



Visitor Exit Survey

June 2004
Report

Statistics Department,
Ministry of Economic Development,
Investment and Commerce,
Government of Anguilla.
The Valley, Anguilla.

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Preface

This report contains information about the Visitor Exit Survey conducted during June 2004. The report was designed for investors, planners and programme developers in the tourism and related sectors to aid in their marketing strategies.

Should you have any questions or comments please do not hesitate to contact the Statistics Department either by email to statistics@gov.ai, by telephone numbers (264)-497-3901 or (264)-497-5731, or fax us at (264)-497-3986.

For further information, you are encouraged to visit the government's website, www.gov.ai/statistics, to access a wide range of statistical information relating to Anguilla.

Acknowledgements

The Department of Statistics would like to thank all visitors who willing cooperated and completed the survey questionnaires. Your cooperation was greatly appreciated.

We would also like to extend thanks to the Dispatch and Departure Tax Officers and the hired Interviewers for distributing and collecting the questionnaires. Your patience and hard work is greatly appreciated.

Methodology

The Visitor Exit Survey was carried out during the month of June 2004. The survey was carried out at the Wallblake Airport and the Blowing Point Seaport, as these ports are the major ports for Visitor Arrivals.

Dispatch Officers at the Blowing Point Ferry Terminal, Departure Tax Officers at the Airport and hired interviewers distributed and collected the questionnaires, which were given to both Excursionists and Tourists. Both categories of visitors received the same questionnaire.

All non-residents (*persons not resident in Anguilla for more than six months, including persons with Anguillan citizenship*) were asked to complete a questionnaire before departing the island.

One person completed a questionnaire on behalf of a group or family. With this in mind the tabulations are based upon number of questionnaires rather than actual numbers of travelers as one questionnaire can represent more than one traveler.

A total of 352 questionnaires were completed and returned. These completed questionnaires were then edited and scanned prior to the report analysis.

Summary

The results of the Visitor Exit Survey conducted throughout June 2004, indicated that Europe and the Caribbean were the two main source markets with an increase in visitor arrivals.

As indicated in previous surveys, St. Martin is becoming a major gateway for visitors whose last port of embarkation is Anguilla. Just over half of those surveyed indicated this. Puerto Rico is the second most popular travel route.

Flight arrangements for travel to Anguilla, are made with very little hassle. Only a small percentage of visitors encounter problems when it comes to either time of travel and or cost of the flight. 89 percent of the visitors said they would definitely return to Anguilla for vacation.

Visitors during June traveled with their spouse or partners. The majority of the visitors were between the ages of 30 years and 49 years. Seventy-two percent of the visitors who came to Anguilla during June stayed in one of the hotel properties on the island. The remaining percentage stayed with family and friends, in villas or apartments or in their own homes.

Travel costs to get to Anguilla on average, was US\$1,797.11 during the month of June. US\$104.42 was the most money spent on dining per day for visitors during this period while US\$293.80 was spent on average for accommodation per day.

During the month of June, Sunday was the most popular day for visitors departing the island as 43% of the questionnaires were completed on this day. Most likely airlines offer special rates to travelers if they leave their country of residence, for example, on a Wednesday and return on a Saturday or Sunday hence the reason for the weekend being the busiest days for distribution of the questionnaire. From the results it is shown that the middle days of the week had lower distribution rates.

Table A: Distribution of Questionnaires by Day of the Week

Response Rate	
Day of the Week	% June 2004
Sunday	43%
Monday	8%
Tuesday	14%
Wednesday	11%
Thursday	8%
Friday	1%
Saturday	14%
Total	100%

Description and Analysis of the Data Collected

1. Visitor Profiles

1.1 Place of Residence

Seventy-five percent of the tourists who came to Anguilla during the month of June lived in the United States of America mainly the North Eastern half of the country where 44 percent said they reside. This month compares to the previous periods when the survey was conducted during January, February and April 2004 where sixty-two percent, sixty-eight percent and sixty percent of those surveyed said they resided in the U.S.A.

