

DIAGNOSTIC

Sint Maarten Tourism Sector Recovery: Tourism Statistics Diagnostic (2020)



Overview

The Tourism Statistics Diagnostic is a systemwide assessment of how Sint Maarten measures tourism: which data are collected, how they're managed and analyzed, and how they're used by government and industry. Conducted under the World Bank-supported Tourism Sector Recovery Strategy Support after Hurricane Irma (2017), it focuses on repairing breaks in the data value chain and designing a more modern, resilient, and decision relevant statistical system.

Tourism is the island's economic engine. Yet even pre-Irma, statistics were fragmented, undercoordinated, and often untimely. The hurricane disrupted border card systems and survey operations precisely when policymakers needed granular, near real time insight into capacity, arrivals, spending, and visitor profiles. The diagnostic traces these disruptions, evaluates current instruments, and sets out a pragmatic reform path that aligns with international good practice but is tailored to a small-island context.

The scope and coverage include:

- Institutional mapping: TEATT, Department of Statistics (STAT), Sint Maarten Tourist Bureau (STB), Immigration and Border Protection (IBP), Princess Juliana International Airport (PJIAE), Port St. Maarten, and private sector sources (e.g., SHTA).
- Core instruments: paper Embarkation/Disembarkation (E/D) cards, planned e-border forms and e-gates, stay-over and cruise exit surveys, yachting surveys, administrative records (airport, port), and voluntary hotel occupancy reporting.

- Statistical products and uses: tracking arrivals, markets, length of stay, accommodation type (including short term rentals), visitor spending and satisfaction, cruise/yachting activity, tourism labor and GDP, and prerequisites for a Tourism Satellite Account (TSA).

Objectives

The diagnostic’s purpose is to restore and upgrade Sint Maarten’s tourism statistics so policy, marketing, and investment decisions are evidence based. Specifically, it aims to:

- Establish a baseline of current data assets, gaps, and weaknesses—and why they matter.
- Recommend short-, medium-, and long term actions to recover core measurement functions and modernize the system.
- Clarify institutional roles, set standards, and create a formal mechanism for data sharing and governance.
- Define priority indicators and dissemination practices to monitor recovery, competitiveness, and resilience, while preparing for a future TSA.

The key policy questions it addresses are:

- How to reliably identify tourists at the border without functioning arrival cards.
- How to measure true accommodation capacity and performance across hotels, timeshares, villas, and short term rentals post-Irma.
- How to capture spending, activities, and satisfaction across stay-over, cruise, and yachting.
- How to reduce lags and make data usable for both public agencies and businesses.
- What sequence of steps is necessary to implement a TSA.

The diagnostic targets primary audiences including government leadership and policy makers in the Prime Minister’s Office and TEATT to mandate coordination, resource reforms, and align statistics with sector strategy; the Department of Statistics (STAT) as lead producer and integrator of surveys, QA, metadata, dissemination, and custodian of the public dashboard; border and transport operators as owners of administrative feeds and partners in electronic arrival data; and the Tourist Bureau. Secondary audiences include the private sector, development partners, and civil society and academia.

Findings and Recommendations

A. Governance and coordination

- Fragmented system, no single source of truth: STAT is the formal producer, but critical data sit with IBP (border), PJIAE and the Port (operations), STB (market intelligence), and the private sector (occupancy/performance). Roles overlap and handoffs are informal, producing inconsistencies and periodic gaps.
- Recommendation: Establish a mandated Tourism Statistics Task Force—chaired at a high level—with authority to set standards, agree release calendars, and formalize data sharing.

B. Data sources and production

Border and arrivals

- Loss of the E/D card without a working digital replacement is the most consequential break. Airline manifests and minimal immigration fields provide counts and nationality but lack tourism defining variables (purpose of trip, length of stay, accommodation).

- Recommendation: Implement an electronic arrival form (online or e-gates) that captures key tourism variables; ensure access for statistical use with proper safeguards.

Exit surveys

- Stayover and cruise exit surveys exist but are infrequent and event weighted, with uneven coverage and limited inclusion of ferry departures. Current sampling cannot fully capture seasonality or source market diversity. Expenditure estimates are volatile.
- Recommendation: Increase the number of collection waves, adopt stratified sampling by season and market, standardize instruments, and incorporate ferries to reduce bias.

Accommodation statistics

- No comprehensive, regularly updated census of accommodation supply. SHTA member reporting is voluntary and excludes nonmembers and major subsegments (villas, condos, short term rentals). Post-Irma capacity shifts were only partially tracked.
- Recommendation: Conduct an accommodation census; formalize ongoing reporting; integrate platform-based rentals through partnerships or validated webscraping.

Sharing economy

- Lack of systematic data on listings, booked nights, and guest profiles obscures both supply and demand, constraining policy on taxation, zoning, and product development.
- Recommendation: Establish data sharing or third party measurement arrangements with short term rental platforms and complement with local validation.

Cruise and yachting

- Cruise calls and passenger counts are available, but spending, activities, and satisfaction are sporadically captured and not routinely integrated. Yachting data are outdated.
- Recommendation: Institutionalize regular cruise spend/satisfaction modules and reinstate a structured yachting survey with environmental and service modules.

Labor and economic impact

- Tourism labor, skills, and gender-disaggregated statistics are limited. Without a TSA, indirect and induced effects are not measured consistently.
- Recommendation: Plan a staged TSA, anchored in improved arrivals, accommodation, expenditure, and national accounts inputs.

