



Paper

Tourism in the Caribbean Netherlands in 2017

May 2018

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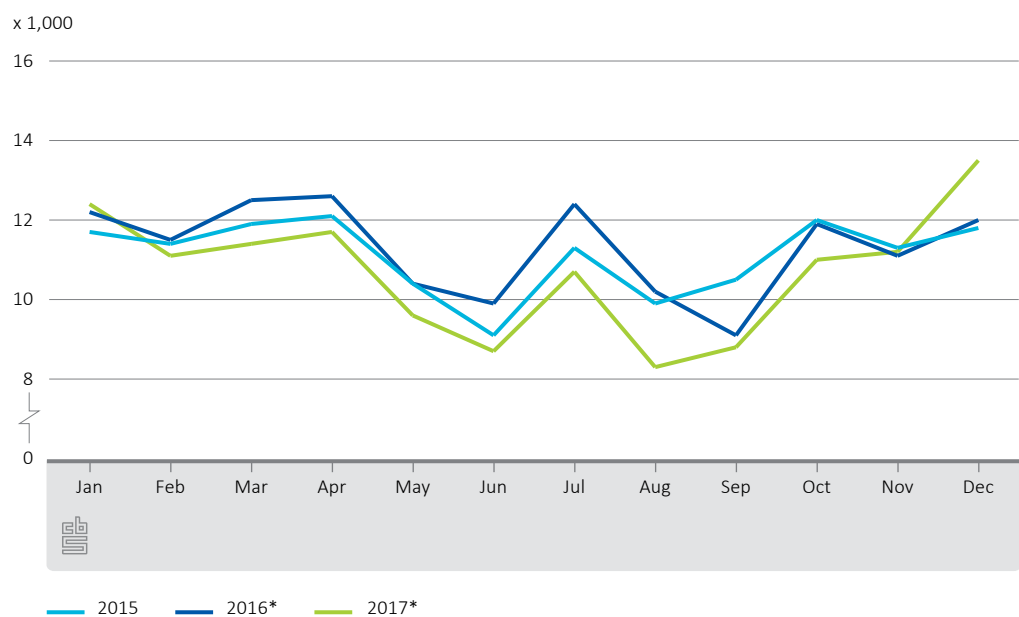
The year 2017 was not an ordinary year for tourism in the Caribbean Netherlands. All three islands had to deal with events that do not occur every year. These affected tourism in the Caribbean Netherlands. Throughout most of the year, Bonaire faced operational problems with a regional airline. Possibly because of this, the number of air tourist arrivals on Bonaire dropped by 5 percent in 2017. The Windward Islands of Saba and St Eustatius were hit by Hurricane Irma in September, one of the strongest hurricanes ever recorded in this part of the kingdom. This completely offset the growth in air tourist arrivals on these islands in the first half of the year. The number of air tourist arrivals on St Eustatius and Saba ultimately dropped by 5 and 9 percent respectively in 2017 year-on-year. November and December did show a slight recovery. In perspective: inbound tourism in the Caribbean area as a whole increased by 4.1 percent in 2017, according to initial estimates by the World Tourism Organization.¹⁾

1. Bonaire

1.1 Number of air tourist arrivals down by 5 percent in 2017

Approximately 128.5 thousand tourists arrived on Bonaire by air in 2017. The number is lower than in 2016, when around 135.8 thousand tourists flew to Bonaire, thus constituting a drop of 5 percent. This seems to be related mainly to structural problems with air traffic which occurred throughout 2017.

1.1.1 Inbound tourism by air, 2015–2017, Bonaire



N.B. Figures have been rounded.
Source: Statistics Netherlands.

