



Paper

Tourism in Caribbean Netherlands in 2015

October 2016

Inhoud

- 1. Bonaire 3**
 - 1.1 Summary 2015 3
 - 1.2 Tourists arriving by airplane 4
 - 1.3 Tourists arriving by boat 6

- 2. St Eustatius 7**
 - 2.1 Summary 2015 7
 - 2.2 Tourists arriving by airplane 7
 - 2.3 Tourists arriving by boat 9

- 3. Saba 10**
 - 3.1 Summary 2015 10
 - 3.2 Tourists arriving by air 10
 - 3.3 Tourists arriving by boat 12

Last year was a good year for tourism on Bonaire. Including business travellers, the number of tourists¹⁾ arriving by airplane on Bonaire in 2015 rose significantly relative to 2014. As a result, the number of nights spent by tourists on Bonaire also increased. This development is in line with the growth of tourism in the entire Caribbean region. The number of cruise passengers visiting Bonaire also grew substantially. Bonaire seems to benefit from the boost in cruise holidays in the Caribbean region over the past decade. The number of passengers aboard recreational craft, like (motor) yachts etc., coming to Bonaire was stable in 2015 relative to the previous year.

Tourism on Saba and St Eustatius has remained at the same level in recent years. The number of tourists arriving on both islands by air in 2015 was approximately the same as in 2014. Apparently, Saba and St Eustatius did not benefit from the boost in the tourism industry in the Caribbean region. Almost as many tourists visited Saba and St Eustatius by boat in 2015 as in 2014.

Although the islands have different market shares, most tourists arriving on Bonaire, St Eustatius and Saba by air were Dutch²⁾ or American nationals. This has been the case for many years, but the market share of local tourists with Dutch passports coming from Aruba, Curaçao and St Maarten seems to decrease gradually. This is possibly due to a reduction in the number of local flights in 2015.

The status of the data presented in this article are provisional and based entirely on registers available to Statistics Netherlands (CBS), see also the [methodological explanation](#) (Dutch only).

1. Bonaire

1.1 Summary 2015

- By air: 137 thousand incoming tourists, of whom 12 thousand day trippers and 125 thousand overnight visitors; a 6 percent growth relative to 2014.
- Cruise ship passengers: 230 thousand; a 47 percent growth relative to 2014.
- Small recreational craft: 2.9 thousand incoming tourists; approximately the same as last year.

¹⁾ A 'tourist' is defined as someone who travels to and stays at places outside their usual environment no longer than twelve (consecutive) months for leisure, business or other purposes not related to paid activities in any of the places where they stay during these twelve months. Contrary to the definition, this publication only includes tourists who spent 0–61 nights on an island. People spending 62 nights or more on an island are not included in the category tourists. This group staying more than 61 nights is only a small group.

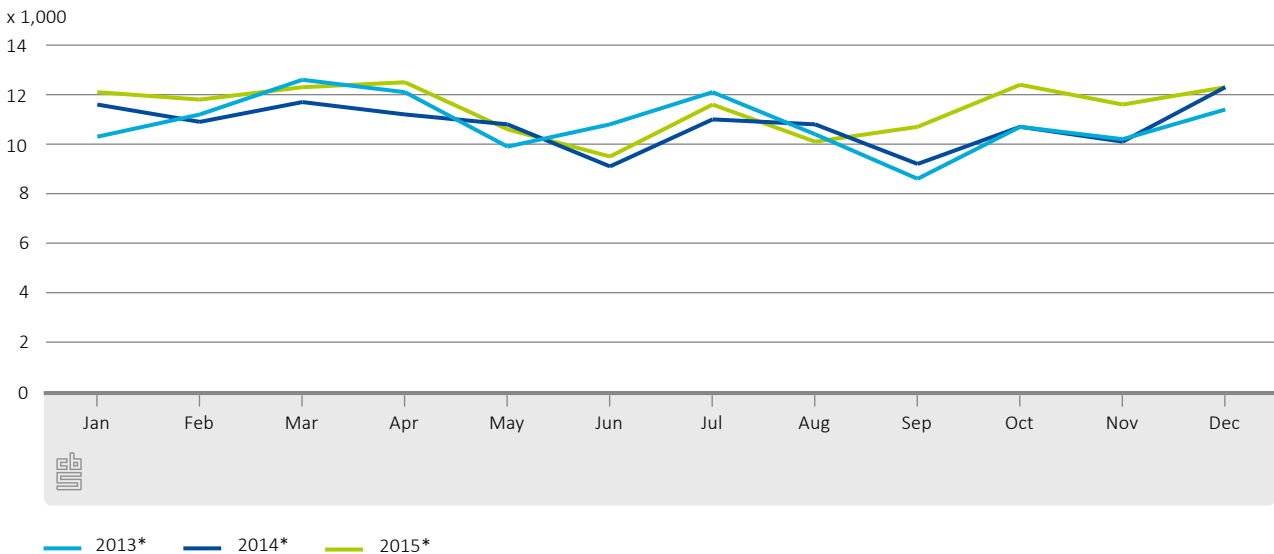
²⁾ Tourists holding Dutch passports not only include Dutch people living in Europe (international market) but also Dutch citizens from Aruba, St Maarten and Curaçao (local market). In this publication, the two groups are published separately. Tourists from Bonaire, St Eustatius and Saba are seen as domestic tourists and are not included in the figures (domestic tourism).

1.2 Tourists arriving by airplane

Strong growth in the number of tourist coming by airplane

Last year, 137 thousand tourists travelled to Bonaire by air, i.e. an average of 11.5 thousand tourists a month and an increase by 6 percent compared to 2014. The percentage growth rate is marginally less than for the Caribbean as a whole: 7.4 percent in 2015, according to the World Tourism Organization.³⁾ Especially in September, October and November, more tourists came to Bonaire than in the same months in 2014. See figure 1. This growth coincides with the increased number of flights to and from Bonaire and thus the growth in passenger numbers.