C. Quality, timeliness, and comparability

- Timeliness is weak: releases often lag by many months. Manual processing and small teams limit throughput. Metadata and methodological documentation are not consistently published. Definitions vary (e.g., “rooms in operation”), reducing comparability over time and across sources.
- Recommendation: Set service standards for release, publish metadata and questionnaires, and adopt common definitions across producers.

D. Integration and dissemination

- No unified data portal: outputs are scattered across PDFs and internal files, limiting use by officials and businesses. Lack of machine readable formats reduces transparency and collaboration.
- Recommendation: Launch a public tourism dashboard combining administrative feeds and survey indicators, with open data downloads and a clear release calendar.

E. Capacity and IT systems

- STAT and partner units lack the headcount, tools, and automation needed for higher frequency surveys, data engineering, and modern dissemination. Border IT investments were delayed by Irma and require coordinated rollout.

- Recommendation: Resource a capacity building plan (survey methods, data engineering, data viz), procure secure ingestion pipelines and visualization software, and align border IT with statistical needs.

F. Recovery context

- Irma severed key data channels and slowed statistical operations during the crucial recovery window. Cruise volumes rebounded earlier; stay-over capacity and demand lagged, but precise measurement was hindered by the data gaps. This underscores the urgency of resilient, redundant measurement systems.

Priority Reforms and Investments

Immediate (0–8 months)

- Expand exit surveys: field at least six waves annually, stratified by season and source market; include ferry departures; standardize questionnaires and core variables.
- Reinstate specialty modules: launch yachting and cruise spend/satisfaction modules with harmonized core questions for comparability.
- Stand up a basic public dashboard: publish headline arrivals, accommodation capacity (as available), expenditure, and market mix with clear metadata and a release schedule.
- Establish the Tourism Statistics Task Force: formalize membership (STAT, IBP, PJIAE, Port, STB, TEATT, SHTA), roles, standards, and decision-making processes.

Near term (begin in 3–8 months)

- Implement electronic arrival solutions: deploy an online arrival form and/or e-gates capturing purpose of trip, length of stay, accommodation type, residence, and party composition; ensure data protections and statistical access.
- Sign data-sharing MoUs: define fields, frequency, confidentiality, and responsibilities among STAT, IBP, PJIAE, Port, STB, and SHTA.
- Build a secure shared data platform: automate ingestion of administrative feeds and survey data; establish QA rules and automated dashboard updates.
- Pilot online follow-up surveys: complement in person intercepts to improve coverage and reduce cost.

Medium to long term (1–5 years)

- Establish an Accommodation Census and short term rental measurement program: combine administrative sources, industry reporting, and platform data.
- Implement a Tourism Satellite Account: plan phased implementation aligned with improved inputs and national accounts capacity.
- Institutionalize capacity building: fund permanent roles for survey design, data engineering, and data communication; maintain tools and training.
- Codify open data practices: publish machine readable datasets with metadata and keep a predictable release calendar to anchor public and private planning.

Lessons Learned

Coordination is foundational, as a formal, empowered governance mechanism is as important as any single instrument upgrade, aligning priorities, definitions, and release schedules while sustaining reforms across political cycles. Avoiding single points of failure is critical, since phasing out paper E/D cards without a digital

alternative created a data vacuum, highlighting the need for resilient systems blending administrative records, frequent surveys, and private sector partnerships. Starting with high-impact basics, timely dissemination, building for shocks, engaging the private sector, and tying indicators to actionable policy levers improve decision-making, trust, and sector responsiveness, particularly in hurricane-prone small islands.

Implications for Policy and Industry

- Without consistent market and spend data by segment, it's difficult to optimize marketing spend or prioritize product upgrades (e.g., heritage, nature, yachting). Expanded surveys and dashboard analytics enable targeting higher yield segments and monitoring ROI.
- Corridor level satisfaction and activity data help prioritize public space upgrades (cleanliness, lighting, wayfinding) and quantify their effects on spend and revisit intent.
- Clear, timely performance indicators reduce investor uncertainty, especially for accommodation and experience providers. A comprehensive accommodation census—including short term rentals—supports zoning, tax policy, and fair competition.
- Better labor and skills data guide training programs aligned to growth niches (e.g., marina services, nature guiding, data analytics), with attention to women's participation and quality jobs.
- Regular yachting and visitor modules that include environmental practices inform plastic reduction, waste management, and blue economy initiatives that protect core assets and strengthen brand positioning.
- With standardized, timely statistics, Sint Maarten can monitor shocks (hurricanes, health crises) and adjust policy quickly—e.g., market rebalancing, targeted bridge support, or rapid restoration of capacity.

Methodology

- Compilation of statistical outputs from STAT, IBP, PJIAE, Port, STB, SHTA, and past survey instruments; identification of breaks in data series pre and post-Irma; consolidation into a compendium to establish baselines.
- Structured interviews and workshops (2019) with public agencies and industry (hotels, tour operators, marinas) to map processes, roles, user needs, and bottlenecks; validation of proposed reforms and phasing.
- Technical review of the E/D card, planned e-border solutions, exit survey design and sampling, yachting survey history, and accommodation reporting practices; definition of minimum viable variables, QA standards, and sampling frames.
- Review of regional and international good practice in automated border controls, open tourism dashboards, exit survey calendars, platform data partnerships, and TSA implementation pathways; selection of fit for purpose models for small islands.
- Analysis of costs, capacity requirements, legal considerations (data sharing/confidentiality), and dependencies (border IT, staffing) to stage reforms; identification of quick wins versus longer-run system upgrades.
- Limitations include conducted during a post-disaster period with incomplete administrative series and infrequent surveys; some observed volatility may reflect both true changes and measurement noise. Recommendations emphasize robustness, redundancy, and manageable steps.

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