



Paper

Tourism in the Caribbean Netherlands in 2016

August 2017

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Introduction

In 2016, approximately 136,000 tourists¹⁾ arrived on Bonaire by air. This figure – which includes business travellers – is similar to that in 2015. Most tourists were European Dutch, Caribbean Dutch or US citizens, with respective shares of 32 percent, 26 percent and 21 percent in the total number of tourists arriving by air. Over the past few years, the number of European Dutch tourists has grown in particular. The number of cruise passengers passing by Bonaire decreased by 6 percent from around 230,000 passengers in 2015 to approximately 217,000 passengers in 2016. Small recreational boats such as (motor) yachts carried 2,700 tourists to Bonaire that year; slightly less than in 2015, but in line with previous years.

On Saba and St Eustatius, inbound tourism has remained at the same level for several years now. The number of tourists arriving on Saba by air was down slightly last year: –4 percent. However, this decline was offset by the growing number of passengers sailing to Saba by ferry and (motor) yacht. The tourists who arrived by air were mainly US, Caribbean Dutch or European Dutch citizens, with respective shares of 29 percent, 23 percent and 18 percent. On St Eustatius, the number of tourists by air increased slightly in 2016: +2 percent. As with the other BES islands, most tourists arriving on St Eustatius by air were Caribbean Dutch, European Dutch or US citizens, with respective shares of 30 percent, 20 percent and 13 percent. The number of tourists arriving on St Eustatius by (small) recreational boat was approximately the same as in 2015, i.e. 3.3 thousand.

In view of the abovementioned developments, all three islands of the Caribbean Netherlands remained behind the growth of tourism worldwide and in the Caribbean region in particular; these growth rates were 3.9 percent and 4.3 percent respectively in 2016.²⁾

1. Bonaire

1.1 Summary 2016

- By air: 136 thousand inbound tourists, of whom 13 thousand were day trippers and 123 thousand overnight visitors; similar to the numbers of inbound tourists in 2015.
- By cruise ship: 217 thousand cruise ship passengers, i.e. a 6 percent decrease relative to 2015.
- By small recreational craft: 2.7 thousand inbound tourists. This is slightly lower than in 2015, but in line with previous years.

¹⁾ A 'tourist' is defined as someone who travels to and stays in places outside his or her usual environment for no longer than twelve (consecutive) months with the purpose of leisure, business or otherwise but not related to paid activities in any of the places visited during this period. Contrary to this definition, visitors who are spending more than two months on an island are not included in this publication. This group staying more than two months and less than one year on an island is only a small group.

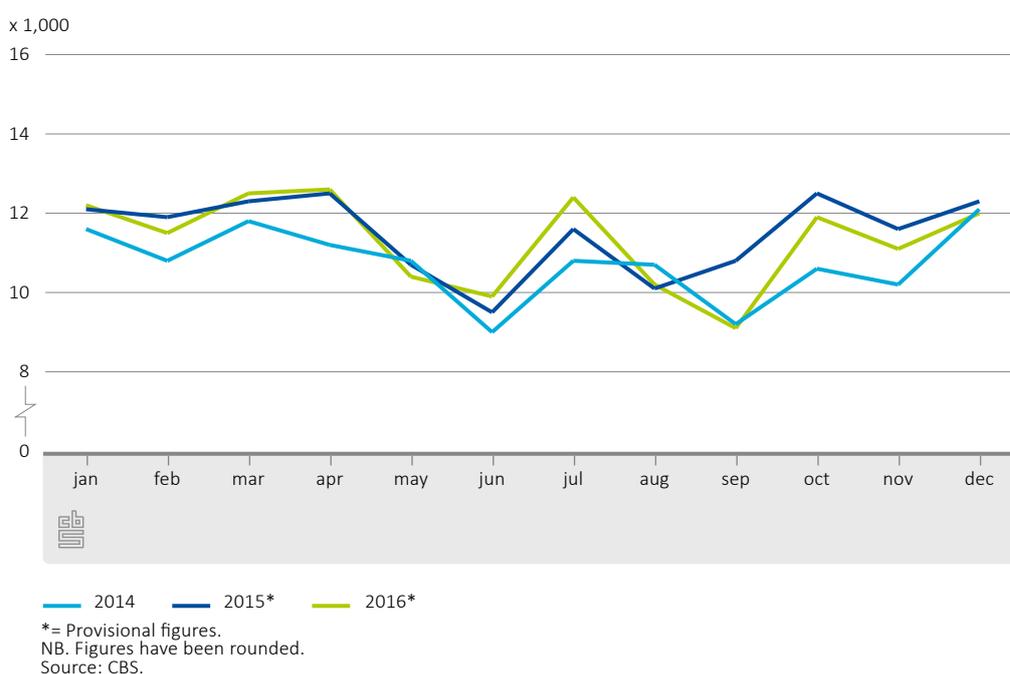
²⁾ UNWTO, Tourism Barometer, January 2017.

1.2 Tourists arriving by air

Number of inbound tourists 2016 similar to 2015

In 2016, around 136 thousand tourists – including business travellers – arrived on Bonaire by air. This is an average of 11.3 thousand tourists per month which is similar to 2015. See figure 1.2.1. Especially in the period May to August, more tourists arrived by air, whereas from September fewer tourists arrived by air relative to the same period in 2015. The decline in autumn coincided with a decreasing number of flights to and from Bonaire, which was related to the situation of some local airlines. But also Hurricane Matthew, which passed the Caribbean in September – early October, will have played a role.

