



Analysis of International Airport Surveys: 2006-2008

FINAL REPORT

By Millay Kogan

For:

**Center for Responsible Travel
A Nonprofit Research Organization
Stanford University and Washington, DC**

*As a component of the project:
“The Impact of Tourism Related Development along Costa Rica’s
Pacific Coast”*

San José, Costa Rica



Analysis of International Airport Surveys: 2006-2008

By Millay Kogan

The following is an analysis of airport surveys that the Costa Rican Tourism board (ICT) conducted from April 2006 to December 2008 with foreign tourists departing from Juan Santamaria International Airport and Daniel Oduber Airport.¹ Juan Santamaria International Airport, located approximately twenty kilometers from the capitol city of San Jose, is Costa Rica's oldest and most popular airport², receiving the majority of the country's tourists arriving by airplane (1,216,180 tourists arrived to Juan Santamaria International Airport in 2008, 1,159,720 in 2007 and 1,067,076 in 2006)³. Daniel Oduber, located in the northern Pacific city of Liberia and commonly referred to as the Liberia airport, also receives arrivals from around the world, yet is smaller in square footage and receives fewer visitors than its San Jose counterpart (the Liberia airport received 204,318 tourists in 2008, 194,853 tourists in 2007 and 161,837 tourists in 2006⁴).

Chart 1: Number of Surveys Analyzed				
	2006	2007	2008	Total
Liberia	2	2	1	5
Juan Santamaria	4	4	1* only includes limited information	9
Total Number of Surveys Analyzed				14

The ICT generally conducts airport passenger surveys at each of the two main international airports four times a year and compiles the statistics (unfortunately, only the first three months of 2009 were available in time to be included here, and thus, were not included in the report). These surveys examine the demographics, spending patterns, and overall travel opinions of tourists interviewed after they had completed their holidays in Costa Rica. While

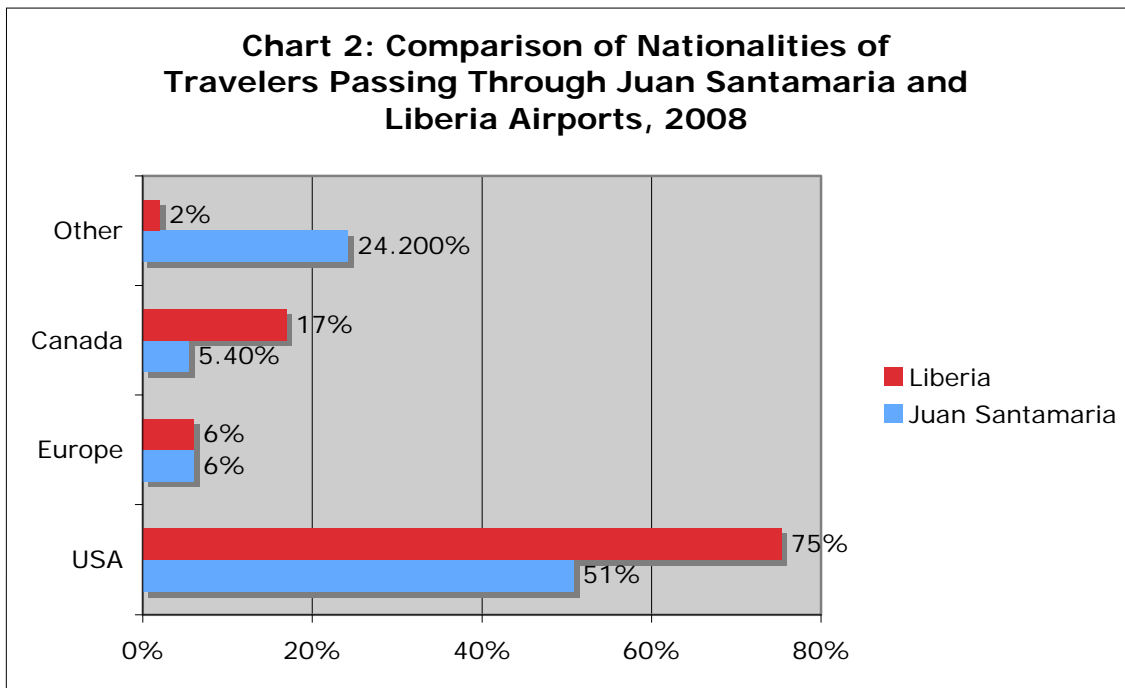
ICT analyzes the surveys from each airport, they do not compare the findings between the airports.

This report seeks to reveal a number of noteworthy differences between those tourists leaving Juan Santamaria International Airport and those leaving the Liberia airport, specifically in terms of the tourists' country of origin, gender, percentage of first-time visitors to Costa Rica, destinations visited in Costa Rica, types of activities, visits to national parks, average nights in the country, star ratings of accommodations, percentage using travel agents, and average amount spent while in Costa Rica. It highlights the most significant of these distinctions, and provides a baseline for which one may eventually be better able to characterize and categorize those tourists visiting Costa Rica.

