

**ACTION PLAN**

# Sint Maarten Tourism Recovery 2020–2022 Priority Action Plan

**Overview**

The Sint Maarten Tourism Recovery 2020–2022 Priority Action Plan is an action-oriented roadmap developed under the World Bank-managed Tourism Sector Recovery Strategy Support, financed by the Government of The Netherlands and implemented with the Government of Sint Maarten. Conceived in the aftermath of Hurricane Irma (September 2017), the plan seeks to “build” by accelerating recovery while laying foundations for a resilient tourism economy. Tourism is the backbone of Sint Maarten’s economy—contributing roughly 45% of GDP and 73% of foreign exchange earnings in 2016—so the shock of Irma had both immediate and systemic consequences for livelihoods, public revenues, and the wider service ecosystem.

The document positions Sint Maarten within an increasingly competitive Caribbean and global tourism marketplace, where traveler preferences have shifted toward authentic, experience-rich, and environmentally responsible products. While cruise traffic rebounded quickly, higher-yield stayover tourism remained constrained by damaged accommodation stock, a shifting demand mix, and structural issues in product quality, business climate, public realm, and environmental stewardship. The plan translates diagnostic insights and stakeholder consultations into eight priority areas to guide action in a 24-month window, complementing and updating earlier strategy work and preparing for a new strategic tourism plan.

## Objectives and Audiences

The primary purpose is to provide a focused set of high-impact, feasible actions for 2020–2022 that can accelerate recovery and enhance the long-run resilience and competitiveness of Sint Maarten’s tourism sector. The plan aims to:

- Move beyond a return-to-2016 conditions toward a refreshed, diversified, and higher-value tourism offer.
- Identify immediate bottlenecks—data gaps, regulatory burdens, degraded public spaces, skills constraints, and environmental risks—and outline solutions that are implementable in the near term.
- Organize stakeholders around a shared, practical agenda while informing the design of an updated, longer-term strategic plan and institutional arrangements.

The plan asks: What must Sint Maarten do now to rebuild a resilient, competitive tourism economy? It proceeds from the hypothesis that physical reconstruction alone is insufficient; resilience requires addressing structural constraints (product quality, business climate, human capital, and environmental stewardship), strengthening data systems for decision-making, and institutionalizing a modern destination marketing and management function. It also assumes that focusing on diversified, authentic experiences and improving the visitor journey—from airport to public realm—will drive higher-yield segments and improve distribution of benefits.

The target audiences for the Action Plan include, as primary actors, the Government of Sint Maarten—specifically the Ministry of Tourism, Economic Affairs, Transport and Telecommunication (TEATT), the Ministry of Education, Culture, Youth and Sports (MECYS), and the Ministry of Public Housing, Environment, Spatial Development and Infrastructure (VROMI)—which provide policy, investment, and implementation leadership. Secondary audiences comprise the private sector, including SHTA, hotels, timeshares, tour operators, taxi associations, and marina and yachting businesses, together with the Sint Maarten Tourist Bureau, the Office of the Prime Minister, and community organizations, whose collaboration is critical for product development, service quality, and co-investment. Tertiary audiences include development partners, such as the World Bank, Government of The Netherlands, and others engaged in the Sint Maarten Trust Fund, which support the plan through technical assistance, financing, and the facilitation of reforms and capacity building.

### Market Dynamics, Evolving Traveler Preferences, Challenges

The plan situates Sint Maarten within global shifts toward experiential travel—culture, heritage, nature, wellness, and community-based offerings—away from narrow, casino-dominated propositions. Competition in the Caribbean is strong, with destinations actively upgrading product quality, greening operations, streamlining investment regimes, and investing in destination management organizations (DMOs). Technology is reshaping the marketplace (online travel agencies, sharing economy, digital marketing), raising both opportunities and pressures to professionalize and modernize capabilities.

Five interlinked constraints are emphasized:

1. **Non-competitive, low-yield core product for stayover markets:** The current offer remains overly concentrated and does not fully leverage the island’s culture, heritage, and natural assets. Product freshness, diversity, and quality standards lag behind rising consumer expectations.
2. **Restrictive business environment and unattractive investment climate:** Licensing and permitting are often slow and convoluted. Ambiguity and fragmentation deter investment and limit the emergence of new products, especially from small and medium enterprises.
3. **Weak infrastructure and unattractive public spaces:** Public realm degradation—particularly in key visitor corridors and hubs like Philipsburg and Simpson Bay—erodes the visitor experience and constrains private investment. Mobility, signage, cleanliness, lighting, and safety require upgrades.