1.2.1 Inbound tourism by air, Bonaire, 2014–2016



One in ten tourists arriving by air are same-day visitors

Of the 136 thousand tourists who arrived by air in 2016, one in ten stayed on Bonaire for only one day, i.e. there were altogether 13 thousand day trippers without overnight stays on the island.

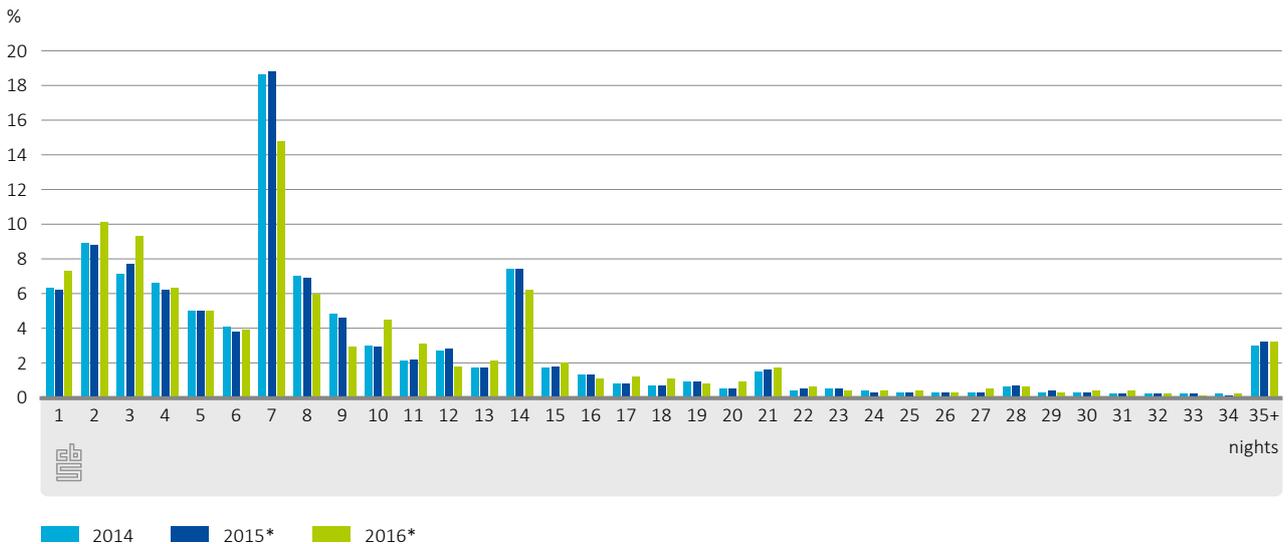
Just over half of overnight visitors flying in stay for up to one week

The remaining 90 percent spent one or more nights on Bonaire, i.e. around 123 thousand overnight visitors. Approximately 57 percent of these overnight visitors spent 1–7 nights on the island with a distinct peak at 7 nights. The proportion of overnight visitors staying on Bonaire for 1 to 3 nights has increased slightly. See Figure 1.2.2. On average, overnight visitors spent 9.6 nights on the island, with a total of 1.1 million overnight stays in 2016. This is comparable to 2015.

Most tourists arriving by air are Dutch or US citizens

For many years, most tourists have been Dutch citizens (including Aruba, Curaçao and St Maarten): 58 percent of all tourists arriving by air in 2016. In absolute terms, the number

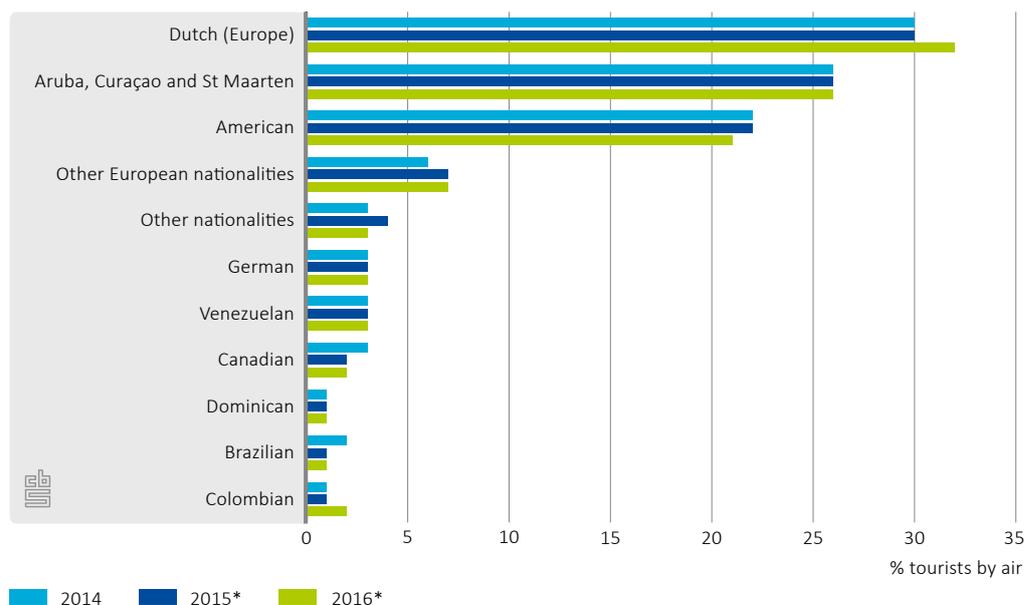
1.2.2 Overnight tourism by air by length of stay, Bonaire, 2014–2016



*= Provisional figures.
 NB. Figures have been rounded.
 Source: CBS.

of European Dutch tourists has increased (international market), while the number of tourists with a Dutch passport living in the Caribbean Netherlands³⁾ (regional market) has decreased in recent years. Approximately 21 percent of tourists are US citizens (including Puerto Ricans). Their market share has remained fairly stable over the years. Although numbers are relatively small, tourists from South America are mainly Venezuelan, Brazilian and Colombian citizens. See Figure 1.2.3.

