

The background of the entire page is a tropical landscape. In the foreground, several tall palm trees with green fronds are visible, some slightly out of focus. In the middle ground, a hillside is covered with lush green vegetation and several white houses with blue roofs. The sky is a pale, hazy blue, suggesting a bright, sunny day. The overall atmosphere is warm and inviting.

# SAINT-BARTHÉLEMY TOURISM OBSERVATORY 2023-2024

*St Barth*  
TOURISME

# Editio



**Alexandra Questel**  
President of the Territorial  
Tourism Board of Saint-Barthélemy

Dear readers,

The entire Tourism Board joins me in wishing you an excellent reading of the Tourism Observatory 2023/2024.

This edition offers more precise analyses tailored to the needs of the sector, with several new features:

- ▶ Seasonal analysis: Better understanding of the variations between high and low seasons.
- ▶ Enhanced customer study: Detailed data on stays, origins, and visitor behaviors, thanks to cross-referencing information.
- ▶ Expanded indicators: Accommodations, activities, and visitor satisfaction.
- ▶ Focus on restaurants: Analysis of structures, staff, and restaurant attendance.
- ▶ Spotlight on the villa market: Seasonal performance and length of stays.
- ▶ Economic impact: In-depth study of economic benefits, particularly in the luxury sector.
- ▶ Trends and rates: Testimonials from hoteliers and analysis of the sector's pricing policies.

This observatory is a strategic tool to guide tourism policies.

We rely on the support of professionals to enrich future editions and anticipate upcoming developments.

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# 1. Introduction and context

The aim of the Saint-Barthelemy Tourism Observatory is to provide a clear and accurate picture of the island's tourism performance based on reliable data and detailed analysis. This report was prepared by Julie Pichon, a strategy consultant specializing in tourism, to offer an in-depth assessment tailored to the needs of both local and international stakeholders.

Tourist numbers in St Barths follow a distinct seasonal pattern: a high season from November to April, peaking around the Holiday Season (Christmas and New Year), a low season from May to August, and almost no activity in September and October, the hurricane season in the Caribbean.

This report covers the 2023-2024 tourism season and marks a significant transition from an annual analysis to a seasonal assessment. This shift aims to better reflect the island's tourism dynamics by accounting for seasonal variations and peak periods.

## 1.1. Report objectives

This report pursues several strategic objectives for the Territorial Tourism Committee of Saint-Barthelemy (CTTSB) and its partners:

- ▶ Assessing the destination's overall performance during the 2023-2024 season by analyzing data on visitor numbers, accommodation, and visitor satisfaction.
- ▶ Identifying emerging trends and visitor behaviors to inform strategies for promoting and attracting tourism to the island.
- ▶ Providing a decision-making tool for local stakeholders by highlighting key successes and challenges within the tourism industry.
- ▶ Supporting sustainable planning through strategic recommendations aligned with visitor expectations and the unique dynamics of the local economy.

## 1.2. Transition from Annual Reports to Seasonal Analysis

Until 2022, tourism reports in St Barths followed an annual calendar format, covering January through December. However, this approach had limitations for a destination where seasonality plays a key role, impacting both visitor numbers and the activities of local economic players.

To better reflect this reality, the Saint Barthelemy Tourism Observatory has restructured its analyses around a tourism season spanning September to August. This new framework offers several advantages:

- ▶ Better alignment with economic realities: The peak season from November to April can now be analyzed as a whole, without splitting data across two calendar years.
- ▶ A more comprehensive view of tourism cycles: Off-season trends, often marked by a slowdown in activity and temporary closures, are now integrated into a broader perspective.

This transition also reflects a commitment to adapting to the evolving needs of both local and international stakeholders.

### 1.3. Methodology and Data Sources

The methodology used for this report is based on a rigorous collection and analysis of both quantitative and qualitative data from multiple sources:

- ▶ **Visitor traffic data:** Statistics provided by Rémy de Haenen Airport, the Port of Gustavia, and key players in the hotel and vacation rental industries.
- ▶ **Visitor satisfaction surveys:** Feedback collected via a terminal installed at St Barths Airport, allowing tourists to share their impressions of their stay.
- ▶ **Hotel industry survey:** A detailed questionnaire sent to hotel operators on the island to gather insights on performance metrics, including occupancy rates and guest demographics.
- ▶ **Restaurant industry survey:** A dedicated survey conducted among restaurant owners to assess their activity, observe emerging trends, and gather their perspectives on tourism flow.
- ▶ **Stakeholder contributions:** Consultations with local players, including hotels, rental agencies, restaurant owners, and professional associations.
- ▶ **Fiscal data:** Information on tourist tax revenue, provided by the Collectivity of St Barthelemy
- ▶ **Luxury goods import data:** Analysis of high-end product imports (perfumes, jewelry, luxury apparel, etc.) to establish correlations between visitor traffic and purchasing behaviors.
- ▶ **Digital trends:** Online search trend analyses using Google Destination Insights and other digital monitoring tools.

All these data sources have been consolidated to provide a comprehensive and coherent view of St Barths' tourism performance. Comparative analyses also include historical data to contextualize observed trends and developments.

## 2. Tourist Traffic in St-Barth

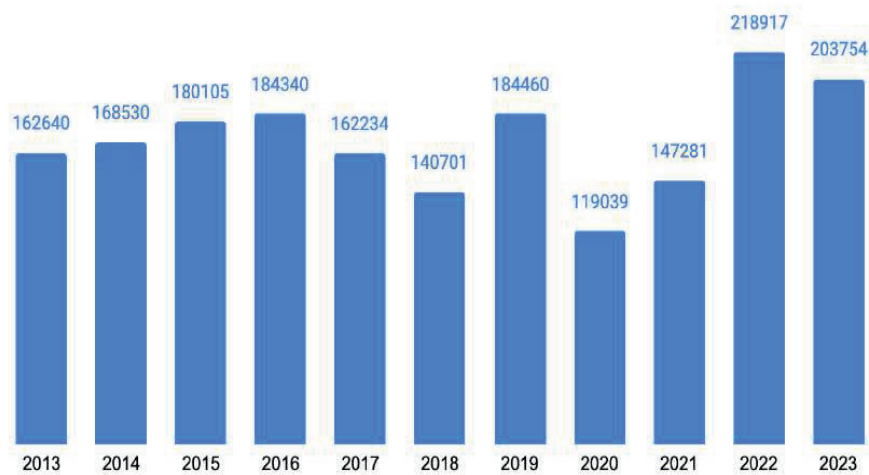
### 2.1. Airport Traffic

#### 2.1.1. Passenger Traffic at St Barths Airport

In 2023, passenger traffic at Rémy de Haenen Airport saw a slight decline compared to the all-time record set in 2022. A total of 203,754 passengers were recorded, representing a 6.9% decrease from 2022 (218,917 passengers). This decline reflects a return to more stable levels following the exceptional recovery in 2022, when traffic surged by 48.6% compared to 2021, largely driven by a post-pandemic rebound.

Despite this decrease, the 2023 figures remain strong, exceeding the 2019 pre-pandemic reference year by 10.5%.

**Airport Traffic Trends (Annual Passenger Numbers)**



Source: Rémy de Haenen airport

The data reveal contrasting trends in passenger traffic for the 2023-2024 season:

- ▶ **High season (November to April):** Traffic remains concentrated during the high season, with a peak in March 2024 (23,091 passengers), making it the busiest month of the period. However, monthly visitor numbers were generally slightly lower than in 2022-2023, particularly in November (-9.8%) and December (-12.6%).
- ▶ **Low season (May to August):** In contrast to the high season, May to August 2024 show signs of resilience, with moderate year-over-year growth. For instance, in May 2024, traffic increased by 4.8% compared to May 2023 (17,805 passengers vs. 16,988). This trend may indicate a diversification of visitor periods, driven by travelers looking to avoid peak seasons. These encouraging off-season performances suggest an opportunity to extend the tourism season from May to July.

## Monthly Passenger Traffic: 2022-2023 Season and 2023-2024 Season

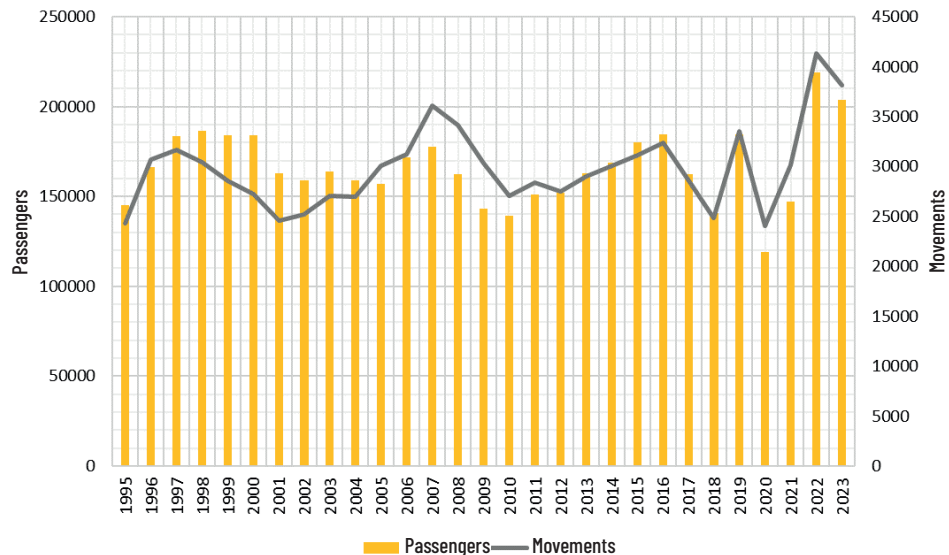


Source: Rémy de Haenen airport

The 2023-2024 season at Rémy de Haenen Airport experienced a slight decline in passenger traffic compared to 2022-2023, with a later start in November instead of October and lower traffic during the high season (November to February). In contrast, March and May saw a noticeable increase, while summer traffic levels remained relatively stable.

Additionally, while aircraft movements generally correlate with passenger numbers, they have shown more pronounced variations in recent years, suggesting improved optimization of recent flights to accommodate growing demand.

## Commercial Air Traffic Trends

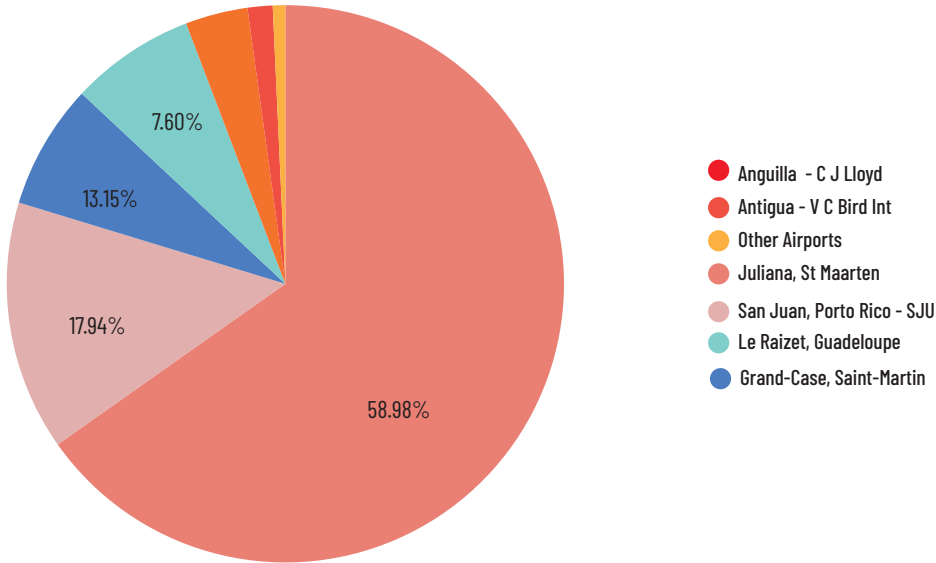


Source : Rémy de Haenen Airport

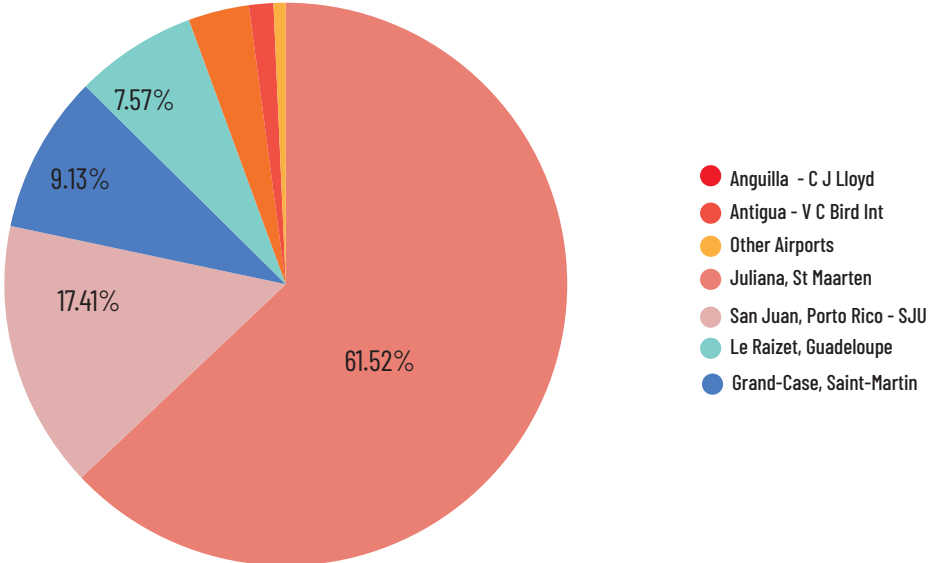
### 2.1.1. Air Traffic: Visitor Origins

In recent years, air traffic at Saint-Barthélemy airport has become increasingly international. In 2024, flights from international airports will account for 83% of the total volume of commercial movements, compared with 79% in 2023 and 77.3% in 2022. This steady increase reflects the central role of foreign markets, particularly North American, in the island’s visitor profile.

Major Air Routes in 2023 (Passenger Traffic)



Major Air Routes in 2024 (Passenger Traffic)





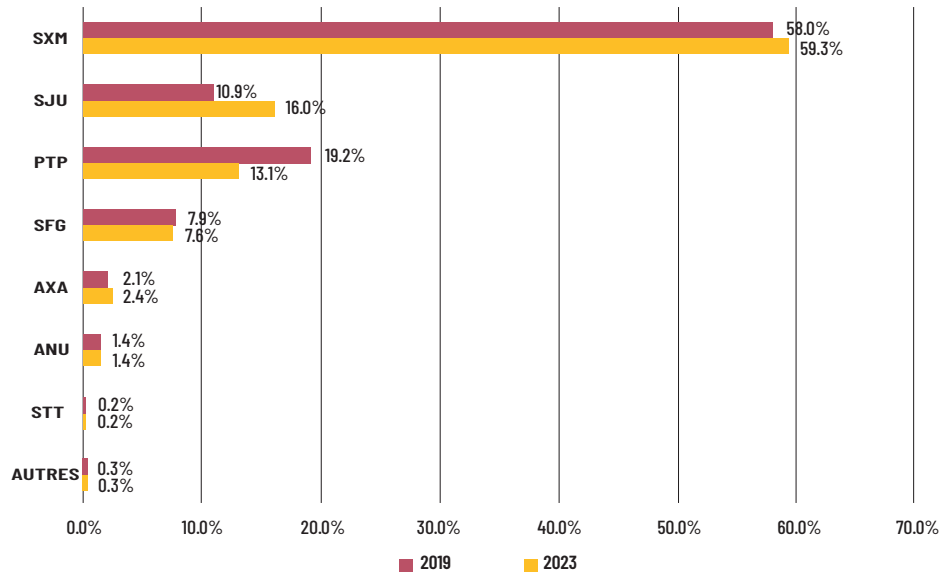
Historically, the two main air routes connecting St Barths were Juliana (Sint Maarten) and Pointe-à-Pitre (Guadeloupe). However, traffic from Pointe-à-Pitre has been declining for several years, reflecting a gradual shift toward international destinations:

- ▶ **Juliana (Sint Maarten):** Juliana International Airport, which opened a new, modernized departure hall in early 2024, remains the primary gateway to St Barths, handling 61.52% of passengers in 2024, compared to 58.98% in 2023 (+4.3%). This slight increase reinforces Juliana’s role as a regional hub and the main access point to St Barths. With the inauguration of a new arrivals terminal at the end of 2024, this connection could strengthen even further in the future.
- ▶ **San Juan (Puerto Rico):** In 2024, San Juan Airport accounted for 17.41% of traffic, a sharp rise from 15.94% in 2023 (+9.2%). This growth allowed San Juan to overtake Pointe-à-Pitre for the first time, highlighting the increasing importance of connections with the North American market, facilitated by direct flights from the United States.
- ▶ **Pointe-à-Pitre (Guadeloupe):** Traffic from Pointe-à-Pitre continues to decline, dropping from 13.15% in 2023 to just 9.13% in 2024 (-30.6%). This confirms the declining appeal of regional domestic routes in favor of international ones. Additionally, the discontinuation of Air Antilles flights to this destination in 2023 contributed to the decrease in traffic.
- ▶ **Other airports (Grand-Case, Anguilla, Antigua):** Secondary routes remain relatively stable. Anguilla saw a slight increase (+10.8%), reflecting interest in inter-island connections, while Antigua and other airports experienced moderate declines.