1. Incoming tourism by air, Bonaire, 2013–2015*



NB Figures are rounded off.

Source: CBS.

Nearly one in ten tourists arriving by airplane is a day tripper

Last year 137 thousand tourists came to Bonaire by airplane, of whom nearly one in ten stayed on Bonaire for only one day: some 12 thousand of all tourists (9 percent). These day trippers did not spend the night on the island.

Just over half of overnight visitors flying in stay one week or less

The remaining 91 percent, about 125 thousand incoming tourists, spent one or more nights on Bonaire. Approximately 56 percent of these tourists spent 1–7 nights on the island with a peak at 7 nights. See figure 2. On average, overnight visitors spent 9.6 nights on the island, with a total of 1.2 million overnight stays in 2015. The corresponding figures for 2014 were 9.4 and 1.1 million.

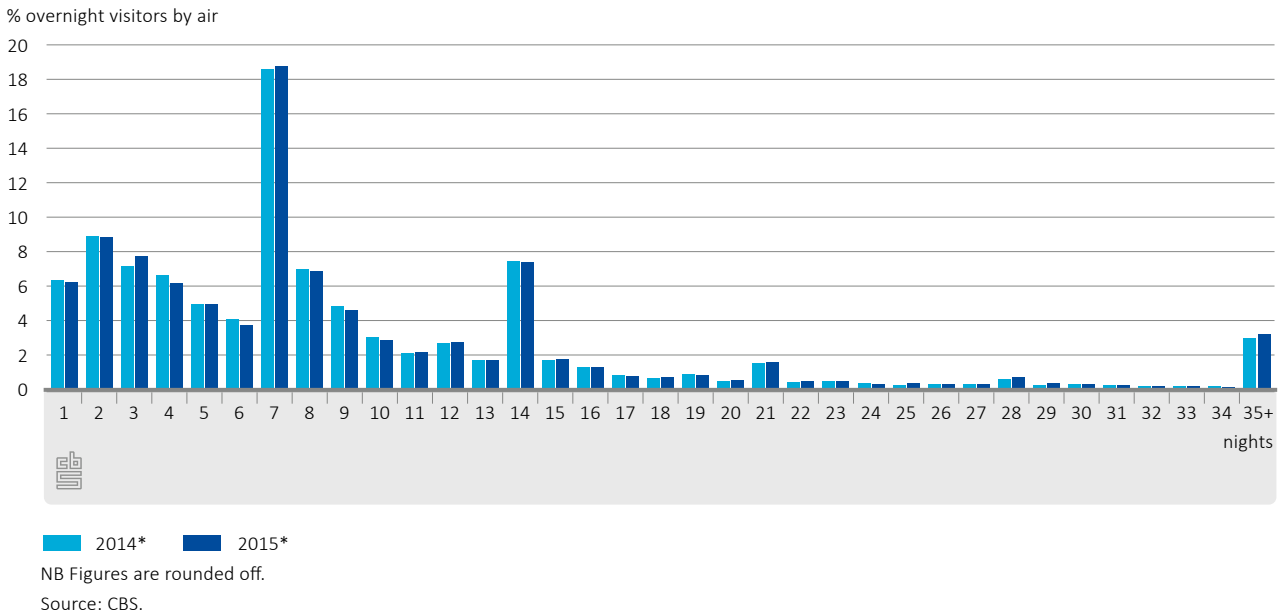
Majority of tourists are Dutch or American nationals

Since many years, most tourists arriving on Bonaire by airplane are Dutch (including Aruba, Curaçao and St Maarten) or American (including Puerto Rico) nationals. This was also the case in 2015. Strikingly, the share of Dutch tourists living in Caribbean Netherlands is decreasing slightly, whereas the market share of tourists living in the European part of the Netherlands has in fact increased marginally over the years. This also applies to the market