From the respondents surveyed, those who visited from Europe during June fell by 3 percentage points when compared to April 2004 when the figures stood at eleven percent. June is considered a slow period for arrivals to the island as the official season has ended. Canada accounted for one percent of departures during this survey period, while the Caribbean (*including St. Martin/St. Maarten*) represented sixteen percent of visitors surveyed.

Sixty-four percent of excursionists (day-trippers) originated from the United States of America. Seven percent came from Europe and sixteen percent said they lived in St. Martin/St. Maarten.

Table 1.1.1 Departures by Country of Residence

Country of Residence	Tourists				Excursionists June 2004
	% January 2004	% February 2004	% April 2004	% June 2004	
U.S. North East	41%	49%	41%	44%	18%
U.S. North West	7%	4%	5%	12%	25%
US Rest	13%	15%	14%	19%	21%
Total United States	62%	68%	60%	75%	64%
United Kingdom	6%	5%	5%	5%	0%
Italy	3%	1%	1%	0%	0%
Germany	1%	0%	1%	2%	0%
France	3%	2%	0%	0%	2%
Other Europe	2%	2%	3%	1%	5%
Total Europe	15%	10%	11%	8%	7%
St. Martin/St Maarten	5%	7%	10%	1%	16%
Caribbean	10%	5%	12%	12%	7%
Canada	5%	7%	4%	1%	0%
Other	4%	2%	4%	2%	7%
All Other Countries	24%	22%	29%	16%	30%
Total	100%	100%	100%	100%	100%

1.2 Country of Residence by Length of Stay

Most persons visiting from the U.S. North East stayed in Anguilla for a period of two weeks. Thirty-eight percent of those from the United Kingdom visited for 24 or more days. Most Caribbean nationals spent 1 – 3 days on Anguilla during this month. Forty percent of the tourists visiting from Germany stayed for just around two weeks.

Table 1.2.1 Country of Residence by Length of Stay

Country of Residence	Length of Stay					Total
	1 - 3 days	4 - 7 days	8 - 15 days	16 - 23 days	24 or more days	
U.S. North East	8%	55%	56%	20%	0%	45%
U.S. North West	14%	12%	10%	20%	25%	12%
US Rest	13%	23%	18%	0%	0%	19%
Canada	0%	1%	0%	0%	0%	1%
United Kingdom	8%	2%	7%	0%	38%	5%
Germany	0%	0%	6%	40%	0%	2%
Other Europe	0%	1%	1%	20%	13%	1%
St. Martin/St Maarten	6%	0%	0%	0%	0%	1%
Caribbean	41%	6%	3%	0%	25%	12%
Other	11%	1%	0%	0%	0%	2%
Total	100%	100%	100%	100%	100%	100%

1.3 Travel Route

Forty –five percent of the visitors from the Caribbean traveled via Antigua to get to Anguilla during the month of June. Nine percent came via Puerto Rico and twenty percent came via St. Martin and then either flew or took the ferry over to Anguilla.

Puerto Rico and St. Martin were the gateways to Anguilla for those visitors originating out of the U.S.A.

Table 1.3.1 Travel Route to Anguilla

Country of Residence	Travel Route				
	Antigua	Puerto Rico	St Maarten, then ferry	St Maarten, then fly	Total
Canada	3%	1%	0%	0%	1%
Caribbean	45%	9%	3%	17%	12%
Germany	0%	0%	8%	0%	2%
Other	3%	2%	1%	11%	2%
Other Europe	3%	1%	1%	11%	1%
St. Martin/St Maarten	0%	0%	4%	0%	1%
U.S. North East	10%	50%	51%	28%	45%
U.S. North West	10%	15%	9%	6%	12%
US Rest	13%	20%	18%	17%	19%
United Kingdom	15%	3%	4%	11%	5%
Total	100%	100%	100%	100%	100%

1.4 Airline used to travel to Anguilla

US Airways and American Airline/Eagle were the airlines of choice for most travelers from the U.S to Anguilla during June. Seventy-two percent of the respondents used these carriers. British Airways, KLM and Air France were the preferred airlines for travelers from Europe. The regional airlines (LIAT, Winair and Caribbean Star) carried 18 percent of the visitors to Anguilla during June.