AIRPORT	2023	2024	VARIATION (%)
JULIANA, SINT MAARTEN - SXM	58.98%	61.52%	4.3%
SAN JUAN, PUERTO RICO - SJU	15.94%	17.41%	9.2%
LE RAIZET, GUADELOUPE - PTP	13.15%	9.13%	-30.6%
GRAND-CASE, SAINT-MARTIN - SFG	7.60%	7.57%	-0.4%
ANGUILLA - C.J. LLOYD - AXA	2.40%	2.66%	10.8%
ANTIGUA - V.C. BIRD INTL - ANU	1.40%	1.23%	-12.1%
OTHER AIRPORT	0.53%	0.48%	-9.4%

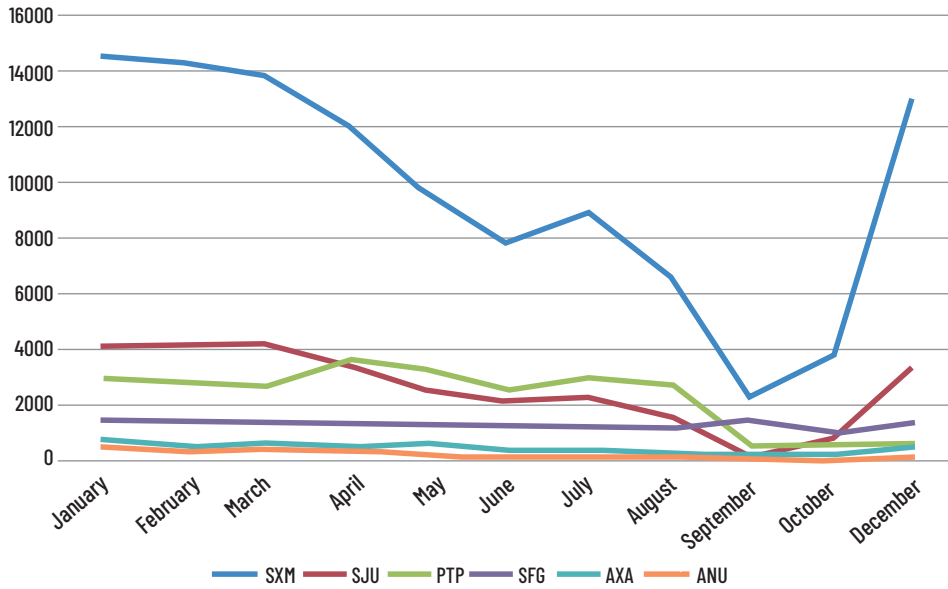
Source : Rémy de Haenen Airport data compilation

### Traffic Distribution 2023 vs 2019



Source: Rémy de Haenen airport

### Monthly Passenger Traffic by Airport in 2023



Source: Rémy de Haenen airport

### 2.1.3. Dynamics of the Air Travel Market in St Barths

- ▶ **Winair** confirms its position as the leading airline in terms of market share, handling 45% of passenger traffic in 2023 compared to 43% in 2022. This slight 2-point increase further strengthens its central role in serving the island, particularly for connections with Princess Juliana Airport in Sint Maarten, which remains the main gateway for travelers.

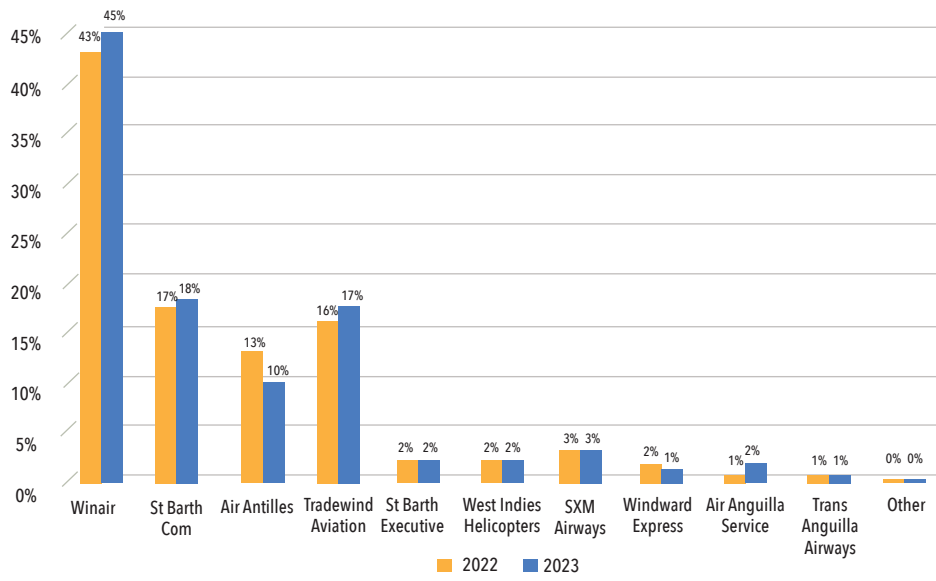
#### **Focus on Day Trip Specials: a promising initiative from Winair**

Since February 2024, Winair has launched a new promotional offer, "Day Trip Specials", allowing visitors from Saint Martin to experience St Barths for a day. This attractive offer, priced at \$99, aims to boost day-trip tourism and strengthen inter-island connections in the Caribbean.

According to data collected from the airline, this initiative has maintained a steady monthly sales volume of approximately 195 tickets, demonstrating its success since its launch. The collaboration between Winair and SXM Airport has been described as "highly successful," leading to the extension of the offer for the entire year 2024.

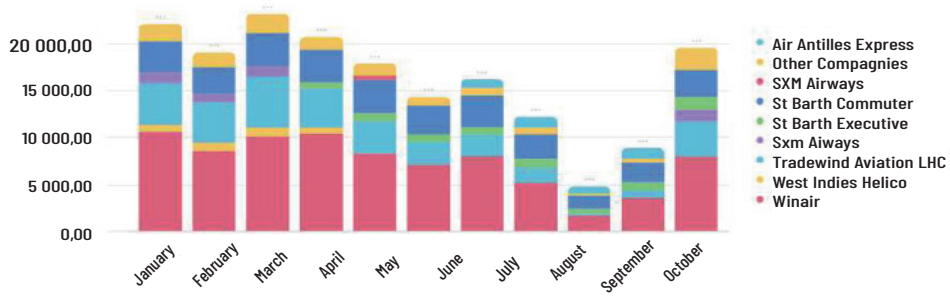
- ▶ **St Barth Commuter** maintains its second position, showing a slight increase from 17% to 18% in market share between 2022 and 2023. The local airline remains a key player in regional traffic.
- ▶ **Tradewind Aviation** continues to gain momentum, handling 17% of traffic in 2023, up from 16% in 2022. This growth reflects rising demand for premium flights and connections from the United States, particularly via San Juan, Puerto Rico.
- ▶ In 2023, **Air Antilles** faced significant financial challenges, disrupting St Barths' regional connectivity, particularly with Guadeloupe and Martinique. The suspension of the direct route to Pointe-à-Pitre forced travelers to transit through Saint Martin Grand-Case via Air Caraïbes, which had an impact on air traffic and the island's accessibility. As a result, the airline saw a significant decline, dropping from 13% market share in 2022 to 10% in 2023. However, Air Antilles has gradually resumed operations in 2024 and is restructuring its network. The situation remains fragile, and the airline's future depends on its ability to stabilize its operations.
- ▶ The other airlines hold relatively small but stable market shares, contributing modest volumes of traffic:
  - **SXM Airways** with 3 % of the market in 2023, stable compared with 2022.
  - **St Barth Executive** and **West Indies Helicopters** each maintain a 2% share, with niche services aimed at a premium clientele.
  - **Windward Express, Air Anguilla Services** and **Trans Anguilla Airways** each maintain a 2% share, with niche services aimed at a premium clientele.

## Passenger Traffic Volume by Airline 2023 vs 2022



Source : Rémy de Haenen airport

## Passenger Traffic by Airline in 2024



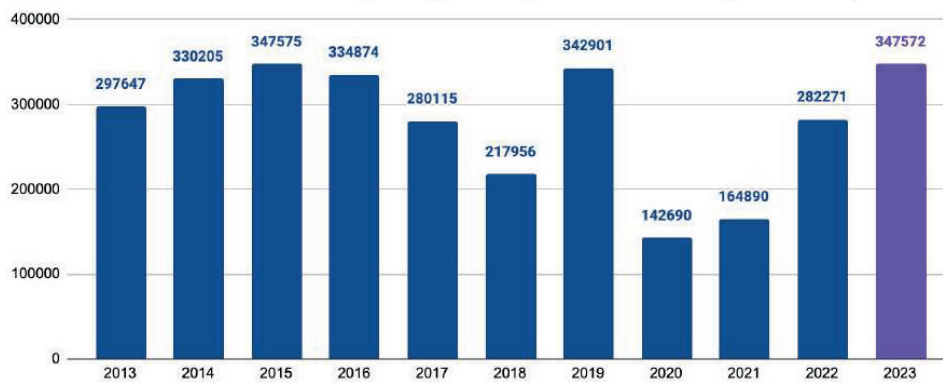
## 2.2. Tourist Activity at the Port of Gustavia

The port of St Barthelemy has experienced significant fluctuations in passenger traffic over the past ten years, driven by major events such as hurricanes, the COVID-19 pandemic, and the island's own tourism dynamics.

In 2023, the port welcomed 347,572 passengers, a 23% increase from 2022, surpassing the pre-pandemic levels of 2019 (342,901 passengers). After reaching an all-time low in 2020, when traffic dropped to 142,690 passengers due to health restrictions and global disruptions, traffic has been steadily recovering. By 2023, it almost reached the record levels of 2015 (347,575 passengers).

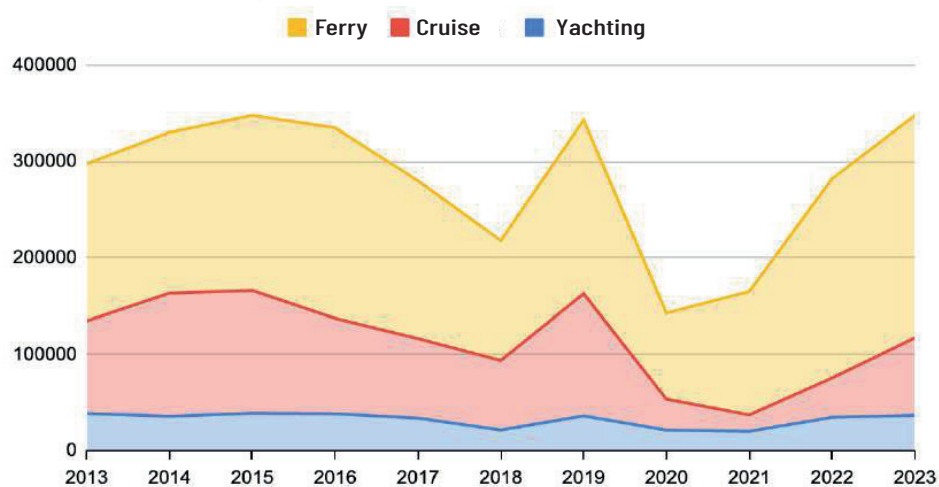
This significant rebound, which began in 2022, confirms St Barths' appeal as a tourist destination and marks a full return to normal, highlighting the sector's resilience after the pandemic's impact.

### Evolution of Passenger Traffic at the Port of Gustavia (2013-2023)



Source : Port of Gustavia

### Passenger Traffic by Mode of Arrival (2013-2023)



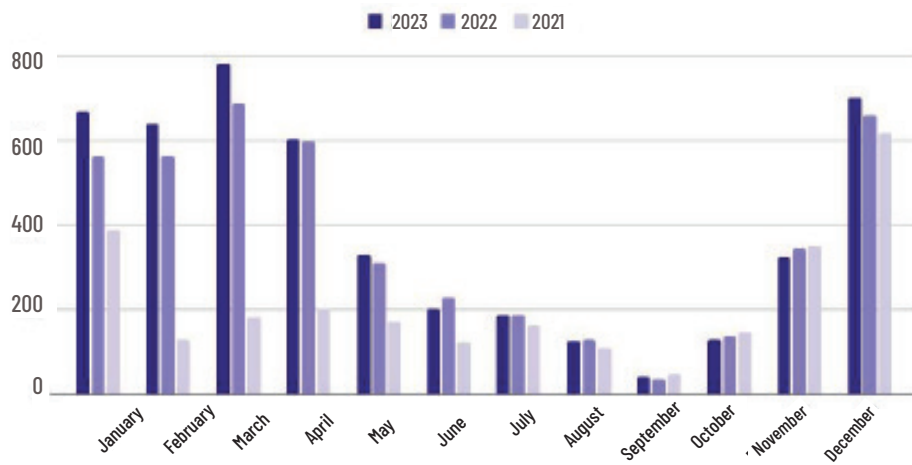
Source : Port of Gustavia

## 2.1.1. Yachting Activities

In 2023, yachting traffic reached 36,551 passengers, a 5.8% increase from 2022 (34,549 passengers). After a historic drop in 2018, when traffic fell to just 21,353 passengers, yachting has gradually returned to its pre-crisis levels, though it still remains below the peak of 2011, when 39,787 passengers were recorded.

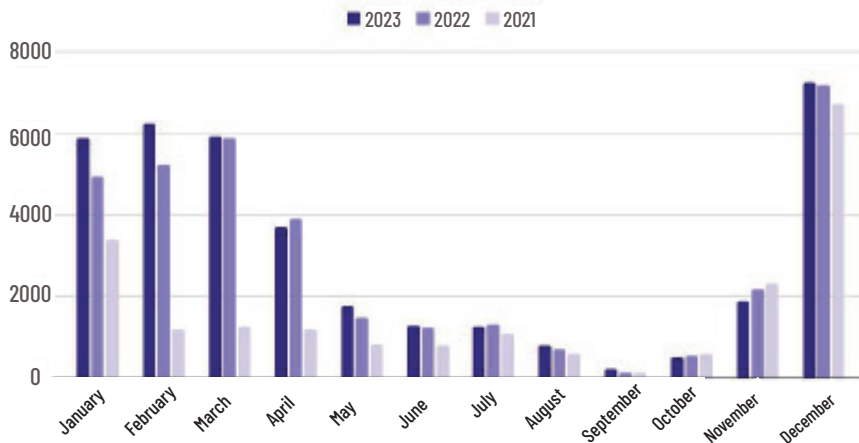
In 2023, the number of stopovers saw a sharp rise in January, February, March, and December, with a similar increase in passenger volume during January and February. However, there was a decline in passenger volume in April and a decrease in stopovers in June.