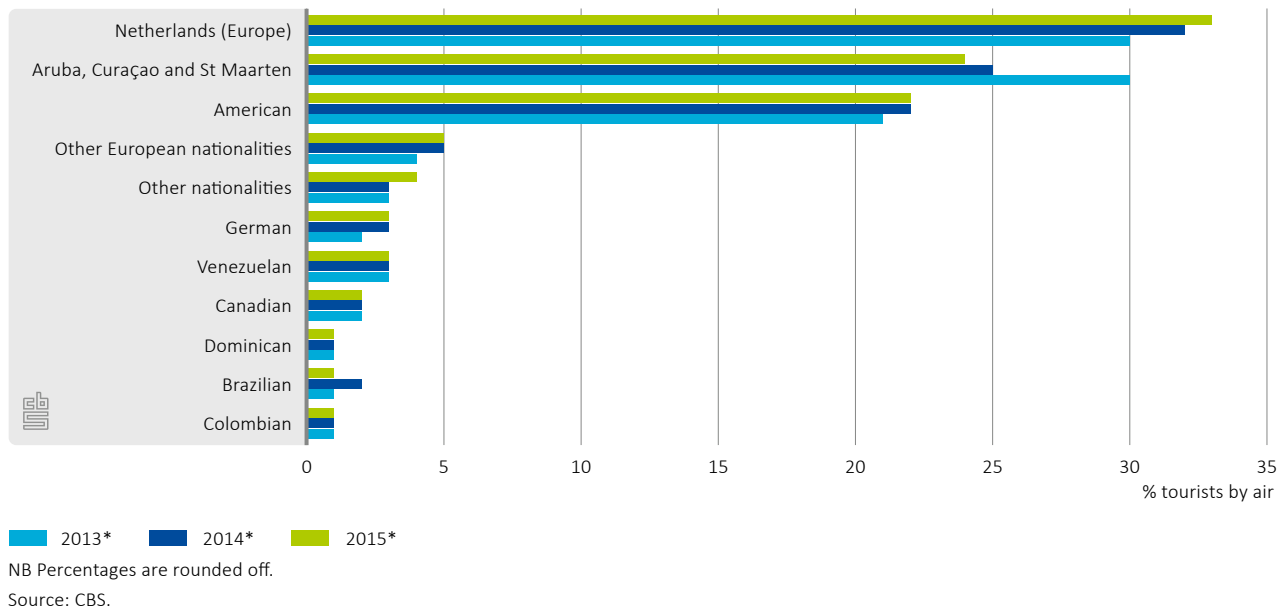
³⁾ <http://www2.unwto.org/>

share of American tourists: 22 percent in 2015. Altogether, 41 percent of tourists arriving on Bonaire by airplane came from Europe; 24 percent of them came from North America, including Canada. See figure 3.

2. Incoming tourism by air by length of stay, Bonaire, 2014 and 2015*



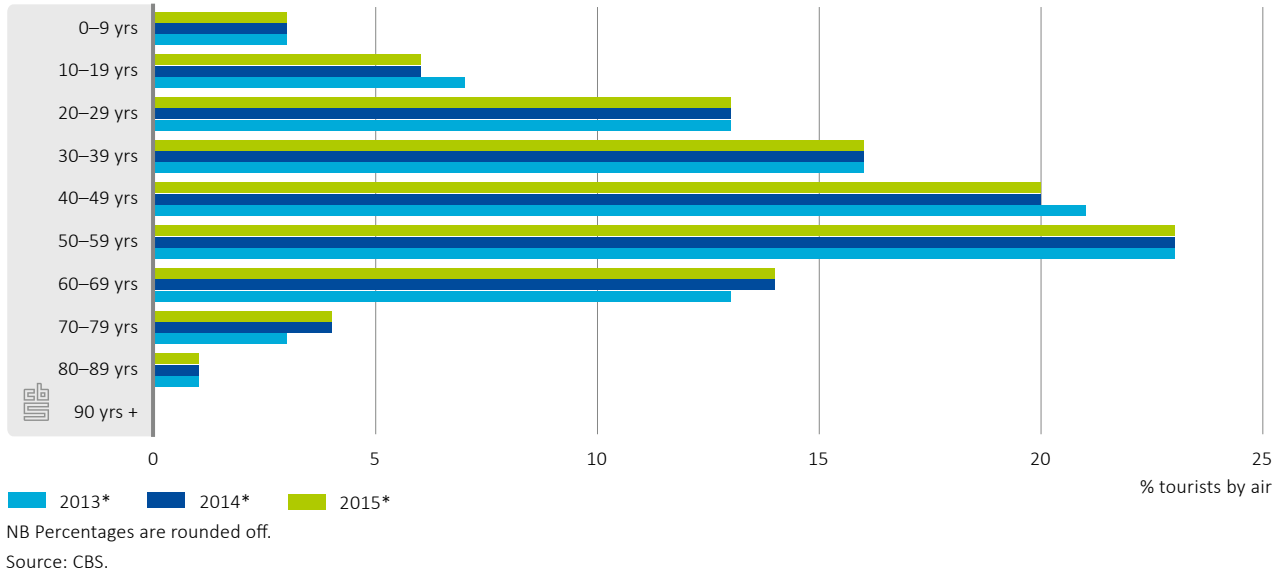
3. Incoming tourism by air by nationality, Bonaire, 2013–2015*



Most tourists flying to Bonaire are 40 to 59

The majority of tourists arriving by air are in the aged category 40–59. The age distribution has hardly changed in the past three years. See figure 4. When looking at incoming tourism in more detail, there seem to be two age groups of tourists visiting Bonaire by air. One group includes people around the age of 50 and another group includes people around 30.