1.2.3 Inbound tourism by air by nationality, Bonaire, 2014–2016



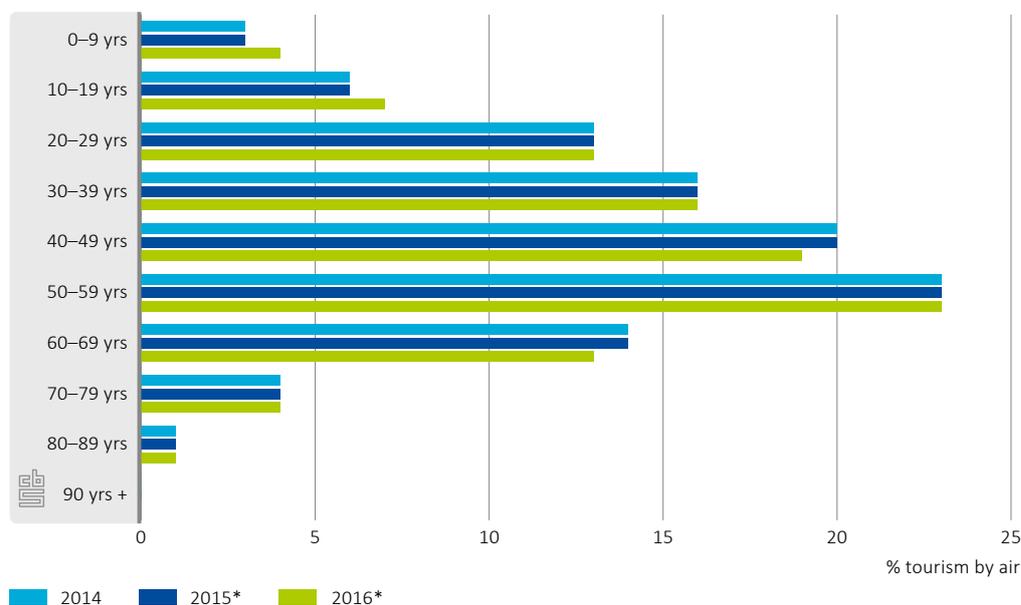
*= Provisional figures.
 NB. Figures have been rounded.
 Source: CBS.

³⁾ 'This concerns people living in Curaçao, Aruba and St Maarten. People living in Bonaire, St Eustatius and Saba are considered domestic tourists and therefore are not included here.'

Most tourists are 40 to 59 years old

The majority of tourists arriving by air are between 40 and 59 years old. Approximately 11 percent belong to the 0–19 age category. In general, the age distribution of tourists has hardly changed over the past four years. See Figure 1.2.4.

1.2.4 Inbound tourism by air by age, Bonaire, 2014–2016



*= Provisional figures.
NB. Figures have been rounded.
Source: CBS.