Monthly Ship Stopover Volume, 2021 to 2023



Source : Port of Gustavia

Monthly Passenger Volume, Yachting Vessels, 2021 to 2023

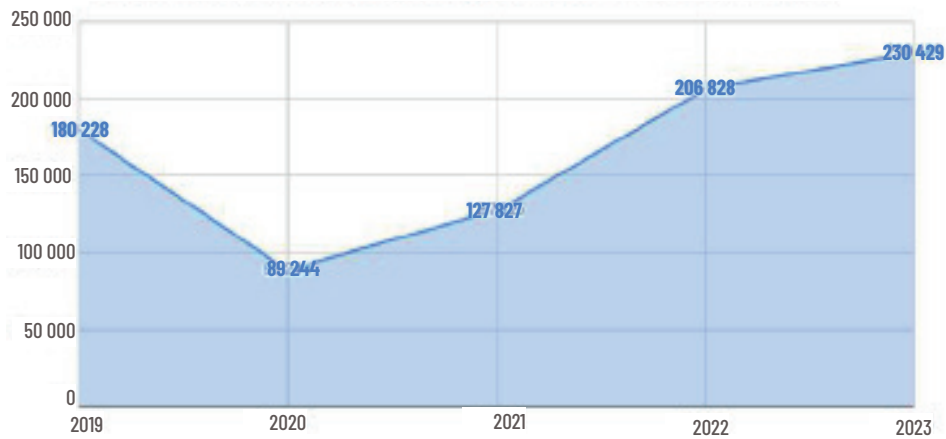


Source : Port of Gustavia

## 2.2.2. Inter-Island Passenger Traffic

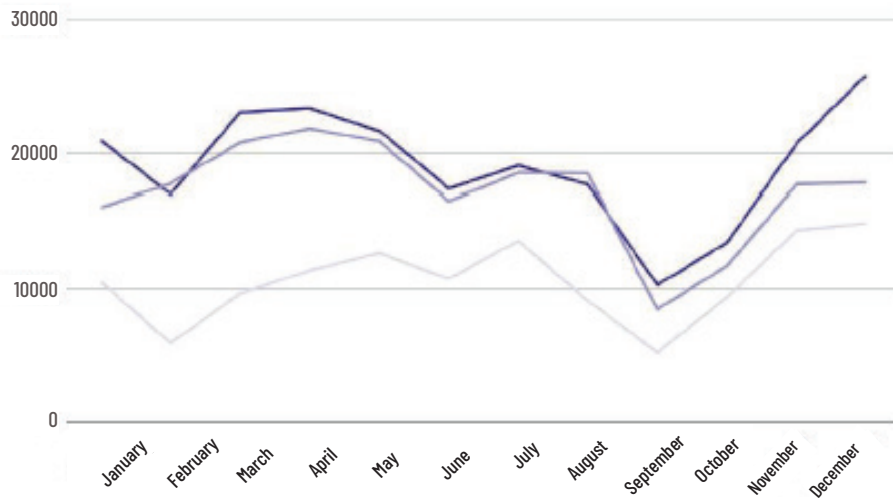
There has been a sustained growth trend since the post-pandemic period, with a consistent increase in the number of embarking and disembarking passengers since 2021. In 2023, inter-island passenger ferry traffic continued its upward trajectory, reaching a new record of 230,489 passengers, an 11.4% increase from 2022 (206,828 passengers). This segment is expected to account for 66.3% of total passengers in 2023.

**Evolution of Inter-Island Passenger Traffic, 2019 to 2023**



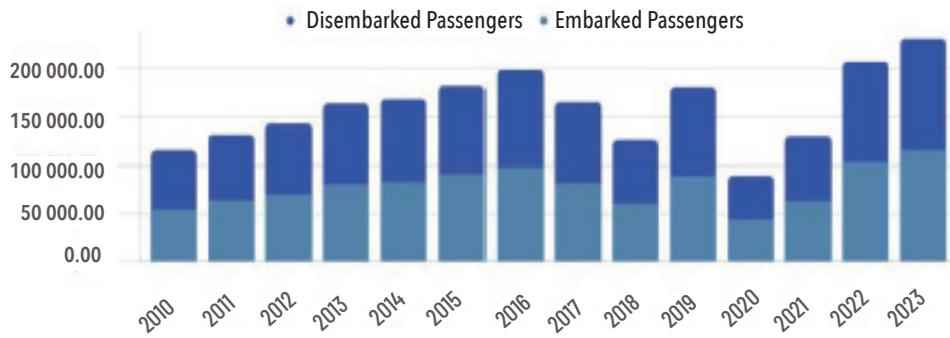
Source : Port of Gustavia

**Evolution of Passenger Numbers (Arrivals/Departures), 2021 to 2023**



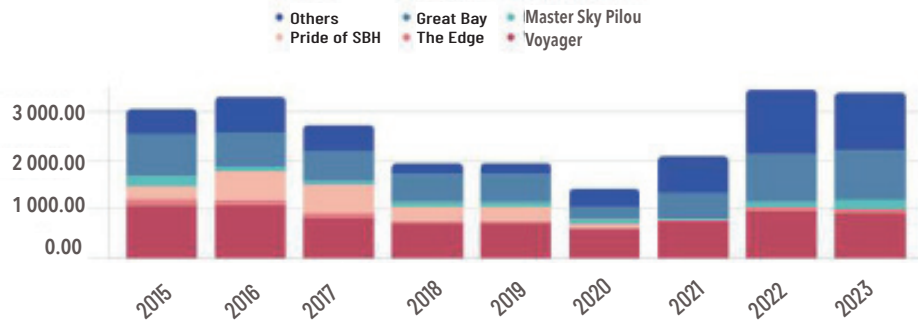
Source : Port of Gustavia

### Inter-island Passenger Traffic (Arrivals/Departures) in 2023



Source : Port of Gustavia

### Number of calls by ferry company in 2023



Source : Port of Gustavia

#### Focus on the New "The Edge" Service Between Simpson Bay and Gustavia

The Edge, operated by Aqua Mania Adventures, provides a ferry service designed for visitors looking to take day trips to St Barths. The ferry runs between Pelican Marina in Simpson Bay (Sint Maarten) and the port of Gustavia, with departures at 9:00 AM and returns at 4:00 PM, offering visitors a full day to explore the island. This service operates three times a week (Monday, Wednesday, and Thursday) and is offered in partnership with several hotels in Sint Maarten. According to these hotels, 70% of bookings for this service are made during the winter season. Feedback from the tourism industry in St Barths regarding the economic impact of this new clientele has so far been divided.



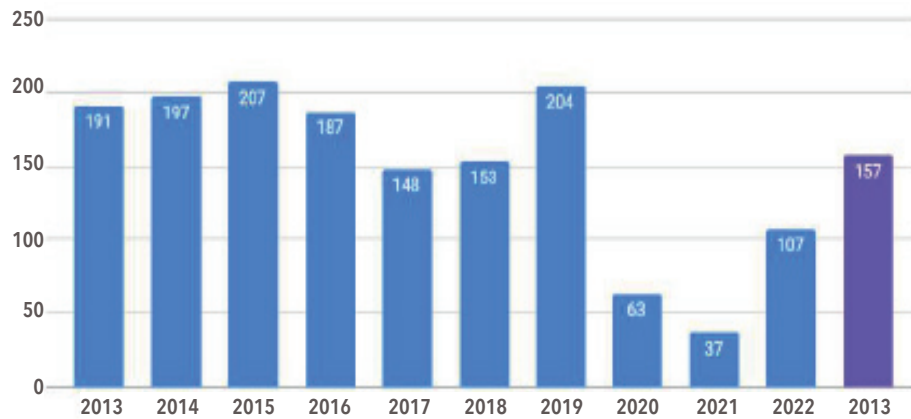
### 2.2.3. Cruise Ship Activity

The big news for 2023 is the strong recovery of the cruise sector, which took longer to bounce back from the COVID-19 pandemic than the rest of the passenger traffic industry.

Cruise traffic surged in 2023, reaching 80,532 passengers, marking an impressive 96.9% increase compared to 2022 (40,894 passengers). The port of St Barths welcomed 157 stopovers, a 46.7% increase from 2022 (107 stopovers).

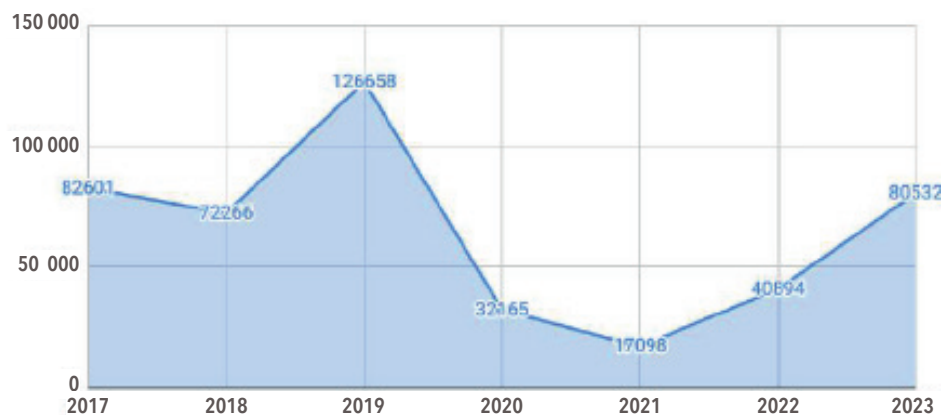
This segment, which was heavily impacted by the pandemic (falling to 17,098 passengers and 37 stopovers in 2021), shows signs of a more dynamic recovery in 2023. However, it has not yet returned to pre-pandemic levels of 2019 (126,658 passengers and 204 stopovers). Nevertheless, the increase from 2022 to 2023 reflects a positive recovery from the disruptions caused by the pandemic.

**Evolution of the Number of Cruise Ship Stopovers (2013-2023)**



Source : Port of Gustavia

**Evolution of the Number of Transit Cruise Passengers (2017-2023)**



Source : Port of Gustavia

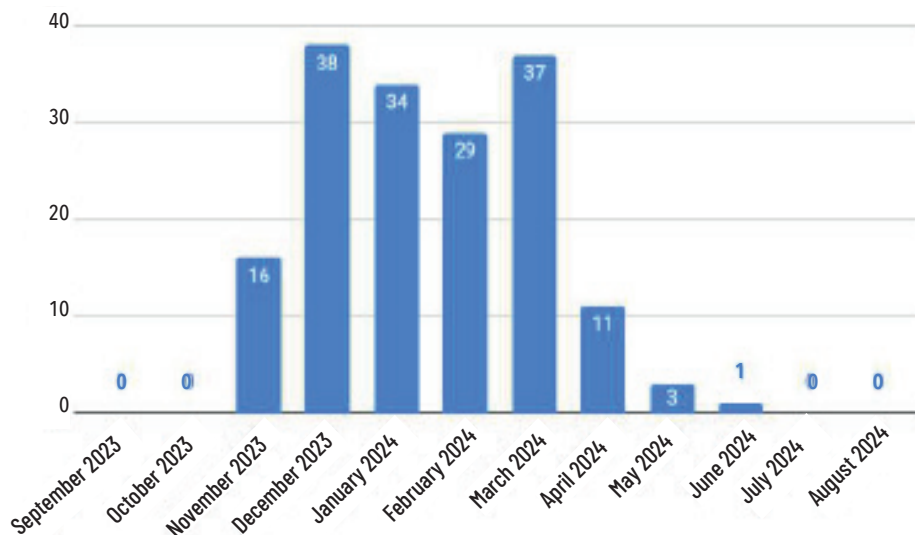
## Cruise seasonality analysis:

The peak cruising season runs from November to April. This season, there was a notable peak in December 2023 (38 liners) and March 2024 (37 liners). These months also saw the highest number of disembarking passengers, with 8,458 in December and 7,364 in March.

St Barths stands out in the Caribbean for hosting small-capacity liners, generally carrying fewer than 500 passengers, with averages often ranging from 200 to 300 passengers per ship. Unlike ports such as Philipsburg in St. Martin, which welcome giant ships carrying over 3,000 passengers, the island specializes in exclusive, intimate cruises. On the one hand, this is because St Barths' port infrastructure is not suited to very large ships, which helps maintain the island's human scale and authenticity. On the other hand, this choice aligns with the island's luxury positioning, attracting niche cruise lines like Ponant.

- ▶ In November 2023, 16 liners docked, carrying an average of 449 passengers per ship, the highest ratio of the season.
- ▶ December 2023 saw the highest number of calls (38 ships) and disembarked passengers (8,458), although the average size of the ships was smaller, with 223 passengers per ship.
- ▶ The months of May and June 2024, although outside the peak season, show continued activity, with 3 and 1 cruise ships respectively, carrying high ratios of 260 and 338 passengers per ship

**Number of Cruise Ships During the 2023-2024 Season**



Source : Port of Gustavia

### Number of Passengers Disembarked in 2023-2024



Source : Port of Gustavia

# 3. Visitor Insights and Tourism Trends

## 3.1. Customer Survey Results

### Methodological Details

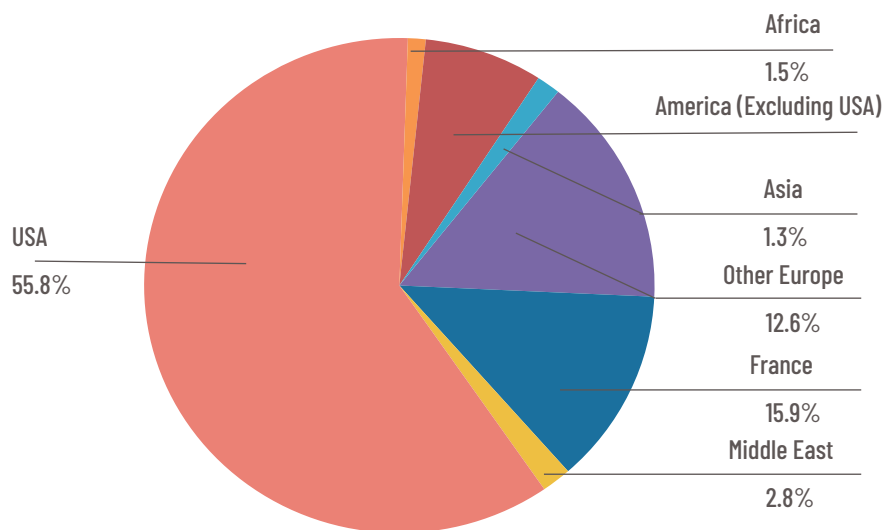
The data presented in this section is derived from an open-access survey terminal at St Barths airport. This terminal enables tourists to rate their satisfaction with their stay on the island<sup>1</sup>. For the 2023-2024 season, 916 participants completed the survey between October 1, 2023, and August 31, 2024.

### 3.1.1 Visitor Profiles and Types of Stay

#### Visitor origins

Responses collected from the terminal throughout the season show a predominance of American visitors, who make up nearly 59% of tourists, followed by French visitors at 16%, and other European visitors (excluding France) at 12.6%. Visitors from the rest of the Americas account for 10%, while combined, the Middle East, Africa, and Asia represent a more modest 5.6% of the market.

Tourists' Countries of Origin, 2023-2024 Season



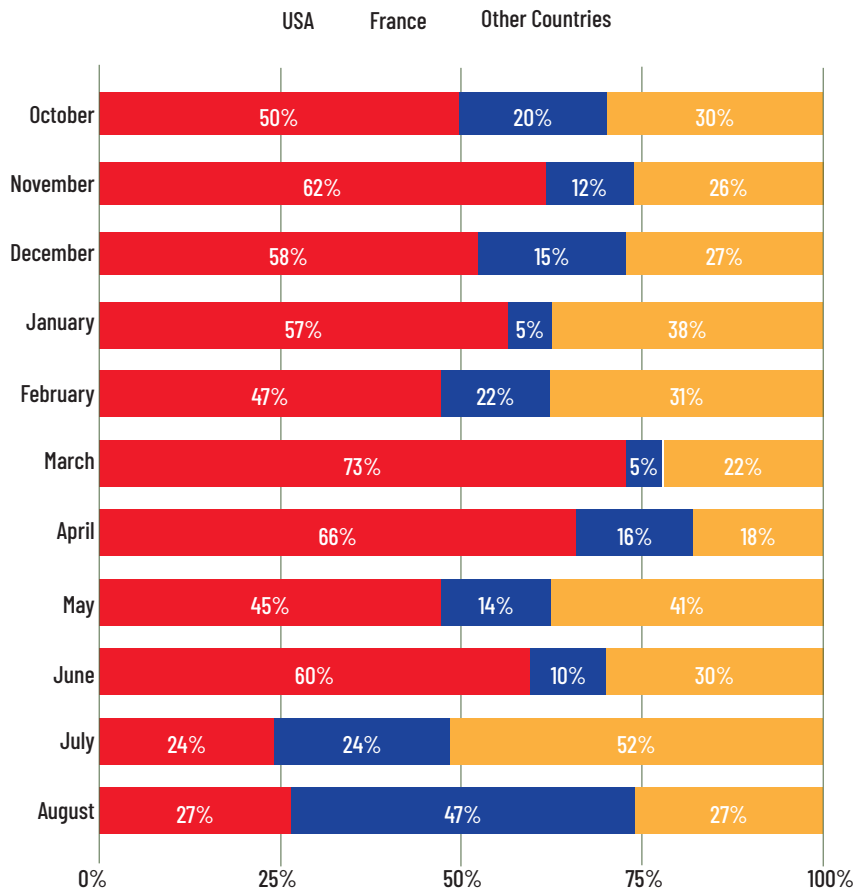
Sample: n=468

An analysis of the month-by-month breakdown reveals significant seasonal variations. American visitors are most prominent during the winter months, from November to January, and again in March and April, peaking in March with 73% of visitors. In contrast, the share of French visitors rises sharply during the summer, reaching a peak of 47% in August, compared to just 5% in January, which is the peak of the winter season.

<sup>1</sup> The results from the terminal, while indicative of the tourist profile, may be biased by non-targeted uses, such as those by children or passersby. They should therefore be interpreted with caution and placed in a broader context.

<sup>2</sup> Note: In August, a significant proportion of seasonal workers leave the island due to the seasonal closure of hotels. This flow could skew the terminal results, leading to an overrepresentation of French visitors in the collected data.

