

ST MAARTEN TRUST FUND
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Sint Maarten Tourism Sector Recovery: Tourism Statistics Diagnostic

February 2020

An output of the Sint Maarten Tourism Sector Recovery Strategy Support activity, financed by the government of The Netherlands, managed by The World Bank, and implemented in collaboration with the government of Sint Maarten.

Summary and recommended action plan

- 1. Tourism drives the economy of Sint Maarten, and short-term tourism recovery planning such as balancing the supply and demand of tourism sector growth is crucial for overall economic recovery.** In 2016, tourism directly accounted for 45 percent of Sint Maarten's GDP and 73 percent of its foreign exchange, driven by hotels and restaurants, retail trade, transport, yacht repair, and harbor services. Hurricane Irma devastated the economy in September 2017, including significant damage and losses to the tourism sector. The sector is recovering, but efforts to build back better, increase sector resilience and enhance competitiveness require strategic initiatives such as raising awareness and investing in product development. These sector planning needs require quality statistics to enable evidence-based decision-making, and in today's highly competitive tourism marketplace, there is a continuous need to measure and monitor tourism activity through sector performance statistics.
- 2. However, inconsistent and incomplete tourism sector statistics constrain short-term recovery planning as well as longer-term sector development.** Even before the hurricane, there were gaps in tourism statistics in Sint Maarten, including: (i) limited access to tourism sector performance data (ii); very limited data on the stay-over tourism market; (iii) no consistent data on yachting activity; (iv) only anecdotal data on sharing economy (villas and apartments) activity, and (vi) not readily available data on public expenditures related to tourism. Numerous public and private sector stakeholders are involved in collecting tourism statistics, with varying levels of consistency and limited open data sharing. Sint Maarten does not have a Tourism Satellite Account system, an international classification to measure sector performance, which enables benchmarking and aids in attracting investment. Hurricane Irma has exacerbated these issues: since the hurricane, there has been inconsistency in the completion of arrival cards by visitors arriving via air transport, preventing formal tracking of post-hurricane visitor trends. Previous efforts to install an automated arrivals and departure tracking system, which would contribute to statistical tracking and profiling of visitors, were postponed until the airport is back in full operation.
- 3. This note documents the status of tourism statistics collection and availability in Sint Maarten and recommends specific steps for improvement.** Improving tourism sector performance data is critical to properly assess trends, inform policy, and attract private investment to support sector recovery and on-going development. Improved data collection and dissemination would facilitate establishing a platform for investment promotion and generation. Further, it would enable evidenced-based policies for integrated tourism development. Based on an assessment by the World Bank in collaboration with staff at the Ministry of Tourism, Economic Affairs, Transport and Telecommunications (TEATT), in particular the Sint Maarten Tourism Bureau (STB) and the Department of Statistics (STAT), this note provides: i) an overview of the current availability of tourism statistics in Sint Maarten, ii) the strengths and weaknesses of the available data, iii) options to address weaknesses, and iv) recommended actions. The recommended actions are summarized in Table 1 below, with short-term priorities including strengthening and expanding the current exit survey process and establishing a multi-stakeholder taskforce to coordinate and monitor efforts to improve tourism statistics. It is recommended that the directive to implement these recommendations and establish a coordinating taskforce be given at the highest political level, to ensure adequate resources, time, and commitment can be given to achieving the critical objective of improving tourism statistics that can guide Sint Maarten's economic advancement.

Table 1: Recommended Tourism Statistics Improvement Action Plan for Sint Maarten

ACTION/TASKS	RESOURCES/TIMING/RESPONSIBILITY
SHORT-TERM	
Action 1: Strengthen the current exit survey process	
a. Expand the frequency of the current stay-over tourism exit surveys to six times a year	<ol style="list-style-type: none"> 1. Evaluate current survey design and collection approach and redesign if required 2. Schedule and undertake additional surveys 3. Hire additional staff or set up partnerships with educational institutions and utilize interns to collect data and analyze data results 4. Conduct analysis, reporting and dissemination of report Timing: 8 months Responsible: STAT with support from STB
b. Develop and conduct periodic exit surveys at the ferries	<ol style="list-style-type: none"> 1. Design survey 2. Schedule and undertake surveys 3. Analysis, reporting and dissemination of report Timing: 5 months Responsible: STAT with support from STB and SHTA
c. Establish a tourism data dashboard for wide and open distribution and awareness of enhanced data	<ol style="list-style-type: none"> 1. Design a tourism dashboard based on good practice of other countries 2. Test and share dashboard amongst stakeholders Timing: 8 months Responsible: STB with support from STAT
Action 2: Establish taskforce to expand tourism data sharing and collaboration	
Establish a taskforce consisting of key public and private sector tourism stakeholders to monitor and support implementation of improvements to tourism statistics	<ol style="list-style-type: none"> 1. Secure Prime Minister directive to establish taskforce 2. Develop TORs for taskforce specifying key members: IBP, PJIAE, STAT, STB, and SHTA 3. Conduct at least quarterly meetings to advocate, monitor, and support implementation efforts of actions in this action plan and others Timing: commence within 6 months Responsible: Prime Minister and TEATT with engagement of key stakeholders
MID-TERM	
Action 1: Support implementation of e-gates and online immigration form processing	
Collaborate on project for implementation of e-gates and online immigration form processing.	<ol style="list-style-type: none"> 1. Participate in training required for new system 2. Facilitate data sharing amongst stakeholder agencies and entities 3. Contribute to design of communications and stakeholder engagement plan Timing: commence within next 3 months Responsible partners: IBP, PJIAE, STAT, STB; supported by tourism statistics taskforce
Action 2: Formalize cross-ministry data sharing and cooperation	
In conjunction with Action 1, establish formal cross-ministry mechanism for agreeing on control and movement of data in new system	<ol style="list-style-type: none"> 1. Review data availability under new system 2. Reach agreements on data ownership and steps for sharing Timing: commence in Q4, 2019 Responsible: IBP, STAT, STB; supported by tourism statistics taskforce

Action 3: Improve system for data sharing by stakeholders	
Create an online platform for uploading and sharing all tourism data by relevant stakeholders in a systematic timely manner	<ol style="list-style-type: none"> 1. Design a platform for easy uploading of data 2. Establish linkages to the online tourism dashboard for automatic/real-time data upload and publication 3. Pilot and test 4. Implement the system 5. Test and engage stakeholders to regularly upload information into the system <p>Timing: 8 months Responsible: STAT with support from STB; supported by tourism statistics taskforce</p>
Action 4: Develop and conduct 'deep-dive' on-line surveys	
Launch targeted online surveys profiling visitor behaviors and satisfaction	<ol style="list-style-type: none"> 1. Evaluate options for collecting visitor emails 2. Design survey 3. Implement surveys 4. Analysis, reporting and dissemination of report <p>Timing: Q1, 2021; 3-6 months to develop Responsible: STAT with support from STB and SHTA</p>
Action 5: Develop and conduct yachting market surveys	
Implement survey to gather data to better plan for and measure the yachting market segment	<ol style="list-style-type: none"> 1. Design survey 2. Schedule and undertake surveys with relevant stakeholders (every 2 years) 3. Analysis, reporting and dissemination of report <p>Timing: Q1, 2021; 3-6 months to develop Responsible: STAT with support from STB and SHTA</p>
LONGER-TERM	
Action 1: Complete establishment and implementation of TSA	
Define, design and implement SXM Tourism Satellite Accounts	<ol style="list-style-type: none"> 1. Prepare implementation plan 2. Secure funding and necessary expertise 3. Include communications plan for adoption by stakeholders <p>Timing: 3-5 years Responsibility: TEATT and STAT with involvement of STB</p>