Table 1.4.1: Airline Used to Travel

Airline	% January 2004	% February 2004	% April 2004	% June 2004
American	49%	55%	37%	59%
American and Other	2%	2%	2%	4%
Caribbean Star	4%	3%	3%	4%
LIAT	7%	6%	7%	9%
Winnair	6%	7%	3%	5%
Air France	0%	0%	3%	2%
British Airways	0%	0%	1%	1%
Delta	0%	1%	0%	1%
KLM	0%	0%	2%	2%
US Airways	8%	9%	7%	8%
Other	4%	17%	3%	5%
Total	80%	100%	100%	100%

1.5 Travel Companion by Accommodation

During this survey, on average over half of the persons traveling with their spouses chose to stay in hotels or their own properties and just over a quarter stayed in villas or apartments. Most person who traveled alone stayed with family and friends or in their own homes as indicated by eighty-four percent of the respondents during June.

Table 1.5.1 Travel Companion by Accommodation

Travel Companion	Accommodation Type				
	Friends/relatives	Hotel	Own property	Villa/Apartment	Total
Alone	42%	8%	40%	14%	12%
Family	21%	10%	0%	18%	12%
Family & friends	0%	4%	0%	14%	5%
Friend(s)	16%	6%	0%	24%	9%
Other	0%	2%	0%	2%	2%
Spouse/partner	21%	70%	60%	28%	59%
Total	100%	100%	100%	100%	100%

1.6 Ages and Sex of Visitors

The majority of visitors to Anguilla during June were in the 30 years to 49 years age group. The visitors in these age ranges were evenly distributed as sixty-three percent for both males and females of the visitors fell within this age range. 25 percent of the visitors were in the 50 and over age range and eighteen percent were under the age of eighteen.

Table 1.6.1 Age and Sex of Visitors

% June 2004			
Age Group	Sex		Total
	Males	Females	
Under 18	9%	9%	9%
18 - 29	16%	18%	17%
30 - 39	31%	41%	36%
40 - 49	32%	22%	27%
50 and Over	13%	11%	12%
Total	100%	100%	100%

1.7 Source of Information about Anguilla

“Word of mouth” continues to be an important source for people hearing about Anguilla. 31% of both repeat visitors and first-time visitors surveyed said they heard about the island from Friends and Relatives.

25 percent of first-time visitors to the island heard about Anguilla via the Internet while eleven percent of both first-time and repeat visitors went to travel agents for information about the island.

Table 1.7.1 Source of Information about Anguilla

Source of Information about Anguilla	% June 2004		
	Repeat Visitors	First-time Visitors	Total
Friends or Relatives	31%	31%	31%
The Internet	6%	25%	20%
Travel Agent	11%	11%	11%
Other	52%	33%	38%

1.8 Length of Stay

Visitors spent more time on Anguilla during the month of June 2004 the results of the survey revealed. The majority of visitors who departed Anguilla in June 2004 stayed for around a week as indicated by fifty-two percent of those surveyed. Twenty-six percent stayed for a period of two weeks, while eighteen percent stayed for 1-3 days. The remainder of the visitors spent over 2 weeks or more in Anguilla.

Table 1.8.1 Length of Stay

Length of Stay	% June 2004
24 or more days	2 %
1 - 3 days	18%
4 - 7 days	52%
8 - 15 days	26%
16 - 23 days	1%
Total	100%

1.9 Accommodation

Seventy-two percent of the visitors who came to Anguilla in June stayed in one of the island's hotels, 14 percent stayed in villas or apartments the same distribution as in April 2004. Six percent stayed either with family and friends or their own property.