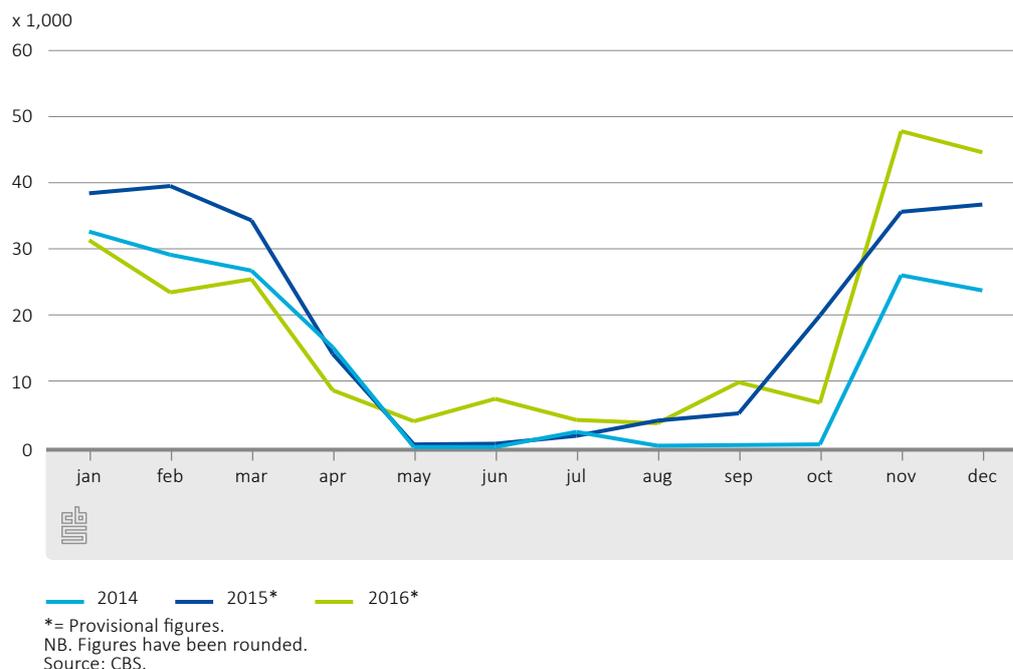
1.3 Tourists arriving by sea

Fewer cruise passengers in 2016

Just as in previous years, more tourists arrived on Bonaire by sea than by air in 2016, most of them aboard cruise ships. Compared with 2015, the number of cruise passengers visiting Bonaire has decreased by 6 percent to 217 thousand. It must be noted that 2015 was a very good year for cruise traffic to Bonaire with 230 thousand cruise passengers and 47 percent growth. Also some previously announced cruises did not reach Bonaire in 2016. Especially in the first part of 2016 and in October, the month in which Hurricane Matthew passed the Caribbean, there were fewer cruise passengers. On the other hand, in the low season between May and September, there were more cruise passengers than in the same period in 2015. No data are available about how many of the 217 thousand cruise passengers actually went ashore.⁴⁾ From an economic perspective, the cruise industry is obviously less important to Bonaire than overnight tourism. Most cruise ships tend to stay in Bonaire for only one day. Moreover, as cruise passengers stay on board, they do not use the tourist accommodations available on the island.

⁴⁾ See for 2014–2015 ‘Economic contribution of cruise tourism to the destination economies, vol II’, BREA, 2015, www.breanet.com.

1.3.1 Number of cruise passengers, Bonaire, 2014–2016



Excluding cruise ships, the number of recreational craft coming to Bonaire in 2016 was relatively small: 800 smaller ships, including (motor) yachts. On board were about 2,700 tourists, an average of 3.4 passengers per boat. On average, these boats stayed at Bonaire for approximately 9 nights. This relatively long period of stay is partly due to the fact that Bonaire has two well-protected harbours: the Harbor Village Marina and the smaller Plaza Resort. The majority of these small pleasure crafts sailed under Dutch (including Caribbean Netherlands) or American flag.

2. St Eustatius

2.1 Summary 2016

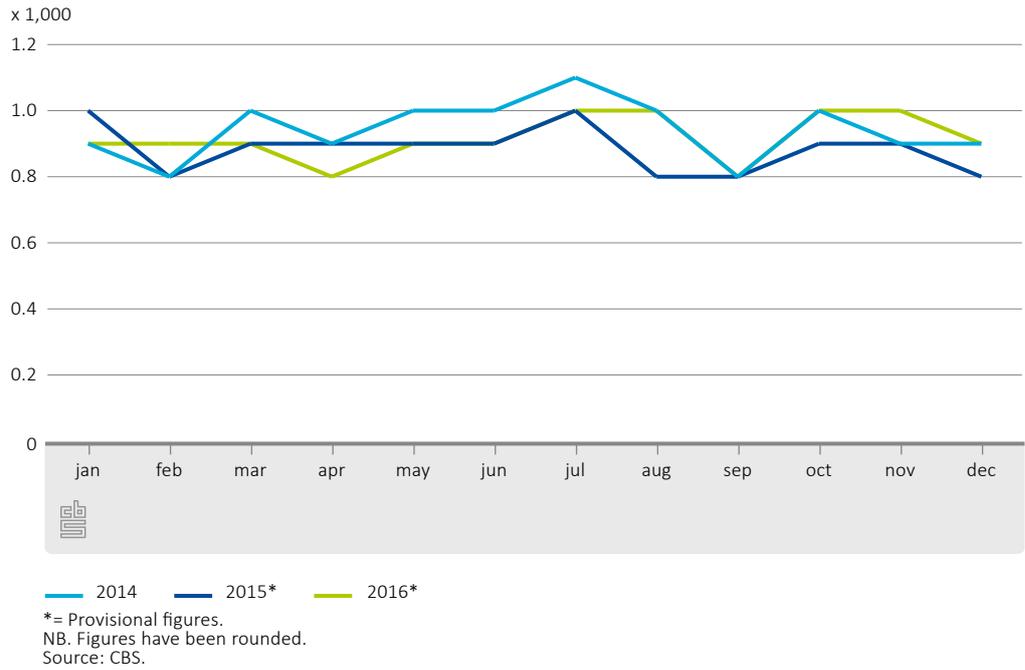
- By air: 11 thousand inbound tourists, of whom 2 thousand were day trippers and 9 thousand overnights visitors.
- By small recreational craft: 3.3 thousand inbound tourists.

2.2 Tourists arriving by air

Approximately 900 inbound tourists per month arrive by air

On average, about 900 tourists per month came to St Eustatius by air in 2016; a total of 11 thousand tourists, including business travellers. This is 2 percent more than in 2015. See Figure 2.2.1. With these developments, St Eustatius does not profit from the growth of tourism worldwide and in the Caribbean. This is related to the fact that the number of flights to and from St Maarten, being the main route to the island, remained the same over the years.