- 4. Adopting these recommendations will provide Sint Maarten with a stronger foundation for policy that seeks to strengthen the sector and its resilience.** While there are many different types of data that can be collected, the recommendations here provide for the collection and dissemination of the most crucial indicators. Developing a sector dashboard similar to good practice in other tourism-focused economies (see Annex 2), is a specific goal that can benefit all involved with the sector now and in the future.

Sint Maarten Tourism Statistics: Current Practices and Recommended Actions

I. Introduction

The crucial importance of collecting destination-level statistical data on tourism demand and supply is recognized globally by the public and private sectors alike as essential for planning and monitoring a diverse services sector such as tourism. Typically, destinations concentrate on collecting the following types of data:

- Volume and type of visitor flows
- visitor and trip characteristics (place of residence, nationality, place of stay, length of stay, purpose of visit, trip frequency, type of accommodation, type of activities undertaken)
- quality of the travelers' experience
- economic and social impact of tourism (type and volume of expenditures, job generation, taxation revenues, etc.)

Detailed data on current and future tourism flows allows for effective and efficient planning of public actions including addressing infrastructure needs and evaluating economic, social and environmental impacts. Analysis of the flow and characteristics of visitors, and their motivations, can provide input for the market segmentation, evaluation, and direction of marketing strategies. Tourism satisfaction results can also direct both short- and longer-term strategic planning. Destinations use data to track the progress toward their goals and to inform their activities to achieve improved productivity.

In Sint Maarten, Hurricane Irma in September 2017 and its aftermath have disrupted the systematic collection of tourism statistics. There is now an even more pressing need for timely and detailed data to support public and private sector efforts to monitor and guide the recovery process of Sint Maarten. Comprehensive tourism trend data is also required for strategic planning purposes. **This note provides insights and guidance on improving tourism statistics to the Ministry of Tourism, Economic Affairs, Transport and Telecommunications (TEATT), as well as other policymakers and public and private sector decision makers committed to strengthening the tourism sector of Sint Maarten.** It provides: i) an overview of the current availability of tourism statistics in Sint Maarten, ii) the strengths and weaknesses of the available data, iii) options to address weaknesses, and iv) recommended actions.

Statistics on tourism activity in Sint Maarten are currently not readily or consistently available. There are several agencies and organizations collecting different types of data. Not all is publicly available. To determine the status of tourism statistic collection and dissemination, this note identifies and categorizes the available indicators, including their availability and limitations.

Annex 1 provides tables with this information. In addition, a complementary report compiles and presents the most current data available on the status of recovery and performance of the tourism sector from a range of public and private entities.¹

Short term recommendations are framed in the context of immediate actions to be taken to improve statistic collection prior to the anticipated re-opening of Princess Juliana International Airport in 2021. Medium-term recommendations focus on support to expanded statistic data collection systems to be operated in the new airport. Introducing new systems and technologies that support improved and consistent collection of data are in line with the government's priority to update Sint Maarten's overall tourism sector strategy as a pillar of broader economic growth.

Accurate and readily available data is integral to attracting investment. In a highly competitive marketplace, such as the Caribbean, destinations use timely and comprehensive data to provide evidence for informed decision making on policy responses that contribute to the strengthening of their competitive position. Measuring competitiveness using a systematic framework also enables benchmarking with other countries. Many destinations are effective in not only collecting data, but also in disseminating this data in user-friendly dashboard formats (See Annex 2 for two examples). While efforts to date in Sint Maarten are well-intended, there is significant opportunity to improve data collection and utilization in a manner that supports Sint Maarten's economic advancement.

II. [Current availability of tourism statistics in St Maarten](#)

The following agencies and organizations collect data on the tourism sector in Sint Maarten:

A. Ministry of Justice - Immigration and Border Protection Service (IBP)

The IBP collects data from incoming and outgoing passengers at the Princess Juliana International Airport (SXM). Prior to Hurricane Irma, data was collected using paper Embarkation/Disembarkation (E/D) cards. These cards were distributed by the airlines and each incoming passenger was required to provide information for immigration-specific purposes as well as information on length of stay, purpose of visit, and place of stay. The E/D cards were being phased out in 2017 in anticipation of the establishment of a new web-based system that was part of the new e-gates operation. Hurricane Irma interrupted final testing of the new system and since then, there has been no systematic way of collecting broad immigration data. Since the re-opening of the airport in its temporary structure, data collection efforts are ad hoc and are being limited only to information on headcount and nationality collected by IBP and through airline manifests. Immigration officers have a list

¹ See Sint Maarten Tourism Sector: Compendium of Tourism Statistics, World Bank, 2020.

with 20 specific nationalities and all other nationalities are grouped into “rest of world”. The Ministry of Justice owns the data but has an MoU with the Princess Juliana International Airport Operating Company (PJIAE). Data on passenger count and nationality are also shared with the Department of Statistics (STAT) in TEATT, which analyzes and shares the data.

B. Princess Juliana International Airport Operating Company N.V. (PJIAE)

PJIAE collects aircraft and passenger movement data. The departing passenger counts are required for billing airport fees to airlines that fly in and out of PJIAE. The airlines provide general declaration forms with passenger counts to PJIAE for billing purposes.

In 2015, PJIAE and the Immigration Border Protection Service (IBP) (now Korps Politie Sint Maarten) jointly solicited proposals to purchase twelve (12) Automated Passport Control Kiosks (APC), six (6) Automated Border Control (ABC) E-Gates and six (6) Barcode Boarding Pass (BCBP) E-Gates for the processing and clearance of arriving and departing passengers. The objective of the joint venture is to enhance the state of the border protection at PJIAE, to offer faster processing time and improved passenger experience, while maintaining an effective enforcement at the border. One phase of this project is to develop a pre-registration website where travelers will be able to enter their travel information online, prior to arriving in St. Maarten. The primary purpose of this website is to collect passenger data in advance, for border control purposes. However, the website will include optional tourism related data, for example, how many times they visited Sint Maarten, their main source of information about Sint Maarten, email address, etc.