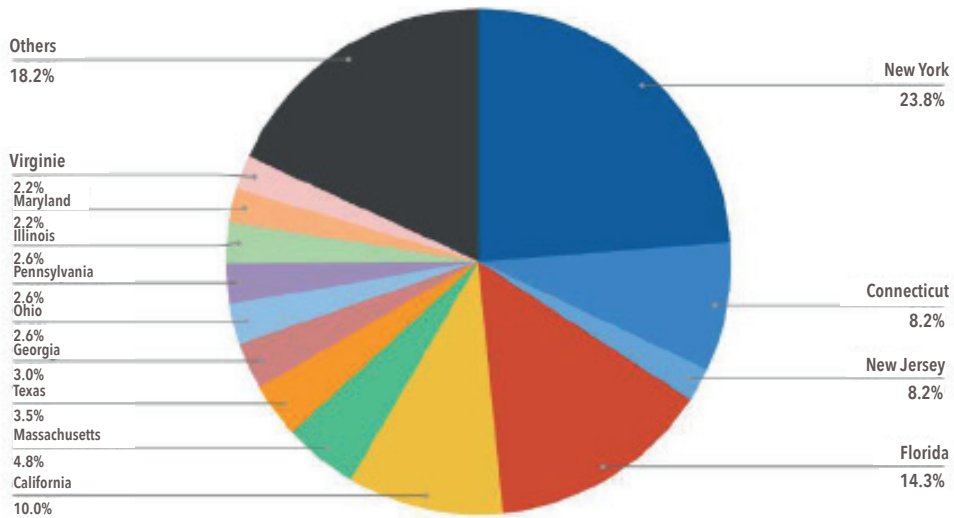
### Tourists' Countries of Origin (in %)



Sample : n=468

American visitors show a strong concentration from the Tri-State area (New York, Connecticut, New Jersey), which accounts for nearly 30% of American arrivals, followed by Florida (14.3%) and California (10%).

### State of Origin of American Visitors



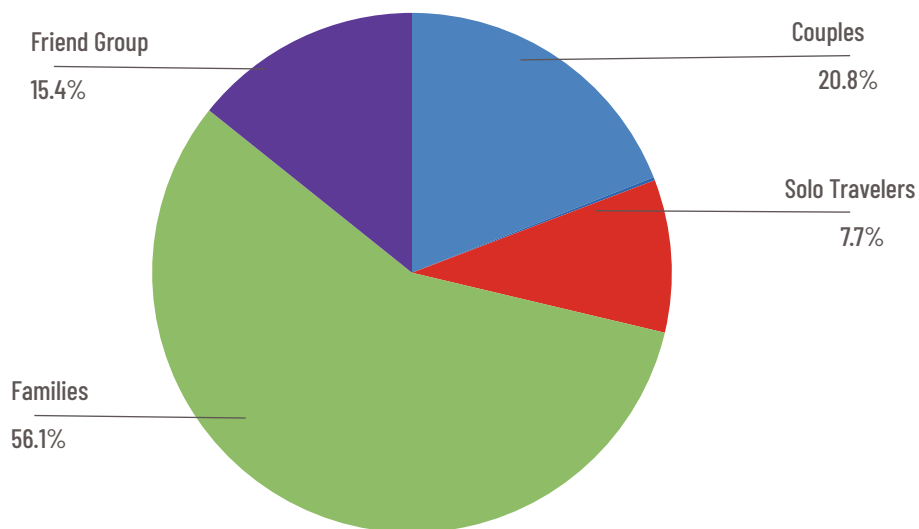
### Length of stay :

- ▶ 37.5 % of respondents stayed between 6 and 10 days.
- ▶ 30.5 % of them stayed 5 days or less.
- ▶ 19.4 % declared stays of more than 15 days.

### Group composition:

- ▶ Family trips are more frequent this season: 56.1% of respondents came to the island with their family, compared to 43.1% in 2022.
- ▶ Couples also make up a smaller proportion of respondents this season: 20.8% of tourists came as a couple (vs. 27.3% in 2022).
- ▶ Groups of friends make up 15.4% of tourists (versus 18.8% in 2022).
- ▶ Finally, 7.7% of respondents said they travelled alone.

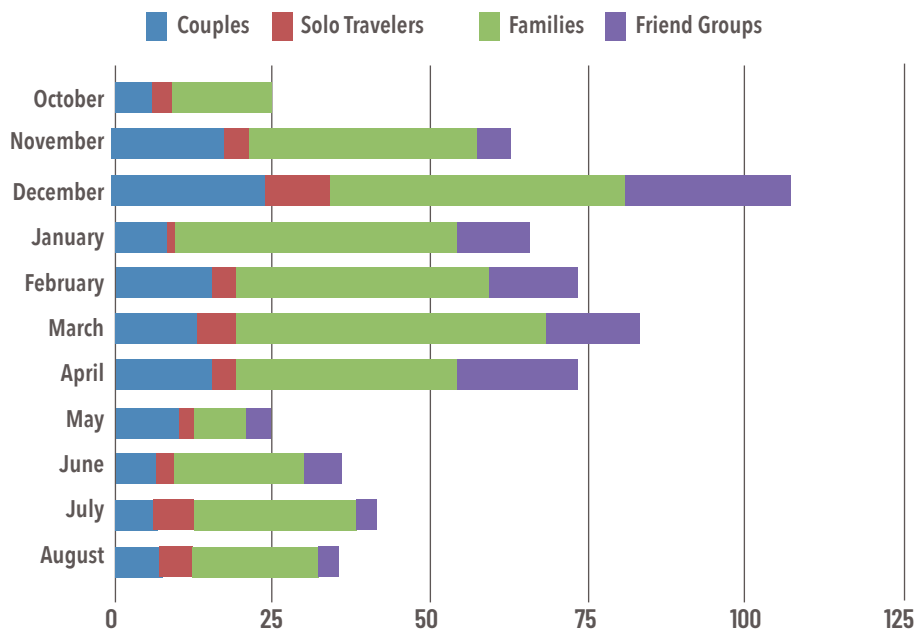
**Group Composition, 2023 - 2024 Season**



Sample : n=624

Throughout the season, the composition of groups varies. Friend groups dominate during the high season and the December holidays, while families travel year-round. Couples, on the other hand, seem to prefer the low season.

### Group Composition, by Month



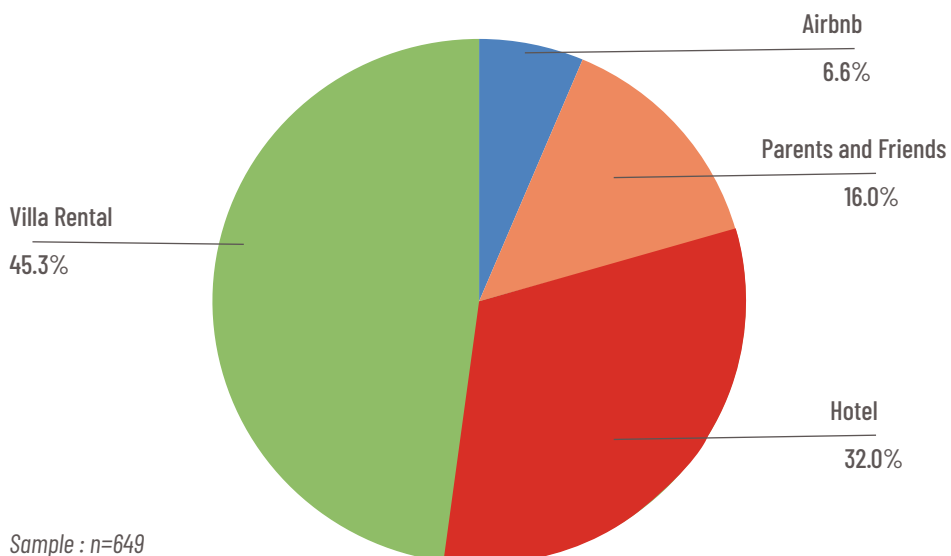
Sample: n=624

### Choice of accommodation

The overall breakdown of accommodation types for the 2023 season - 2024 is as follows

- ▶ Villa rentals: (45.3%)
- ▶ Hotels: (32.0%)
- ▶ Parents and Friends: (16%)
- ▶ Airbnb: (6.6%)

### Preferred Accommodation Type, 2023 - 2024 Season



Sample : n=649

- ▶ Villa rentals are the preferred choice, particularly in December (50 stays), January (33 stays), and March (41 stays).
- ▶ Hotels see their highest share in October (22 stays), but during peak tourist periods, their share is relatively lower than that of villa rentals, likely due to their more limited number compared to villas on the island. During low tourist seasons, it seems that visitors tend to opt for this type of accommodation more frequently.
- ▶ Although Airbnb reaches a peak in December (13 stays reported by visitors), it remains a less popular option.

Demand for villas is particularly strong during the high season, with notable peaks in December (50 stays), January (33 stays), and March (41 stays), confirming their position as the top choice for visitors. Hotels play an important role in the off-season, peaking in October (22 stays), but their relative share declines during peak periods, likely due to their limited capacity. Airbnb, while seeing a moderate peak in December (13 stays), remains a niche option, primarily targeting specific clientele, especially in November and December.

### Tourist Accommodation Choices by Month



Sample : n=545

When analyzing the origin of visitors according to their preferred accommodation type, the following observations can be made:

- ▶ American visitors show a clear preference for villas (62%), followed by hotels (32%). Airbnb remains a marginal option in this category (6%).
- ▶ French visitors overwhelmingly favor hotels (66%), followed by villas (59%). Airbnb remains a secondary choice (17%).
- ▶ Other European visitors have a more balanced preference, with villas (42%) and hotels (36%) being relatively even, while Airbnb attracts a notable share (21%).



- ▶ For visitors from the Americas (excluding Americans), there is a fairly even distribution between hotels (43%) and villas (49%), with Airbnb remaining a marginal option.
- ▶ Respondents from Africa, the Middle East, and Asia are few, but clear trends emerge. For instance, Middle Eastern visitors strongly prefer hotels (86%)

	<b>AIRBNB</b>	<b>HOTEL</b>	<b>VILLAS</b>
<b>USA</b>	<b>6%</b>	<b>32%</b>	<b>62%</b>
<b>FRANCE</b>	<b>17%</b>	<b>66%</b>	<b>59%</b>
<b>REST OF EUROPE</b>	<b>27%</b>	<b>46%</b>	<b>54%</b>
<b>AMERICA (EXCLUDING USA)</b>	<b>9%</b>	<b>43%</b>	<b>49%</b>
<b>MIDDLE EAST</b>	<b>0%</b>	<b>86%</b>	<b>14%</b>
<b>AFRICA</b>	<b>60%</b>	<b>20%</b>	<b>20%</b>
<b>ASIA</b>	<b>33%</b>	<b>33%</b>	<b>33%</b>

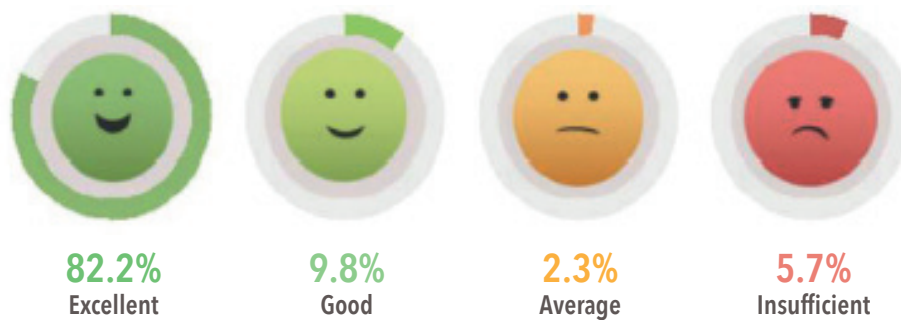
Sample : n=348

### 3.1.2 Destination Satisfaction

The survey results also highlight a generally high level of visitor satisfaction and a strong intention to return to the island. St Barths remains highly attractive as a premium destination, overall meeting the expectations of the visitors who come to the island.

#### Overall satisfaction with the island:

- ▶ The average rating for the stay was 8.7/10 (compared with 8.8/10 in the last survey in 2022).
- ▶ Overall, 90.9% of participants say they are satisfied (91.5% in 2022).
- ▶ 82.2% of visitors even describe their level of satisfaction with their stay as excellent (versus 80.2% in 2022).



Sample : n=916

- ▶ A very large majority of respondents (96.4%) say they would recommend St Barths to their friends and family, a slight increase compared to 2022 (95.8%). These figures confirm a slight improvement in the island's reputation as a high-quality tourist destination.

#### Visitors' main activities

Going to the beach is the most popular activity among visitors (26.6%), followed by shopping (18.1%) and gastronomy (15.9%). Nightlife (11.2%) and water activities (10.4%) add to the experience, while events (7.1%) and wellness (5.4%) round out the offerings. These results highlight a diverse range of activities centered around relaxation, luxury, fine dining, and leisure.

#### Main tourist expenditures

- ▶ Catering (26.1 %)
- ▶ Lodging (24.3 %)
- ▶ Rental Car (13.6 %)
- ▶ Shopping (14.8 %)

- ▶ Nautical Activities (8%)
- ▶ Nightlife (7.5%)
- ▶ Other expenses (5.7%)

### Satisfaction with catering

Tourists' overall satisfaction with the island's restaurants and gastronomy is positive, but slightly lower than for accommodations:

- ▶ 66.8% of visitors rated the dining experience as excellent.
- ▶ 20.4% described it as satisfactory, reflecting a positive overall experience.
- ▶ A minority of 4.5% are moderately satisfied with the food.
- ▶ 7.3% said they were disappointed, suggesting areas for improvement to maintain a consistent, high-quality culinary offering.

The average satisfaction rating for the restaurants is 8.3/10. However, restaurant satisfaction scores vary according to visitor origin

- ▶ **Americans:** With a score of 8.7/10, they are the most satisfied, demonstrating a strong match between their culinary expectations and the local offer.
- ▶ **Americas excluding USA:** Satisfaction is also high (8.4/10), reflecting a generally appreciated dining experience.
- ▶ **France and rest of Europe:** Satisfaction was decent (8.1/10), but slightly lower, perhaps due to more demanding culinary expectations.
- ▶ **Middle East:** Satisfaction is more limited (6.4/10), possibly due to cultural differences or a lack of suitable options.
- ▶ **Asia:** A moderate score (5.6/10), highlighting a noticeable gap between visitors' expectations and the culinary offering.
- ▶ **Africa:** With a score of 4.3/10, they express the lowest level of satisfaction, suggesting a significant mismatch between their expectations and the experience on offer.

### Intention to return

- ▶ 79.8% of respondents say they plan to return to St Barths, an increase compared to 2022 (77.3%).

## 3.2. Online Search Trends

### Focus on the US Market :

Overall, Google searches by Americans for St Barths have been increasing over the past five years. Searches peaked this season during the Holiday Season between Christmas and New Year's Day in 2024, indicating a growing interest in the destination.

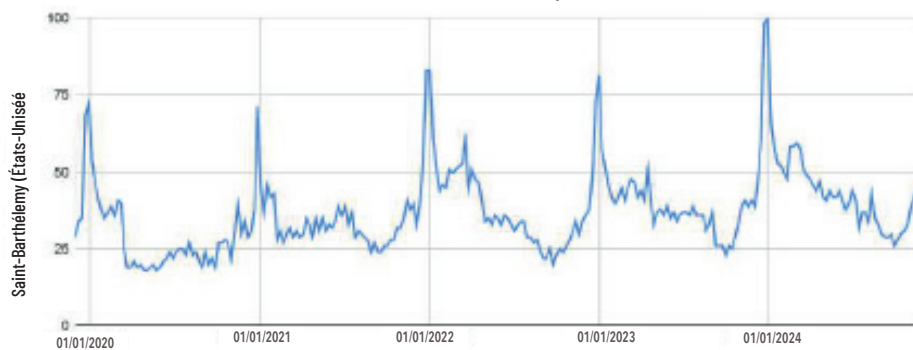
When comparing the travel demand of Americans to St Barths during the Holiday Season (from November 18, 2023, to January 2, 2024) using Google Destination Insights, it is evident that the demand during this period is generally higher or equal to that of the previous period, confirming a stable, if not growing, enthusiasm for St Barths among American travelers.



Source: Google Destination Insights, USA to Saint-Barthélemy, period from 18/11/2023 to 02/01/2024

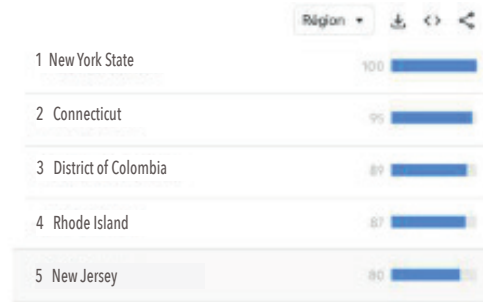
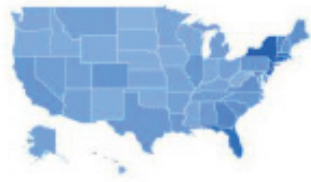
In addition, searches by region show that searches for Saint-Barthélemy are particularly high in New York State, Connecticut, the District of Columbia, Rhode Island and New Jersey. If we look at the US cities that generate a particularly high number of Google searches for Saint-Barthélemy, the top 5 include Aspen, New York's prestigious Connecticut suburbs (New Canaan, Greenwich and Darien) and Miami Beach.