¹⁾ See World Tourism Organization: http://cf.cdn.unwto.org/sites/all/files/pdf/unwto_barom18_01_january_excerpt_hr.pdf

1.1.2 Inbound tourism by air, 2012–2017, Bonaire

	2012	2013	2014	2015	2016*	2017*
	x 1,000					
Jan	10.7	10.4	11.6	11.7	12.2	12.4
Feb	9.9	11.3	10.8	11.4	11.5	11.1
Mar	11.0	12.7	11.8	11.9	12.5	11.4
Apr	11.3	12.2	11.2	12.1	12.6	11.7
May	9.1	10.0	10.8	10.4	10.4	9.6
Jun	9.8	10.7	9.0	9.1	9.9	8.7
Jul	12.5	12.0	10.8	11.3	12.4	10.7
Aug	11.5	10.5	10.7	9.9	10.2	8.3
Sep	8.5	8.7	9.2	10.5	9.1	8.8
Oct	11.4	10.8	10.6	12.0	11.9	11.0
Nov	10.6	10.2	10.2	11.3	11.1	11.2
Dec	11.2	11.5	12.1	11.8	12.0	13.5
Total	127.6	131.0	128.9	133.4	135.8	128.5

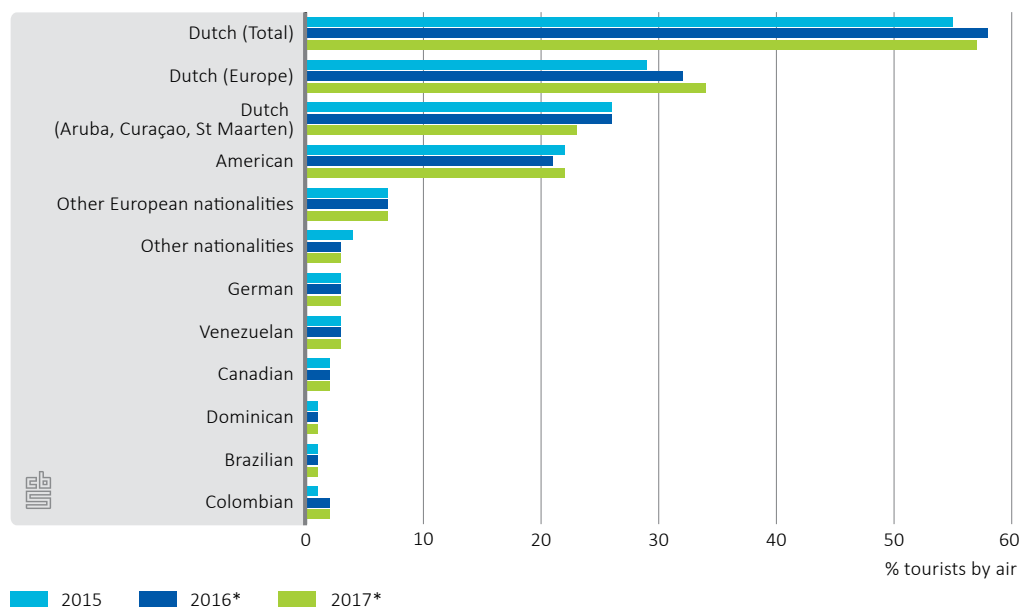
N.B. Due to rounding, some totals may not correspond to the sum of the separate figures.
Source: Statistics Netherlands.

From the beginning of 2017, Bonaire suffered from operational problems of an important regional airline which had run into financial difficulties. Flights were either cancelled or delayed as a result, those connecting with Curaçao in particular. Due to lack of clarity about the safety of the aircraft, the Ministry of Infrastructure also imposed a flight ban on this airline as of February 2017 for all Dutch civil servants. It seems that these events had an effect on the number of passengers and the number of tourist arrivals on Bonaire in 2017. From February through October 2017, the number of tourist arrivals by air was below the level of 2016. See figure 1.1.1 and table 1.1.2.

From November 2017 onwards, another regional airline filled the gap. They now maintain service routes between the ABC islands. In addition, a Canadian airline has started operating weekly flights between Toronto and Bonaire. The growth in available seats seems to have had a positive effect on the number of tourists. In November, the number of air tourist arrivals was back at the level of 2016. December even showed a positive trend compared to 2016. Nevertheless, this growth could not fully offset the negative impact on the first part of the year. The year 2017 ended with 5 percent fewer tourist arrivals on Bonaire by air compared to 2016. This negative trend follows the overall decline in number of inbound air passengers in 2017: -5.2 percent. Partly due to the use of alternative options during the year such as charters and private aircraft, the total number of aircraft movements from Flamingo Airport did increase in 2017.