4. Incoming tourism by air by age, Bonaire, 2013–2015*

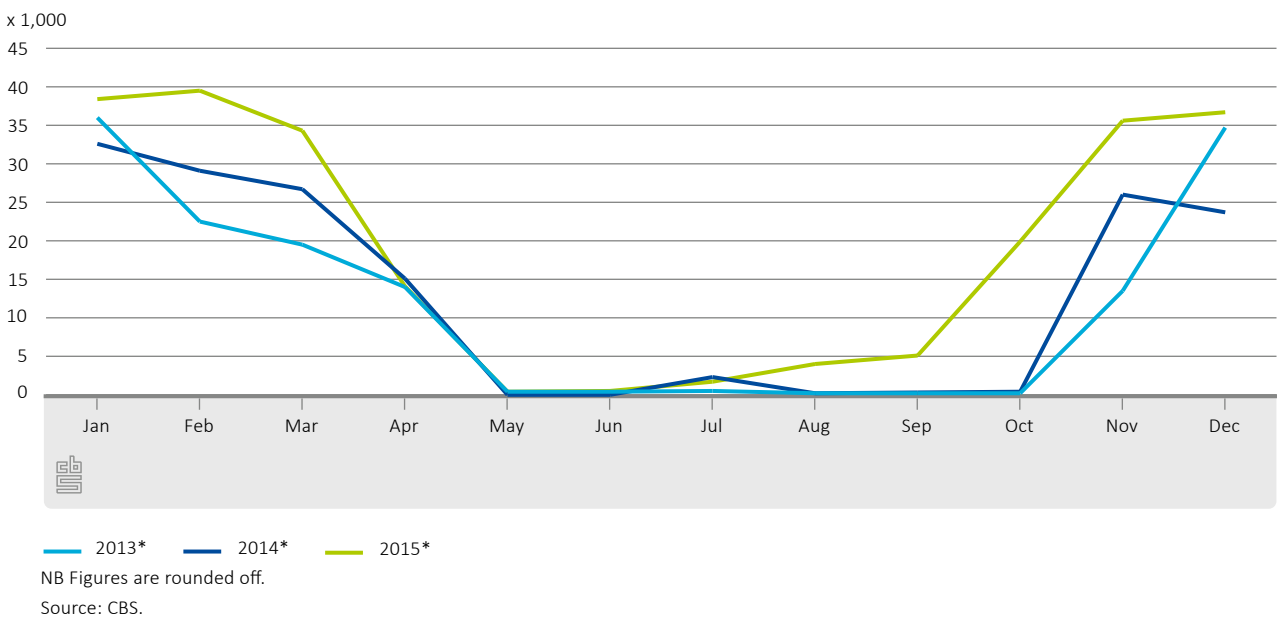


1.3 Tourists arriving by boat

Substantial more cruise passengers

Just as in previous years, more tourists arrived on Bonaire by sea than by air in 2015, most of them aboard cruise ships. Compared to 2014, the number of cruise passengers visiting the island has risen significantly, by no less than 47 percent in 2015. In 2014 some 156 thousand cruise passengers came to Bonaire, versus 230 thousand last year. See figure 5. Due to extension of the cruise season in 2015 more ships came to Bonaire, although in the months outside the cruise season, there was also an increase in cruise passengers. Bonaire seems to benefit from the boost in cruise ship tourism in the Caribbean region in the past decade. No data are available about how many of the 230 thousand cruise passengers actually went ashore. From an economic perspective, the cruise industry is obviously less important for

5. Number of cruise passengers, Bonaire, 2013–2015*



Bonaire than overnight tourism. Most cruise ships tend to stay in Bonaire for only one day. Moreover, cruise passengers do not spend the night on Bonaire, so they do not use the tourist accommodations available on the island.

Excluding cruise ships, the number of recreational craft coming to Bonaire in 2015 was relatively small. Last year some 870 smaller boats, including (motor) yachts, visited Bonaire. On board were 2,900 tourists, an average of 3.3 passengers per boat. On average, these boats stayed for 13 nights in 2015. The relatively long period of stay is partly due to the fact that Bonaire has two well-protected harbours: the Harbour Village Marina and the smaller harbour at Plaza Resort. Most of these small boats were sailing under Dutch (including Caribbean) or American flag.

2. St Eustatius

2.1 Summary 2015

- By air: 11 thousand incoming tourists, of whom 2 thousand day trippers and 9 thousand overnight visitors.
- Small recreational craft and cruise ship: 3.8 thousand incoming tourists.

2.2 Tourists arriving by airplane

Approximately 900 tourists per month arrive by planeplane

On average, about 900 tourists a month came to St Eustatius by air each month in 2015, a total of nearly 11 thousand tourists, slightly less than in 2014. See figure 6. St Eustatius does not benefit from the boost in tourism in the Caribbean region. Possibly, this has to do with the fact that the number of flights to and from St Maarten, as a major international hub for tourists going to St Eustatius, has hardly changed over the years.

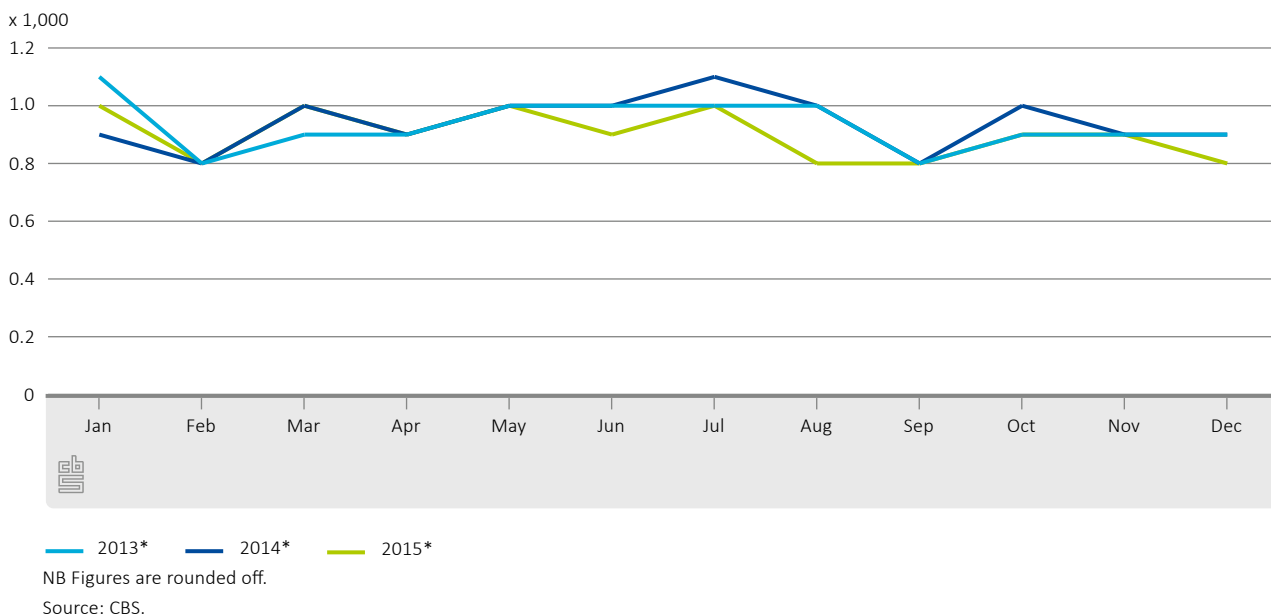
One in five tourists flying to St Eustatius is a day tripper

Last year 11 thousand tourists arrived by air on St Eustatius, of whom one in five stayed on the island only one day, i.e. 19 percent of all tourists who were flown in (2 thousand). They did not spend the night on the island.