Table 1.9.1: Type of Accommodation

Type of Accommodation	% June 2004
Hotel	72%
Villa/Apartment	14%
Friends/Relatives	5%
Own Property	1%
Total	100%

1.10 Place of Stay by Country of Residence

During this survey period forty-six percent of visitors from the U.S.A stayed in Villas or apartments while thirty-four percent stayed in hotels. Just over a quarter of visitors traveling from Canada stayed with friends and relatives on the island and fourteen percent stayed in villas or apartments. During their stay on the island, villas or apartments were home to twelve percent of visitors from the United Kingdom.

Table 1.10.1: Place of stay by Country of Residence

Country of Residence	Place of Stay				
	Friends/relatives	Hotel	Own property	Villa/apartment	Total
Canada	26%	11%	0%	14%	12%
Caribbean	0%	2%	0%	4%	2%
Germany	0%	2%	0%	0%	2%
Other	0%	2%	0%	2%	1%
Other Europe	11%	0%	20%	0%	1%
St. Martin/St Maarten	37%	49%	80%	30%	45%
U.S. North East	5%	10%	0%	16%	12%
U.S. North West	21%	20%	0%	18%	19%
US Rest	0%	4%	0%	12%	5%
United Kingdom	0%	4%	0%	12%	5%

1.11 Revisiting Anguilla

89 percent of departing visitors said they would definitely return to Anguilla. 9 percent indicated that they might consider returning while 2 percent said they have no plans of ever returning to Anguilla.

Table 1.11.1: Percentage of Sample Regarding Revisiting Anguilla

Revisit	
	% June 2004
Yes	89%
Maybe	9%
No	2%
Total	100%

2. Visitor Expenditure

2.1. Travel Costs by Length of Stay

Travel today is expensive no matter the distance. For those traveling from the United States of America costs tend to be higher than those traveling from Europe as expenditure on travel on average ranged from as low as US\$ 500 to as much as US\$3000 or more to get to Anguilla. Twenty-seven percent of those from this area used their frequent flyer miles to come to Anguilla. Visitors from the United Kingdom spent between US\$500 to US\$1,999 to get to Anguilla. Flight costs for visitors from the Caribbean ranged between US\$50 to US\$1,999.

Table 2.1.1 Travel Costs by Length of Stay

Country of Residence	Flight Costs							Miles or points	Total
	Less than US\$50	US\$50 - \$499	\$500 - \$999	\$1,000 - \$1,999	\$2,000 - \$2,999	\$3,000 or more			
U.S. North East	0%	14%	38%	53%	59%	51%	27%	45%	
U.S. North West	0%	0%	4%	19%	15%	9%	36%	12%	
US Rest	13%	18%	18%	12%	15%	33%	18%	19%	
United Kingdom	0%	4%	9%	5%	4%	4%	0%	5%	
Canada	0%	0%	0%	1%	0%	0%	9%	1%	
Germany	0%	0%	5%	1%	0%	0%	0%	2%	
Other Europe	0%	0%	2%	1%	3%	1%	0%	1%	
Caribbean	50%	54%	23%	6%	3%	0%	0%	12%	
St. Martin/St Maarten	25%	7%	0%	0%	0%	0%	0%	1%	
Other	13%	4%	2%	1%	1%	1%	9%	2%	
Total	100%	100%	100%	100%	100%	100%	100%	100%	

2.2 Accommodation Cost

Accommodation properties on Anguilla ranges from very high- end hotels and villa resorts to moderately priced apartments and condo hotels to low priced small hotels and guesthouses. There are also a number of privately owned villas. This wide range of options not only caters to up scale visitors but it also widens the market for any person to come to the island for a vacation.