2.2.1 Inbound tourism by air, St Eustatius, 2014–2016



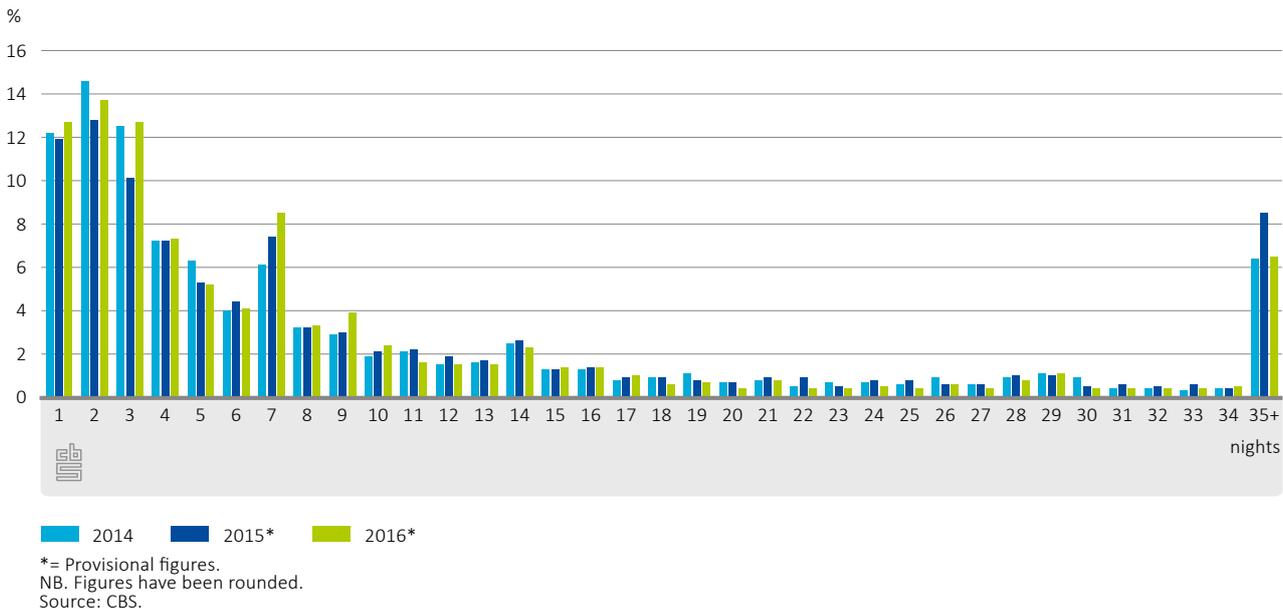
One in five tourists arriving by air on St Eustatius are same-day visitors

In 2016, 11 thousand tourists arrived by air on St Eustatius. One in five stayed on the island for only one day, i.e. 22 percent of all tourists flown in (2 thousand tourists). These figures are comparable to 2015.

Two-thirds of overnight visitors arriving by air stay 1 to 7 nights

Of the 9 thousand overnight visitors who arrived on St Eustatius by air in 2016, approximately 64 percent spent 1–7 nights on the island, with a peak in the 1–3 nights range: 39 percent of all the overnights visitors who arrived by plane. This share is somewhat higher than in 2015,

2.2.2 Overnight tourism by air by length of stay, St Eustatius, 2014–2016

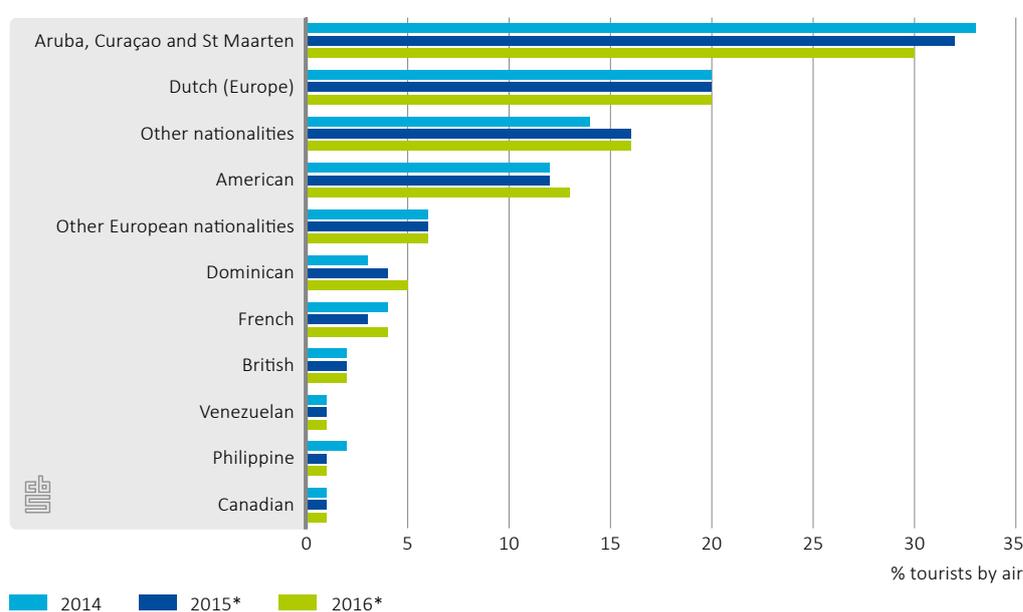


when 35 percent of the overnight visitors spent 1–3 nights on St Eustatius. See Figure 2.2.2. Overall, tourists spent 85 thousand nights on St Eustatius with an average of 9.5 nights per tourist, versus 11.5 nights in 2015.

Majority of tourists are Dutch or US citizens

Just like on Bonaire and Saba, most tourists arriving on St Eustatius by air in 2016 are Dutch (including Aruba, Curaçao and St Maarten) or US (including Puerto Rican) citizens: 63 per cent of all tourists arriving by air. See Figure 2.2.3. The market share of tourists with US citizenship is smaller on St Eustatius than on Bonaire and Saba: 13 percent of all tourists arriving by plane in 2016. Of all arriving tourists, 20 percent had a Dutch passport which was registered in the European Netherlands (international market). Approximately 30 percent had a Dutch passport that was registered in Caribbean Netherlands (regional market). This percentage is slightly lower than in 2015.

2.2.3 Inbound tourism by air by nationality, St Eustatius, 2014–2016



*= Provisional figures.
 NB. Figures have been rounded.
 Source: CBS.

