

GOVERNMENT OF ANGUILLA



Anguilla Visitor Expenditure Survey February 2002



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Preface

Thanks are expressed to the interviewers for their work and of course to those visitors to Anguilla during the period February 24th to March 9th, without whose cooperation this survey would not have been possible.

The information in this publication can be used by investors, planners and programme developers in the Tourism and related sectors.

Comments are welcome and questions should be directed to the Statistics Department at tel no.1-264-497-3901/5731 or email at stats@gov.ai.

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METHODOLOGY AND SAMPLE

The Anguilla Visitor Expenditure Survey was carried out during the two-week period of Sunday February 24th to Saturday March 9th 2002.

Five interviewers were hired and trained in the questionnaire and interviewing techniques. They were stationed in shifts to interview persons leaving Anguilla from the Wallbake Airport and Blowing Point Port. The interviewers approached individuals in the departure lounge at Blowing Point and by the check-in terminals at the airport, to identify whether they were residents of Anguilla or not.

All non-residents were asked to complete either a day visitor form or an overnight visitor form depending upon the length of their visit. Visitors through the Airport were mostly overnight visitors while Blowing Point visitors were mainly day visitors from St. Martin. Some visitors fly to St. Martin from Europe and North America and then take the ferry across to Anguilla.

Interviewers were paid according to the number of completed questionnaires, which provided an incentive to the interviewers to encourage visitors to complete the forms. The number of forms completed were 491 compared to 471 for the previous winter visitor survey, which was conducted in February 2001. There was an average of 2 people per group.

While interviewers were not stationed at the ports 24 hours a day, they were there during the time of ferry departure and when the major and other flights left the airport. The shifts worked were between 6:00 a.m. to 6:20 p.m. at the airport and 7:00 a.m. to 6:00 p.m. at Blowing Point.

The questions were the same as those asked on the previous visitor expenditure survey. The Stay-over Visitor Form had 8 additional questions compared to the Day Visitor Form. Day visitors were also asked where they came from on the day of their visit. A summary of the questions can be found in Appendix 1.

There were a total of 32-Day Visitor Forms and 459 Stay-over Visitor Forms completed. Response was generally very good.

SURVEY HIGHLIGHTS

1. PROFILE OF VISITORS

1.1 Purpose of Visit

During the winter of 2002, 85% of the stay-over visitors reported being on the island strictly for vacation compared to 80% during the winter 2001 survey. As with previous surveys, vacation is an even more important reason for visitors from the United States where 92% of those answering from this region gave this as their main purpose for visiting Anguilla. Only 5% reported coming for business compared to 3% in 2001, while others were on their honeymoon and came to visit friends and relatives (3% each). 0.2% of stay-over visitors gave diving as their main purpose for visiting Anguilla.

Among day visitors, sightseeing was given as the most popular reason for visiting Anguilla. 40% of day visitors answering the survey gave this as their main purpose, compared to 57% for the winter 2001, while 34% said Beaches, 6% the Dolphin Fantaseas and 13% gave business as their main reason for visiting Anguilla. 6.3% of those surveyed said visiting friends or relatives was important to them for this survey as opposed to 17% for the winter 2001 survey.

Table 1: Distribution of Main Purpose of Visit, Winter 2002

Purpose	DAY Distribution	Purpose	STAY OVER Distribution
Sightseeing	40.6%	Vacation	85.1%
Business	13.0%	Honeymoon	3.1%
Dolphin Fantaseas	6.3%	Visit Friends/Relatives	3.5%
Beaches	34.4%	Business	5.5%
Visit Friends/Relatives	6.3%	Other	2.4%
		Diving	0.2%
Total	100%	Total	100%

1.2 Place of Residence

Most visitors to Anguilla come from the United States. For this survey period 83% of the stay-over visitors interviewed came from this region, while 6% were from Europe, 2% came from Canada and 9% came from the Caribbean.

For the first three months of 2002, 19,084 visitors to Anguilla came from the USA, 1,722 from Canada, 5,345 from Europe compared to 14,743 from the USA, 1,278 from Canada and 4,778 from Europe for the same period in 2001. There were a total of 13,844 excursionists to the island during the 1st quarter 2002. Of these 13,844 excursionists 8,625 came from the USA, 1,293 from Canada and 3,926 from Europe compared to 3,715 from the USA, 812 from Canada and 2,298 from Europe for the same period in 2001.

Of the day visitors to Anguilla, 75% came from the United States, while 3% of persons visiting for the day came from Canada whereas 13% came from Europe and 9% from the Caribbean.

Day visitors originate mainly from St. Martin where tourists fly into that island from Europe and North America for vacation and then take the ferry over for a day trip to Anguilla.

