

COMPENDIUM

Sint Maarten Tourism Sector Recovery: Compendium of Tourism Statistics (2020)



Overview

The Compendium of Tourism Statistics is a consolidated, single-source reference for the state of Sint Maarten’s tourism sector before and after Hurricane Irma (September 2017). Produced in February 2020 as part of the Tourism Sector Recovery Strategy Support under the St. Maarten Trust Fund (financed by the Government of the Netherlands and managed by the World Bank), it brings together disparate datasets from multiple public and private sources into a coherent picture of performance and structural shifts. It is explicitly designed to be the factual backbone for recovery planning, marketing, investment decisions, and subsequent analytical work (including the companion Tourism Statistics Diagnostic and the 2020–2022 Priority Action Plan).

The compendium situates tourism as the economy’s central pillar and treats Irma as a structural break in nearly every time series. Using 2016 as the pre-Irma baseline, it documents the immediate collapse (late 2017 through 2018), the initial rebound through 2019, and the uneven nature of recovery across stayover, cruise, and niche segments like yachting. It also surfaces where the evidence is thin—particularly for the sharing economy and yachting—so users understand what can and cannot be concluded with confidence.

Objectives

- **Integrate fragmented data into one authoritative reference.** The compendium pulls together official statistics, administrative records, and industry reporting (e.g., from the Department of Statistics, Port St. Maarten, Princess Juliana International Airport, SHTA, Ministry of Justice, UNWTO, and real estate sources) to eliminate guesswork, reduce duplication, and align stakeholders around shared facts.
- **Establish a clear pre and post-Irma performance profile.** It uses 2016 as a baseline to quantify the shock’s magnitude and to chart early recovery patterns, making it easier to benchmark progress and identify persistent constraints.
- **Inform public policy and private investment.** By consolidating arrivals, market mix, capacity and occupancy, visitor spending and satisfaction, and cruise/yachting activity, it gives decision-makers the inputs needed to prioritize marketing, product development, infrastructure, and regulatory reforms.
- **Highlight data gaps and caveats.** The compendium is transparent about missing series (e.g., 2017 gaps), voluntary and partial coverage (e.g., SHTA members), and definitional issues (e.g., airport data that cannot distinguish Dutch vs. French stays), signaling where system strengthening is required.
- **Support monitoring of recovery.** The indicators and series included form a baseline that subsequent reports and dashboards can update to track progress against recovery and competitiveness goals.

The target audiences include primary users like the Government of Sint Maarten—TEATT for policy and strategy, the Department of Statistics for production and dissemination, the Ministry of Justice/Immigration for border data, PJIAE and Port St. Maarten for administrative feeds, and the Office of the Prime Minister for coordination mandate—as well as the Sint Maarten Tourist Bureau (STB) for market intelligence, campaign targeting, and performance monitoring. Secondary users comprise the private sector and investors, including SHTA and non-member operators, tour and transport providers, retailers, and marinas/yachting services using the compendium to assess demand, adjust products, and plan investments; development partners such as the World Bank and Government of the Netherlands, leveraging the baseline for technical and financial support; and civil society, academia, and media analyzing tourism’s economic and social impacts and advocating for open, accountable data practices.

Findings

1. Arrivals and recovery dynamics

- **Stay-over arrivals:** Sint Maarten welcomed 528,153 stay-over visitors in 2016—the highest annual total since 1994. Following Irma, stay-over arrivals fell to 177,589 in 2018. By July 2019, monthly arrivals had recovered to roughly 70% of July 2017 levels. The compendium cautions that late-2018/2019 flows include a mix of tourists, relief workers, and business travelers, reflecting atypical market conditions during reconstruction.
- **Cruise passengers:** Cruise activity rebounded faster than stayover. After the post-Irma halt, monthly volumes returned to 2016 levels by September 2018. Annual totals were 1,668,863 in 2016 and 1,597,101 in 2018. The compendium also notes a pre-Irma softening influenced by the Zika episode (2015–2017), underscoring that exogenous shocks can move demand independently of infrastructure capacity.
- **Structural break:** Across key series, 2017 data are incomplete or unavailable due to the hurricane’s disruption of collection systems. Users are advised not to infer continuity across 2016–2018 without considering this break.