With regard to the breakdown of inbound tourism by nationality, there appear to have been hardly any changes in 2017 compared to previous years. Most tourists still come from the Netherlands and the United States. As for Dutch tourists, the share arriving from the European part of the Netherlands seems to have grown somewhat against a slightly decreasing share of Dutch tourists from Aruba, Curaçao and St Maarten in 2017. This may be due to the aforementioned infrastructural problems in 2017. See figure 1.1.3 and table 1.1.4.

1.1.3 Inbound tourism by air by nationality, 2015–2017, Bonaire



N.B. Figures have been rounded.
Source: Statistics Netherlands.

1.1.4 Inbound tourism by air by nationality, 2012–2017, Bonaire

	2012	2013	2014	2015	2016*	2017*
Nationality	% of tourists					
Dutch (Total)	61	59	56	55	58	57
Dutch (Europe)	29	29	30	29	32	34
Dutch (Aruba, Curaçao, St Maarten)	32	30	26	26	26	23
American	20	21	22	22	21	22
Venezuelan	3	3	3	3	3	3
German	2	2	3	3	3	3
Canadian	2	2	3	2	2	2
Colombian	1	1	1	1	2	2
Brazilian	1	1	2	1	1	1
Dominican	1	1	1	1	1	1
Other European nationalities	4	5	6	7	7	7
Other nationalities	3	3	3	4	3	3

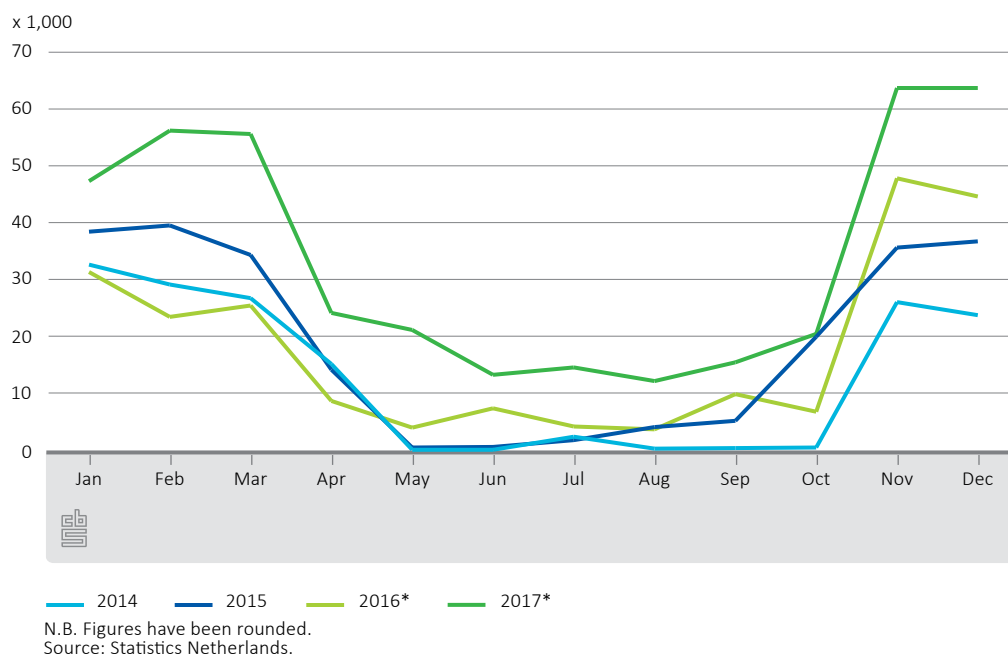
N.B. Figures have been rounded.
Source: Statistics Netherlands.

1.2 Number of cruise passengers on Bonaire almost doubled in 2017

In contrast to tourist air travel, 2017 was an exceptionally good year for Bonaire's cruise tourism. The number of cruise passengers increased by no less than 88 percent: 407.3 thousand cruise passengers in 2017 compared to 216.5 thousand in 2016. See figure 1.2.1 and table 1.2.2. Only a small part of this growth could be explained by the growth in number

of cruise passengers in the Caribbean as a whole in 2017.²⁾ However, Bonaire put in a lot of effort to bring more cruises to the island. In addition, two cruises of the Windward Islands were diverted to Bonaire on account of Hurricane Irma.