C. Department of Statistics (STAT)

STAT is under the Ministry of Tourism, Economic Affairs, Transport and Telecommunications (TEATT) and is the entity officially charged with the collection, analysis and dissemination of all statistical information related to the economic, demographic, social and environmental status of St Maarten. The department has ten employees, of which five are analysts. Their statistical data collection relevant to the tourism sector includes:

- i. **Stay-over tourism exit survey:** STAT conducts four exit surveys per year, two of which are event-focused (September, December, Regatta and Carnival). During each round, they survey approximately 850 people using self-completion paper questionnaires that are distributed at SXM sites. Using trained enumerators, two types of surveys are distributed – a satisfaction and an expenditures survey – since administering one survey on both topics proved to be too lengthy for successful data collection. Each year, a highlights report for a few of the surveys becomes available on the STAT website.

- ii. **Cruise market exit survey:** STAT also conducts self-completion paper questionnaires at the cruise terminal twice a year. Not all results of these surveys are publicly available.
- iii. **Immigration statistics:** Data on the number and nationality of stay-over and cruise passengers is obtained monthly from the Ministry of Justice and Port St Maarten. It is analyzed and reported by STAT on their website.
- iv. **2018 Labor Force Survey and 2018 Economic Census²:** The 2018 Labor Force Survey included the number of employed persons in the accommodation and food services sector. The 2018 Economic Census included 5,900 businesses and provided insights into business size, employment, and number of available rooms in lodging establishments. This survey also included questions for respondents to provide their perceptions and assessment of hurricane damage to accommodation and food services businesses. The 2018 Labor Force Survey and the 2018 Economic Surveys reports are available on the STAT website.

D. Sint Maarten Tourism Bureau (STB)

STB is under TEATT and its main responsibility is to promote St Maarten as a tourism destination. In the past, they have facilitated data entry of E/D cards but since the cards are no longer consistently distributed and collected, STB is not actively collecting tourism statistics. STAT undertakes the tourism surveys and reports findings to STB. In 2019, STAT did not survey during the Regatta's time period. However, during the March 2019 Sint Maarten Heineken Regatta, STB undertook a first-time onsite survey of approximately 100 Regatta visitors. In previous years, this event-based survey was conducted by STAT polling passengers at the SXM airport. In addition to the onsite survey by STB, the main Regatta's sponsor, Heineken, distributed an electronic survey among the 114 participants. The results of the surveys indicated that further fine-tuning of onsite surveys is required.

E. Sint Maarten Hospitality and Trade Association (SHTA)

SHTA, a private sector organization representing its member businesses in hospitality, trade, and other industries, receives monthly data from its members (hotel and timeshare operators) on the number of available rooms and occupancy rates. This is done on a voluntary basis and does not include all operations. Data is shared on an aggregate basis only and not publicly available.

Overall, data is collected by a variety of entities in diverse formats. The publication and sharing of data is not organized or centralized. This is further exacerbated by the inconsistent timing of

² Previous labor force surveys were conducted in 2013 and 2017. The previous Economic Census was done in 1998.

data collection, limiting the ability to regularly inform industry stakeholders. Annex 1 presents summary tables of the available indicators and their limitations.

III. Strengths and weaknesses of available tourism statistics in Sint Maarten

A. Strengths

In Sint Maarten, tourism statistics are collected by different stakeholders, and when combined, these statistics can provide basic information for elementary evidence-based decision making. Data is collected on the number of stay-over and cruise passengers by month and nationality; survey results on age, length of stay, travel party composition, activities, expenditures and satisfaction ratings for cruise passengers and stay-over tourists; hotel occupancy rates; and number of people employed in the tourism sector. The basic stay-over tourists and cruise passenger's arrival data is publicly available on the website of the Department of Statistics. The stay-over tourists and cruise passenger surveys are comprehensive and based on a sufficient sample size per survey. STAT provides a clear and useful highlights report presenting their findings for most of their exit surveys on their website.

B. Weaknesses

There are currently several gaps in the collection of tourism sector data. Presently, official sources only collect and share basic data on airline passengers and cruise passengers. This is supplemented by tourist exit surveys, typically administered four times per year. However, the current practices leave a significant gap in the availability of systematic reliable data on visitor trends and sector performance to inform planning and marketing efforts. Incomplete data collection also inhibits Sint Maarten's ability to be included in global tourism indexes such as World Travel & Tourism Council (WTTC) and the World Economic Forum (WEF) Travel and Tourism Competitiveness Index. The main weaknesses in data collection are the following:

1. **There is very limited data available on the stay-over tourism market.** Since the distribution and collection of the manual E/D cards at SXM has stopped, only a few indicators are collected consistently. Currently, only information on nationality is collected, but not on country of residence. There is no data collected at SXM on purpose of visit, length of stay, type of accommodation, country of residence or place of stay for the stay-over market. Insights into the profile of this market segment is limited to periodic exit surveys. These results are hindered by the relatively small sample size and limited sampling periods. Two of the four STAT exit surveys are timed during special events which limits the annual data collection on the typical stay-over market to two time periods (one during low and one during high season). The varied locations and event activity influence data collection contributing to generalizability limitations. Two countries on one island with one major international airport makes it

challenging to provide insight into which share of the arriving passengers overnight in Sint Maarten and which share stays in St. Martin or travels on to neighboring islands. The exit surveys are limited to respondents departing from SXM airport and there is no data available on visitors that use the ferries to travel to and from other islands.

2. **No consistent data collection on yachting activity.** The last survey of this market segment was in 2012. The yachting market was identified in the 2005 tourism strategic plan as one of the key growth markets. The lack of data, however, prevents measuring the growth and impact of this market segment. This limits planning for and benefitting from a potentially high-value market.
3. **Limited access to tourism sector performance data.** Currently, data is collected by different stakeholders and STAT has the main responsibility of analyzing and disseminating results. STAT publishes monthly arrival data for stay over and cruise arrivals on their website, but there is a lag in circulation of data (e.g., in May 2019 monthly data was available only through June 2018) and it is limited to the number of arrivals by region with no individual country information. Key stakeholders informally share some of their data, but this is not available to all tourism sector stakeholders.
4. **There is only anecdotal data on sharing economy (villas and apartments) activity.** It is believed that visitors renting privately owned villas and apartments have become an important market especially after filling the accommodation gap following Hurricane Irma. However, no formal system is in place to measure and monitor on a recurring basis the supply and demand in this segment. This makes it impossible to determine accurately the size and impact of this market over time.
5. **Data on public expenditures related to tourism** (such as the marketing and promotion budget) **is not readily available.** This data can be used by public and private sector stakeholders to evaluate the impact of marketing strategies and estimate future budgets. It is also fundamental to building evidence for additional funding to support the sector.

The above-mentioned gaps in data collection limit the ability to inform the recovery planning process and enable the sector to achieve its full potential. In addition, many of the parties involved are protective of their data which prevents easy access to the available information and contributes to limited credibility of data. There is a need to consistently cooperate openly and work towards common goals and transparency.