2. Market mix shifts

- Stay-over markets: The North America share (US and Canada) declined from 63% of stay-over visitors in 2016 to 43% in 2018. Europe's share rose from 27% to 42% over the same period, reflecting relative resilience and possibly airlift and price dynamics during recovery.
- Cruise source markets: The United States remained dominant (63% in 2018), with a growing Caribbean origin share (23%) and a marked decline in European cruise source markets (from 12% in 2016 to 3% in 2018).
- Interpretation: The shift toward Europe in stay-over markets during early recovery likely reflects a combination of demand preferences, price/availability of accommodation, and route networks; it also indicates a temporary change in the island's effective customer mix that has implications for product and marketing.

3. Accommodation capacity and occupancy

- Capacity loss and partial restoration: Just prior to Irma, SHTA reported inventory totaled 3,976 rooms on the Dutch side. By August 2019, only 2,521 hotel and timeshare units were officially available—about 63% of pre-Irma inventory. Projections anticipated an increase to roughly 81% by March 2020 as properties returned online.
- Occupancy: Post-Irma occupancy rates in 2018 appear high (e.g., 84.4% in November 2018) but on a much smaller base of available rooms. Timeshares historically showed higher occupancy than hotels pre-Irma. The compendium cautions that SHTA figures are based on voluntary member reporting and do not capture nonmembers or the villa/condo market, so representativeness is limited.
- Sharing economy: Villas, condos, and short-term rentals likely filled part of the capacity gap, but the compendium reports only anecdotal (non-systematic) data for this segment in 2018–2019. This limits precise estimates of total bed-nights and distributional impacts across neighborhoods.

4. Visitor spending and satisfaction

- Spending (stay-over): Average daily expenditure for stay-over visitors was US\$119.95 in 2016 but fell to US\$83.20 in 2018. By source region in 2018, Latin America (US\$112.56/day) and the Caribbean (US\$108.19/day) outspent the US (US\$86.25/day) and Europe (US\$40.87/day), an atypical pattern that may reflect the composition of travelers during the recovery period and measurement limits from small samples.
- Spending (cruise): Cruise passenger spending is uneven across years; total cruise expenditures in 2018 (about US\$347 million) returned to 2014 levels, indicating volume recovery, though with known lower per capita yields compared to stayover.
- Satisfaction: 2018 stayover exit surveys show relatively strong ratings for accommodation on the Dutch side (4.1/5 vs. 3.5/5 on the French side) but weak ratings for tours and excursions (2.7/5), telephone and internet (3.2/5), and cleanliness (3.4/5). These point to specific product and public realm deficits that likely suppress spend and repeat visitation.

5. Cruise and yachting activity

- Cruise: Recovered quickly by late 2018; however, the compendium notes that passenger counts alone do not measure on island engagement, spend, or satisfaction. Integration of port records with survey based spending and activity modules is needed for a full picture.
- Yachting: Identified as high value with an estimated GDP contribution of US\$31 million in 2011, yet the last comprehensive yachting survey predated Irma (2012). Absence of updated, regular yachting

statistics during recovery limits planning for berthing, services, environmental management, and marketing.

6. Airlift and connectivity (contextual)

- The destruction and gradual restoration of airport infrastructure shaped both arrivals and traveler mix. While the compendium draws selectively on airport administrative data, it flags that immigration data limitations (see below) constrain the ability to distinguish final destination (Dutch vs. French side) and purpose of trip.

7. Data gaps and comparability issues

- 2017 gaps: For many indicators, 2017 is missing or incomplete due to the hurricane's disruption of systems and collection instruments.
- Immigration/border data: The phaseout of the paper Embarkation/Disembarkation (E/D) card in 2017, compounded by Irma's disruption of the planned digital replacement, removed a primary source for visitor characteristics (e.g., purpose of visit, length of stay, accommodation). Post-Irma reliance on airline manifests yields headcounts and nationality but not tourism defining variables.
- Accommodation statistics: SHTA data are voluntary and limited to members; villas and short-term rentals are not systematically measured. This impedes accurate accounting of capacity, occupancy, and revenue dynamics.
- Dutch vs. French attribution: With one shared international airport for two jurisdictions, many airport based series cannot reliably attribute visitors to the Dutch side alone, complicating Sint Maarten specific analyses.
- Public expenditures: The compendium notes limited availability of data on public tourism spending (e.g., marketing budgets), constraining evaluation of ROI.