1.2.1 Number of cruise passengers, 2014–2017, Bonaire



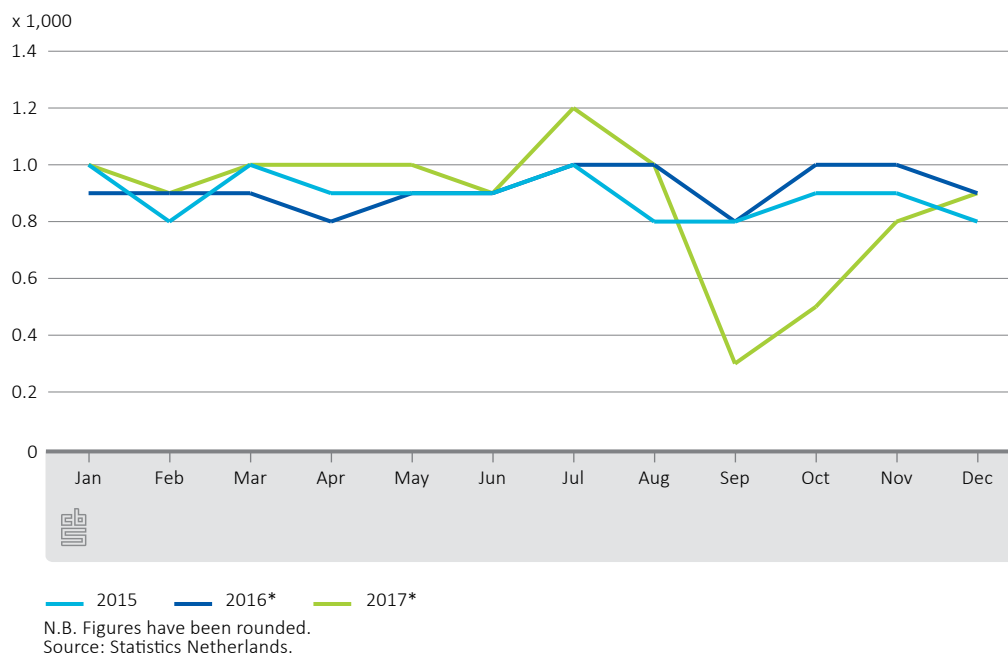
1.2.2 Number of cruise passengers, 2012–2017, Bonaire

	2012	2013	2014	2015	2016*	2017*
	x 1,000					
Jan	28.6	36.0	32.6	38.4	31.3	47.3
Feb	33.7	22.5	29.1	39.5	23.4	56.2
Mar	24.5	19.5	26.7	34.3	25.4	55.6
Apr	21.3	14.0	15.1	14.1	8.6	24.1
May	0.0	0.4	0.0	0.4	3.9	21.1
Jun	0.0	0.4	0.0	0.5	7.3	13.2
Jul	0.2	0.5	2.3	1.7	4.1	14.5
Aug	0.4	0.2	0.2	4.0	3.6	12.1
Sep	0.1	0.2	0.3	5.1	9.8	15.4
Oct	0.7	0.2	0.4	19.9	6.7	20.4
Nov	14.5	13.5	26.0	35.6	47.8	63.7
Dec	33.6	34.7	23.7	36.7	44.6	63.7
Total	157.5	142.0	156.4	230.2	216.5	407.3

N.B. Due to rounding, some totals may not correspond to the sum of the separate figures.
Source: Statistics Netherlands.

²⁾ See Cruise Lines International Association (CLIA). According to this organisation, the number of cruise passengers grew by 6.5 percent in the Caribbean as a whole in the first three quarters of 2017.

2.1.1 Inbound tourism by air, 2015–2017, St Eustatius



2.1.2 Inbound tourism by air, 2012-2017, St Eustatius

	2012	2013	2014	2015	2016*	2017*
	x 1,000					
Jan	1.2	1.1	0.9	1.0	0.9	1.0
Feb	1.0	0.8	0.8	0.8	0.9	0.9
Mar	1.2	0.9	1.0	1.0	0.9	1.0
Apr	1.0	0.9	0.9	0.9	0.8	1.0
May	1.2	1.0	1.0	0.9	0.9	1.0
Jun	1.1	1.0	1.0	0.9	0.9	0.9
Jul	1.3	1.1	1.1	1.0	1.0	1.2
Aug	1.1	1.0	1.0	0.8	1.0	1.0
Sep	0.7	0.8	0.8	0.8	0.8	0.3
Oct	1.1	0.9	1.0	0.9	1.0	0.5
Nov	1.1	1.0	0.9	0.9	1.0	0.8
Dec	1.0	0.9	0.9	0.8	0.9	0.9
Total	13.0	11.2	11.3	10.7	11.0	10.5

N.B. Due to rounding, some totals may not correspond to the sum of the separate figures.
Source: Statistics Netherlands.