IV. Options to improve tourism statistics

To address the need for timely and comprehensive tourism data to inform the recovery process as well as medium-term planning efforts, there are options for the short and the medium-term collection and dissemination of data. Given the current status of the international airport, the ideal option to install an electronic system cannot be implemented at this time. In the longer-term, the PJIAE and the Ministry of Justice are planning to implement a new system which includes Automated Border Control e-gates and a pre-registration website, similar to systems currently used in Aruba and Curacao. This system will be introduced when the airport is in full operation (expected in 2021). Of note, further funding for purchasing the required hardware to make the planned system operational may still need to be secured.³ Further, there is no clarity on the willingness or plans of the Ministry of Justice to disseminate relevant information to tourism sector stakeholders once this system is operational.

To bridge the remaining time until the new airport is open and fully operational, and to avoid further gaps in data collection, practical short-term solutions are required. In addition, there are options that are not critical in the short or medium term but are in line with best practice and should be considered.

A. Short-term options

Full functionality of the automated border control systems is scheduled to be done in tandem with the new airport reaching full functionality. Therefore, in the immediate and short-term, options to address gaps and increase data collection are:

1. **Accelerating establishment of online immigration card system** separate from the larger new system. This may be difficult due to design complexity and multiple stakeholder involvement.
2. **Reintroducing the previous manual E/D card collection process**, with improved data entry and analysis processes. There are locations in the region, such as Jamaica, Barbados, and the Cayman Islands, that still use manual E/D card collection successfully. Their experience and systems can provide best practice insights to rapid data entry and data analysis methods.
3. **Strengthening the current stay-over tourism and cruise exit survey processes** by increasing the frequency and statistical rigor of the surveys. This would improve generalizability and contribute to a more accurate profile of year-round activity, rather than four surveys at selected times. However, building upon the excellent work that is being done by STAT will require additional resources and staffing.

³ The Airport Terminal Reconstruction Project being prepared for grant financing from the Building Resilience Trust Fund may include funding for this system hardware, but this has not been finalized.

B. Longer-term actions

STAT is currently in the preliminary and exploratory stages of setting up a Tourism Satellite Account (TSA) system which is the international standard to measure tourism activity in a country's economy. The TSA is demanding in terms of detailed data needed, user capacity required, and intensive long-term data collection efforts across a number of sectors. Annex 3 provides a brief explanation on the TSA system.

Establishing this system in Sint Maarten will require on-going technical and financial resources in order to comply with TSA data requirements. The multi-year process to establish TSA requires additional technical expertise, introduction of new systems, capacity building and integrated communications to assure stakeholder adoption. Establishment of TSA and emerging online data collection systems requires a long-term commitment and adequate resources but will enable St Maarten to more accurately profile the direct and indirect economic impact of all tourism activities.

V. Specific recommended actions

Based on the evolving operations of SXM airport and pressing needs, the following short-, medium- and longer-term solutions are recommended:

A. Short-term

Action 1: Strengthen the current exit survey process. Until the new automated border control system is established and operational in the airport and agreements can be reached regarding the sharing of data, expanding the current system of face-to-face exit surveys, is the recommended approach. Introducing an online arrival card system will require significant cooperation across agencies, funding and time---all of which are scarce. Mobilization of an online system would require addressing both policy and regulatory issues around data ownership and privacy. Similarly, reintroduction of the manual E/D cards is problematic. It will require consistent cooperation and ongoing coordination of multiple stakeholders including airlines and IBP which can hold up the process. Data entry would also burden the already occupied staff of the Tourism Bureau. Therefore, strengthening and expanding exit surveys is advised. This would provide a logical extension of series data already collected as well as the ability to tailor surveys as issues and opportunities arise.

There are different components of strengthening the exit surveys and disseminating the improved information, which are presented here:

- a. Expanding the frequency of the current stay-over tourism exit surveys** from twice a year to six times a year (in addition to surveys during the Regatta and Carnival) will increase the accuracy, generalizability and timeliness of the data. Using electronic

tablets for data collection could minimize 'dirty data' incidents, reduce the need for 'data cleaning' and can shorten data processing time. This would require the hiring and training of additional enumerators, 1- 2 data analysts and investment in tablets.

b. Conducting periodic exit surveys at the ferries. The information gathered can provide insights into the volume and travel behavior of day visitors as well as provide insights into visitors using SXM as a hub. This information is currently not available and would profile activity for a significant segment contributing to a more complete understanding of sector activities.

c. Establish a tourism data dashboard for wide and open distribution of key performance indicators (KPIs). This action will improve access to a broader group of stakeholders and the greater Sint Maarten community similar to other competitive island countries. Development of a Sint Maarten tourism dashboard through the collaboration of STAT and STB would enable all stakeholders to have similar information and contribute to enhanced collaboration. A best practice example is the Belize Tourism Dashboard, available online on the Belize Tourism Board website (<http://belizetourismboard.org/belize-tourism/statistics/>). Annex 2 shows the Belize Tourism Dashboard illustrating effective data communication and open sharing. Another example is the Hawaii Tourism Dashboard (<http://dbedt.hawaii.gov/economic/tourism-dashboard/tourism-dashboard-by-market-monthly/>). A monthly update of the main KPIs can support public as well as private sector stakeholders by strengthening their evidence-based decision making. Developing similar tools for Sint Maarten would contribute to informed policy making as well as support attracting investment.

Action 2: Establish a taskforce to expand and open data sharing and collaboration among stakeholders. To improve sharing of data and the collection of dissemination of tourism statistics in general, and to assist with the implementation of actions recommended in this report, a taskforce should be established. The directive for such a taskforce should ideally come from the Prime Minister level, to give sufficient political emphasis to the issue and to ensure the engagement and collaboration of relevant stakeholders. TEATT could chair the taskforce, which should include members from IBP, PJIAE, STAT, STB, and SHTA. Formal TORs should be established to clarify roles and expectations, and the taskforce should meet at least quarterly to advocate, monitor, and otherwise support implementation of the actions recommended here and others. In addition, as sharing of data across the island is typically informal and not systematized, as gaps are addressed on the Sint Maarten side, further integration and coordination with St Martin (French-side of the island) would provide additional competitive advantages for future tourism development and positioning.

B. Medium-term

Action 1: Prepare for the establishment of automated border control systems and possible sharing of data. The Sint Maarten Tourism Statistic Information System (TSIS) project that was initiated in 2009 was hindered by significant delays, mostly due to concerns about data ownership and the challenges of collaboration required between the Ministry of Justice, TEATT and the PJIAE. Meanwhile, similar and more sophisticated systems have been successfully implemented in Aruba (2015) and Curacao (2016). To launch SXM's new automated border control systems and potential utilization of electronically collected arrival and departure data in conjunction with the opening of the new airport, the following steps are required:

- Reach new agreement according to privacy protocols on data sharing amongst stakeholder agencies and entities
- Installation and testing of the new system by PJIAE
- Design and roll-out of multimedia communications plan by PJIAE in collaboration with STB informing all stakeholders of the new electronic system through engagement of airlines, hotels, tour operators, passengers and the residents of Sint Maarten.