4. **Limited workforce capacity:** Skills gaps in hospitality, data and analytics, product development (e.g., yachting and adventure tourism), and service quality limit the sector’s ability to compete and adapt to new trends.
5. **Inadequate environmental protection:** Solid waste management challenges, plastic pollution, and weak enforcement threaten natural assets central to the destination’s appeal. Greening practices are uneven, and environmental education and incentives need scaling.

### Priority Action Areas (2020–2022)

1. **Upgrade and diversify the tourism product:** Develop and curate heritage and cultural sites, community-based experiences, and nature-based parks and trails that broaden appeal and increase dwell time and spend.
2. **Improve tourism data and analytics:** Increase frequency and coverage of visitor and business surveys; establish a public tourism data dashboard; formalize a statistics task force to harmonize methods and improve timeliness and quality.
3. **Establish a Tourism Promotion Entity:** Create a public–private destination marketing and management organization (DMMO) with sustainable funding and clear mandates, modeled on best practices (e.g., Aruba Tourism Authority).
4. **Update the strategic tourism plan:** Review and modernize the 2005 TourMap; align product strategy, infrastructure, marketing, and workforce development under a coherent, long-term vision with performance indicators.
5. **Streamline licensing and permitting:** Map current processes, reduce steps and timelines, digitize where possible, clarify standards, and create transparent guidance to stimulate investment and innovation.
6. **Beautify and enhance commercial districts:** Target Philipsburg and Simpson Bay for cleanliness, greening, signage, lighting, street furniture, shading, waste management, and safety improvements to elevate first impressions and visitor flow.
7. **Strengthen workforce expertise:** Expand targeted training for data analytics, yachting services, adventure and nature guiding, and service quality; leverage proven programs (e.g., the Sint Maarten Training Foundation) and industry partnerships.
8. **Improve environmental protection:** Scale environmental education, incentivize private greening and certification (e.g., eco-labels), and enhance enforcement and incentives to reduce single-use plastics and improve waste management.

### Lessons Learned

Lessons learned show that recovery is multidimensional, because physical reconstruction without product refresh, institutional reform, and human capital development yields limited competitiveness gains. While speed matters, so does quality, as quick cruise recovery bought time but sustainable value depends on higher-yield stayover segments requiring upgraded supply and experiences. Data is a strategic asset, with gaps and inconsistencies in tourism statistics—particularly on accommodation, yachting, and the sharing economy—hampering marketing, investment decisions, and policy targeting, while governance and collaboration enable sustained competitiveness through a dedicated, well-governed DMMO, clear public–private collaboration platforms, and streamlined regulations. Targeted upskilling delivers high returns by retaining and upgrading the workforce, to improve service quality, inclusion, and adaptability to new markets.

Notable examples and peer practices include the Aruba Tourism Authority, where an independently funded, professionalized DMMO is presented as a model for branding, market development, and stakeholder coordination; the Kaya Kaya Street Party in Curaçao as a case of community-led urban regeneration that

combines cultural vitality with public-space improvement to create authentic attractions for locals and visitors; Hong Kong’s hiking trails, which demonstrate how urban destinations can successfully develop, signpost, and promote accessible nature-based experiences to diversify their tourism offer; and Caribbean plastics bans and blue economy initiatives, where regional peers have advanced policy frameworks that align environmental protection with tourism competitiveness and brand value.

## Risks and Assumptions

- Regulatory reforms are assumed to catalyze private investment; delays or partial implementation could slow product diversification.
- Establishing a sustainable funding model and governance structure is pivotal; without it, marketing and destination management will remain fragmented.
- Education and incentives need to be complemented by consistent enforcement; otherwise, environmental gains will be limited.
- Delivering a credible, timely dashboard depends on institutional coordination and resources; failure to close data gaps would perpetuate blind spots.
- Global health crises, economic downturns, or severe weather could disrupt demand and timelines, underscoring the need for contingency planning.