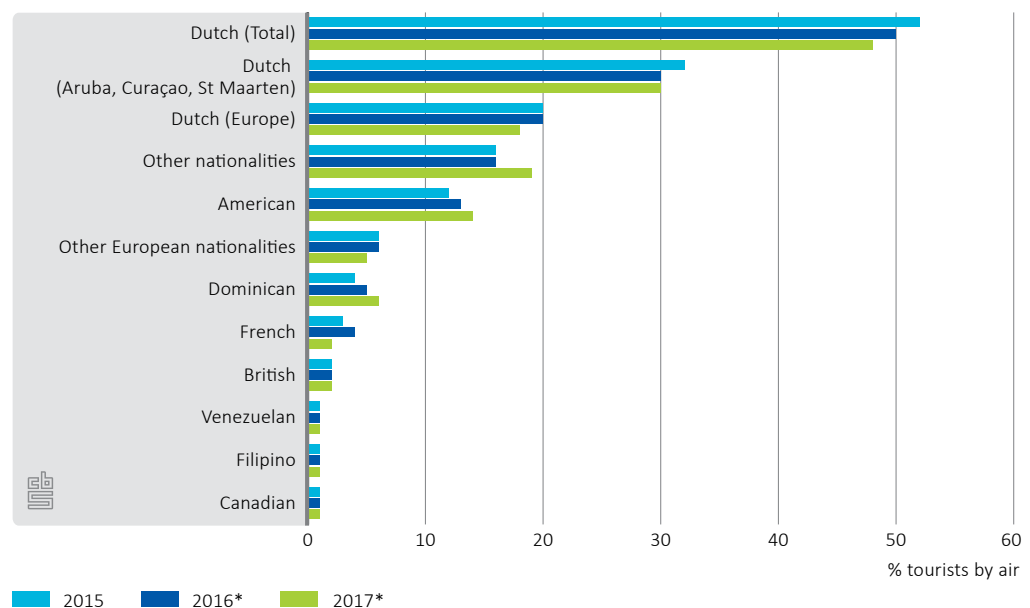
2. St Eustatius

2.1 Drop in number of air tourist arrivals due to Hurricane Irma

The number of tourists flying to St Eustatius stood at approximately 10.5 thousand in 2017. This is 5 percent lower than in 2016. Until September, the number of air tourist arrivals on

St Eustatius grew substantially: up by 10 percent compared to 2016. This growth was completely offset by the arrival of Hurricane Irma in September. This led to a sharply decreasing number of air tourist arrivals on St Eustatius in September and October. The devastation on St Maarten, an important gateway to St Eustatius, also played a major role. It brought air traffic to a complete standstill for several days. Air traffic showed some recovery in November and December, but levels were still below those in 2016. Account should be taken of the fact that figures published here also include business tourism. This means, for example, that aid workers and civil servants who do not live on St Eustatius are also counted as tourists. See figure 2.1.1 and table 2.1.2.

2.1.3 Inbound tourism by air, by nationality, 2015–2017, St Eustatius



NB. Figures have been rounded.
Source: Statistics Netherlands.

2.1.4 Inbound tourism by air, by nationality, 2012–2017, St Eustatius

Nationality	2012	2013	2014	2015	2016*	2017*
	% of tourists					
Dutch (Total)	56	56	53	52	50	48
Dutch (Europe)	21	21	20	20	20	18
Dutch (Aruba, Curaçao, St Maarten)	35	35	33	32	30	30
American	11	13	12	12	13	14
Dominican	4	4	3	4	5	6
French	3	4	4	3	4	2
Canadian	2	2	1	1	1	1
British	2	2	2	2	2	2
Filipino	2	1	2	1	1	1
Venezuelan	1	1	1	1	1	1
Other European nationalities	6	5	6	6	6	5
Other nationalities	12	13	14	16	16	19

N.B. Figures have been rounded.
Source: Statistics Netherlands.