Action 2: Formalized cross-ministry data sharing and cooperation. Institutionalizing the collaboration necessary for the planned airport-based system and related processes will require wide stakeholder engagement and seamless collaboration between the Ministry TEATT, Ministry of Justice and SXM Airport. The importance of reaching agreements as to 'ownership' and sharing mechanisms of data is a high priority that can be time-consuming to establish. Commencing this activity immediately with conviction and leadership from senior levels of government is strongly urged. The tourism data taskforce can assist in ensuring that this agenda is advanced.

Action 3: Improve the system for data sharing by all stakeholders that collect data on the tourism sector. Sharing of data in a systematic manner can improve cross validation of the KPIs. An efficient way to collect the data is through a platform where the different stakeholders can upload the data monthly. This is important for informing policy, attracting investment and supporting day-to-day operations of the private sector---all fundamental to an open, collaborative and economically productive sector. The design of the platform can be linked to the tourism data dashboard (recommended above in short-term Action 1) to enable real-time data uploading and publication.

Action 4: Supplementing the current exit surveys with on-line surveys can be a cost-effective way to generate information. For example, online surveys in South Pacific island countries have been able to achieve impressive response rates of 16% capturing almost 10% of visitors during the sampling period. Incentives can be used to increase the response rate even more. Such

surveys can be tailored to the needs of the Government and the private sector with potential to query about actual experiences on the island and future intentions. Once established, this can provide a rapid response system that can be utilized in the current environment and after a natural disaster when extensive exit survey administration is especially challenging. One constraint in conducting such surveys is the need to obtain email information for respondents, which relates to the data ownership and sharing issue to be addressed in medium-term Actions 2 and 3 above.

Action 5: Formalize the conducting of periodic surveys of the yachting market to provide insights into the travel behavior of this market. This could provide economic impact insights as well as contribute key data for expanding this segment.

C. Longer-term

Action 1: Complete establishment and implementation of TSA. TEATT has recently initiated work on introducing a TSA system with the assistance of a technical consultant. Setting up a TSA will require cooperation and support between different government departments. In addition to collecting detailed tourism statistics, a TSA also requires regular household expenditure and business surveys. The gradual establishment process requires long term commitment, funding and technical capacity. See Annex 3 for more details on TSA.

VI. Action plan

Based on the recommendations given above, the following specific action plan is recommended for review, approval, and implementation. It summarizes the actions recommended above, including identifying specific steps, timing, and responsible parties.

Table 2: Sint Maarten Tourism Statistics Improvement Action Plan

ACTION/TASKS	RESOURCES/TIMING/RESPONSIBILITY
SHORT-TERM	
Action 1: Strengthen the current exit survey process	
a. Expand the frequency of the current stay-over tourism exit surveys to six times a year	1. Evaluate current survey design and collection approach and redesign if required 2. Schedule and undertake additional surveys 3. Hire additional staff to collect data and analyze data results 4. Conduct analysis, reporting and dissemination of report Timing: 8 months Responsible: STAT with support from STB

b. Develop and conduct periodic exit surveys at the ferries	<ol style="list-style-type: none"> 1. Design survey 2. Schedule and undertake surveys 3. Analysis, reporting and dissemination of report <p>Timing: 5 months Responsible: STAT with support from STB and SHTA</p>
c. Establish a tourism data dashboard for wide and open distribution and awareness of enhanced data	<ol style="list-style-type: none"> 1. Design a tourism dashboard based on good practice of other countries 2. Test and share dashboard amongst stakeholders <p>Timing: 8 months Responsible: STB with support from STAT</p>
Action 2: Establish taskforce to expand tourism data sharing and collaboration	
Establish a taskforce consisting of key public and private sector tourism stakeholders to monitor and support implementation of improvements to tourism statistics	<ol style="list-style-type: none"> 1. Secure Prime Minister directive to establish taskforce 2. Develop TORs for taskforce specifying key members: IBP, PJIAE, STAT, STB, and SHTA 3. Conduct at least quarterly meetings to advocate, monitor, and support implementation efforts of actions in this action plan and others <p>Timing: commence within 3 months Responsible: Prime Minister and TEATT with engagement of key stakeholders</p>
MID-TERM	
Action 1: Support implementation of e-gates and online immigration form processing	
Collaborate on project for implementation of e-gates and online immigration form processing.	<ol style="list-style-type: none"> 1. Participate in training required for new system 2. Facilitate data sharing amongst stakeholder agencies and entities 3. Contribute to design of communications and stakeholder engagement plan <p>Timing: commence within next 3 months Responsible partners: IBP, PJIAE, STAT, STB; supported by tourism statistics taskforce</p>
Action 2: Formalize cross-ministry data sharing and cooperation	
In conjunction with Action 1, establish formal cross-ministry mechanism for agreeing on control and movement of data in new system	<ol style="list-style-type: none"> 1. Review data availability under new system 2. Reach agreements on data ownership and steps for sharing <p>Timing: commence in Q4, 2019 Responsible: IBP, STAT, STB; supported by tourism statistics taskforce</p>
Action 3: Improve system for data sharing by stakeholders	
Create an online platform for uploading and sharing all tourism data by relevant stakeholders in a systematic timely manner	<ol style="list-style-type: none"> 1. Design a platform for easy uploading of data 2. Establish linkages to the online tourism dashboard for automatic/real-time data upload and publication 3. Pilot and test 4. Implement the system 5. Test and engage stakeholders to regularly upload information into the system <p>Timing: 8 months Responsible: STAT with support from STB; supported by tourism statistics taskforce</p>
Action 4: Develop and conduct 'deep-dive' on-line surveys	
Launch targeted online surveys profiling visitor behaviors and satisfaction	<ol style="list-style-type: none"> 1. Evaluate options for collecting visitor emails 2. Design survey 3. Implement surveys 4. Analysis, reporting and dissemination of report <p>Timing: Q1, 2021; 3-6 months to develop Responsible: STAT with support from STB and SHTA</p>

Acton 5: Develop and conduct yachting market surveys	
Implement survey to gather data to better plan for and measure the yachting market segment	<ol style="list-style-type: none"> 1. Design survey 2. Schedule and undertake surveys (every 2 years) 3. Analysis, reporting and dissemination of report Timing: Q1, 2021; 3-6 months to develop Responsible: STAT with support from STB and SHTA
LONGER-TERM	
Action 1: Complete establishment and implementation of TSA	
Define, design and implement SXM Tourism Satellite Accounts	<ol style="list-style-type: none"> 1. Prepare implementation plan 2. Secure funding and necessary expertise 3. Include communications plan for adoption by stakeholders Timing: 3-5 years Responsibility: TEATT and STAT with involvement of STB

Concluding comment

Improving the collection and dissemination of tourism sector statistics is fundamental to the sector's longevity and growth in Sint Maarten. The World Bank team found a strong appetite amongst stakeholders and decision-makers for consistently collected and shared data profiling the sector's supply and demand. While there are many different types of data that can be collected, the recommendations here provide for the collection of the most crucial indicators. Developing a sector dashboard, similar to good practice in other tourism-focused economies, is a specific goal that can benefit all involved with the sector now and in the future.