Cross-cutting Insights and Implications

- Recovery is constrained by supply and product, not just demand. Stay-over recovery lagged primarily because accommodation capacity remained suppressed, and product gaps (tours/excursions, connectivity, cleanliness) reduced yield and satisfaction.
- Cruise volume ≠ value. Cruise's faster rebound restored traffic and visibility, but per capita spend and local linkages remained lower than for stayover visitors. A balanced strategy requires tailored product development and management by segment.
- Market mix volatility requires agile marketing and product strategy. The pivot toward Europe and a more regionally diverse demand base during early recovery suggests opportunities (e.g., length of stay patterns, spend profiles) and risks (e.g., overreliance on a single market returning).
- Evidence gaps impede precise targeting. Incomplete stayover profiling, limited expenditure measurement frequency, and poor coverage of short term rentals and yachting reduce the ability to prioritize corridors, experiences, and workforce programs or to measure reform impacts.
- Public realm and services matter. Visitor satisfaction scores point to actionable gaps—tours, connectivity, and cleanliness—that intersect with municipal services, licensing, and skills development. Addressing these can lift spend and advocacy (“word of mouth”) while widening the distribution of benefits.

Lessons Learned

Lessons learned show that coordination is decisive, as data reside across STAT, the Ministry of Justice, PJIAE, Port St. Maarten, STB, and private actors, and without formalized roles, standards, and sharing protocols, statistics remain fragmented, slow, and inconsistently defined. Retiring instruments without replacements

creates gaps, demonstrated when phasing out paper E/D cards without a fully operational electronic alternative produced a prolonged information vacuum, highlighting the need for redundant administrative and survey channels. Frequency, sampling, metadata, transparency, open dissemination, alignment with policy levers, and resilience measures—including backups and cross-training—are essential to generate reliable, actionable tourism insights in a hurricane-prone, small-island context.

Implications for Policy and Industry

- With documented shifts in source markets and declines in average daily spend, the island should recalibrate campaigns toward resilient, higher yield segments and test ROI using refreshed expenditure and satisfaction metrics.
- Low scores for tours/excursions and connectivity point to opportunities for curated experiences (heritage, nature, culinary) and infrastructure upgrades (wifi/telecoms), which can raise length of stay and in destination spend.
- A formal accommodation census and the inclusion of short term rentals into the statistical frame support fair competition, taxation, and neighborhood management, while improving total capacity and occupancy estimates.
- Regular cruise spend/satisfaction and revived yachting surveys enable tailored shore-side product and service investments, berth planning, and environmental management—improving value capture per visit.
- Corridor level satisfaction and spend indicators can guide sequencing of cleanliness, wayfinding, shading, and safety improvements in key districts (e.g., Philipsburg, Simpson Bay), and help track their payoff.

Methodology

- The compendium aggregates series from the Sint Maarten Department of Statistics (arrivals, exit surveys, economic census), Ministry of Justice/Immigration (border data), Princess Juliana International Airport (operations), Port St. Maarten (cruise and vessel data), the Sint Maarten Hospitality & Trade Association (accommodation inventory and occupancy for members), UNWTO (international tourism receipts), and real estate sources (villas/condos).
- The team organized disparate inputs into thematic tables/figures and standardized the use of 2016 as the pre-Irma baseline; 2017 is treated as a break year with incomplete series. Notes accompany tables to flag gaps, definitional issues, and representativeness limits (e.g., SHTA voluntary reporting).
- Where multiple sources exist, figures are crosschecked, and the most reliable series chosen for trend depiction. Each figure includes source and caveats, including: incomplete 2017 data; inability to attribute airport arrivals to Dutch vs. French stays; limited visibility on short term rentals; and event weighted sampling in exit surveys.
- The compendium was prepared alongside the Tourism Statistics Diagnostic and the 2020–2022 Priority Action Plan. It intentionally focuses on factual consolidation; analysis and recommendations are developed in the companion documents that use this compendium as the evidentiary base.
- Limitations include coverage gaps (notably yachting and sharing economy), reliance on voluntary industry reporting for accommodation, and immigration system disruptions constrain completeness and comparability. Users are cautioned against overinterpreting year to year volatility where sample sizes are small or series are broken.

This summary was produced with the assistance of an AI language model based on the original report. The full report is available at sintmaartenrecovery.org/analytical-studies