### Evolution of Google Searches in the USA for St Barths, Last Five Years



Source: Google Trends, period from Sept. 01, 2023 to August 8, 2024

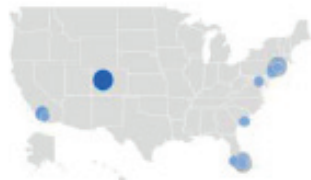
### Searches by Region



Source: Google Trends, period from Sept. 01, 2023 to August 8, 2024

For Americans, Eden Rock is one of the top 10 searches associated with St Barths. Other brands, such as Cheval Blanc St Barths, Poupette St Barth, Calypso, and Nikki Beach, also appear in related searches.

### Searches by Region

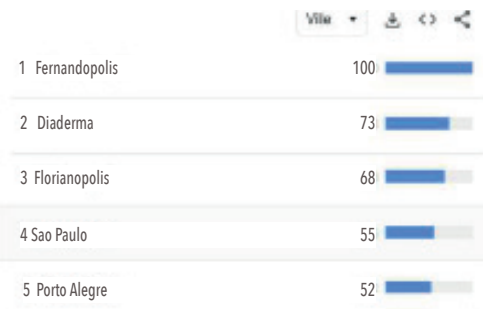


Source: Google Trends, period from Sept. 01, 2023 to August 31, 2024

### Focus on the Brazilian Market:

Among the searches related to St Barths on Google by Brazilians from December 1, 2021, to August 30, 2024, the island's luxury hotels top the list: first is Eden Rock, followed by Cheval Blanc, Rosewood Guanahani, Toiny, Sereno, Christopher, and Nikki Beach.

### Searches by Region



Source: Google Trends, period from Sept. 01, 2023 to August 31, 2024

### 3.3. Key Tourism Trends

The tourism and luxury hospitality sectors are constantly evolving to meet the expectations of travelers. Here are some current trends illustrated by examples from popular destinations:

#### Wellness Tourism

Travelers are seeking immersive wellness experiences, including personalized retreats and holistic treatments. This segment is expected to grow by 16.6% annually by 2027<sup>3</sup>.



*Six Senses Douro Valley (Portugal) and Chenot Palace Weggis (Switzerland)*

#### Exclusive Getaways and Tailored Experiences

Travelers are increasingly seeking exclusive and spontaneous getaways to escape the daily grind. In response, companies like Marriott International and Sotheby's<sup>4</sup> are auctioning off unique experiences, focusing on key areas such as jewelry, fashion, watchmaking, and fine art, offering personalized stays to the highest bidders.



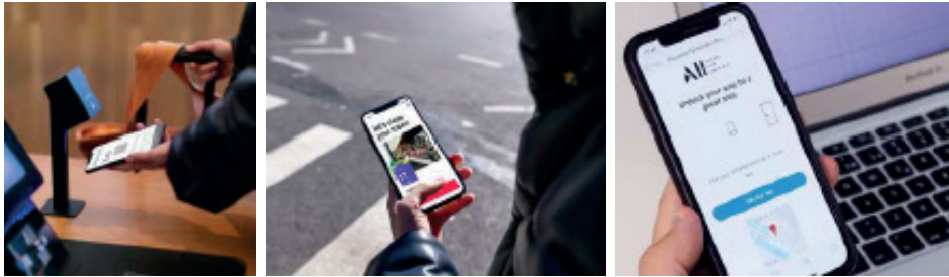
*Whisky Reverie presented by Ritz-Carlton and AlexanderMcQueen Discovery presented by EDITION*

<sup>3</sup> Luxury Travel Trend Watch: 2025, Virtuoso & Globetrenter, 2024

<sup>4</sup> Sotheby's and Marriott International: auctions for exclusive experiences, Journal du Luxe

## Technological Revolutions in Hospitality

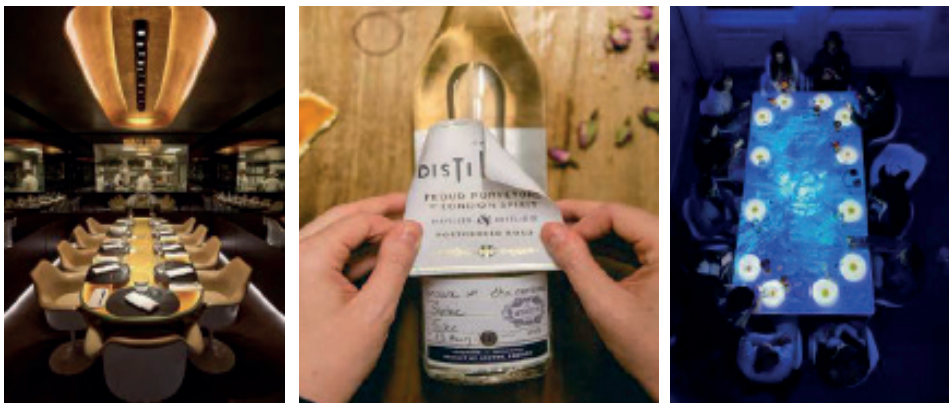
The adoption of innovative technologies is transforming the hotel experience, offering more personalization and convenience. For example, digital keys accessible via smartphones simplify access while enhancing security. Artificial intelligence, on the other hand, analyzes preferences to provide tailored recommendations, while virtual and augmented reality allow for immersive tours of the facilities before booking. Finally, mobile apps streamline stay management and communication with staff, optimizing the overall user experience.



*Check-in at Citizen M, Accor Key hotels (Accor Group)*

## Culinary Discovery: Experiences, Authenticity, and the Senses in the Spotlight

Many hotels are innovating by offering unique and interactive culinary experiences. Among these initiatives are four-hand dinners, where a guest chef collaborates with the hotel's chef, as well as meals served directly in the kitchen, providing guests with a unique immersion. Some establishments also feature in-room cooking spaces or offer specialized classes, such as making your own gin, cooking local dishes, or learning to bake bread with experts, creating memorable and personalized moments.



*La Table du Chef - Meurice Alain Ducasse, The Ginstitute Experience and Kitchen Theory*

## Preserving the environment while optimizing resources

Environmental concerns are driving hotels to adopt sustainable practices: reducing plastic use, utilizing renewable energy, and collecting both rainwater and greywater. Energy-efficient technologies (LEDs, HVAC, solar panels) and room automation help optimize resources, while recycling, composting, and alternatives to disposable products are becoming widespread. Some hotels go even further, surpassing the goal of carbon neutrality to aim for a net positive impact, as demonstrated by initiatives in “regenerative tourism”.



*Grey water recycled for irrigation and WCs at Bucuti & Tara Beach Resort (Aruba), hydro turbine power generation at Ulaman Ecolodge (Bali) and regenerative tourism at Aguas Claras Hotel (Costa Rica)*

## Local products

By incorporating local ingredients into their menus, hotels and restaurants support the local economy while reducing their carbon footprint. At the same time, the creation of eco-friendly gardens with native plants preserves biodiversity, provides guests with calming spaces, and creates an authentic connection between the land and the plate.



*Cuisine from the organic gardens of Song Saa Resort (Cambodia) and a visit to the banana plantations and gardens of True Blue Boutique Hotel (Grenada).*

- ▶ **Soneva Fushi, Maldives:** This resort is a pioneer in sustainability, with initiatives such as waste recycling and the use of solar energy.
- ▶ **Whitepod Eco-Luxury Hotel, Suisse:** Offering eco-friendly pod accommodations, this hotel minimizes its environmental impact while providing a luxurious experience.



## 4. Accommodation Market Analysis

### 4.1. Hotel Industry Overview

In 2024, the hospitality sector comprises 26 establishments, including hotels, residences, and guesthouses, with a total of 536 rooms. Nearly half of these are luxury properties, including 5-star hotels and palaces.

There are two main categories of hotel accommodations on the island:

- ▶ Luxury hospitality, consisting of 5-star hotels and high-end palaces.
- ▶ Independent hospitality, consisting of hotel residences, small hotels, guesthouses, and eco-lodges.

ESTABLISHMENT NAME	ESTABLISHMENT TYPE	NEIGHBORHOOD
CHEVAL BLANC SAINT BARTHÉLEMY	LUXURY HOTELS	FLAMANDS
CHRISTOPHER ST-BARTH	LUXURY HOTELS	POINTE MILOU
EDEN ROCH - ST BARTH	LUXURY HOTELS	SAINT JEAN
GYP SEA HOTEL	LUXURY HOTELS	COLOMBIER
HOTEL BAIE DES ANGES	INDEPENDANT HOTEL	FLAMANDS
LA PRESQU'ÎLE	INDÉPENDENT HOTEL	GUSTAVIA
LE BARTHÉLEMY HÔTEL & SPA	LUXURY HOTELS	GRAND CUL-DE-SAC
LE CARL GUSTAF	LUXURY HOTELS	GUSTAVIA
LE P'TIT MORNE RÉSIDENCE	INDEPENDENT HOTEL	COLOMBIER
LE SERENO	LUXURY HOTELS	GRAND CUL-DE-SAC
LE TOINY	LUXURY HOTELS	TOINY
LE VILLAGE SAINT-JEAN	INDEPENDENT HOTEL	SAINT JEAN
LES ILETS DE LA PLAGE	INDEPENDENT HOTEL	SAINT JEAN
LES ONDINES	INDEPENDENT HOTEL	GRAND CUL-DE-SAC
MANAPANY	INDEPENDENT HOTEL	ANSE DES CAYES
PEARL BEACH ST BARTH	INDEPENDENT HOTEL	SAINT JEAN
ROSEWOOD LE GUANAHANI	LUXURY HOTELS	GRAND CUL-DE-SAC
SUNSET HÔTEL	INDEPENDENT HOTEL	GUSTAVIA
TROPICAL HÔTEL	LUXURY HOTELS	SAINT JEAN
VILLA LODGE 4 EPICES	INDEPENDENT HOTEL	GRAND CUL-DE-SAC
HÔTEL LES MOUETTES	INDEPENDENT HOTEL	LORIENT
FLEUR DE LUNE	INDEPENDENT HOTEL	SALINES
AUBERGE TERRE NEUVE	INDEPENDENT HOTEL	TERRE NEUVE
AUBERGE DE LA PETITE ANSE	INDEPENDENT HOTEL	FLAMANDS
SALINES GARDEN COTTAGE	INDEPENDENT HOTEL	SALINES
AU CŒUR CARAIBE	INDEPENDENT HOTEL	VITET

## 4.1.1 Hotel Performance Analysis

### Methodological details - Tourism Observatory Survey

As part of the CTTSB's Tourism Observatory, an annual survey measures the island's hotel performance. For the 2023-2024 season, 14 hotels participated: Rosewood Le Guanahani, Le Christopher, Le Barthélemy, Le Tropical, Le Sereno, Eden Rock, Le Toiny, Villa Marie, Le Carl Gustaf, Cheval Blanc, Hôtel Le Village, Les Ilets de la Plage, Fleur de Lune, and Les Mouettes.

Data comes from a representative sample of 14 hotels. Sample size varies by question, and the results presented are aggregated averages. No individual hotel data will be published.

For the 2023-2024 season, hotel occupancy rates in St Barths show a slight decline compared to the previous season (2022-2023) across several key months, though signs of improvement are seen toward the end of the season. The average annual<sup>5</sup> occupancy rate for the hotels in the sample is 64.6%, compared to 68.1% the previous year.

Notably, there was a slower start to the tourist season, with lower hotel occupancy rates during the high season from November to February. In November 2023, the occupancy rate was 65.2%, compared to 70.4% the previous year (-5.2 percentage points). In December, the rate stood at 68.6%, down from 75.5% in 2022-2023 (-6.9 percentage points). This decrease is significant for a month typically boosted by the holiday season.

A notable increase is recorded in March 2024, with an occupancy rate of 77.1%, up from 75.2% in 2022 (+1.9 percentage points). This month stands out as the peak of the 2023-2024 season. Similarly, the improvement in May (+5.4 percentage points) is a positive signal for a potential extension of the tourist season. Finally, the summer months show stable occupancy rates, with a slight improvement in July 2024 (52.7% average occupancy, compared to 51.5% the previous year, +1.2 percentage points). While most hotel operators reported higher occupancy rates in the summer in previous years, it seems the trend in recent years has been relatively lower summer occupancy levels.

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<sup>5</sup> Excluding the months of September and October, when many of the island's hotels close.

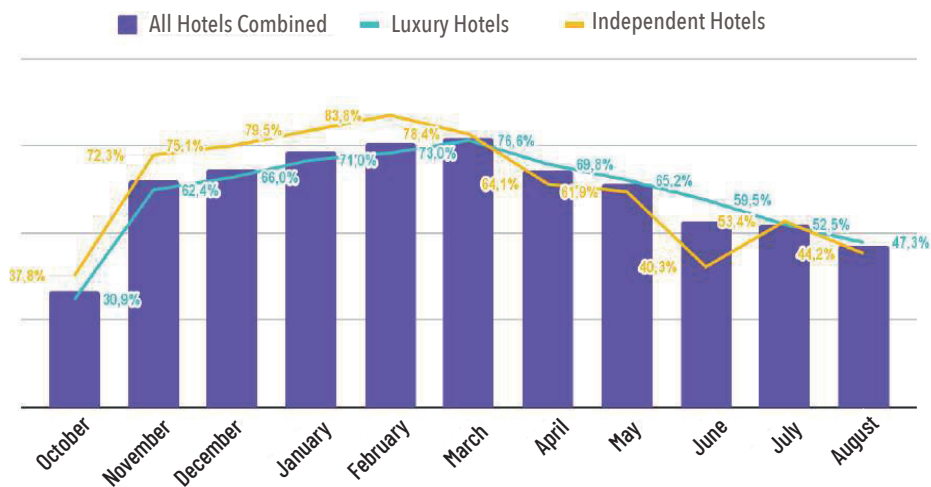
## Monthly Hotel Occupancy Rates



Source: Tourism Observatory annual survey, 2023-2024

Independent hotels generally outperform luxury hotels during the high season (November to March), with a peak in March. This trend can be attributed to greater pricing flexibility and typically more loyal demand. In the low season (April to August), the gap narrows. Luxury hotels tend to remain more attractive in April and May, possibly due to a more accessible pricing strategy during this off-season period.

## Hotel Occupancy Rates, 2023-2024 Season

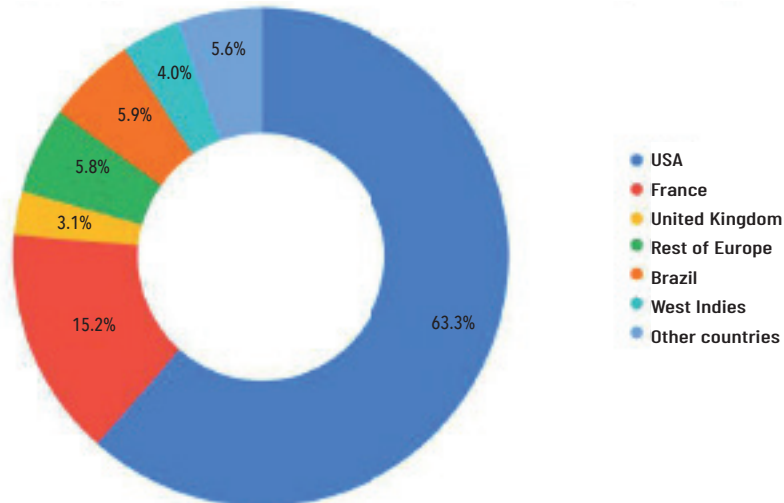


Source: Tourism Observatory annual survey, 2023-2024

## 4.1.2. Hotel Guest Profile

It is interesting to note that the geographical origins of tourists vary considerably depending on the type of hotel establishment in St Barths.

### Countries of Origin of Hotel Guests for the 2023-2024 Season (Estimates)



Source: Tourism Observatory annual survey, 2023-2024

### A predominantly American clientele

The clientele of hotels in St Barths is primarily made up of American visitors, who account for 63.3% of guests across all establishments. This trend is even more pronounced in luxury hotels, where American clients make up 71.4% of the total occupancy.

- ▶ Among high-end hotels, several establishments report that over 75% of their guests are American, indicating the island's strong appeal to this market, particularly for short winter stays.
- ▶ In contrast, in independent hotels, the proportion of American clientele is much lower, at 43.1%. This difference can be attributed to more flexible pricing strategies and offerings that better cater to visitors seeking authenticity and longer stays.