Annex 1: Sint Maarten Tourism Statistics Indicators and Availability

Table A1.1: Summary of available indicators and sources

Table	Indicator	Source	Year
1	Number of stay-over visitors	STAT (data collected by Ministry of Justice)	1994-2018
2	Number of cruise passengers and cruise vessels	STAT (data collected by Port of St Maarten)	1995-2018
3	Number of stay-over visitors by region	STAT (data collected by Ministry of Justice)	2006-2018
4	Number of stay-over visitors by region	STAT (data collected by Ministry of Justice)	2019
5	Number of stay-over visitors by region, 2019 versus 2016 performance	STAT (data collected by Ministry of Justice)	2016 and 2019
6	Number of stay-over visitors by nationality and month	STAT (data collected by Ministry of Justice)	2018
7	Cruise arrivals by market (% of total)	STAT, Cruise passenger exit survey	2014, 2015, 2016 and 2018
8	Stay-over visitors, by purpose of visit (% of total)	STAT, Stay-over visitor exit survey	2014, 2015, 2016 and 2018
9	Number of stay-over visitors, by month	STAT (data collected by Ministry of Justice)	2016- 2019
10	Number of cruise passengers by month	STAT (data collected by Port of St Maarten)	2014-2019
11	Stay-over visitors, travel party composition (% of total)	STAT, Stay-over visitor exit survey	Average for years 2014, 2015, 2016 and 2018
12	Cruise passengers, travel party composition (% of total)	STAT, Cruise passenger exit survey	Average for years 2014, 2015, 2016 and 2018
13	Stay-over visitors, age (% of total)	STAT, Stay-over visitor exit survey	Average for years 2014, 2015, 2016 and 2018
14	Cruise passengers, age (% of total),	STAT, Cruise passenger exit survey	Average for years 2014, 2015, 2016 and 2018
15	Cruise passengers, household Income (% of total)	STAT, Cruise passenger exit survey	2014, 2015, 2016 and 2018
16	Stay-over visitors, activities participated in	STAT, Stay-over visitor exit survey	2018
17	Cruise passengers, activities participated in	STAT, Cruise passenger exit survey	2018
18	Stay-over visitors, satisfaction ratings, Dutch versus French side	STAT, Stay-over visitor exit survey	2018
19	Stay-over visitors, satisfaction ratings	STAT, Stay-over visitor exit survey	2018
20	Cruise passengers, tourism product rating	STAT, Cruise passenger exit survey	2014, 2015, 2016 and 2018
21	Occupancy rates of available rooms	SHTA	2013-2019
22	Occupancy rates, by accommodation and month	SHTA	2017
23	Occupancy rates, by accommodation and month	SHTA	2018 and 2019
24	Number of Villas and Condo's on the Dutch side	Real Estate Agencies	2019
25	Stay-over visitors, average daily expenditures	STAT, Stay-over visitor exit survey	2014, 2015, 2016 and 2018
26	Stay-over visitors, average daily expenditures, by market	STAT, Stay-over visitor exit survey	2018
27	International tourism receipts	UNWTO	2013-2017
28	Cruise passengers, average daily expenditures by market	STAT, Cruise passenger exit survey	2014, 2015, 2016 and 2018
29	Cruise passengers, expenditures by category (% of total),	STAT, Cruise passenger exit survey	Average of years 2014, 2015, 2016 and 2018
30	Cruise passengers, total expenditures	STAT, Cruise passenger exit survey	2014, 2015, 2016 and 2018
31	Number of people employed in accommodation and food service activities, before hurricane Irma	STAT, Economic Census 2018	2017
32	Number of people employed in accommodation and food service activities	STAT, Economic Census 2018	2018
33	Number of accommodation and food service activities establishments	STAT, Economic Census 2018	2018

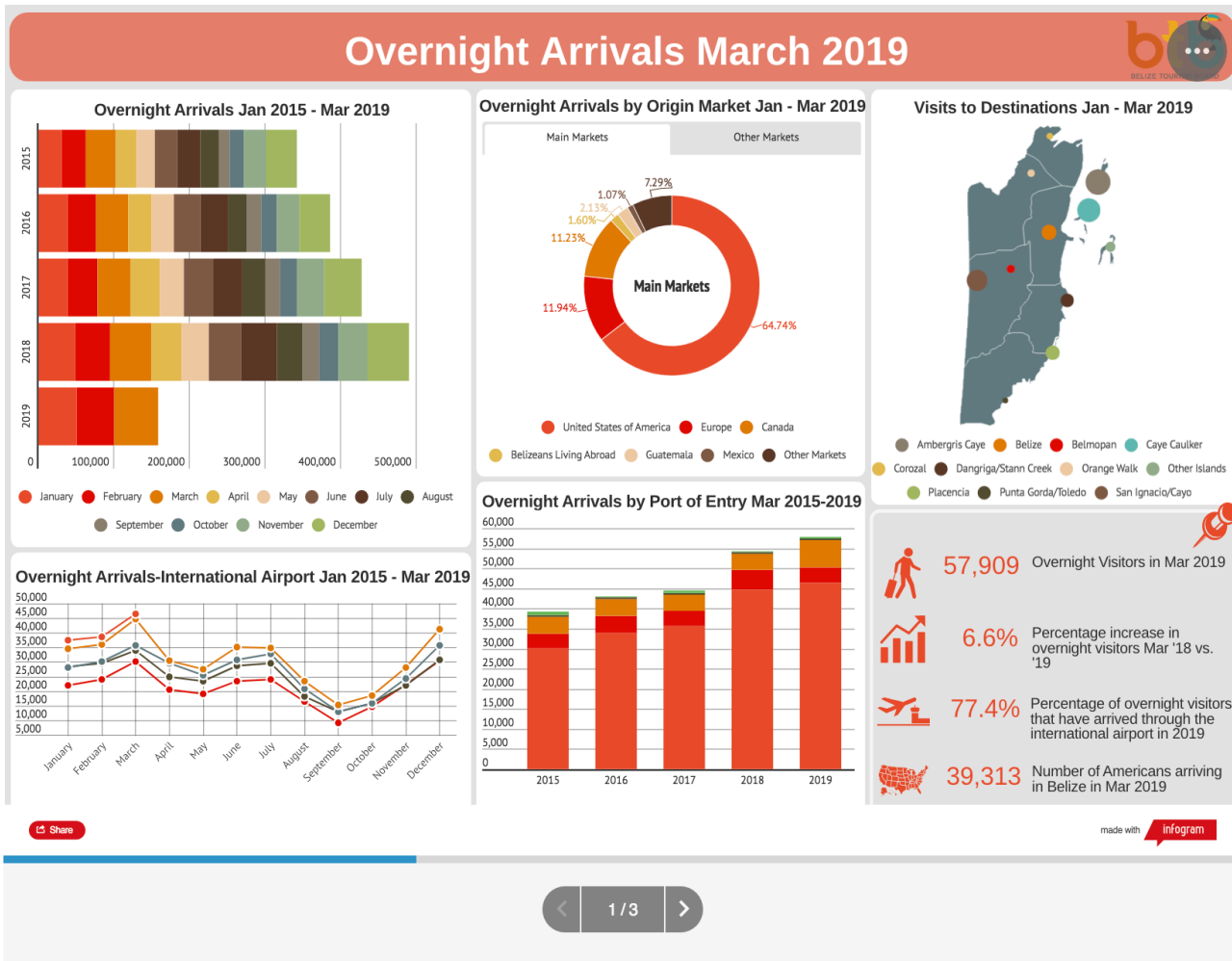
Source: Collected from STAT, SHTA, STPB, UNWTO, IBP, Port of St Maarten, and PJAIE