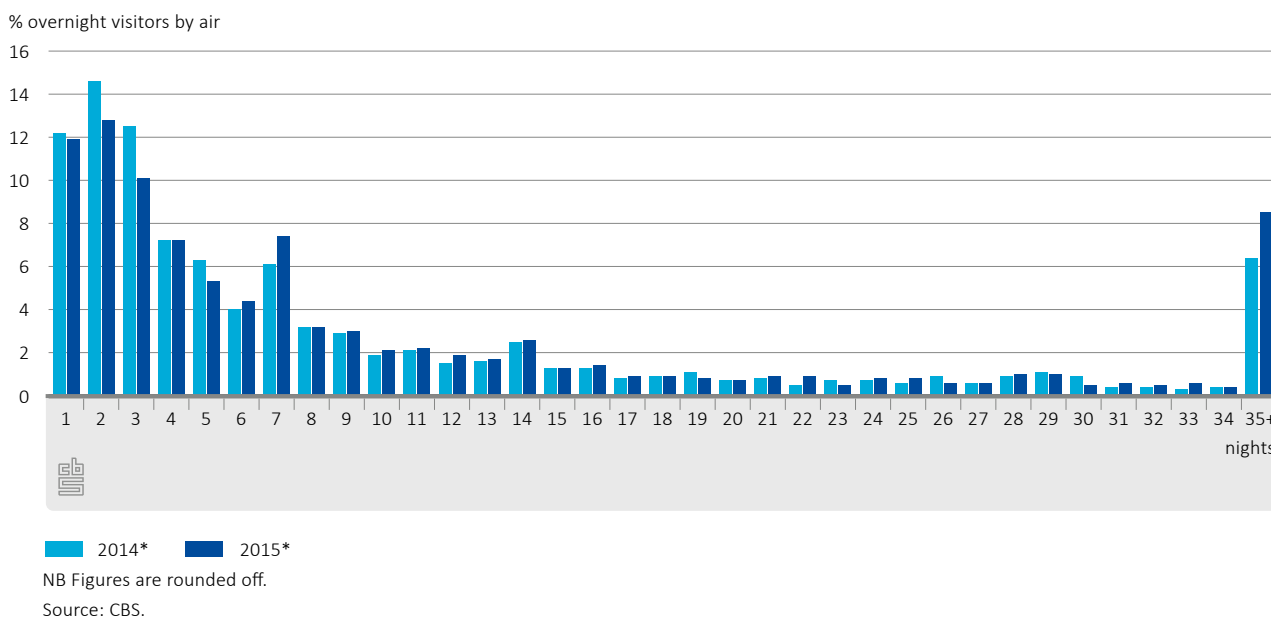
Fewer than 60 percent of overnight visitors arriving by plane stay 1–7 nights

Of the 9 thousand overnight visitors who arrived by air on St Eustatius in 2015, just under 60 percent spent 1–7 nights on the island, with a peak in the 1–3 nights range: nearly 35 percent of overnight visitors arriving by airplane. See figure 7. Overall, tourists spent 99 thousand nights on St Eustatius with an average of 11.5 nights per tourist, versus 10.3 nights in 2014.

6. Incoming tourism by air, St Eustatius, 2013-2015*



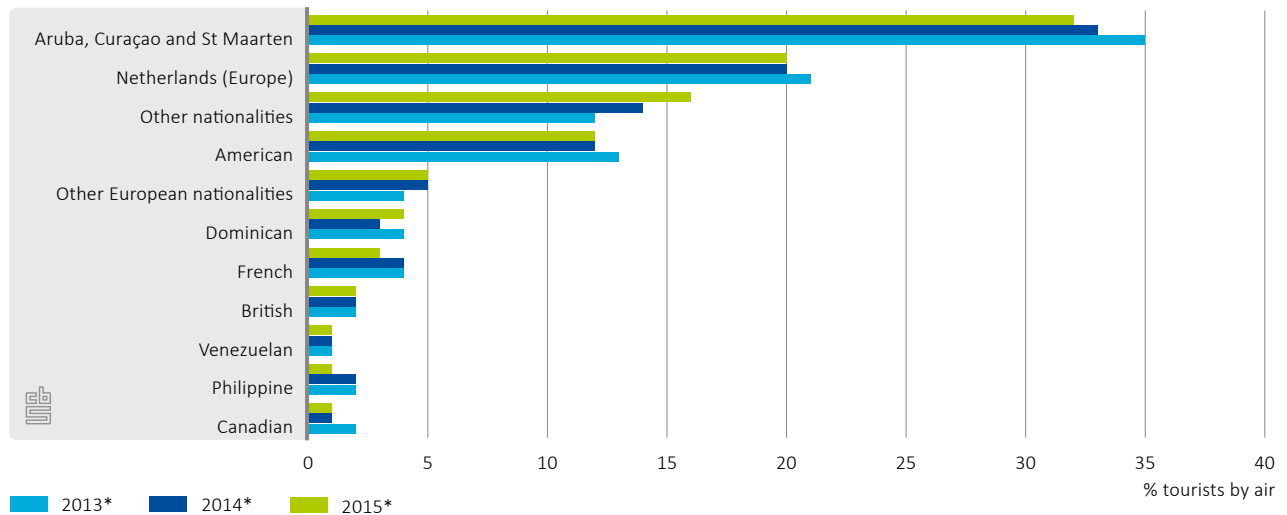
7. Incoming overnight tourism by air by length of stay, St Eustatius, 2014 and 2015*



Majority of tourists are Dutch or American nationals

Just like on Bonaire and Saba, most tourists arriving on St Eustatius by airplane are Dutch (including Aruba, Curaçao and St Maarten) or American (including Puerto Rico) nationals. See figure 8. The market share of American tourists on St Eustatius is smaller than on Bonaire and Saba: 12 percent of all tourists arriving by air. Twenty percent of the tourists were Dutch nationals from the European part of the Netherlands, 32 percent had passports registered in the Caribbean Netherlands. On St Eustatius, too, the market share of the latter group of tourists seems to decrease.