### An unevenly represented French clientele

France is the second-largest source market, with 15.2% of the total hotel clientele. However, this proportion varies significantly across hotel segments:

- ▶ In luxury hotels, the French clientele remains limited, with only 7.6% on average. According to hotel managers, this can be explained by French visitors' preference for more affordable accommodations and some reluctance towards the price increases observed in recent years.

- ▶ In contrast, in independent hotels, French visitors make up a significant portion of the clientele, reaching 34.3%. This preference may be linked to a desire for cultural proximity, longer stays, and an attractive price-quality ratio.

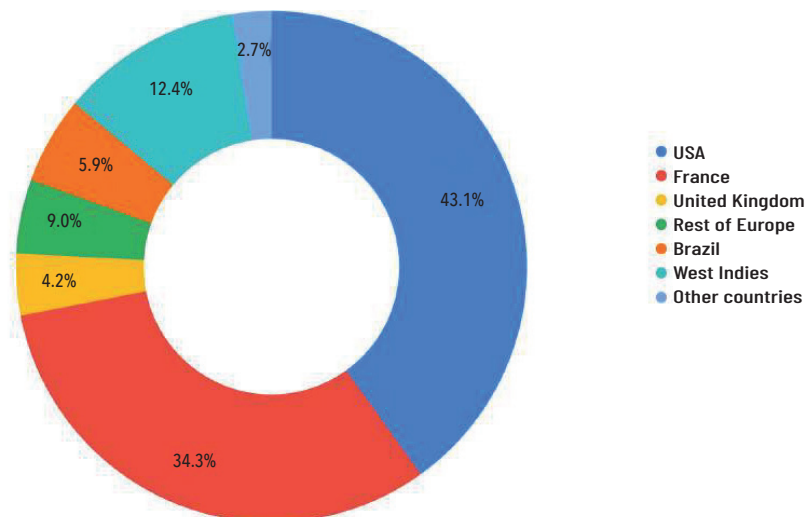
### A declining European market

The rest of Europe, while still present, represents only 5.8% of visitors. In luxury hotels, this proportion is slightly higher (6%), but still low compared to the American market. According to hotel managers, this underrepresentation of European guests can be attributed to the increased competition from other high-end destinations in the Mediterranean or the Caribbean, as well as the high costs of airline tickets, especially during the summer months.

### The emergence of other markets

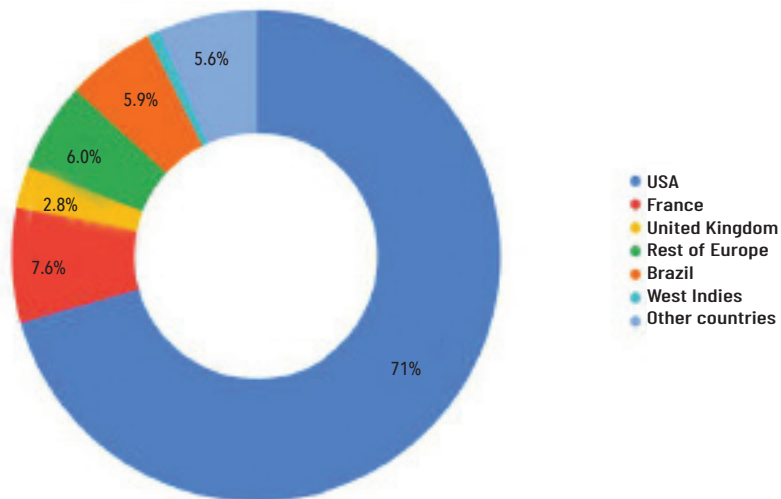
- ▶ Brazil stands out for its stability, accounting for 5.9% of the overall clientele, with this figure remaining consistent across all hotel segments. The Brazilian market represents an opportunity for several establishments looking to diversify their clientele.
- ▶ The West Indies, with 4% of visitors across all hotels, shows significant disparities. In luxury hotels, this clientele is nearly absent (0.8%), while it represents a significant portion of guests in independent hotels (12.4%), particularly due to short stays and geographical proximity.

Country of origin of guests in independent hotels



Source: Tourism Observatory annual survey, 2023-2024

### Country of origin of guests in luxury hotels



Source: Tourism Observatory annual survey, 2023-2024

The average length of stays on the island, across all hotels, remained stable at 5.5 nights compared to the previous period.

However, while the overall length of stays remains steady, dynamics vary significantly depending on the positioning of the establishments and the specific expectations of the clientele:

- ▶ In independent hotels, stays now average 7.4 nights, a decrease from the 8.7-night average in 2022. This decline is attributed to rising airfare combining multiple destinations in one trip (e.g., Anguilla, Bahamas). Despite this, these establishments maintain a loyal clientele, often European, who prefer longer stays.
- ▶ In contrast, luxury hotels have seen a slight increase, rising from 4.5 nights in 2022 to 4.9 nights for the 2023-2024 season. This increase reflects the expectations of a predominantly American clientele, which favors short but intense stays, often for long weekends or private events.

### 4.1.3. Housing and Hotel Staff

Across all hotels, establishments employ an average of 60 full-time employees and 61 seasonal or temporary workers, reflecting a strong reliance on seasonal labor, essential to handle peak activity, especially during the high season.

- ▶ Luxury hotels require a significant workforce, with an average of 81 full-time employees and 84 seasonal or temporary workers. This increased workforce is due to high service quality demands, personalized hospitality, and the management of complex facilities (e.g., spas, restaurants, concierge services).
- ▶ In independent hotels, the need for staff is notably lower, with an average of 6 full-time employees and 4.5 seasonal staff. These hotels, often smaller in size, offer more limited services, which reduces their workforce needs.

**Housing** The issue of housing is a major concern for hotels on the island due to the shortage of accessible accommodations and high costs. The 15 hotels surveyed in the study have a total of 371 employee accommodations and rent 337 others, highlighting the significant efforts made to house their workforce.

In luxury hotels, on average, each hotel owns 40 housing units and rents 37 for its employees. The large size of the teams and the need for employee housing require significant investments in housing solutions. Some hotels have even developed dedicated facilities to attract and retain staff, despite the high costs involved.

In independent hotels, with an average of 2 owned accommodations and 1 rented accommodation per hotel, establishments face more significant constraints in housing their staff. This is mainly due to their limited capacity and smaller budgets for investing in housing.

#### 4.1.4. Hotel Interviews: Trends and Challenges

Fifteen interviews with hotel managers on the island enriched the analysis with trends and provided insights shared by local hoteliers.

##### **Clientele Profile:**

The majority of guests are American (60-80% depending on the hotel), followed by the French. Brazilians are identified as an emerging market by several establishments.

##### **Growing Segment:**

Another current trend observed is the increasing number of privatizations of establishments for weddings or anniversaries, particularly in the low season.



##### **Booking Trends:**

Hoteliers confirmed a growing demand for short stays of 4 to 6 nights, replacing traditional long stays. Bookings are increasingly last-minute (reduced window to 30 days). Online Travel Agencies (OTAs) like Booking.com play an increasing role for smaller establishments, although luxury hotels prefer direct bookings or bookings via travel agencies.

##### **Next-Generation Clientele:**

Changes in behavior are being observed, with a younger and more festive clientele attracted to beach clubs and trendy restaurants, while repeat guests continue to seek the tranquility and authenticity of the island. Repeat visitors represent a significant segment, between 40 and 50% in many establishments. According to the hoteliers interviewed, visitors are typically aged between 35 and 75, but some hotels are seeing an increasing number of younger clients.

##### **Activities Sought by Tourists:**

There is strong demand for festive experiences in certain establishments in the St. Jean Bay, while other hotels elsewhere on the island still emphasize tranquility and authenticity. Several hoteliers would like the island's positioning and its core identity to be more clearly defined. Although opinions vary significantly by hotel type, the majority of hotels wish to prioritize exclusive and sustainable tourism over party tourism, highlighting authenticity and the French art of living.



## Environmental Responsibility:

Several of the hotels interviewed have developed sustainable initiatives such as electric cars, waste sorting, responsible cooking, support for local coral protection associations, and solar energy production



## Key Challenges for the Destination:

Finally, hoteliers shared observations on the evolution of the destination and raised major challenges:

- ▶ **Price Increases:** Post-COVID, hotels and villas have significantly raised their rates, leading to a drop in demand during certain periods. Several hotels mention that guests have become more discerning and price-sensitive.
- ▶ **Traffic and Infrastructure:** Ongoing concerns about road congestion and lack of parking spaces.
- ▶ **Juliana Airport (SXM):** The airport has been criticized for frequent delays and the absence of a true VIP service, which negatively impacts the customer experience for some guests.
- ▶ **Regional Competition:** Destinations like Anguilla, Antigua, and Turks & Caicos are gaining ground with enhanced air services and more aggressive pricing policies.

## 4.1.5. Pricing Policy Analysis:

### Methodological Details

A collection and analysis of the prices displayed by hotels was carried out to create this summary. The prices presented are general averages, rounded to the nearest hundred, and were recorded at different times: during the Holiday Season, in January-February, and in May-June. However, it is important to emphasize that these prices are purely indicative. Several hotels on the island have implemented dynamic pricing systems, so prices may vary within the same establishment depending on various factors such as the date of search, the period of stay, supply and demand, or even the geographical location of the user at the time of booking (e.g., price differences depending on whether the user's IP address is from the US or Europe).

The analysis of the pricing policies of hotels in St Barths reveals significant differences between hotel categories (luxury hotels and independent hotels), depending on the time of year: the Holiday Season, the high season (December to mid-April), and the low season (May to August).

### Pricing During the Holiday Season: A Time of Maximum Exclusivity

The Holiday Season, corresponding to the week between Christmas and New Year's, features particularly high prices, reflecting the strong demand and exclusivity of the destination. This period is often accompanied by minimum stay requirements, ranging from 7 to 10 nights in certain luxury hotels, which helps maximize revenue over a short period.

- ▶ **Luxury Hotels:** Prices range from €1,700 to €12,000 per night, with the most prestigious establishments reaching the highest levels, while others offer high, but relatively more accessible, prices.
- ▶ **Independent Hotels:** Prices range from €300 to €900, reflecting a more flexible positioning and catering to a diverse clientele. Some establishments offer excellent value for money during this period.

### High Season: Stabilization of Prices at High Levels

Between January and mid-April, hotel prices drop slightly compared to the Holiday Season, while still remaining high to meet continued strong demand:

- ▶ **Luxury Hotels:** Prices range from €1,100 to €7,000, with significant variations between hotels.
- ▶ **Independent Hotels:** Prices range from €300 to €900, reflecting a more flexible positioning and catering to a diverse clientele. Some establishments offer excellent value for money during this period.

## Low Season: Price Flexibility to Stimulate Demand

The low season, primarily covering the months of May and June, is marked by a reduction in prices to attract a broader clientele:

- ▶ **Luxury Hotels:** Prices are significantly reduced, ranging from €700 to €3,200. The most luxurious hotels offer rates starting from €1,000 to €1,500, while some five-star hotels offer deals starting around €700 to €900. This period is often accompanied by attractive promotions (e.g., free night offers, early bird discounts).
- ▶ **Independent Hotels:** The most affordable prices of the year are seen here, ranging from €120 to €600. Independent hotels stand out for their accessibility while still offering an attractive range of services.

## Pricing Strategies Observed in Hotels in St Barths

Hotels in St Barths deploy various pricing strategies to attract and retain their clientele while optimizing their occupancy rates. These practices reflect a desire to adjust offers based on seasons, customer expectations, and market dynamics. Several major trends stand out:

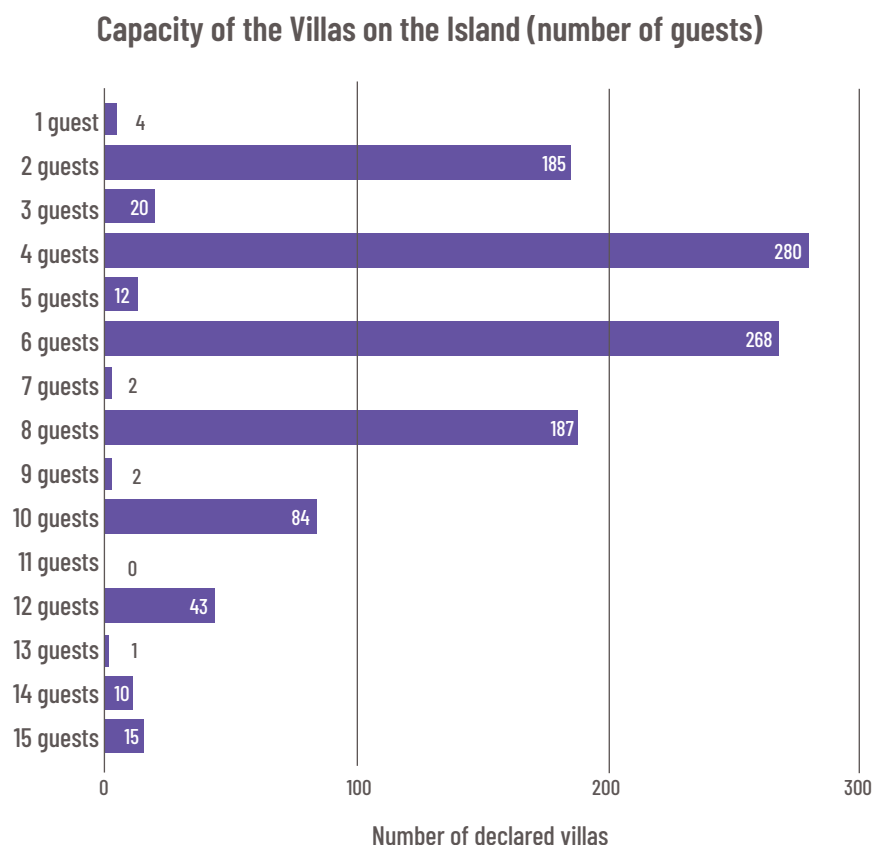
- ▶ **Incentive Promotions for Early Bookings:** Early bird discounts are a common practice. Discounts typically range from 15% to 25% and aim to secure occupancy rates months in advance. This approach allows hoteliers to mitigate risks associated with last-minute bookings, while offering an attractive incentive for proactive clients.
- ▶ **Offers Based on Length of Stay:** Several hotels offer packages tied to the length of stay to encourage bookings during the low and mid seasons:
  - “Stay X nights and get one night free”: A frequently observed practice (for example, 3=2 or 5=4), which rewards customers for extending their stay. This promotes stable occupancy rates and limits room turnover.
  - Offers targeted at weekday arrivals: Discounts of 20% on stays with arrival from Sunday to Tuesday help to alleviate early-week troughs.
- ▶ **Additional Offers for Extended Stays:** Some establishments enhance their offerings with additional perks aimed at encouraging clients to book more nights, such as offering a free car rental for stays exceeding a certain duration.

- ▶ **Specific Policies for the Holiday Season:** During the Holiday Season (late December to early January), hotels typically apply longer minimum stay policies, often between 7 and 14 nights. However, several hotels have shared their decision to relax these minimum stay requirements this season to avoid discouraging potential clients with overly rigid constraints.
  
- ▶ **Customer Experience Personalization (Upselling):** Many hotels offer paid options at the time of booking, allowing guests to personalize their stay. Among the options frequently highlighted :
  - Romantic set-up (flowers, champagne, decorations).
  - Added services for families: cots, children's equipment.
  - Pet services.
  - Reservations for spas or other activities: this enhances the customer experience while generating additional revenue for hotels.

## 4.2. The Villa Rental Market

### 4.2.1 Overview of the Villa Rental Market

1,113 villas have been registered with the local authority. In total, these registered tourist accommodations account for 4,572 rooms, for a total capacity of 6,484 people, with an average capacity of 6 people.



Source: Collectivity of Saint-Barthélemy

The majority of villas on the island sleep between 4 and 6 people, representing 60.4% of the declarations made to the Collectivity :

- ▶ Villas for 4 people dominate the market with 280 of them.
- ▶ They are followed by those accommodating 6 people (268 declarations), and 8 people (187 declarations).