Most tourists are 40 to 59 years old

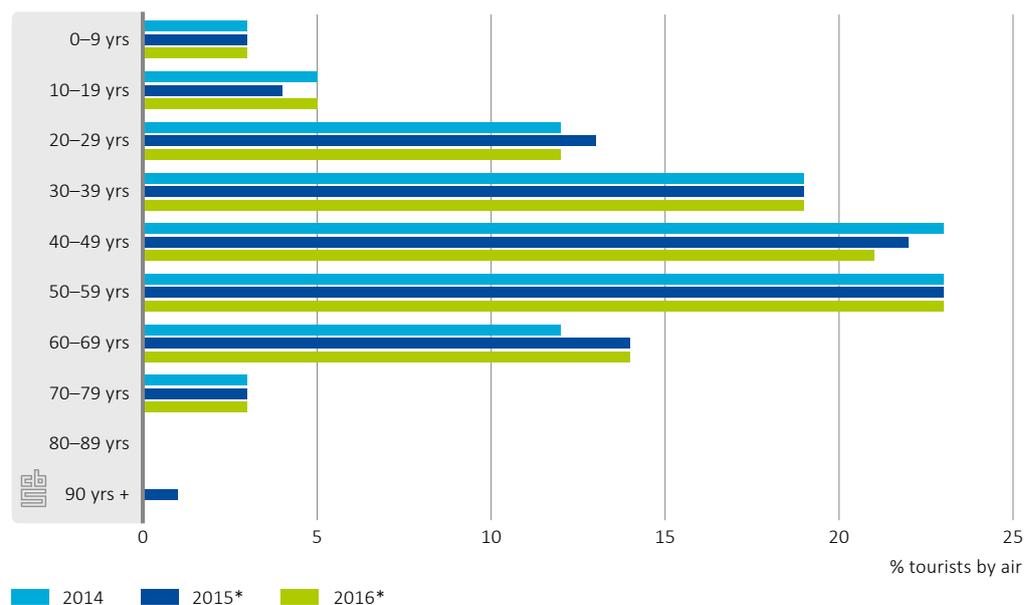
St Eustatius is an important holiday destination for 40 to 59-year-olds and, to a lesser extent, 30 to 39-year-olds. The age category of 0 to 19-year-olds accounts for 8 percent of tourists arriving by air. See figure 2.2.4. The age distribution has hardly changed over the last four years.

2.3 Tourists arriving by sea

3.3 thousand inbound tourists by sea

St Eustatius is difficult to reach for large cruise ships and the island does not have a protected (yacht) harbour. However, it does have moorings and a jetty for small (recreational) ships. These small recreational ships, e.g. (motor) yachts, brought 3.3 thousand tourists to St Eustatius in 2016. The 800 small recreational ships carried 4.8 passengers on average. Their average length of stay was 2 nights. These figures are comparable to those of 2015. Most ships sailed under Dutch, American or French flag.

2.2.4 Inbound tourism by air by age, St Eustatius, 2014–2016



3. Saba

3.1 Summary 2016

- By air: 9.2 thousand inbound tourists, of whom 2 thousand were day trippers and 7.2 thousand were overnight visitors; a decrease of about 4 percent compared to 2015.
- By ferry: 7.7 thousand passengers, of whom a part were tourists; an increase of more than 10 percent.
- By small recreational craft: 4 thousand inbound tourists.

3.2 Tourists arriving by air

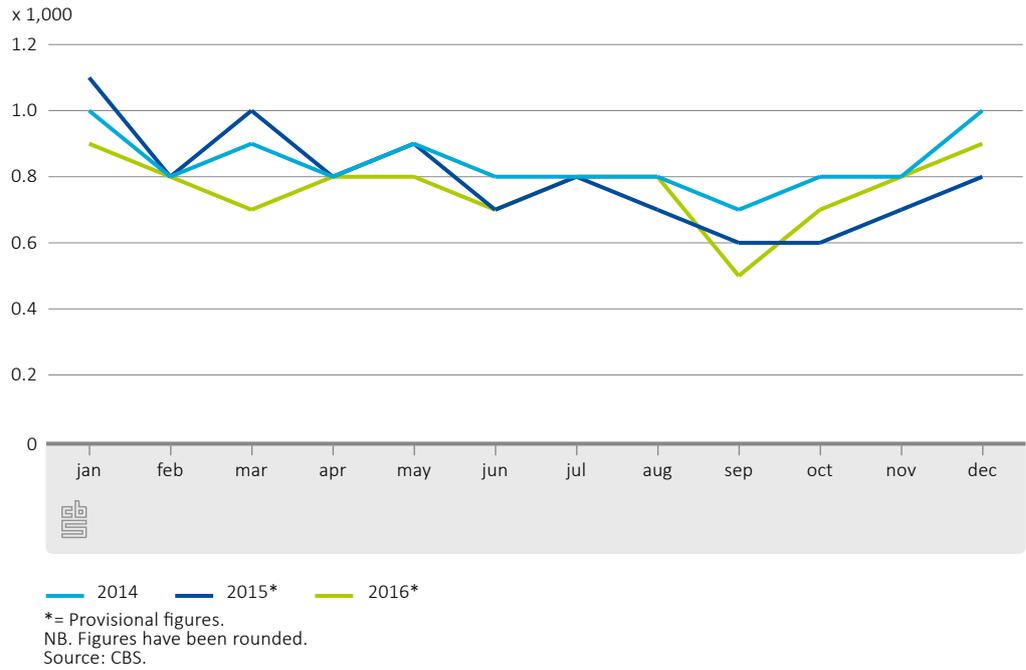
On average about 800 inbound tourists per month by air

In 2016, on average about 800 tourists a month travelled to Saba by air, bringing the total of approximately 9.2 thousand tourists to Saba, including business travellers; a small decrease of 4 percent compared to 2015. See Figure 3.2.1. On Saba, too, the number of flights to and from St Maarten – the main route of (international) access – has remained the same in recent years. This made it difficult for Saba to benefit from the ongoing growth in tourism in the Caribbean region in 2016.