Table A1.2: Availability and limitations of Sint Maarten tourism indicators

Indicator	Frequency	Collected by					Limitations
		Min of Jus	PJIAE	STAT	SHTA	STB	
<i>SXM immigration information</i> 1. Number of incoming/outgoing airline passengers 2. Nationality of incoming airline passengers	Monthly	√					Data for all visitors on key indicators such as length of stay, place of stay and purpose of visit is missing. Data includes passengers who stay in St. Martin or who travel by ferry to nearby islands
<i>Tourism exit survey</i> 1. Purpose of visit 2. Travel party composition 3. Age 4. Permanent residence 5. Activities participated in 6. Satisfaction ratings 7. Average daily expenditures (by market)	Four times per year			√			Small sample size and limited sampling periods. No information on the yachting segment.
<i>Regatta survey</i> 1. Purpose of visit 2. Travel party composition 3. Age 4. Permanent residence 5. Activities participated in 6. Satisfaction ratings 7. Average daily expenditures (by market)	Once a year					√	Small sample size
<i>Sint Maarten Port information</i> 1. Number of cruise arrivals 2. Source markets of cruise arrivals 3. Number of cruise vessels	Monthly			√			No information on how many cruise passengers leave the ship
<i>Cruise passenger exit survey</i> 1. Group size 2. Age 3. Household income 4. Activities 5. Tourism product rating 6. Average daily expenditures by market, category, household income, number of visits	Twice a year			√			Small sample size and limited sampling periods
<i>SHTA members</i> 1. Number of available rooms 2. Room occupancy rates	Monthly				√		Data collected on voluntary basis from SHTA members, considerable margin of error is possible
<i>Labor Force Survey</i> 1. Number of employed persons in the accommodation and food services sector	Annual			√			Detailed data on labor force data is available upon request
<i>Economic Census</i> 1. Number of businesses 2. Number of employed 3. Number of available rooms 4. Hurricane assessment perception	Every five years			√			The internationally recommended frequency for Economic Censuses is every 5 years.

Annex 2 – Tourism Dashboard Examples

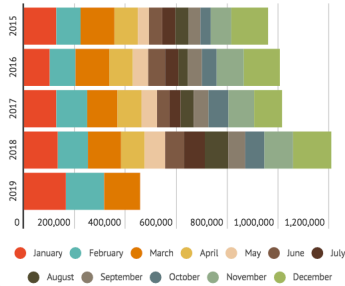
Belize Tourism Dashboard (<http://belizetourismboard.org/belize-tourism/statistics/>)



Cruise Passenger Arrivals March 2019



Total Cruise Passenger Arrivals Jan 2015 - Mar 2019

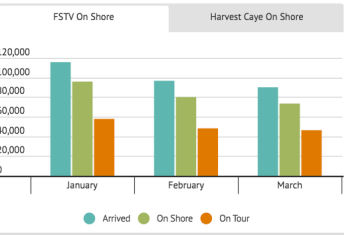


143,176 Total Cruise Visitors in Mar 2019

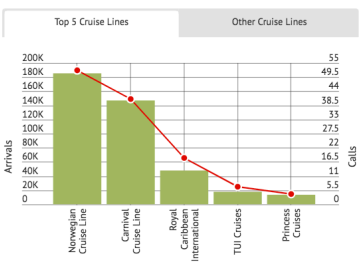
8.4% Percentage increase in cruise visitors Mar '18 vs. '19

45 Total cruise ship calls in Mar 2019

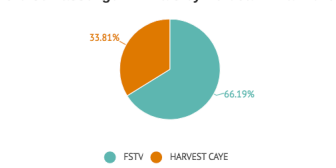
Cruise Passengers On Shore Jan - Mar 2019



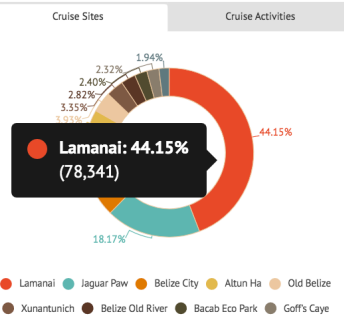
Total Arrivals & Calls by Cruise Lines Jan - Mar 2019



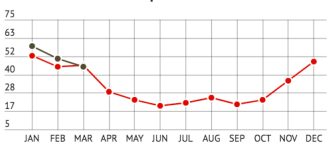
Cruise Passenger Arrivals by Port Jan - Mar 2019



Top 10 Cruise Sites/Activities Jan - Mar 2019 - FSTV



Total Cruise Ships Calls 2018 vs. 2019



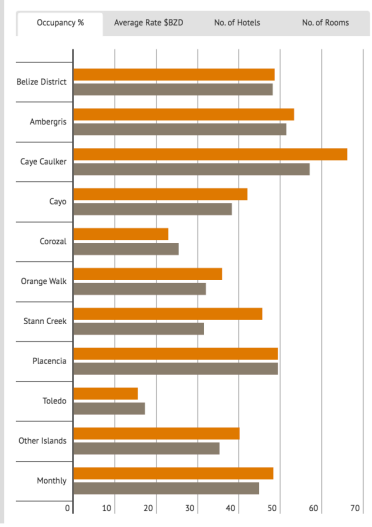
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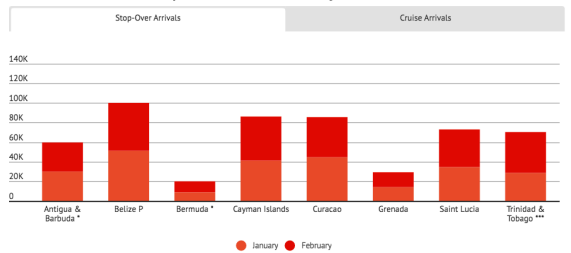
Accommodation KPIs/Caribbean Region Stats