## Implementation Considerations and Sequencing

- **Quick wins in public realm:** Early, visible improvements in cleanliness, lighting, signage, and greening in Philipsburg and Simpson Bay can lift visitor satisfaction and business confidence, helping crowd in private investment.
- **Parallel tracks on reform and product:** Regulatory streamlining should proceed alongside targeted product pilots (e.g., curated heritage routes, signed hiking loops) to demonstrate value and build momentum.
- **Build the DMMO while upgrading data:** Establish the Tourism Promotion Entity in tandem with a data task force and dashboard so that marketing and management decisions are evidence-based from inception.
- **Workforce programs linked to product:** Training should be demand-led and synchronized with product development (e.g., nature guiding for new trails, yachting services).
- **Environmental wins with co-benefits:** Phase in plastic reduction, recycling pilots, and green certification—prioritizing areas with immediate visibility and cost savings for businesses.

## Findings

- **The recovery is uneven:** Cruise has bounced back, but stayover capacity and demand remain below potential due to product, data, and institutional gaps.
- **The current offer underperforms evolving demand:** Travelers want authentic, diversified, and sustainable experiences that Sint Maarten can provide with targeted development and quality standards.
- **Institutional modernization is essential:** A professional, accountable DMMO and streamlined regulatory environment are necessary to compete effectively and coordinate stakeholders.
- **Public realm matters:** Visitor experience is shaped as much by streetscapes and services as by hotels; strategic upgrades in key districts are foundational.
- **Environmental leadership is a market advantage:** Greener practices directly protect core assets and strengthen brand positioning in high-value segments.

## Recommendations

- Establish the Tourism Promotion Entity with a clear mandate, governance, and sustainable funding; recruit professional leadership and define KPIs aligned to market development and destination management.
- Launch a public tourism data dashboard and formalize a statistics task force; standardize data definitions and collection, including sharing-economy and yachting metrics; increase survey cadence.
- Implement licensing and permitting reform: map, simplify, digitize, and publish processes and service standards; pilot a one-stop interface for tourism MSMEs.
- Execute a targeted public-space improvement program in Philipsburg and Simpson Bay: cleanliness, waste management, lighting, wayfinding, street furniture, shade, and safety measures.
- Pilot product diversification projects: curated heritage and cultural circuits, signed hiking and nature trails, community-based experiences, and yachting service enhancements; embed quality standards and storytelling.
- Scale workforce development: expand training in data/analytics, service excellence, language skills, nature and adventure guiding, and yachting operations; partner with industry for placements.
- Advance environmental measures: expand education, incentivize green certification, reduce single-use plastics, strengthen enforcement for waste and pollution controls, and monitor outcomes.

Gaps and limitations reflect that data limitations persist, as incomplete and inconsistent statistics, especially post-Irma, constrain fine-grained analysis and targeting, making the plan's metrics and comparisons conservative in places. The plan's short-term scope as a 24-month action plan means it is not a full sector strategy but is intended to catalyze action while informing a comprehensive, updated strategic plan. While priorities are clear, consensus on implementation modalities remains a constraint, as institutional alignment on the "how," including roles, financing, and sequencing, requires continued facilitation and stakeholder buy-in.

## Methodology and Data Sources

- Approach: Mixed methods combining quantitative analysis and qualitative stakeholder engagement.
- Diagnostics and baselines: Review of background data and two companion studies—Sint Maarten Tourism Sector Recovery – Compendium of Tourism Statistics and Tourism Statistics Diagnostic.
- Comparative benchmarking: Recovery trajectories and performance benchmarking against regional peers affected by hurricanes (e.g., Puerto Rico, Anguilla) using sources such as STR and ForwardKeys.
- Consultations: Extensive engagements in 2019 with public agencies, private sector (hotels, tour operators, associations), and community stakeholders to validate challenges and prioritize actions.
- Data sources: Sint Maarten Department of Statistics; Sint Maarten Hospitality & Trade Association (SHTA); World Travel & Tourism Council (WTTC); STR; ForwardKeys; UNWTO; program administrative data (e.g., SMTF).
- Limitations: Significant pre- and post-Irma data gaps (e.g., incomplete accommodation coverage, irregular arrival card data, limited yachting and sharing-economy statistics), and reliance on voluntary hotel reporting that may bias representativeness.

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](https://sintmaartenrecovery.org/analytical-studies)