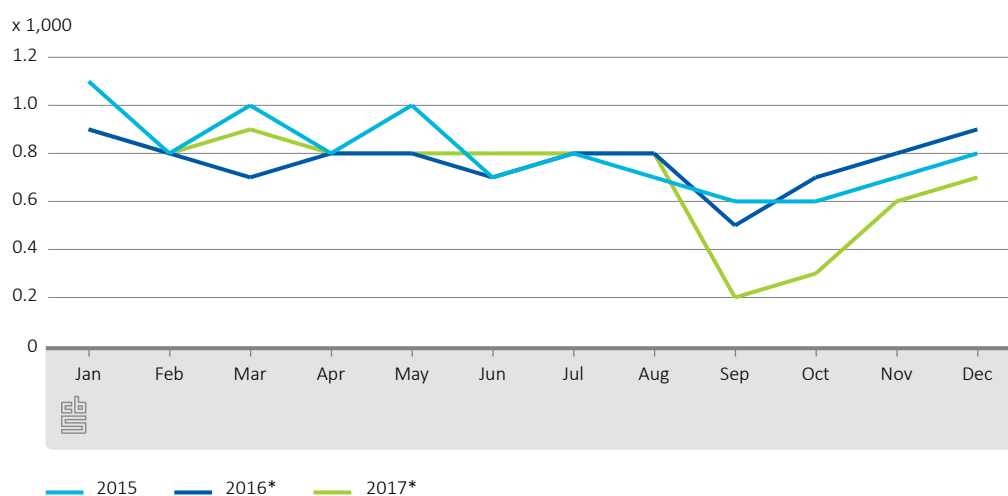
In 2017, no specific changes occurred compared to previous years when looking at the nationality of visitors who flew to St Eustatius. As with the other two public bodies, most tourists were either Dutch or US nationals. The share of American and Dominican tourists seems to have increased somewhat in 2017, while the share of tourists from the European part of the Netherlands seems to have decreased slightly. See figure 2.1.3 and table 2.1.4.

3. Saba

3.1 Fewer tourists flew to Saba in 2017 due to Hurricane Irma

The arrival of Hurricane Irma had a greater effect on tourism on Saba than on St Eustatius. On Saba, the number of air tourist arrivals grew until September 2017, increasing by 5 percent compared to 2016.³⁾ Due to Hurricane Irma, the number of inbound tourists fell drastically in September and October. Saba's airport was shut down for more than a week and the timetable was disrupted for some time. The destruction on St Maarten, an essential gateway to Saba, also played a role here. November and December showed some recovery, although more modest than on St Eustatius. This ultimately resulted in an overall decrease of 9 percent in inbound tourism by air on Saba in 2017: approximately 8.4 thousand tourists arrived by air in 2017 compared to approximately 9.2 thousand in 2016. See figure 3.1.1 and table 3.1.2. This decline is consistent with the decrease in the number of flights (-16 percent) and the number of air passenger arrivals (-13 percent) in 2017. Here, it should also be taken into account that business travellers including aid workers and civil servants are counted as tourists.

3.1.1 Inbound tourism by air, 2015–2017, Saba



NB. Figures have been rounded.
Source: Statistics Netherlands.

³⁾ Saba's files show that a number of commercial flights were also carried out between Saba and St Barthélemy in February, March and July 2017.