Country of Origin

While the majority of tourists leaving both Juan Santamaria International Airport and Liberia Airport stated that they were residents of the United States, Canada and Europe, the Liberia airport receives a higher percentage of visitors who are residents of United States and Canada than Juan Santamaria, while Juan Santamaria received more European visitors.

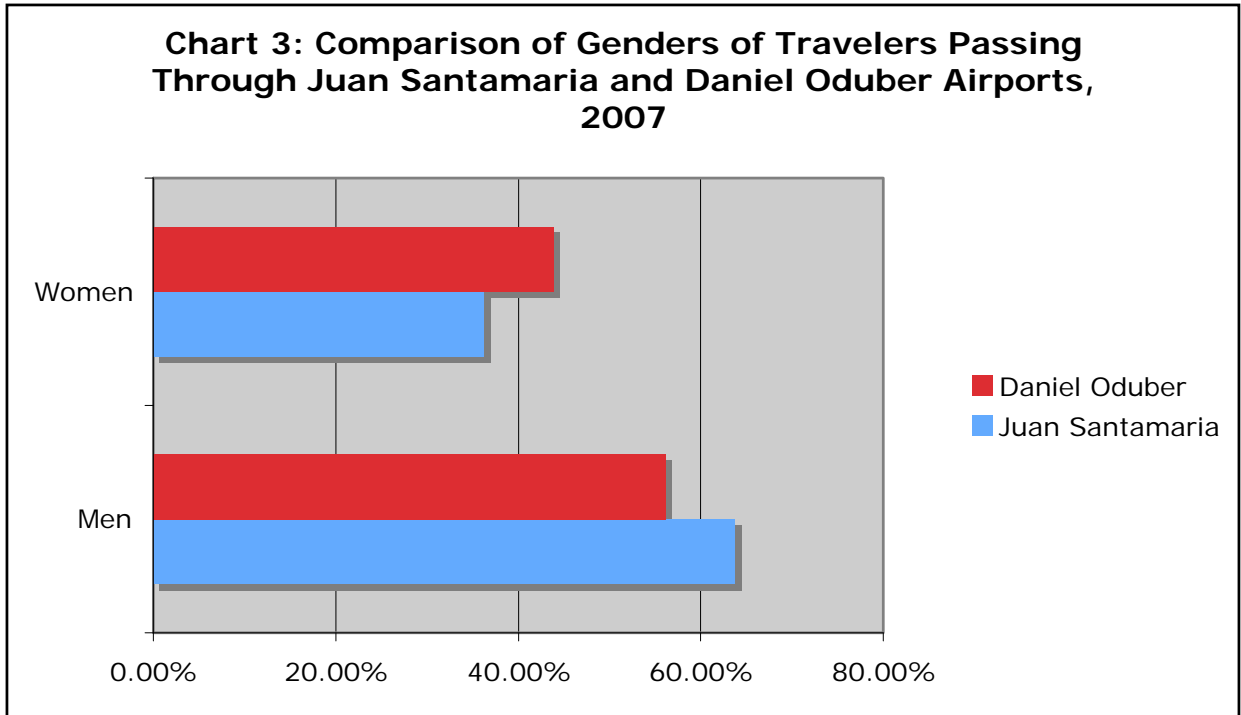
According to the surveys, people from the United States comprised approximately 54.25% of the international tourists in 2006⁵, 54% in 2007⁶ and 50.8% in 2008⁷ departing from Juan Santamaria International Airport, compared to the Liberia airport where an average of 61% were from the U.S. in 2006⁸, 69% in 2007⁹ and 80% in 2008.¹⁰ Canadians comprised approximately 4.75% of tourists in 2006, 5.5% in 2007 and 5.4% in 2008 who left from Juan Santamaria International Airport, compared to an average of 36% in 2006, 25% in 2007 and 14% in 2008 of those departing from the Liberia airport. Europeans constituted approximately 19.25% of tourists in 2006, 18.25% in 2007 and 19.6%% in 2008 of those who left from Juan Santamaria International Airport, compared to an average of 2.85% in 2006 and 6% in 2008 of those tourists surveyed in Daniel Oduber airport. The following chart below illustrates this trend:



One factor that might help to explain this phenomenon is the flight schedule of each individual airport, with Liberia much more heavily dependent on U.S. carriers. (See Annex 1)

Gender of Tourist

The Liberia airport seems to attract a higher percentage of male visitors than Juan Santamaria International Airport. An average of 60.25% of visitors to Juan Santamaria International Airport in 2006 and 63.75% in 2007 were male, while only 53.55% of visitors to the Liberia airport in 2006, 56.15% in 2007 and 53.8% in December 2008 were male. The following chart below illustrates this trend:



Percentage of First Time Visitors to Costa Rica

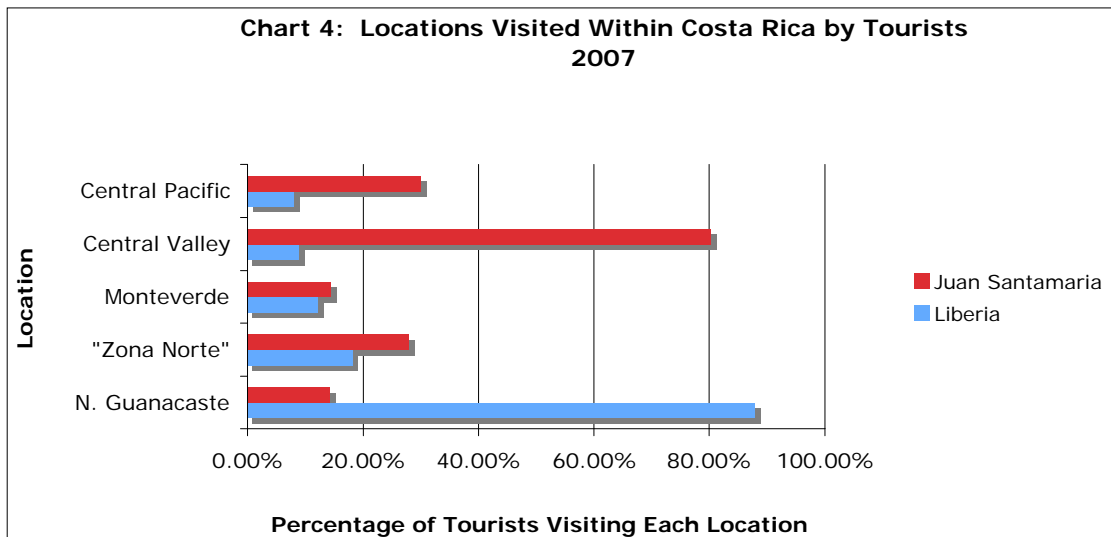
Liberia airport also seems to attract a higher percentage of first-time visitors to Costa Rica. An average of 60% of visitors to Juan Santamaria International Airport in 2006 and 58% of visitors in 2007¹ stated that it was their first visit to Costa Rica, compared to an average of 76% of visitors to Liberia airport in 2006, 76% in 2007 and 71% in December 2008. We can therefore assume that travelers passing through Liberia airport tend to be less familiar with Costa Rica, in general, than travelers passing through Juan Santamaria.

Destinations Visited During Trip

Those tourists passing through Juan Santamaria International airport seem to visit a more diverse number of places and tourists attractions during their stay in Costa Rica than those passing through Liberia airport. According to

¹ Number derived from taking the average of numbers produced by all four *Informe de Encuestas de Turismo 2007: Turistas No Residentes que Salieron por Juan Santamaria* produced in 2007.

the 2007 surveys (which was the only year surveys from both airports asked this question), the vast majority of tourists going through the Liberia airport -- 88% -- visited Northern Guanacaste, while only 18% visited an area known as the Northern Zone ("Zona Norte", which includes the Arenal Volcano and La Fortuna, popular tourist attractions), 12% visited Monteverde, less than 10% visited the Central Valley and less than 10% visited the Central Pacific Coast. The same question posed to those tourists passing through Juan Santamaria International Airport in 2007 showed that approximately 80% visited the Central Valley, 30% visited the Central Pacific coast, 28% visited the "Zona Norte", 15% visited Monteverde and 14% visited Northern Guanacaste. The following chart below (an average of the locations visited according to the 2007 surveys) illustrates this trend:

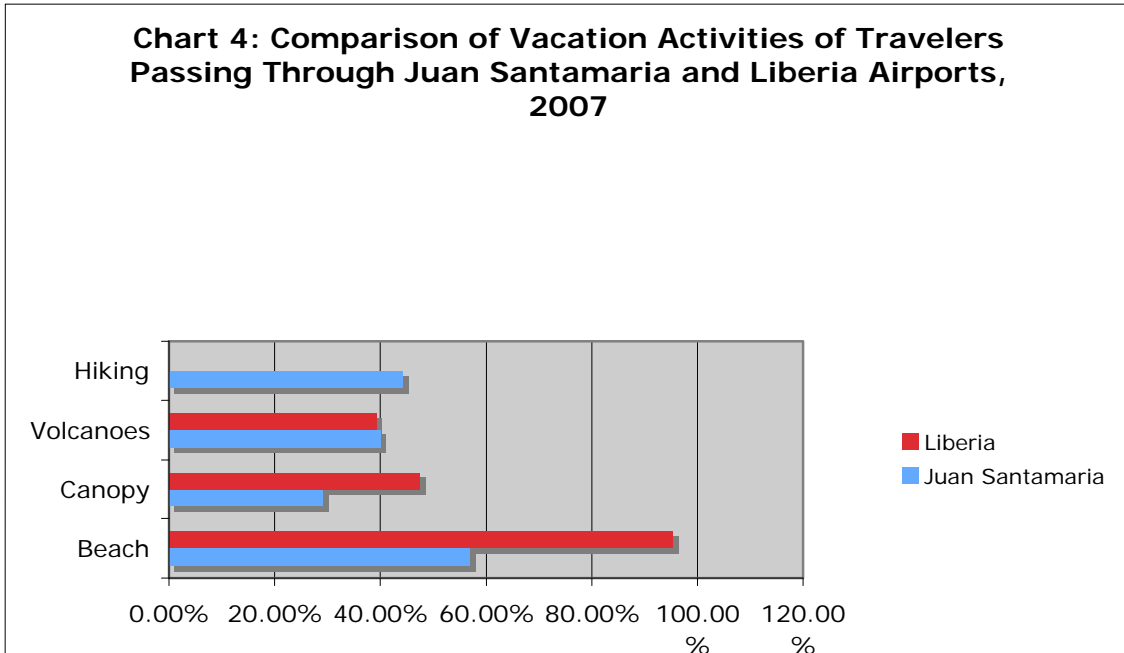


In addition, the trend appears to be for even more tourists using the Liberia airport to stay and spend their holiday at nearby beaches: the December 2008 survey found that 96% of tourists surveyed at the Liberia airport visited North Guanacaste, 87% said their activities included "sun and beach," and 89% said they went on tours in North Guanacaste.