One in four tourists travelling to Saba by air are same-day visitors

In 2016 about 9.2 thousand tourists travelled to Saba by airplane, of whom one-quarter stayed for only one day: 23 percent of all the tourists arriving by air. These 2,100 tourists did not spend the night on Saba. These figures are comparable to 2015.

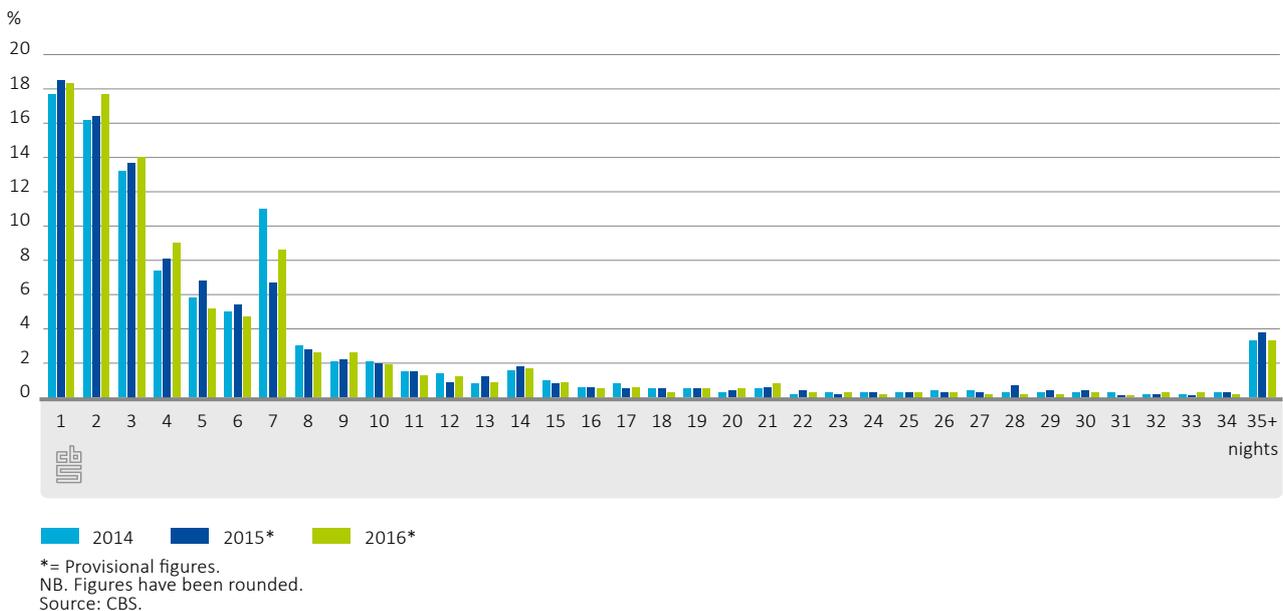
3.2.1 Inbound tourism by air, Saba, 2014–2016



Most overnight visitors spend 1 to 4 nights on Saba

More than half of the remaining 7,200 overnight visitors who arrived by plane at Saba stayed 1–4 nights on the island: 59 percent of all overnight visitors. About 78 percent of the overnight visitors stayed on Saba for 1–7 nights. See Figure 3.2.2. Overnight visitors spent overall approximately 48 thousand nights on Saba in 2016, with an average stay of 6.7 nights. This is shorter than in 2015, when the average length of stay was 7.4 nights.

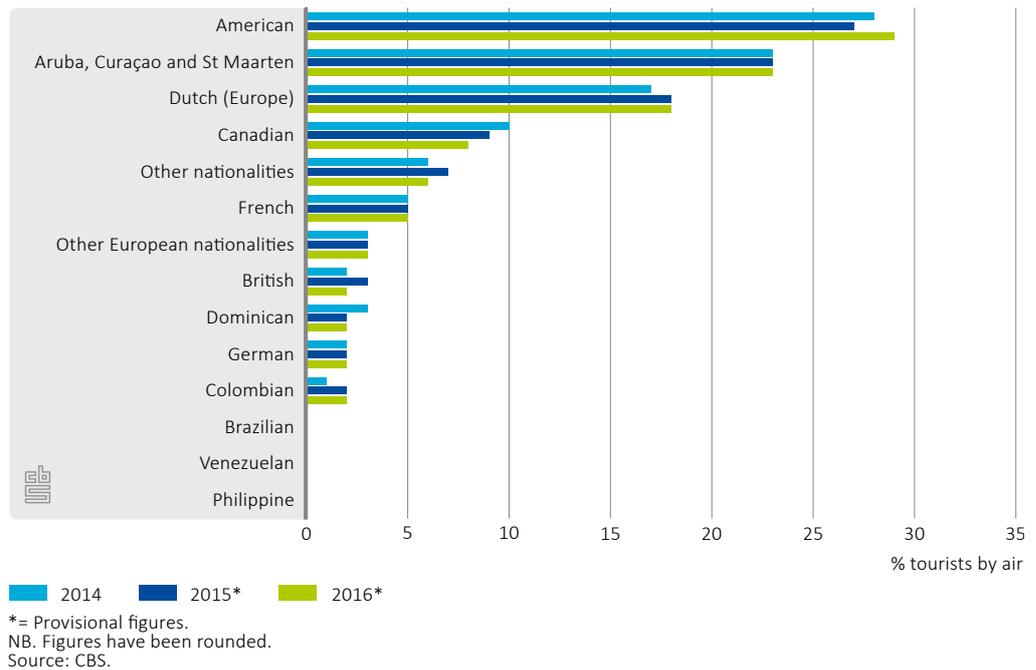
3.2.2 Overnight tourism by air by length of stay, Saba 2014–2016