8. Incoming tourism by air by nationality, St Eustatius, 2013–2015*



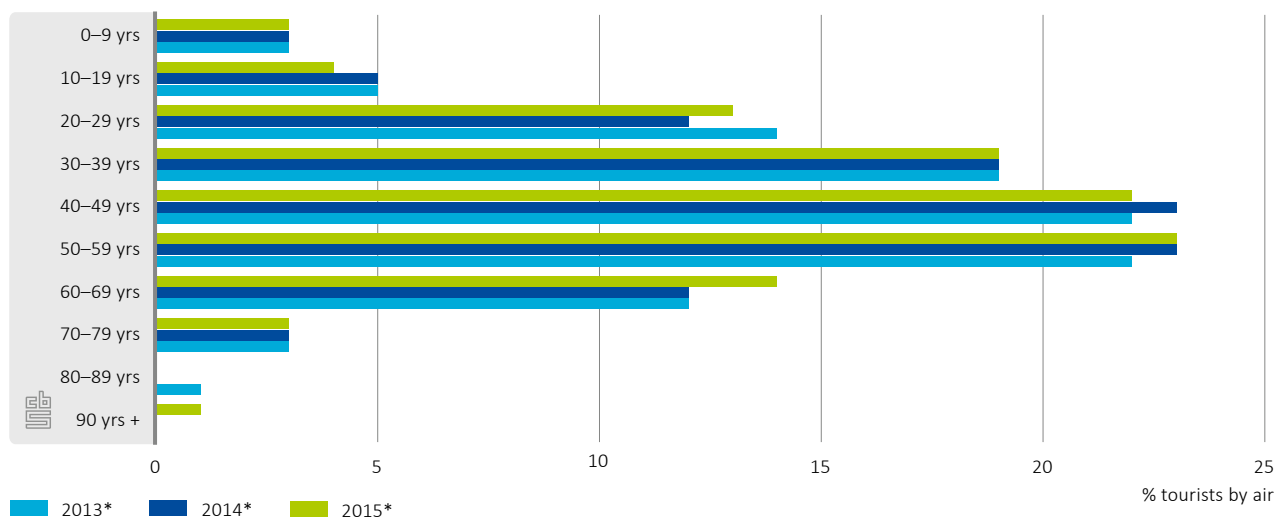
NB Percentages are rounded off.

Source: CBS.

Most tourists in the age range of 40–59

St Eustatius is an important holiday destination for 40 to 59 year-olds and - to a lesser extent - for 30 to 39-year-olds. Although the age distribution has hardly changed during the period 2013–2015, older tourists seem to have gained some ground.

9. Incoming tourism by air by age, St Eustatius, 2013–2015*



NB Percentages are rounded off.

Source: CBS.

2.3 Tourists arriving by boat

3.8 thousand tourists come by boat

St Eustatius is difficult to reach for large cruise ships and the island does not have a protected harbour. However, it does have moorings for small boats. These small recreational crafts, e.g. (motor) yachts and a small cruise ship, brought 3.8 thousand tourists to St Eustatius last year.

Excluding the cruise ship, 770 recreational boats carried on average 4.8 passengers. Their average length of stay was 2.1 nights. These figures are comparable to those of 2014. Most of these small boats were sailing under Dutch, American or French flag.

3. Saba

3.1 Summary 2015

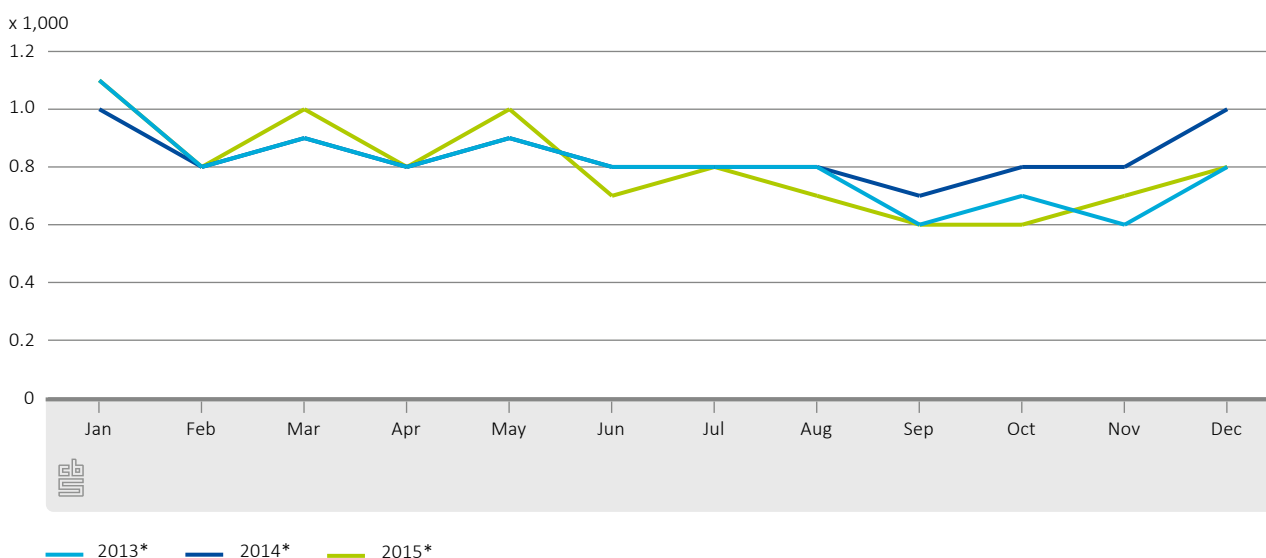
- By air: 9.6 thousand incoming tourists, of whom 2 thousand day trippers and 7.6 thousand overnight visitors.
- Ferries: 6.8 thousand passengers, partly tourists.
- Small recreational craft: 4 thousand incoming tourists.