Villas for 2 people are also plentiful, with 185 villas registered, indicating a range suited to couples or small groups. On the other hand, very large-capacity villas, accommodating between 10 and 15 people, are less well represented:

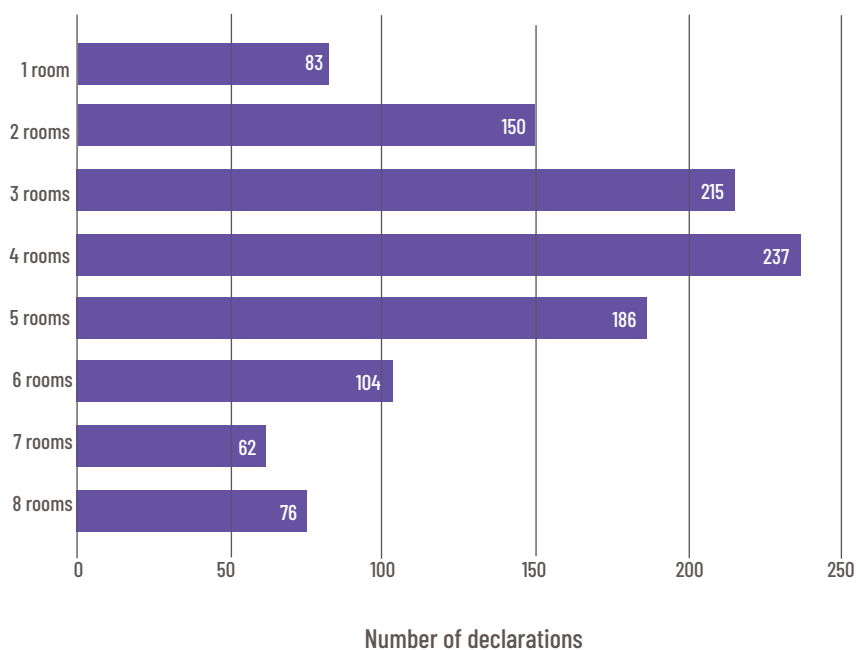
- ▶ 10 people: 84 declarations
- ▶ 12 people : 43 declarations
- ▶ 15 people : only 15 declarations

Finally, villas for intermediate capacities (7, 9 or 13 people) are rarer, with fewer than 3 declarations in each category.

The average size of villas in St Barths is 4.2 rooms per villa. This distribution confirms the predominance of medium-sized villas, with the majority having 3 to 5 rooms (638 listings, or about 57% of the total). Four-room villas stand out as the most represented category with 237 units, followed by three-room villas (215 units) and five-room villas (186 units).

In contrast, smaller villas, with one to two rooms (233 listings), cater to couples or small groups, while larger villas, with seven to eight rooms (138 listings), are rarer and target clients seeking spacious accommodations for groups or large families.

### Accommodation capacity of the island's villas (number of rooms)



Source: Collectivity of St. Barthelemy

## 4.2.2. Villa Rental Performance for the 2023-2024 season

### Methodological Details

The figures presented on the villa market are averages calculated from a sample of villas, collected by the Real Estate Agencies Association of Saint-Barthelemy ("AAISB"). These data are provided for informational purposes only and do not claim to reflect the entirety of the market.

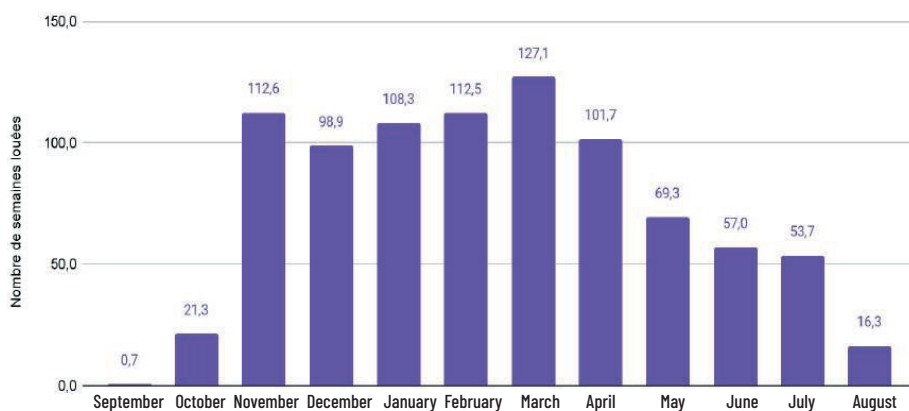
It is important to note that the small number of respondents (3 villa rental agencies) in the first year limits the statistical significance of the results. Therefore, the data should be interpreted with caution, as initial trends to be refined in future analyses.

The analysis of data provided by the Real Estate Agencies Association of Saint-Barthelemy highlights trends in the villa rental market on the island, based on three key indicators: the number of weeks rented, the average duration of stays, and the number of monthly arrivals.

### Marked Seasonality in Rented Weeks

- ▶ **Low season :** October and August show the lowest performance, with only 21.3 and 16.3 weeks rented, respectively. This period corresponds to very low tourist activity due to the closure of many establishments on the island and less favorable weather conditions.
- ▶ **High season:** The period from November to April is the peak season, with a notable peak in March when 127.1 weeks were rented. This confirms the attractiveness of St Barths during the winter months, when demand is highest, particularly among American visitors.
- ▶ **Shoulder season:** The months from May to July show a decline in rented weeks, with figures ranging from 53.7 to 69.3 weeks, marking the transition into the low season.

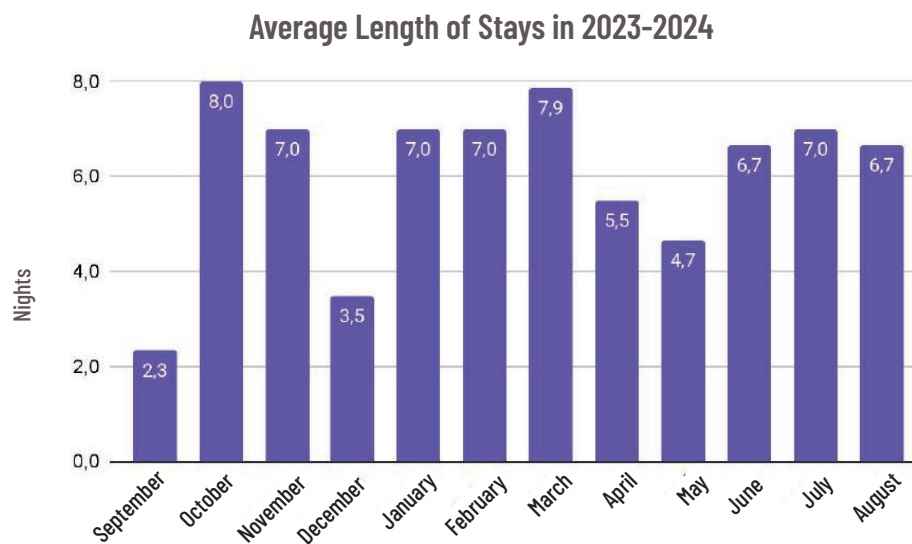
### Average number of weeks rented per month per agency in 2023-2024



Source : AAISB, 2023-2024

## Average length of stays

- ▶ **High season:** Between November and March, the length of stays stabilizes around 7 to 7.9 nights, confirming the dominance of one-week stays, a characteristic of the villa market.
- ▶ **Holiday Season:** The Holiday Season in December has a particularity: despite high demand and minimum stay requirements often imposed by agencies, the average length of stays remains relatively short (3.5 nights), indicating that the clientele is willing to stay for just a few days during this popular period.
- ▶ **Spring and summer:** Starting in April, the average length of stays gradually decreases to 4.7 nights in May. It slightly increases in June and July, ranging between 6.7 and 7 nights, reflecting more fragmented and flexible attendance during this period.



Source : AAISB, 2023-2024

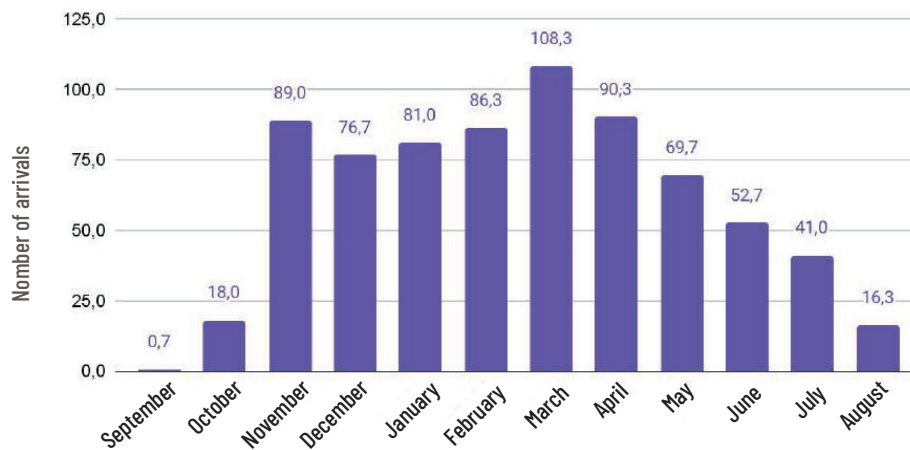


## Number of Arrivals per Month

The number of arrivals follows a similar trend to the weeks rented:

- ▶ November to April shows a clear uptick with a progressive rise: 89.0 arrivals in November, peaking at 108.3 arrivals in March, in line with the rental peaks observed in 2023-2024.
- ▶ Sharp fall at the end of the season: From May onwards, the number of arrivals declines, reaching a low in August with 16.3 arrivals, underlining lower tourist demand in summer.

### Average Number of Arrivals per Month per Agency in 2023-2024



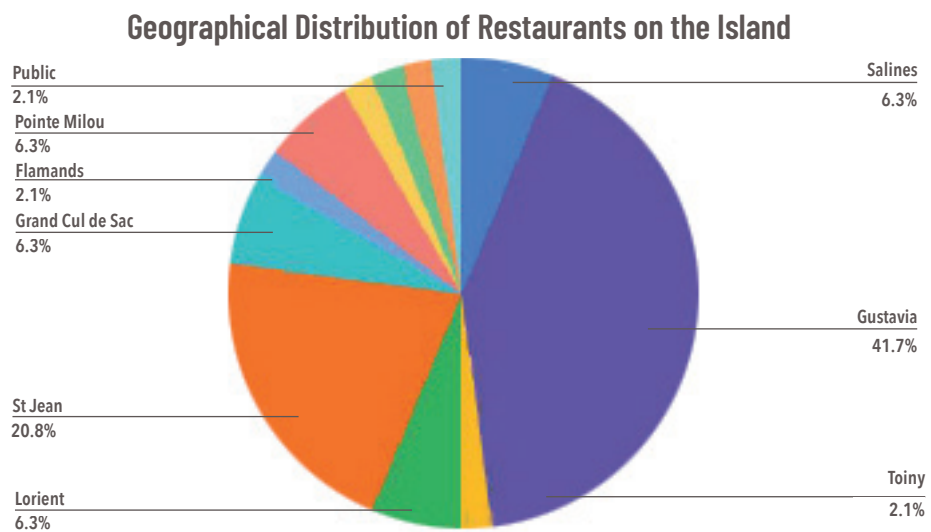
Source : AAISB, 2023-2024

# 5. The Restaurant Industry

## 5.1. Overview of the Restaurant Industry in St Barths

In 2024, the island of St Barths has 65 restaurants and 12 hotel restaurants. The dining options are primarily concentrated in the main areas of the island, Gustavia and St Jean, which house the majority of establishments. Other areas, while less populated with restaurants, still contribute to the variety of offerings by providing complementary culinary experiences.

- ▶ The geographical distribution shows a strong concentration in Gustavia, which accounts for 41.7% of the establishments. This area is the central hub for dining on St Barths, benefiting from its strategic location near shops and its strong tourist appeal.
- ▶ St Jean ranks second with 20.8% of the restaurants. It is the second most dynamic area on the island and popular with tourists.
- ▶ The areas of Pointe Milou, Grand Cul-de-Sac, Salines, and Lorient each account for 6.3% of the establishments, showing a balanced but more limited presence in these zones. Flamands, Toiny, and Public have the lowest proportions, with just 2.1% of restaurants each, reflecting a very limited dining offer in these neighborhoods.



Source: Tourism Observatory survey, 2024

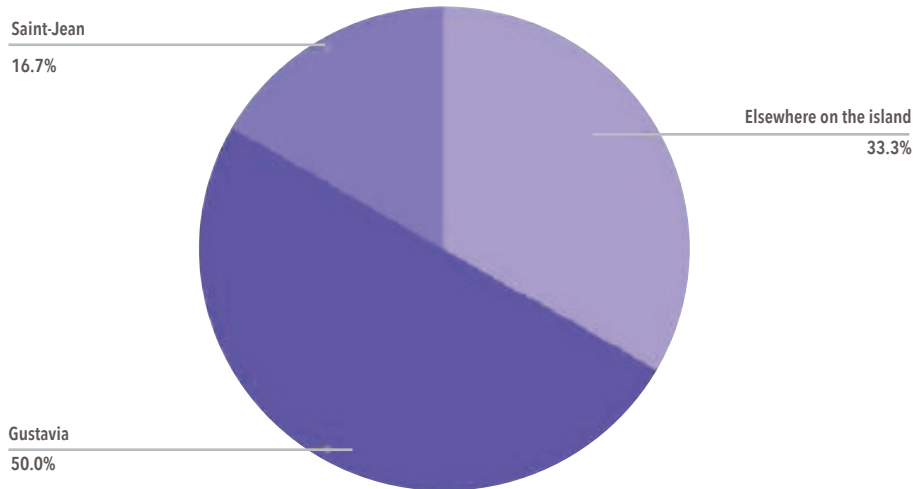
## 5.2 Restaurant Survey Results

### Methodological Details

The data presented in this analysis comes from a survey conducted with restaurants on the island. The limited sample of 6 restaurants does not allow for a comprehensive representation of the entire restaurant industry on St Barths. Therefore, the results should be interpreted with caution, considering the specificities and small size of the sample.

The establishments surveyed were divided between Gustavia (50%), St Jean (16.6%) and the rest of the island (33%).

### Geographical Area of the Restaurants in the Survey



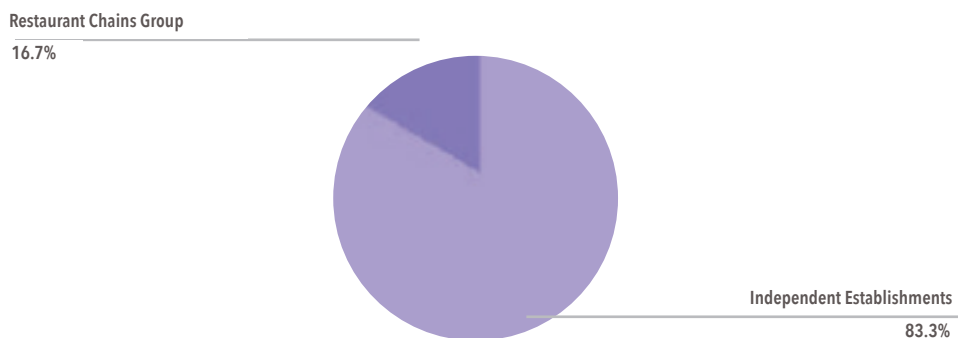
Source: Tourism Observatory survey, 2024

### Establishments Structure

83% of restaurants surveyed are independent establishments.

In terms of age: 3 establishments have been in business for 10 years or more, and 3 opened less than 5 years ago.

### Status of Establishments: Independent Restaurants and Chains on the Island

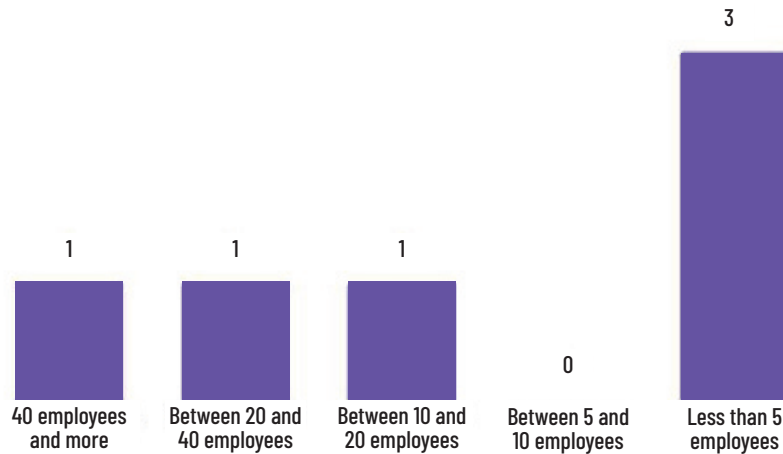


Source: Tourism Observatory survey, 2024

## Staff and Operating Costs

The restaurants in the sample employed an average of 16 staff members. Three of them had fewer than 5 employees, while two had more than 20 employees.

### Employee Numbers of Surveyed Restaurants



Source: Tourism Observatory survey, 2024

On average, 73% of employees are housed by the restaurants, especially in the larger establishments. A strong correlation is observed between the share of tourists in the clientele and the number of employees housed. Restaurants with a high tourist volume typically provide accommodation for their staff. Two restaurants in our sample have housing for their staff, and these are restaurants with more than 20 employees.

