverage               | \$ 20.32  | \$ 13.41 | \$ 19.19 | \$ 15.84  | \$ 15.10 | \$ 23.22  | \$ 18.49    |
| Car Rental                    | \$ 10.85  | \$ 8.54  | \$ 10.48 | \$ 8.41   | \$ 8.95  | \$ 12.60  | \$ 10.12    |
| Taxi                          | \$ 3.26   | \$ 2.73  | \$ 3.18  | \$ 4.39   | \$ 2.14  | \$ 5.00   | \$ 3.23     |
| <b>Public Transportation</b>  | \$ 1.27   | \$ 1.40  | \$ 1.29  | \$ 2.95   | \$ 1.79  | \$ 1.87   | \$ 1.48     |
| <b>Tours &amp; Excursions</b> | \$ 6.67   | \$ 4.65  | \$ 6.34  | \$ 4.84   | \$ 5.17  | \$ 7.48   | \$ 6.12     |
| Shopping                      | \$ 13.44  | \$ 11.65 | \$ 13.15 | \$ 20.75  | \$ 12.85 | \$ 27.30  | \$ 13.88    |
| Telephone / Internet          | \$ 2.03   | \$ 1.24  | \$ 1.91  | \$ 3.82   | \$ 2.56  | \$ 3.41   | \$ 2.12     |
| Other Services                | \$ 1.89   | \$ 1.70  | \$ 1.86  | \$ 3.09   | \$ 2.98  | \$ 2.42   | \$ 2.06     |
| <b>Grand Total</b>            | \$ 101.24 | \$ 81.31 | \$ 98.01 | \$ 83.00  | \$ 73.09 | \$ 109.50 | \$ 94.36    |

**Table 8. Average Daily Expenditure by Region per Average Travel Party** 

|                               | United    |           | North     | ·         |           | Latin     | Total       |
|-------------------------------|-----------|-----------|-----------|-----------|-----------|-----------|-------------|
|                               | States    | Canada    | America   | Caribbean | Europe    | America   | Respondents |
| Accommodations                | \$ 90.61  | \$ 80.87  | \$ 89.07  | \$ 20.25  | \$ 31.13  | \$ 32.52  | \$ 75.88    |
| Entertainment                 | \$ 22.67  | \$ 15.30  | \$ 21.46  | \$ 23.30  | \$ 19.56  | \$ 26.98  | \$ 21.40    |
| Food & Beverage               | \$ 55.47  | \$ 35.82  | \$ 52.25  | \$ 36.52  | \$ 35.49  | \$ 52.71  | \$ 48.81    |
| Car Rental                    | \$ 29.63  | \$ 22.82  | \$ 28.52  | \$ 19.38  | \$ 21.03  | \$ 28.60  | \$ 26.70    |
| Taxi                          | \$ 8.91   | \$ 7.29   | \$ 8.65   | \$ 10.12  | \$ 5.04   | \$ 11.36  | \$ 8.51     |
| <b>Public Transportation</b>  | \$ 3.48   | \$ 3.73   | \$ 3.52   | \$ 6.80   | \$ 4.20   | \$ 4.25   | \$ 3.92     |
| <b>Tours &amp; Excursions</b> | \$ 18.21  | \$ 12.43  | \$ 17.26  | \$ 11.16  | \$ 12.14  | \$ 16.98  | \$ 16.15    |
| Shopping                      | \$ 36.70  | \$ 31.12  | \$ 35.80  | \$ 47.84  | \$ 30.19  | \$ 61.99  | \$ 36.64    |
| Telephone / Internet          | \$ 5.56   | \$ 3.32   | \$ 5.19   | \$ 8.80   | \$ 6.01   | \$ 7.74   | \$ 5.60     |
| Other Services                | \$ 5.16   | \$ 4.53   | \$ 5.06   | \$ 7.13   | \$ 6.99   | \$ 5.50   | \$ 5.43     |
| <b>Grand Total</b>            | \$ 276.39 | \$ 217.22 | \$ 266.77 | \$ 191.30 | \$ 171.79 | \$ 248.63 | \$ 249.06   |

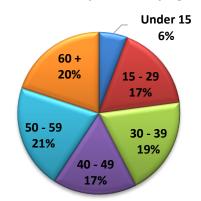
### **Visitor's Profile**

Demographic information collected indicates that there was a pretty even spread between male and female respondents across age categories, to the island in 2014. The largest group consisted of respondents between the ages of 50 - 59 and 60+ (see chart 10). However, based on the marital status of respondents (chart 11) it is clear that visitors are primarily married 69%, versus singles 24% and other categories.