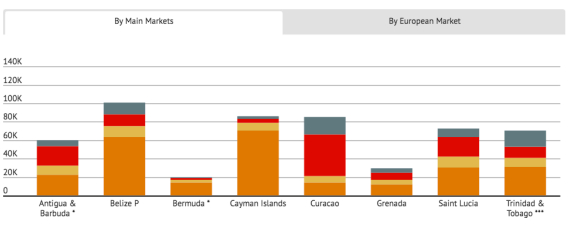
Accommodation Stats 2018-2019



Tourist Stop-Over & Cruise Arrivals by Month Jan - Feb 2019



Tourist Arrivals by Main Markets and European Market Jan - Feb 2019



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Hawaii Tourism Dashboard

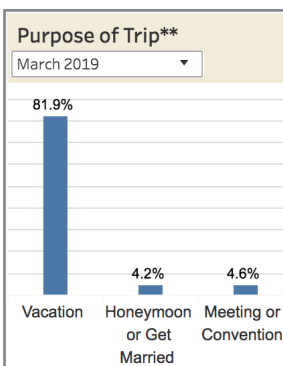
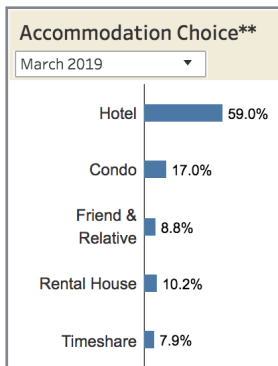
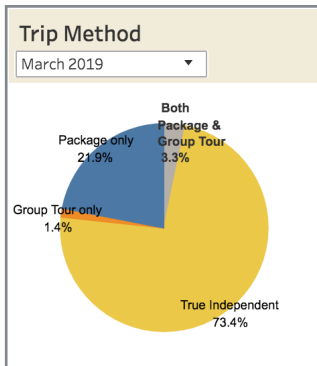
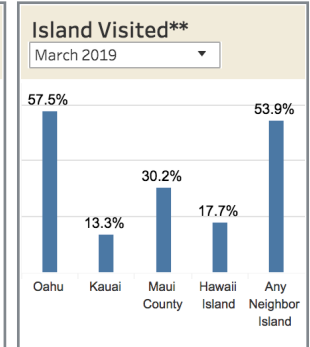
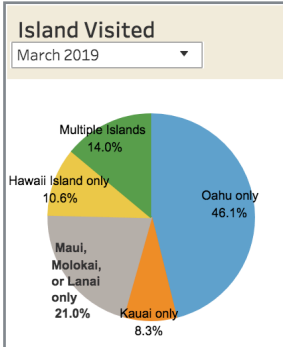
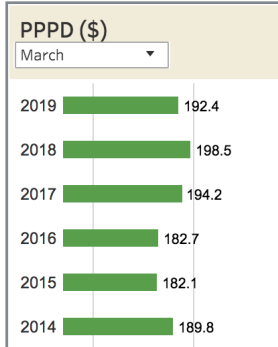
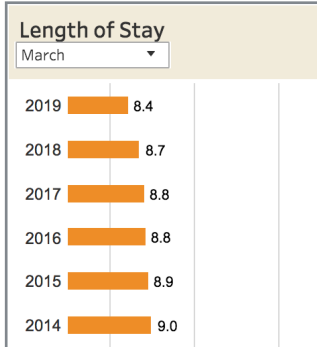
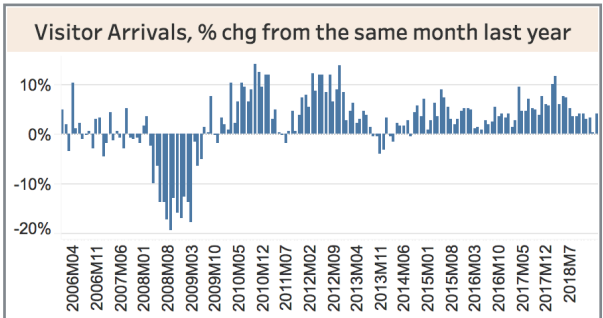
(<http://dbedt.hawaii.gov/economic/tourism-dashboard/tourism-dashboard-by-market-monthly/>)

TOURISM DASHBOARD BY MARKET-MONTHLY

AirTotal | US West | US East | Japan | Canada | Europe | Oceania | China | Korea

Air Total, March 2019

Indicator	Unit	This Month	% chg M*	YTD	% chg YTD*
Arrivals	persons (1,000)	927.2	4.1%	2,502.6	2.6%
Days	days (1,000)	7,809.6	0.8%	22,818.0	0.2%
Expenditure	\$ million	1,502.7	-2.3%	4,506.3	-2.4%
Length of Stay	days	8.4	-3.2%	9.1	-2.3%
PPPD	\$	192.4	-3.0%	197.5	-2.6%



Indicator	Value
% of first-time visitors	30.6
Avg. number of trips	5.3
Avg. number of Islands visited	1.2
Avg. size of party	2.2

* Percentage change from the same period last year

** Visitor who selected multiple responses were counted in each category they selected. Therefore, the sum of percentages may add to more than 100%.

Annex 3 - Tourism Satellite Account (TSA) System

Tourism Satellite Account Explained

The setting up of a Tourism Satellite Account (TSA), which was developed by the United Nations (UN), consists of analyzing, in detail, all aspects of demand for goods and services which might be associated with tourism; establishing the actual interface with the supply of such goods and services within or outside the economy of reference; and describing how this supply (from domestic or imported origin) interacts with other economic activities. As this instrument requires consistency among the different data sources that are used and imposes more stringent conditions on them, in particular, reconciliation between the different data, it becomes possible to estimate internally consistent variables that more accurately represent the direct economic contribution of tourism and its interdependence with the rest of a national economy.

The complete TSA provides:

- Macroeconomic aggregates that describe the size and the direct economic contribution of tourism, such as tourism direct gross value added (TDGVA) and tourism direct gross domestic product (TDGDP), consistent with similar aggregates for the total economy and for other productive economic activities and functional areas of interest;
- Detailed data on tourism consumption, a more extended concept associated with the activity of visitors as consumers, and a description of how this demand is met by domestic supply and imports, integrated within tables derived from supply and use tables which can be compiled both at current and constant prices;
- Detailed production accounts of the tourism industries, including data on employment, linkages with other productive economic activities and gross fixed capital formation;
- Links between economic data and non-monetary information on tourism, such as number of trips (or visits), duration of stay, purpose of trip, modes of transport, etc., which is required to specify the characteristics of the economic variables.

Although some implicit assumptions are needed for the compilation of the recommended tables, the TSA is mainly descriptive in nature and does not include any measurement of the indirect and induced effects of tourist consumption on the economic system as a whole. This means that the impact of tourism on the economy is not fully reflected in the TSA tables and must therefore be measured and analyzed using other means. This can be done for instance using input-output or Computable General Equilibrium (CGE) models based on the TSA or other modelling instruments which allow for comprehensive tourism impact analysis.

There is no obligation for countries to produce a TSA. Nevertheless, the compilation of the TSA tables is to be understood as an important step in a process that aims to further develop and integrate tourism statistics within the national accounting system of a country. Those countries that have implemented a TSA or have included a TSA within their system of national accounts have experienced the relevance of such an instrument for the improvement of the coverage and the quality of tourism statistics, as well as for the macroeconomic analysis of tourism.

Adapted from: United Nations (2008). Tourism Satellite Account: Recommended Methodological Framework 2008. Available at https://unstats.un.org/unsd/publication/Seriesf/SeriesF_80rev1e.pdf