3.2 Tourists arriving by air

On average about 800 tourists a month flying in

In 2015, an average of almost 800 tourists a month travelled to Saba by air, bringing the total to approximately 9.6 thousand tourists, a small decrease relative to 2014. See figure 10. On Saba, too, the number of flights to and from St Maarten as the main international hub has not changed in recent years. It seems Saba has not benefited from the boost in tourism in the Caribbean region either.

10. Incoming tourism by air, Saba, 2013–2015*



NB Percentages are rounded off.

Source: CBS.

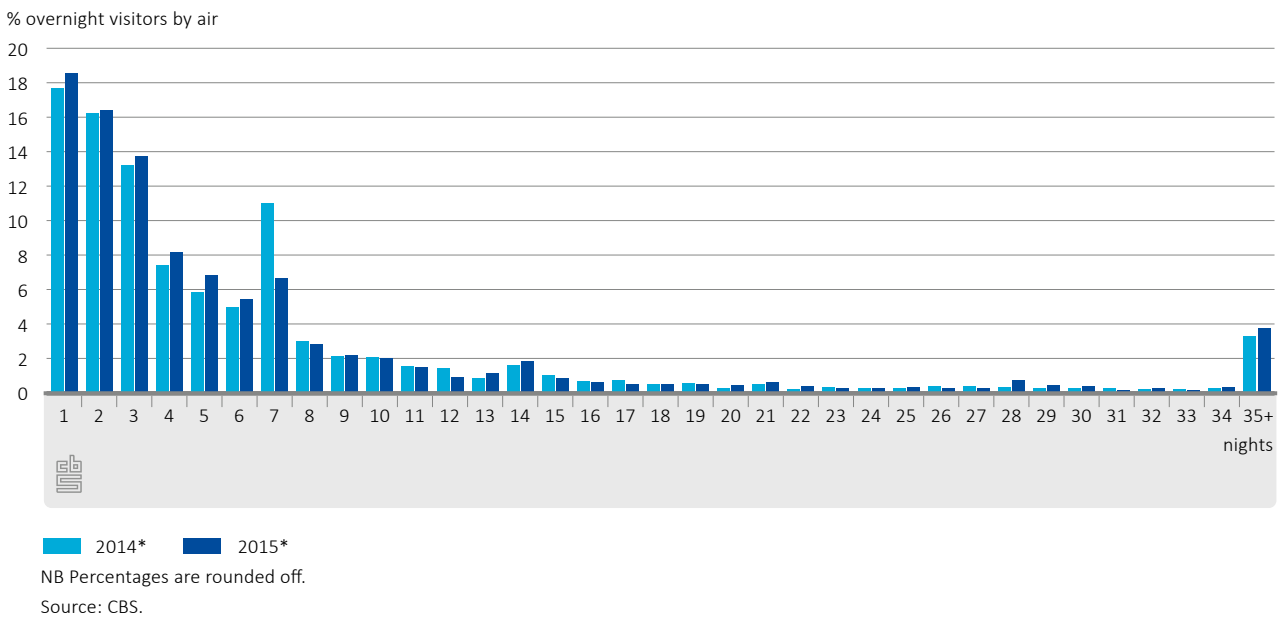
One in five tourists travelling to Saba by air is a day tripper

Last year, 9.6 thousand tourists travelled to Saba by airplane, of whom one-fifth stayed for only one day: 21 percent of all tourists arriving by air (fewer than 2,000). They did not spend the night on Saba.

Most overnight visitors spent 1–4 nights on Saba

The overnight visitors (7.6 thousand) coming to Saba by airplane spent for 1–4 nights on the island: 50 percent of all overnight visitors; 75 percent stayed for a maximum period of 7.4 nights, versus 7.2 nights in 2014.

11. Incoming overnight tourism by air by length of stay, Saba, 2014 and 2015*



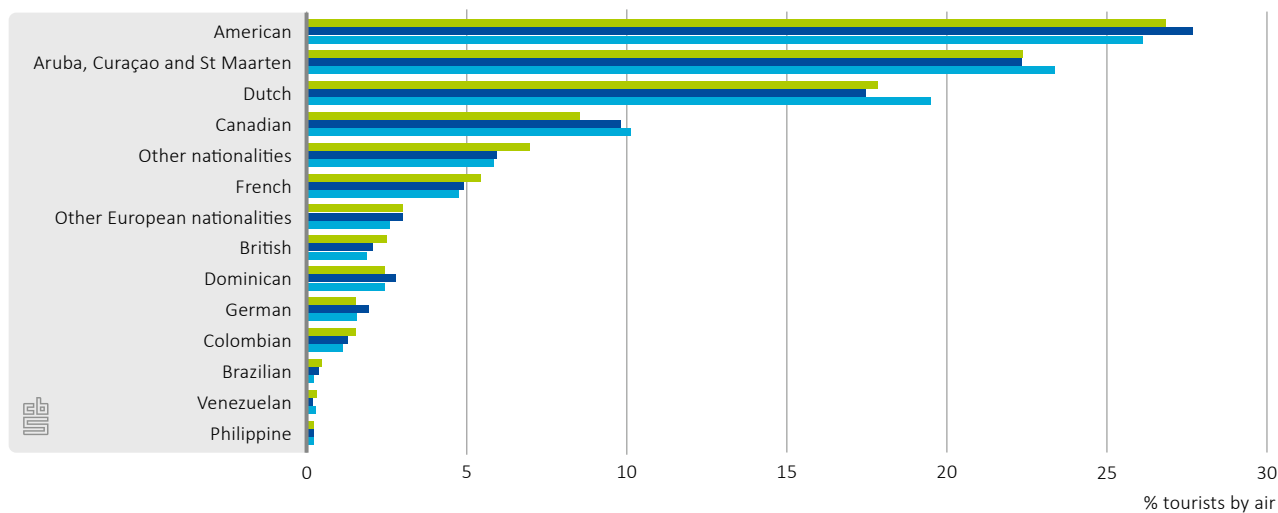
Most tourists arriving by air are Dutch or American nationals