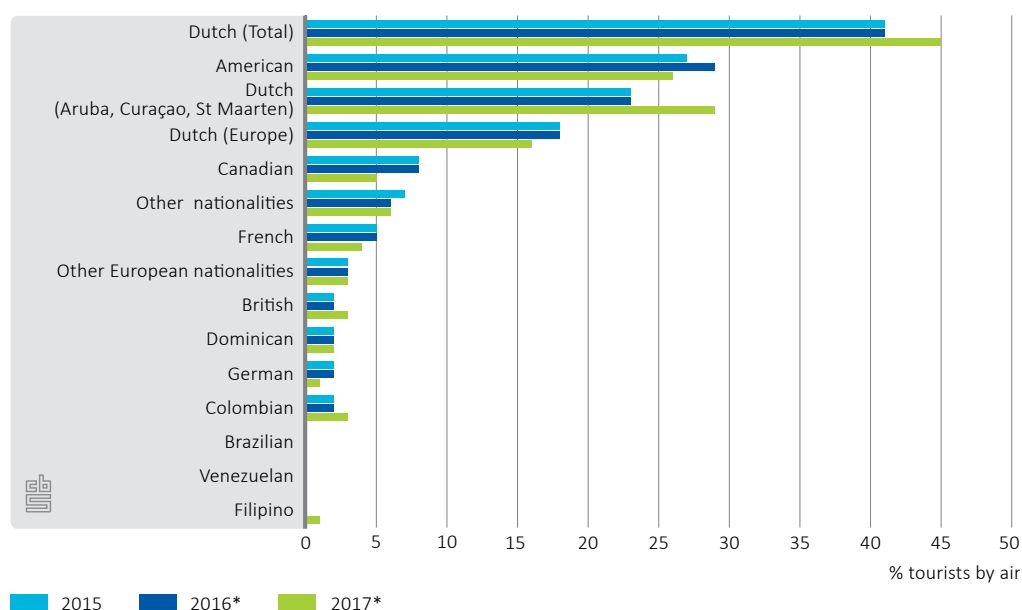
3.1.2 Inbound tourism by air, 2012–2017, Saba

	2012	2013	2014	2015	2016*	2017*
	x 1,000					
Jan	0.9	1.1	1.0	1.1	0.9	0.9
Feb	0.8	0.8	0.8	0.8	0.8	0.8
Mar	0.9	0.9	0.9	1.0	0.7	0.9
Apr	0.7	0.8	0.8	0.8	0.8	0.8
May	0.9	0.9	0.9	1.0	0.8	0.8
Jun	0.7	0.8	0.8	0.7	0.7	0.8
Jul	0.8	0.8	0.8	0.8	0.8	0.8
Aug	0.7	0.8	0.8	0.7	0.8	0.8
Sep	0.7	0.6	0.7	0.6	0.5	0.2
Oct	0.6	0.7	0.8	0.6	0.7	0.3
Nov	0.7	0.6	0.8	0.7	0.8	0.6
Dec	0.8	0.8	1.0	0.8	0.9	0.7
Total	9.2	9.7	10.2	9.7	9.2	8.4

N.B. Due to rounding, some totals may not correspond to the sum of the separate figures.
Source: Statistics Netherlands

As with the two other islands of the Caribbean Netherlands, there was only a limited shift in the nationalities of tourists arriving by air. The majority of tourists on Saba are of Dutch or American nationality. In contrast to Bonaire and St Eustatius, the group of Americans is largest on Saba. The share of tourists from Aruba, Curaçao and St Maarten seems to have increased slightly, while the share of tourists from the European part of the Netherlands and the United States seems to have decreased slightly in 2017. The latter also applies to the group of Canadian tourists. See figure 3.1.3 and table 3.1.4.

3.1.3 Inbound tourism by air, by nationality, 2015–2017, Saba



NB. Figures have been rounded.
Source: Statistics Netherlands.