Activities

While the tourists visiting both airports reported participating in a similar set of activities, a far higher percentage of tourists visiting the Liberia airport stated that they participated in activities relating to the “sun and beach” (an average of 92% in 2006, 95% in 2007 and 87% in December 2008) than did those tourists visiting Juan Santamaria (an average of 62% in 2006 and 57% in 2007). Tourists passing through the Liberia airport also seemed, on average, to prefer going on canopy tours than do those visiting Juan Santamaria International Airport (in Liberia, an average percentage of 60% in 2006, 47% in 2007 and 38% in December 2008 reported going on a canopy tour during their stay, while in Juan Santamaria, an average percentage of 30% in 2006 and 30% in 2007 stated the same). Both tourists passing through Juan Santamaria and the Liberia airport seemed to frequent the nearby volcanoes (in Liberia, 40% of tourists visited volcanoes in 2006 and 2007, while in Juan Santamaria, 44.5% of tourists visited volcanoes in 2006 and 40% in 2007). In general, those tourists who passed through the Liberia airport participated in the following activities (listed in order, with highest percentage first): beach, canopy, wildlife, and hiking, while those tourists who passed through Juan Santamaria participated in the following activities (listed in order): beach, volcano, hiking, and canopy. Comparisons between the airports are difficult because the surveys are not always the same either between the two airports or from one year to the next. For instance, “wildlife” is listed in the Liberia surveys but not in the Juan Santamaria one. In addition, the important tourist activity “shopping” is not a category in these surveys. The following chart below illustrates trends evident from the available data:

Chart 4: Comparison of Vacation Activities of Travelers Passing Through Juan Santamaria and Liberia Airports, 2007



Visits to National Parks

A higher percentage of tourists using Juan Santamaria International Airport stated that they had visited national parks than had tourists interviewed at the Liberia airport. Approximately 44% of tourists going through the Liberia in 2006, 45% in 2007 and 34% in December 2008 stated that they had visited a national park during their visit, while 57% of tourists going through Juan Santamaria International Airport in 2006 and 53% in 2007 reported similar responses.

Number of Nights Spent in Costa Rica

On average, tourists passing through Juan Santamaria International Airport spent more time in the country than tourists passing through the Liberia airport. Tourists leaving from Juan Santamaria International Airport stayed an average of 12.5 nights in both 2006 and 2007, while tourists passing through the

Liberia airport stayed an average of 8 nights in 2006, 11 nights in 2007 and 9 nights in December 2008.

Star Rating of Hotels

While the surveys show that similar percentages of tourists who pass through both Juan Santamaria and Liberia airports report staying in three and four star hotels, there was a dramatic jump in the percentage of Liberia travelers who stayed in five-star rated hotels, from just over 3% in 2007 to 65% in 2008. Data for tourists passing through Juan Santamaria is not available for 2008. In addition, the ICT surveys do not ask passengers if they stayed in accommodations also rated under the CST program – data that seems important to collect in the future in order to help gauge consumer interest in sustainable tourism.

The following charts below illustrate this trend:

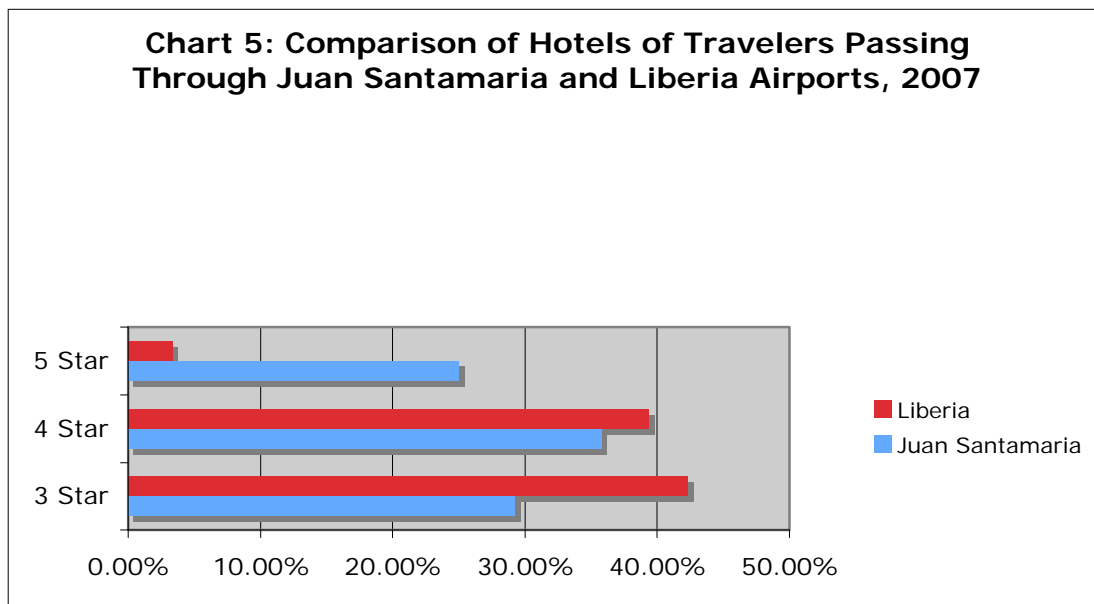
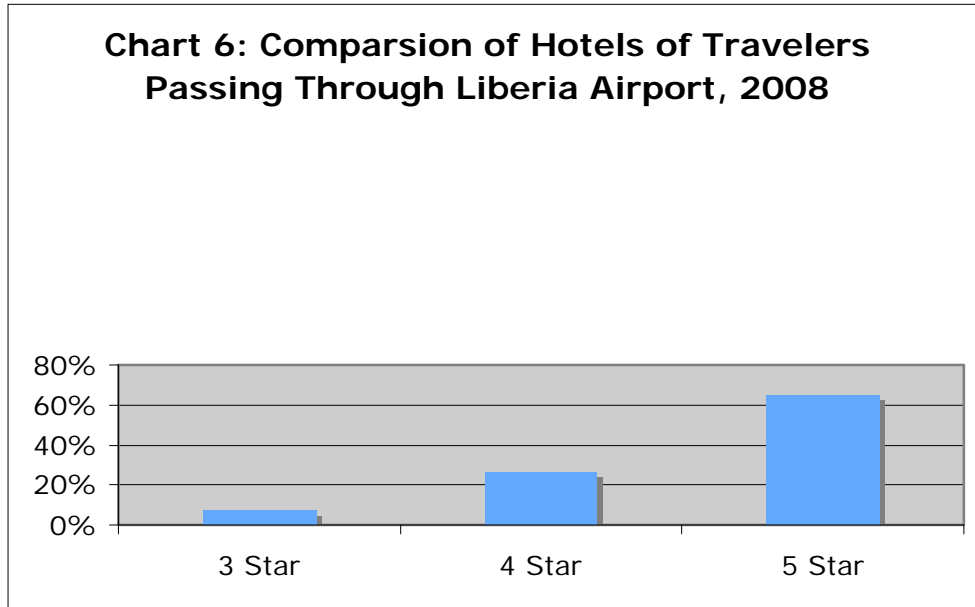