Most tourists arriving by air are Dutch or US citizens

Most tourists visiting Saba by air have the same countries of origin as the tourists arriving on St Eustatius and Bonaire by air. They are either Dutch (including Aruba, Curaçao and St Maarten) or US (including Puerto Rican) citizens. Throughout the years, the share of US tourists on Saba has been higher than on St Eustatius and Bonaire: 29 percent in 2016. The market share of tourists with a European Dutch passport remains the same: 18 percent. The market share of tourists with a Canadian passport is 8 percent. Over the last few years, there have not been any major changes in the proportions of tourists by nationality.

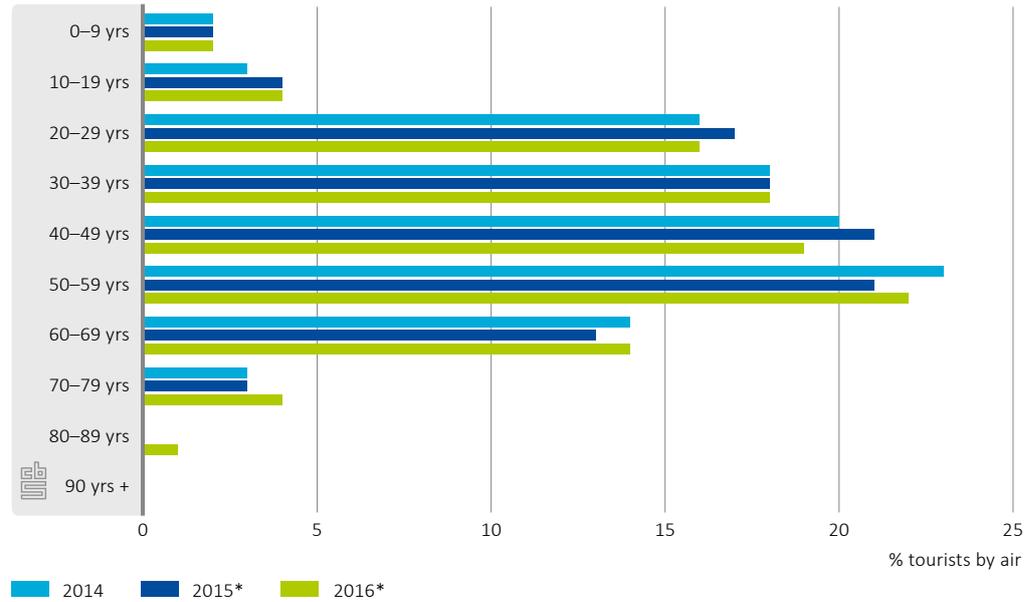
3.2.3 Inbound tourism by air by nationality, Saba, 2014–2016



Most tourists are 40 to 59 years old

Like St Eustatius and Bonaire, Saba attracts many tourists in the age category 40–59, but Saba also attracts relatively many tourists in the age category 20–39. About 6 percent of the tourists by air falls in the category 0–19. See Figure 3.2.4.

3.2.4 Inbound tourism by air by age, Saba, 2014–2016



3.3 Tourists arriving by sea

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

Just like St Eustatius, it is difficult for large cruise ships to call at Saba as the island has no protected (yacht) harbour. However, two ferries sail between Saba and St Maarten, and there are moorings and a jetty for small ships and (motor) yachts. Both ferries carried 7.7 thousand passengers in 2016; 10 percent more than in 2015. However, it is not (yet) possible to determine how many of these ferry passengers were tourists and how many were residents, nor is it possible to determine how long the tourists stayed on the island.

In addition to ferries, about 660 smaller recreational boats came to Saba in 2016 bringing 4 thousand tourists, i.e. an average of 6.1 passengers per boat. The average length of stay was 1.9 days. Most ships sailed under American, French or British flag.

In summary: aside from the 9.2 thousand tourists arriving by air, Saba was visited by 11.7 thousand sea passengers, including a substantial group of tourists.

Explanation of symbols

Empty cell	Figure not applicable
.	Figure is unknown, insufficiently reliable or confidential
*	Provisional figure
**	Revised provisional figure
2016–2017	2016 to 2017 inclusive
2016/2017	Average for 2016 to 2017 inclusive
2016/'17	Crop year, financial year, school year, etc., beginning in 2016 and ending in 2017
2014/'15–2016/'17	Crop year, financial year, etc., 2014/'15 to 2016/'17 inclusive

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

Publisher
Statistics Netherlands
Henri Faasdreef 312, 2492 JP The Hague
www.cbs.nl

Prepress
CCN Creatie, The Hague

Design
Edenspiekermann

Information
Telephone +31 88 570 7070
Via contact form: www.cbs.nl/information

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