3.1.4 Inbound tourism by air, by nationality, 2012–2017, Saba

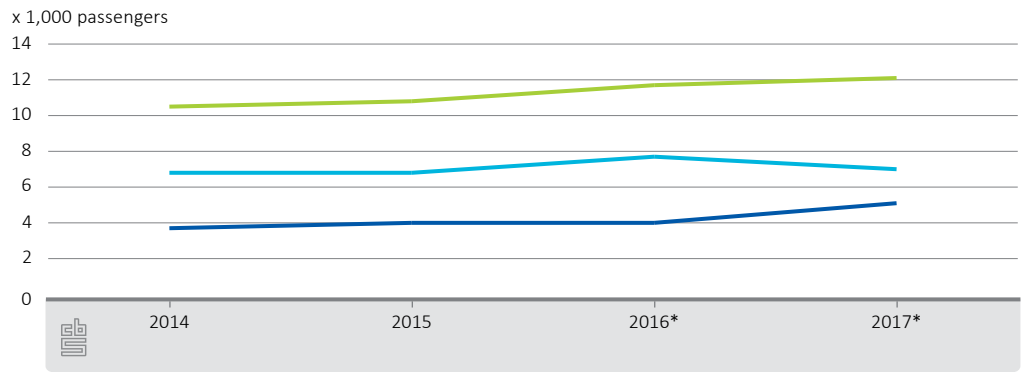
	2012	2013	2014	2015	2016*	2017*
Nationality	% of tourists					
Dutch (Total)	49	43	40	41	41	45
Dutch (Aruba, Curaçao, St Maarten)	29	23	23	23	23	29
Dutch (Europe)	20	20	17	18	18	16
American	23	26	28	27	29	26
Brazilian	0	0	0	0	0	0
British	1	2	2	2	2	3
Canadian	9	10	10	8	8	5
Colombian	1	1	1	2	2	3
Dominican	2	2	3	2	2	2
German	1	2	2	2	2	1
Filipino	0	0	0	0	0	1
French	4	5	5	5	5	4
Venezuelan	0	0	0	0	0	0
Other European nationalities	3	3	3	3	3	3
Other nationalities	7	6	6	7	6	6

N.B. Figures have been rounded.
Source: Statistics Netherlands.

3.2 Slight rise in number of passengers on ferries and yachts

In addition to the number of tourists arriving by air, the number of passengers arriving by ferry or yacht is also important to Saba. The majority of these arrivals are tourists as well. In 2017, approximately 12.1 thousand passengers arrived on Saba by ferry or yacht. This number is 3 percent higher than in 2016, when approximately 11.7 thousand passengers arrived on Saba by ferry or yacht. When adding together the traffic arriving by air and sea, 2017 shows only a slight decline: approximately 20.8 thousand passenger arrivals in 2017 versus approximately 20.9 thousand in 2016. Finally, the large number of passenger arrivals by sea in December is striking. See figures 3.2.1 and 3.2.2.

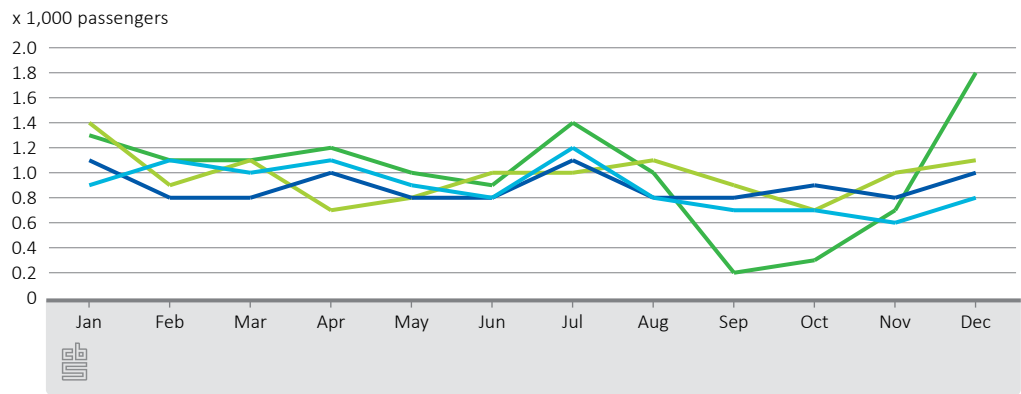
3.2.1a Inbound tourism by sea, 2014–2017, Saba



— Ferry — Yachts — Total

N.B. Figures have been rounded.
Source: Statistics Netherlands.

3.2.1b Inbound tourism by sea, 2014–2017, Saba



— 2014 — 2015 — 2016* — 2017*

N.B. Figures have been rounded.
Source: Statistics Netherlands.

Explanation of symbols

Empty cell	Figure not applicable
.	Figure is unknown, insufficiently reliable or confidential
*	Provisional figure
**	Revised provisional figure
2017–2018	2017 to 2018 inclusive
2017/2018	Average for 2017 to 2018 inclusive
2017/'18	Crop year, financial year, school year, etc., beginning in 2017 and ending in 2018
2015/'16–2017/'18	Crop year, financial year, etc., 2015/'16 to 2017/'18 inclusive

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

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