Operating expenses (water, electricity, gas, and waste disposal taxes) vary significantly from one establishment to another. However, they typically represent between 2% and 3% of annual revenue.

### Cross-data analysis - Neighborhood Representatives Survey, 2024

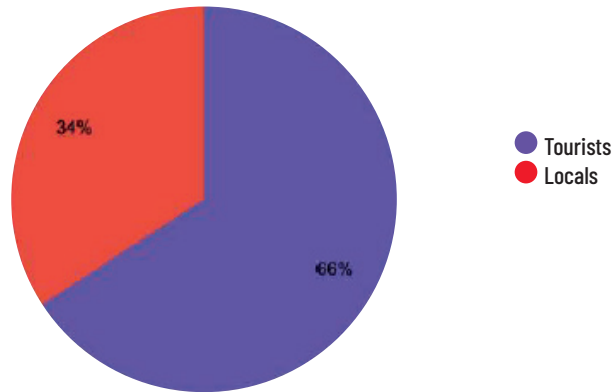
In addition to the data from the Tourism Observatory survey, information collected throughout the year by neighborhood representatives from beach restaurants provides further insights.

Among the surveyed beach restaurants, team sizes ranged from 20 to 50 employees, with an average of 35 employees and a turnover rate of approximately 20%, which is relatively stable in the restaurant industry. They owned about 74% of the housing they provide to their employees. These restaurants reported that, on average, 30% to 40% of their clientele were locals throughout the year.

## Seasonal Traffic

In winter, tourist traffic intensifies. Of the 6 restaurants surveyed, 5 reported a majority of tourists in winter, with 3 welcoming 75% or more of tourists in their clientele.

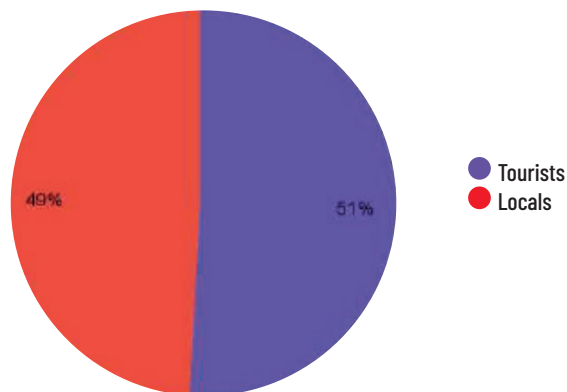
**Clientele Distribution in Winter**



Source: Collectivity of Saint-Barthélemy

In the summer, the proportion of tourists (51%) and locals (49%) is more balanced. Some restaurants rely on local customers year-round. Only one restaurant claims to receive more locals than tourists throughout the year.

**Clientele Distribution in Summer**



Source: Tourism Observatory survey, 2024

## Restaurant activity

During the peak winter season, half of the restaurants in the sample serve lunch, catering to the concentrated tourist demand of this time. When it comes to dinner service, there is a noticeable variation between establishments. One-third of the restaurants report serving over 100 meals each night, reflecting high traffic and large seating capacities. On the other hand, another third serve fewer than 30 meals, highlighting the diversity in offerings and demand. This variation is likely influenced by differences in positioning, location, and the overall capacity of the restaurants.

# 6. Economic Impact of Tourism

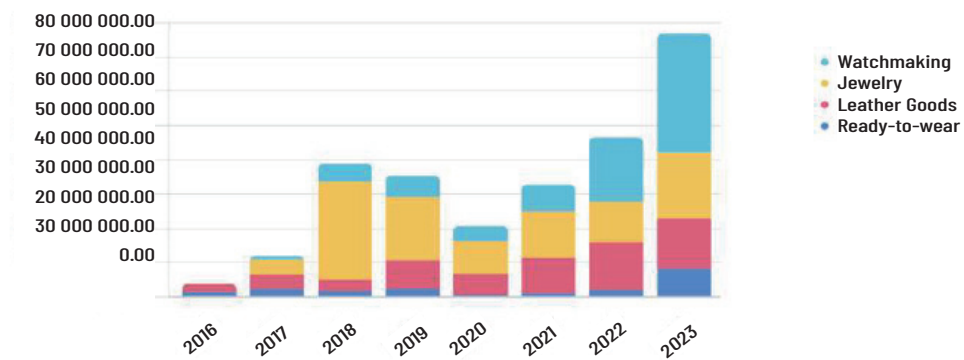
## 6.1. Impact via Luxury Goods Imports

Imported luxury goods to St Barths serve as a key indicator of the economic impact generated by tourism. The luxury products declared at customs for the year 2023 reflect the economic weight of these sectors:

- ▶ **Watches:** €34,759,763
- ▶ **Jewelry:** €19,095,975
- ▶ **Ready-to-wear:** €8,035,682

The total value declared at customs has seen a significant increase since 2016, reaching a peak in 2023 with nearly €75 million. This record year highlights the importance of high-end tourist consumption on the island.

**Total customs declared value of luxury goods imported by category (Euros):**



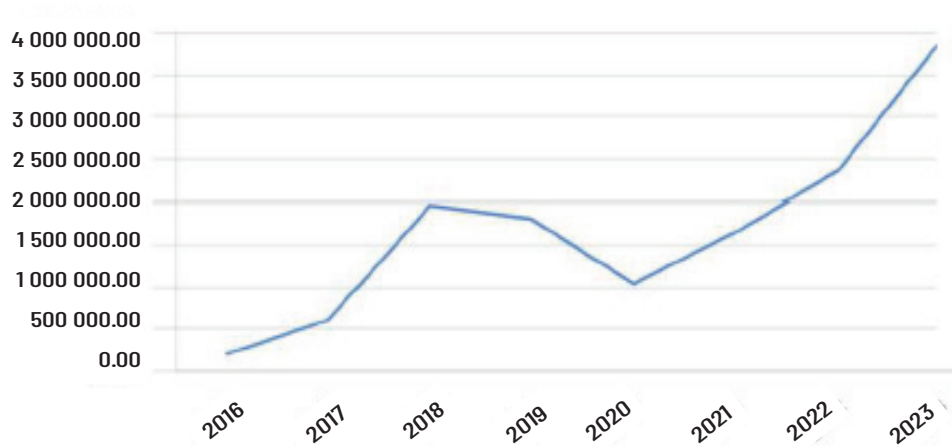
Source: Collectivity of Saint-Barthélemy

- ▶ Watches dominate imports, especially in 2023, when they are expected to rise significantly. This reflects the growing demand for luxury watches on the island.
- ▶ Jewelry has remained consistent, maintaining a significant share of imports since 2018, reflecting tourists' attraction to luxury jewelry. After a slight decline in 2022, this category is set to grow again in 2023.
- ▶ Leather goods have shown steady growth since 2016, with stability from 2022 onward
- ▶ Although less dominant, ready-to-wear continues to contribute to imports, with a significant increase expected in 2023.

This dynamic growth in luxury goods imports is directly linked to the high purchasing power of visitors, who are mainly international clients with substantial spending capacity. The year 2023 stands out, likely due to the full recovery of the post-COVID tourism industry and increasingly discerning customers.

In 2023, imported luxury goods generated **€3,854,890 in revenue for the Collectivity, thanks to taxes collected**. This marks a substantial increase from previous years, setting an all-time high since 2016. This development reflects the growing significance of high-end tourism and luxury goods consumption on the island, making a direct contribution to local tax revenues.

**Tax Collected on Imported Luxury Goods by Category (Euro)**



Source: Collectivity of Saint-Barthélemy

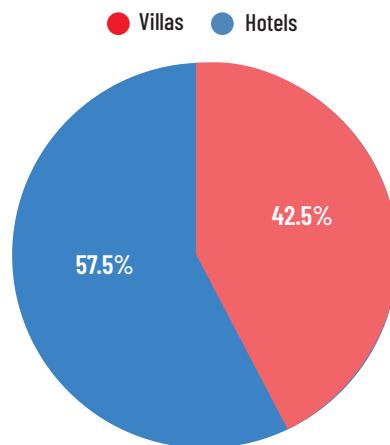
## 6.2. Tourist Tax Revenues

### Understanding tourist tax

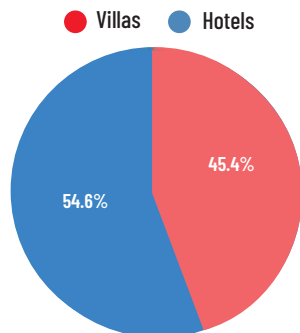
All tourist accommodations in St Barths are subject to a 5% tourist tax based on the net rate per night. This tax, paid by tourists staying in paid accommodations, is collected by hoteliers and villa owners, then paid annually to the Collectivity's Finance Department. It plays a key role in funding the maintenance of tourist facilities, beautification of the island, promotional activities, as well as the development of reception and entertainment infrastructure for both visitors and residents. Additionally, it contributes to the operating budget of the Tourist Office.

For the 2023-2024 season, the total tourist tax amounted to €15,653,750, with 57.5% allocated to hotels and 42.5% to villas, confirming the growing dominance of hotels as major contributors to this tax. This trend marks a significant shift from 2019, when villas accounted for 56.4%. This change can be attributed to hotels' better ability to quickly adapt to the market and demand, as well as their efforts to maximize occupancy.

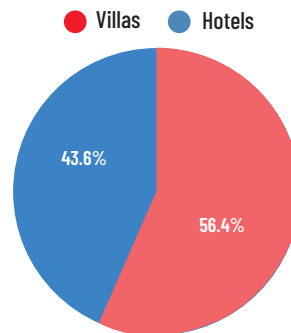
Distribution of the Tourist Tax for the 2023-2024 Season



Distribution of the Tourist Tax in 2022



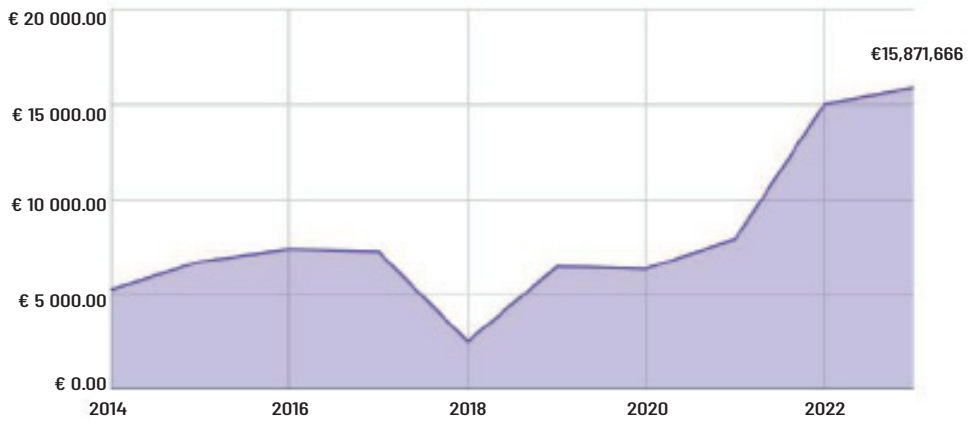
Distribution of the Tourist Tax in 2019



Source: Collectivity of Saint-Barthélemy



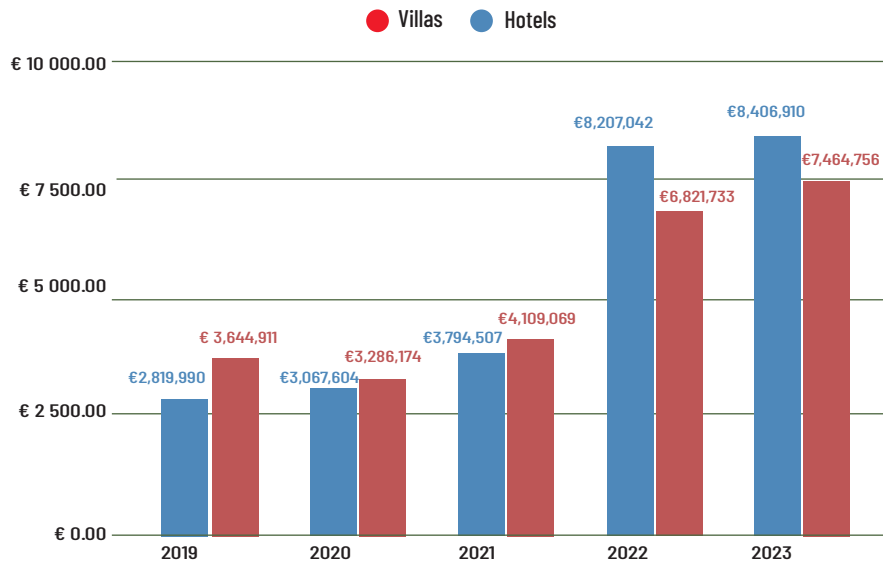
## Evolution of the Tourist Tax Collected, 2014 to 2023



Source: Collectivity of Saint-Barthélemy

The revenue from the tourist tax in St Barths has been steadily increasing in recent years. The revenue grew from €6.71 million in 2019 to €7.96 million in 2021, then to €15.03 million in 2022, and finally reached €15,871,665.97 in 2023. This trend reflects the vibrant tourism activity on the island.

## Distribution of the Tourist Tax Amount



Source: Collectivity of Saint-Barthélemy

In 2023, the revenue from the tourist tax continued to rise, both for hotels and villas. However, in the first half of 2024, while hotel revenue shows an increase compared to the same period last year, villa revenue has slightly declined. This decrease could be attributed to greater difficulty in filling villas during the 2023-2024 season. Indeed, the total tourist tax revenue of €15,653,749.62 for the 2023-2024 season is slightly lower than the 2023 calendar year (€15,871,665.97). This decline appears to be due to the weaker performance of villas, while hotels continue to offset this trend with stable growth.

## 7. Tourism Events Throughout the Year



The 2023-2024 tourist season in St Barths was once again marked by a rich program, ensuring the island's year-round appeal.

In November 2023, the island celebrated the 10th edition of the Gourmet Festival, held from November 7 to 12. This event brought together internationally renowned chefs, showcasing local cuisine and attracting food enthusiasts from around the world. November also marked the launch of the new tourist season, with events such as the Cata Cup, the much-anticipated catamaran regatta.

In December, the Holiday Season once again brought the island to life with exclusive evenings, lavish celebrations, and fireworks lighting up the skies over Gustavia. Then, between January 8 and 22, 2024, the island hosted classical music and jazz concerts in the churches of Gustavia and Lorient, featuring internationally renowned artists and offering visitors a unique cultural experience.

In March 2024, the St Barths Bucket Regatta hosted world-class yachts for spectacular races, showcasing the island's deep connection to its nautical heritage. The event remains a cornerstone of the tourist calendar, attracting a loyal following of sailing and luxury enthusiasts. However, the season was also marked by the cancellation of the 2024 edition of Les Voiles de Saint-Barth, scheduled for April, meaning this flagship event in the island's sporting calendar did not take place this season.

Thus, the diversity of events held throughout the 2023-2024 season allowed St Barths to remain an extremely attractive destination throughout the year.

## 8. Conclusion

The 2023-2024 tourism season report highlights a dynamic year, characterized by continued recovery and solid performance, despite some structural challenges. This season saw strong results across all segments, reinforcing the recovery momentum that began following the health crisis.

In 2023, Rémy de Haenen Airport welcomed 203,754 passengers, a slight decrease of 6.9% compared to 2022, but still 10.5% higher than pre-pandemic levels in 2019. Meanwhile, the Port of Gustavia experienced significant growth, with 347,572 passengers, a 23% increase from 2022. This growth underscores the rising importance of yachting and inter-island traffic, which now account for 66.3% of maritime flows.

The hospitality industry recorded an average occupancy rate of 64.6%, with notable peaks in March, signaling opportunities to extend the tourist season into May. The independent hotel industry performed particularly well during the high season, while the luxury hospitality industry continued to dominate in terms of revenue and attractiveness during the low season. This can be attributed to the significant price differences between luxury and independent hotels during the winter months. At the same time, villa rentals remain a crucial part of the accommodation mix, despite a slight decline in performance this year, as reflected in the tourist tax receipts.

The island continues to be highly appealing to the U.S. market, which accounts for 59% of visitors. The loyalty of these visitors, with a return rate of nearly 80%, reflects the island's sustained appeal, supported by a diverse offering and signature events such as the Holiday Season and the Bucket Regatta.

Finally, the economic impact remains significant, with record revenues from the tourist tax (€15.87 million) and luxury goods imports totaling €75 million in 2023. These figures illustrate the positive impact of high-end tourism on the local economy.

In conclusion, St Barths continues to strengthen its position as one of the world's premier destinations. While the 2023-2024 season reflects sustained recovery and enduring appeal, it is essential to continue refining offerings, diversifying markets, and maintaining a balance between exclusivity, sustainability, and accessibility to ensure the long-term growth of its tourism industry.



# St Barth

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