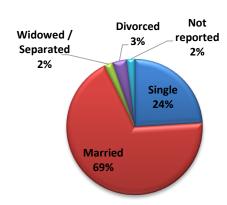
Table 9. Age Group by Sex

| rable or rige er out by sex |      |        |       |  |  |  |  |  |  |
|-----------------------------|------|--------|-------|--|--|--|--|--|--|
|                             | Male | Female | Total |  |  |  |  |  |  |
| Under 15                    | 292  | 266    | 558   |  |  |  |  |  |  |
| 15 - 29                     | 648  | 1,020  | 1,668 |  |  |  |  |  |  |
| 30 - 39                     | 942  | 959    | 1,901 |  |  |  |  |  |  |
| 40 - 49                     | 786  | 850    | 1,636 |  |  |  |  |  |  |
| 50 - 59                     | 945  | 1,082  | 2,027 |  |  |  |  |  |  |
| 60 +                        | 995  | 944    | 1,939 |  |  |  |  |  |  |
| Total                       | 4608 | 5,121  | 9,729 |  |  |  |  |  |  |
|                             |      |        |       |  |  |  |  |  |  |

Chart 10: Respondents by Age



**Chart 11: Marital Status** 



Further analysis indicates that "Singles" were more likely to earn U\$ 25,000 per annum or less, while the highest earners reported to be "Married" couples as well as those who did not report their marital status.

**Table 10. Marital Status and Annual Household Incomes** 

|                             |               |                |                           |                 | Not             |                    |
|-----------------------------|---------------|----------------|---------------------------|-----------------|-----------------|--------------------|
|                             | Single<br>(%) | Married<br>(%) | Widowed/<br>Separated (%) | Divorced<br>(%) | reported<br>(%) | Grand<br>Total (%) |
| Less than US \$25,000       | 16            | 3              | 8                         | 4               | 3               | 6                  |
| US \$25,000 - US \$50,000   | 22            | 8              | 17                        | 18              | 6               | 12                 |
| US \$50,001 - US \$75,000   | 14            | 11             | 18                        | 23              | 11              | 13                 |
| US \$75,001 - US \$100,000  | 13            | 15             | 21                        | 12              | 11              | 14                 |
| US \$100,001 - US \$125,000 | 11            | 13             | 8                         | 12              | 7               | 12                 |
| US \$125,000 and over       | 15            | 38             | 8                         | 22              | 26              | 30                 |
| Not reported                | 10            | 12             | 18                        | 7               | 37              | 12                 |
| Total                       | 100%          | 100%           | 100%                      | 100%            | 100%            | 100%               |

North American households reported mostly to have an annual household income level of \$125'000 and greater. European residents indicated annual household incomes of mostly between \$25'000 - \$50'000 and \$125'000 and greater. Caribbean respondents primarily had a household income of between \$25'000 -\$50'000. Latin Americans held an average household income of between \$25'000 and \$50'000.

Table 11. Gross Annual Household Income by Region

|                             | United<br>States<br>(%) | Canada<br>(%) | North<br>America<br>(%) | Caribbean<br>(%) | Europe<br>(%) | Latin<br>America<br>(%) | Grand<br>Total<br>(%) |
|-----------------------------|-------------------------|---------------|-------------------------|------------------|---------------|-------------------------|-----------------------|
| Less than US \$25,000       | 3                       | 3             | 3                       | 25               | 9             | 21                      | 6                     |
| US \$25,000 - US \$50,000   | 9                       | 11            | 9                       | 28               | 18            | 23                      | 12                    |
| US \$50,001 - US \$75,000   | 12                      | 14            | 13                      | 13               | 15            | 10                      | 13                    |
| US \$75,001 - US \$100,000  | 16                      | 14            | 15                      | 9                | 12            | 9                       | 14                    |
| US \$100,001 - US \$125,000 | 13                      | 13            | 13                      | 8                | 12            | 8                       | 12                    |
| US \$125,000 and over       | 36                      | 32            | 36                      | 6                | 19            | 20                      | 30                    |
| Not reported                | 11                      | 14            | 11                      | 10               | 16            | 9                       | 12                    |
| Total                       | 100%                    | 100%          | 100%                    | 100%             | 100%          | 100%                    | 100%                  |





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