Chart 6: Comparison of Hotels of Travelers Passing Through Liberia Airport, 2008

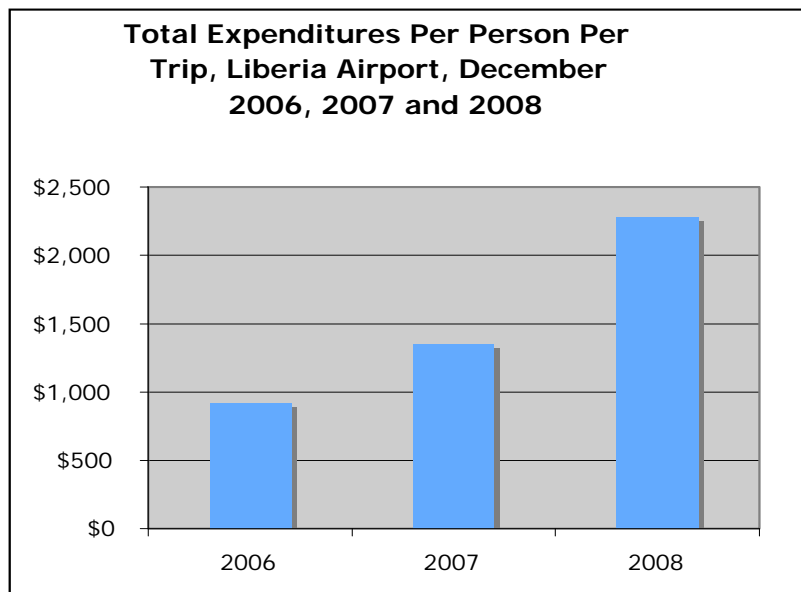


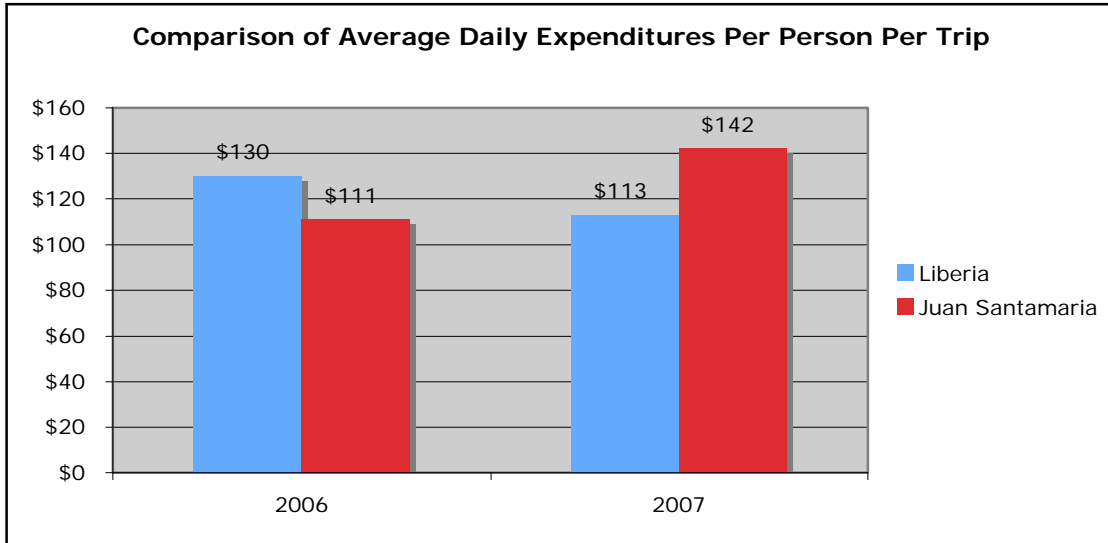
Trip Planning Patterns

Tourists who pass through the Liberia airport are more reliant on travel agencies from their home countries than tourists passing through Juan Santamaria International Airport. Approximately 40% of tourists going through the Liberia airport in 2006, 32% in 2007 and 37% in December 2008 stated that they used travel agencies from home to plan their trip to Costa Rica, while only 20% of tourists going through Juan Santamaria International Airport in 2006 and 18% in 2007 reported similar responses. This indicates that more of those tourists traveling to Costa Rica via the Liberia airport purchase vacation packages outside Costa Rica. While there is no concrete evidence showing how much of this spending is actually retained within Costa Rican borders, we may be able to infer from the available data that a smaller percentage of total vacation spending of tourists passing through Juan Santamaria may actually be retained in Costa Rica. More precise surveys are needed to better analyze spending patterns.

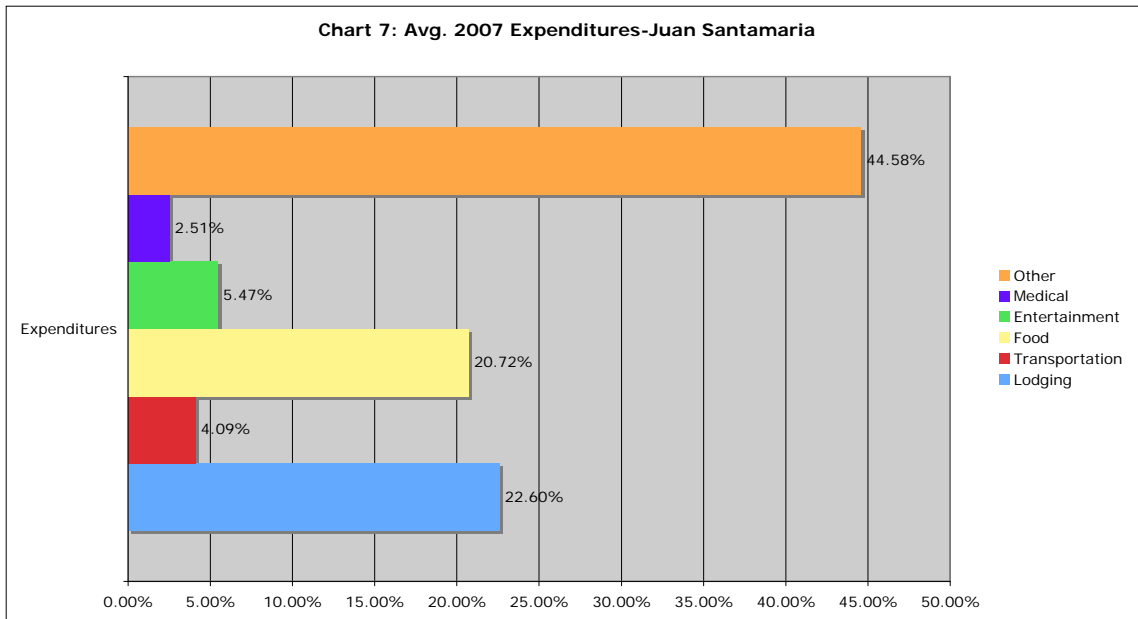
Average Number of US Dollars Spent During Visit