The origin of most tourists arriving by air on Saba is similar to those arriving by air on St Eustatius and Bonaire. They are Dutch (including Aruba, Curaçao and St Maarten) or American (including Puerto Rico) nationals. Throughout the years, the share of American tourists on Saba has been higher than on Bonaire and St Eustatius: 27 percent in 2015. On Saba the share of Dutch tourists living in Caribbean Netherlands is also decreasing. The market share of Dutch tourists living in Europe remains stable at 18 percent. Unlike Bonaire and St Eustatius, Saba attracts many tourists from Canada (10 percent).

Most tourists are 40 to 59-year-olds, but share of young tourists also relatively high

Saba also attracts many tourists in the age category 40–59. In relative terms, Saba attracts many tourists in the age category 20–39 compared to Bonaire and St Eustatius.

12. Incoming tourism by air by nationality, Saba, 2013–2015*

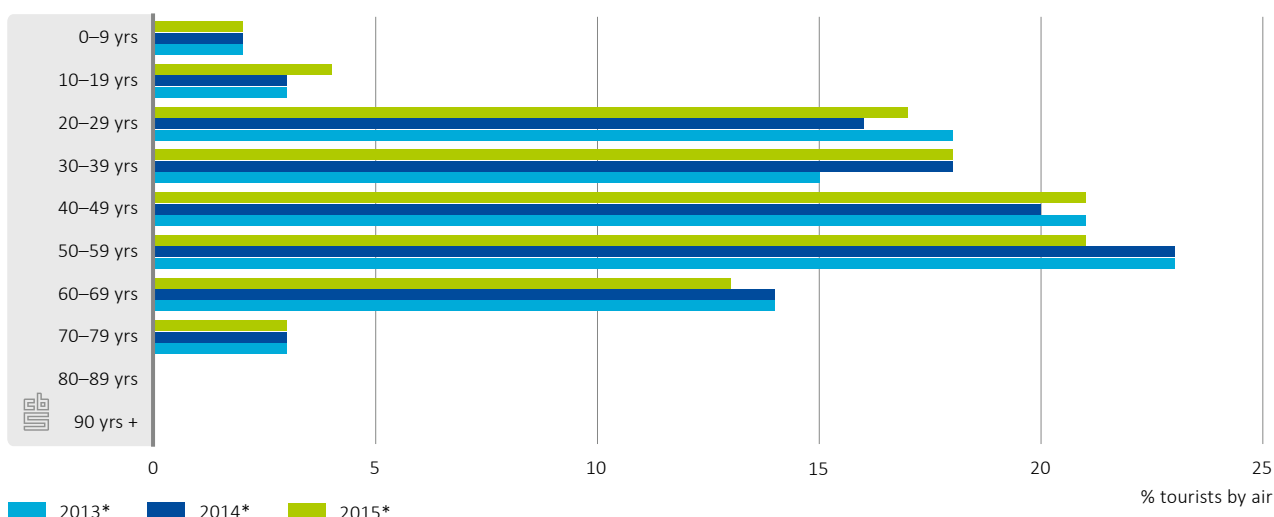


■ 2013* ■ 2014* ■ 2015*

NB Percentages are rounded off.

Source: CBS.

13. Incoming tourism by air by age, Saba, 2013–2015*



■ 2013* ■ 2014* ■ 2015*

NB Percentages are rounded off.

Source: CBS.

3.3 Tourists arriving by boat

Number of boat passengers equal to the number of tourists by air

Just like St Eustatius, it is difficult for large cruise ships to call at Saba and the island has no protected (yacht) harbour. However, two ferries sail between Saba and St Maarten and there are moorings for small (cruise) ships and (motor) yachts. Both ferries carry many passengers: 6.8 thousand in 2015, as many as in 2014. However, it is not possible to determine how many of these ferry passengers are tourists and how many are residents, nor is it possible to determine how long they stay on the island.

In addition to the ferries, about 500 smaller recreational boats came to Saba last year, bringing 4 thousand tourists, i.e. an average of 7.8 passengers per boat. The average length of stay was 1.8 days. Most ship sailed under American, French and British flag

.
So, together a total of 10.8 thousand passengers arrived in Saba by boat. A substantial part of them were tourists.

- Toerisme in Caribisch Nederland 2012–2015 (maatwerktabel)
- [Methodologische verantwoording](#)

Explanation of symbols

Empty cell	Figure not applicable
.	Figure is unknown, insufficiently reliable or confidential
*	Provisional figure
**	Revised provisional figure
2015–2016	2015 to 2016 inclusive
2015/2016	Average for 2015 to 2016 inclusive
2015/'16	Crop year, financial year, school year, etc., beginning in 2015 and ending in 2016
2013/'14–2015/'16	Crop year, financial year, etc., 2013/'14 to 2015/'16 inclusive

Due to rounding, some totals may not correspond to the sum of the separate figures.

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