During June 2004, the majority of those visiting stayed with friends or relatives as indicated by forty-seven percent. These persons did not incur any expenditure for accommodation. Those that stayed in villas or apartments spent between US\$100 – US\$300 on accommodation expenses. The majority of the paying tourists spent between US\$200 – US\$600 and more for accommodation. These persons stayed in the various hotels on the island. During June, more tourists chose villas and apartments as their place of stay on the island

Table 2.2.1: Accommodation Cost by Type of Accommodation

Accommodation Costs (per person per night)	Type of Accommodation				
	Friends/relatives	Hotel	Own property	Villa/apartment	Total
\$0	47%	1%	40%	2%	4%
NA	26%	2%	60%	14%	7%
US\$1 - \$49	5%	1%	0%	2%	1%
US\$50 - \$99	0%	9%	0%	28%	11%
US\$100 - \$199	11%	21%	0%	26%	20%
US\$200 - 299	0%	19%	0%	10%	15%
US\$300 - \$399	0%	18%	0%	4%	14%
US\$400 - \$499	0%	10%	0%	4%	8%
US\$500- \$599	0%	8%	0%	4%	6%
US\$600 or more	5%	11%	0%	2%	8%
	100%	100%	100%	100%	100%

2.3 Dining Cost

When reading about Anguilla the visitor is promised a great dining experience. The dining cuisine on the island is very diverse. One’s taste buds can be tantalized with French Caribbean, Mediterranean, Spanish Mediterranean, Chinese, Italian and West Indian to local barbecue and many other exotic cuisines.

During June 2004, between US\$50 – US\$150 was the most money spent on eating per person per day for Tourists during as indicated by forty-five percent 45 percent of those responding. Fifteen percent spent US\$200 or more on their dining experiences.

Table 2.3.1: Dining Costs

Dining Costs	% June 2004
\$0	1%
US\$1 - \$9	1%
US\$10 - \$19	2%
US\$20 - \$29	5%
US\$30 - \$39	4%
US\$40 - 49	7%
US\$50 - 99	22%
US\$100 - \$149	23%
US\$150 - \$199	13%
US\$200 or more	15%
Total	100%

2.4 Sundry Costs

This cost includes all other expenditure incurred by the visitor during their stay on the island. These expenses can be souvenirs bought, a ticket to a program or nightclub, a trip to a neighboring island or T-Shirts admission costs to the various attractions on the island such as the Museums and Dolphin Fantaseas.

Below is the visitor expenditure on sundry costs during June.

Table 2.4.1: Sundry Costs

Sundry Costs	% June 2004
Less than US\$20	9%
US\$20 - \$49	12%
US\$50 - \$99	9%
US\$100 - \$199	15%
US\$200 - \$299	12%
US\$300 - \$399	8%
US\$400 - \$499	9%
US\$500 - \$999	9%
US\$2,000 or more	3%
Total	100%

Glossary

Excursionist: - A visitor who spends less than 24 hours in the country.

Place of Residence: - A person's centre of dwelling for 6 months or more of a year.

Sundry: - An assortment of different items not specified. It excludes all the before mentioned items of expenditures such as Dining, Travel and Accommodation.

Tourist: - A visitor who spends more than 24 hours in Anguilla. In this case it also includes citizens of Anguilla who do not reside in Anguilla for at least 6 months of the year.

U.S. North East: - Maine, New Hampshire, Vermont, Massachusetts, Connecticut and Rhode Island.

U.S. North West: - Western Colorado, Wyoming, Montana, Utah, California, Nevada, Idaho, Oregon, Washington, Alaska, and Hawaii.

U.S. Rest: - **Southwest** (western Texas, parts of Oklahoma, New Mexico, Arizona, and Nevada), **the Midwest** (Ohio, Michigan, Indiana, Wisconsin, Illinois, Minnesota, Iowa, parts of Missouri, North Dakota, South Dakota, Kansas, Nebraska and eastern Colorado), **the South** (Virginia, West Virginia, Kentucky, Tennessee, North Carolina, South Carolina, Georgia, Florida, Alabama, Mississippi, Arkansas, Louisiana, and parts of Missouri, Texas and Oklahoma) and **the Middle Atlantic** (New York, New Jersey, Pennsylvania, Delaware, Washington, DC, and Maryland).