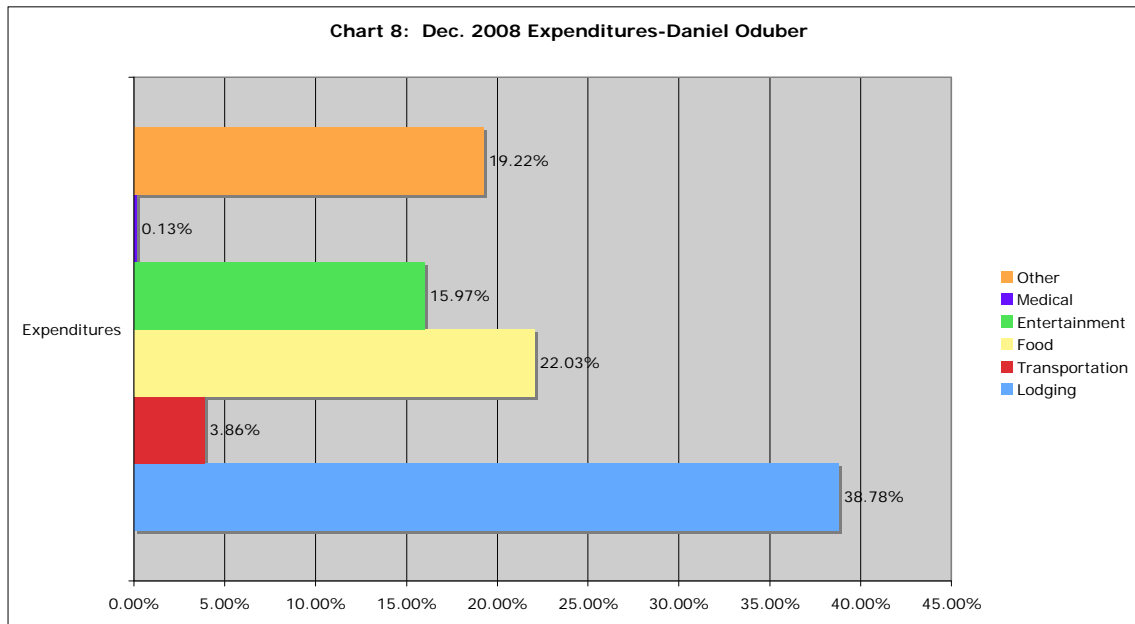
According to 2006 and 2007 survey results, tourists visiting Juan Santamaria International Airport spent more US dollars per person per visit than those tourists visiting the Liberia airport. Tourists passing through Juan Santamaria International Airport reported spending approximately a total of \$1,390 per person during their visits (or approximately \$111 per person per day) in 2006 and a total of \$1,779 per person during their visits (or approximately \$142 per person per day) in 2007. Tourists visiting the Liberia airport spent an average of \$1,053 during their entire trip (approximately \$130 per person per day) in 2006 and \$1,232 (approximately \$113.50 per person per day) in 2007. It is worth noting, however, that while there were no figures available for expenditures of tourists passing through Juan Santamaria Airport in 2008, the total amount of US dollars per person for their entire trip of those tourists passing through the Liberia airport surveyed in December 2008 jumped drastically to approximately \$2,280 (approximately \$253.33 per person per day). This includes purchases in five categories – lodging, transport, food and beverages, recreational and cultural activities, medial services, and ‘other’. Since the number of tourists staying at 5 star accommodations also jumped dramatically in 2008, this appears to indicate that this sharp increase reflects increasing numbers staying in luxury beach resorts.





While the data indicating spending patterns is limited (data was only available for March, June and September 2007 for Juan Santamaria, while in 2008, data is only available for the Liberia airport), the following charts seem to show that on average, tourists passing through Juan Santamaria airport spent more money on “Other” expenditures (mostly consisting of purchasing properties within the country itself) than those passing through the Liberia airport, who spent a higher percentage of their money on activities falling under the “Entertainment” category (a large percentage of this category consisted of “recreational sports”).





Tourist Profiles

Based on these airport surveys from 2006-2008, Liberia airport tourists, compared with those using Juan Santamaria, show the profile:

- A very high number are from the United States: the percentage increased from 61% in 2006 to 80% in 2008.
- A higher percentage of first-time visitors: 76% in 2006, 76% in 2007 and 71% in December 2008.
- A high percentage spend their holidays in the Northern Guanacaste: 87.9% in 2007 and 96% in December 2008
- Their favorite activity is “sun and beach” and related activities, followed by canopy tours (an average of 92% in 2006, 95% in 2007 and 87% in December 2008 for “sun and beach” related activities followed by an average of 60% in 2006, 47% in 2007 and 38% in December 2008 for canopy activities).
- Their preference for five-star rated accommodations has jumped dramatically: from just over 3% in 2007 to 65% in 2008.
- Total spending/person has fluctuated but shows a dramatic jump: from \$1355 per person in December 2006, to \$924 in December 2007, to \$2280 in December 2008.
- A higher percentage purchase vacation packages in their home countries – an indication that while their spending may be higher, less of it may actually come to Costa Rica.

In contrast, tourists passing through Juan Santamaria airport from 2006-2008 show the following profiles:

- A mix of nationalities, with more European travelers: 19.25% in 2006, 18.25% in 2007 and 19.6% in 2008.
- A higher percentage of male travelers (60.25% in 2006 and 63.75% in 2007).
- They visit a more diverse array of destinations while in Costa Rica, including the Central Valley, the Central Pacific coast, the “Zona Norte” and Monteverde.
- A larger percentage visit national parks.
- They stay slightly longer in Costa Rica.

Comparative Data on Liberia and Juan Santa Maria Airports

General¹¹

- Number of flights arriving in Costa Rica increased 37% in 2007, in relation to 2006. In 2006, 1380 flights landed monthly in Costa Rica, while in 2007 it increased to 1.888 flights (to August 2007).

Santamaría¹²

2006

- Number of airlines flying to CR: 16
- Number of passengers that entered and exited through the airport: 2,7 million passengers.

2007

- Number of Airlines increased from 16 to 19.
- Number of passengers that entered and exited through the airport increased 12% and reached 3 million for the first time (both nationals and foreigners).
- First trimester the number of arrivals to Santamaría increased 3,14% in relation to same period in 2006.

Liberia¹³

2006

- 187.000 passengers arrived through Liberia between April 2006 and March 2007, which is 20% more than the same period of previous year.
- 26 flights a week as average.
- 48 international flights during the high season (December 2006-March 2007).
- According to CATURGUA (Guanacaste Tourism Chamber) the Oduber is considered as a Golden Gate due to high expenses of tourists arriving through it. CATURGUA estimates that each tourist spends \$2.280, while each tourist coming through Santamaría only spends \$1.400. Thus, the 187.067 tourists arriving through Oduber generated \$411 millions, 25% of all \$1.663 millions generated by tourism in Costa Rica in 2006.

2007

- Number of people arriving through Liberia: 368,000 persons
- 32 flights a week.
- First trimester the number of arrivals to Liberia increased 15,66% in relation to same period in 2006.

2008

- Number of people arriving through Liberia: 414.000 persons

INTERNATIONAL AIRLINES FLYING TO COSTA RICA (2009)

Airlines flying to San Jose Juan Santamaria

Air Canada flights

Air Comet flights

Air France flights

Air Panama flights

America West (Phoenix)

American Airlines flights (Dallas, Miami, New York & Los Angeles)

Avianca flights (Colombia)

CAL Cargo Airlines/Cavei Avir Levitanim flights

Condor flights

Continental Airlines flights (Houston, USA)

Copa flights (Panama)

Delta flights (Atlanta, USA)

Frontier Airlines flights

Grupo TACA (Central America- fly from Dallas & Los Angeles, New York)

Iberia flights (Spain)

Jet Blue flights (USA)

Mexicana flights (Mexico)

Sansa Regional flights (local)

Spirit Airlines flights
United (Chicago & Los Angeles)
US Airways flights (USA)

Airlines flying to Liberia

American Airlines (Miami, Detroit, Dallas)
Air Canada
CAL Cargo Airlines/Cavei Avir Levitanim flights
Continental Airlines (Houston, New York)
Delta Airlines (Atlanta)
First Choice Airways
Frontier Airlines
Grupo TACA (Central America)
Mexicana
Miami Air
Nature Air flights (local)
Sansa Regional (local)
Sunwing Airlines
United (Chicago)
US Airways (from Charlotte, NC)

Some seasonal Charters

Worry Free Vacations (Dallas & Minneapolis)
Vacation Express (Atlanta, Baltimore, Charlotte, Cincinnati, Louisville & Nashville)
Adventure Tours (Dallas)

Recent additions:

Air Caraibes (Europe)
Air Comet (Spain)
Champion Air (USA)
First Choice (British)
Iberia (Spain)
Spirit (from San Francisco)

¹ The survey results were provided by the ICT, but the analysis and interpretation was done by CREST analysts.

² <http://www.sellingcr.com/20081106280/Costa-Rica-Airports/san-jose-airport.html>

³ Numbers derived from the 2006, 2007 and 2007 *Anuario de Turismo* reports

⁴ Numbers derived from the 2006, 2007 and 2007 *Anuario de Turismo* reports

⁵ Number derived from taking the average of numbers produced by all four *Informe de Encuestas de Turismo 2006: Turistas No Residentes que Salieron por Juan Santamaria* produced in 2006.

⁶ Number derived from taking the average of numbers produced by all four *Informe de Encuestas de Turismo 2007: Turistas No Residentes que Salieron por Juan Santamaria* produced in 2007.

⁷ Number derived from the 2008 *Anuario de Turismo* report

⁸ Number derived from taking the average of numbers produced by both *Informe de Encuestas de Turismo 2006: Turistas No Residentes que Salieron por Daniel Oduber* produced in 2006.

⁹ Number derived from taking the average of numbers produced by both *Informe de Encuestas de Turismo 2007: Turistas No Residentes que Salieron por Daniel Oduber* produced in 2007

¹⁰ *Informe de Encuestas de Turismo Diciembre 2008: Turistas No Residentes que Salieron por Daniel Oduber* produced in 2008

¹¹ “Llegada de extranjeros creció un 6,4% en el primer semestre”. *La Nación*, August 2, 2007. Base don Carlos Ricardo Benavides, Minister of Tourism and CANATUR, with data from airports.

¹² “Aumento de pasajeros eleva ingresos del Santamaría”. In: *La Nación*, March 5th, 2008. Base don information from Alterra Partners, airport manager (until 2009).

¹³ “Aeropuerto de Liberia espera 15% más de turistas en temporada baja”. *La Nación*, April 30th, 2007. Base don Mauricio Cespedes, CATURGUA’s Executive Director, and Analive Gonzáles, Airport Manager.