Table 2: Distribution by Country of Residence from the Survey

	Survey Feb. 2001		Survey Feb. 2002	
	Day Visitors	Stay-over	Day Visitors	Stay-over
United States	60%	81%	75%	83%
Caribbean	15%	7%	9%	8%
Other Europe	11%	3%	12%	1%
Canada	8%	2%	3%	2%
United kingdom	5%	6%		5%
Other	1%	1%		1%
Total	100%	100%	100%	100%

1.3 Age Profile of Visitors

The age question was only answered by one member of the group. That is the one who answered the whole questionnaire but it does give some indication of the age of the other members of the group who answered the questionnaire.

The percentage distribution with regards to the visitors in the 18-29 age range is similar for both this survey and the previous survey carried out in February 2001. For day visitors there were only 9% as opposed to 10% in 2001 and stay-overs represented 16% for this survey compared to 12% in 2001. The 50-60+ age range had the highest percentage distribution of 48% (day visitors) and 45%(stay overs). When compared to 2001 there was a 3% increase by stay-overs from this age category. The percentage distribution for day visitors in the 50-60+ age group was the same for both 2002 and 2001.

Table 3: Age Distribution of Respondents

	2001		2002	
	Day Visitors	Stay-over	Day Visitors	Stay-over
Under 18	1%	1%	3%	6%
18-29	9%	11%	6%	10%
30-39	23%	19%	25%	12%
40-49	18%	28%	18%	31%
50-59	41%	33%	28%	33%
60+	8%	8%	20%	12%

1.4 Previous Visits to Anguilla and the Caribbean

Stay-over visitors were primarily on their second and third trips to Anguilla. The survey also showed that more than half of the day visitors were on their inaugural visit to the island. In comparison with the previous 2001 winter survey, first time visits by stay-overs dropped from 46% in 2001 to 38% in 2002, while first time visits by day trippers increased by 2%.

Table 4: Previous Visits to Anguilla

Number of previous visits	Day Visitors	Stay - over
1 st	68%	38%
2 nd	22%	18%
3+	9%	43%
Total	100%	100%

1.5 Travel Companions

Couples comprised 60% stay-over visitors for this survey compared to 62% during the winter 2001 survey. Family/Children made up 13% of stay over visitors and 25% for day visitors. There was an increase in visitors travelling alone for this winter survey 2002 compared with the winter survey in 2001 for both stay-overs and day visitors. Unaccompanied visitors made up 14% for stay overs 2002 as opposed to 10% in 2001 and for 15% for day visitors in 2002 compared with 10% in 2001.

Table 5: Travel Companions

	2001		2002	
	Day Visitors	Stay-over	Day Visitors	Stay-over
Spouse/Partner	41%	62%	43%	60%
Family/Children	24%	11%	25%	13%
Group/Friends	22%	16%	15%	10%
Alone	10%	10%	15%	14%
Other	3%	1%		1%
Total	100%	100%	100%	100%

1.6 Activities Engaged In

Relaxation was cited as the most popular activity engaged in by day visitors followed by sightseeing. This activity was popular among 62% of visitors.

Sightseeing was also popular among stay-over visitors to Anguilla with water sports following closely behind. In February 2001, 54% of stay-over visitors engaged in sightseeing while for this survey 58% engaged in this activity. 12% of the visitors surveyed during this two-week period visited the Dolphin Fantaseas, which is a new attraction to Anguilla.

Table 6: Percentage of Visitors Who Engaged in Different Activities

	Day Visitors		Stay-over
Relaxation	71%	Sightseeing	57%
Sightseeing	62%	Water Sports	38%
Swimming	56%	Boat Trips	24%
Scuba Diving	6%	Scuba Diving	11%
Other	18%	Sailing	11%
		Fishing	6%
		Dolphin Fantaseas	12%

1.7 Accommodation Type for Stay Over Visitors

Hotels were home to just over half of the respondents. Another 17% occupied vacation homes or villas. 15% of the visitors stayed with friends/relatives, while 8% and 4% stayed in apartments and guesthouses respectively. In comparison for the winter survey 2001, 66% of the visitors occupied hotels, 20% stayed in vacation homes or villas, 10% with friends or relatives and 3% stayed in guesthouses.

Of those visitors originating from the USA, exactly half used hotel accommodation while visiting Anguilla and guesthouses were the least popular mode of accommodation for them.

Table 7: Accommodation Where Stay-over Visitors Stayed

	United States	United Kingdom	Caribbean	Canada	Other Europe	Other	Total
Hotels	50%	2%	2%	1%	1%	1%	57%
Vacation Home /villa	15%	0%	0%	0%	1%	1%	17%
Friends/Relatives	7%	1%	5%	1%	0%	1%	15%
Apartment/Condo	7%	1%	0%	0%	0%	0%	8%
Guest House	3%	0%	1%	0%	0%	0%	4%
Total	82%	4%	8%	2%	2%	3%	100%

2 MARKETING IMPLICATIONS

2.1 Factors Affecting Decision to Visit Anguilla

For stay-over visitors, Beaches were cited as the most important factor with 76% of respondents giving this as a very important or important factor for visiting Anguilla. 56% stated that the feeling of safety on the island and the not so commercialised status is what motivated them to visit Anguilla.

Table 8: Percentage of Visitors Who Cited Factors as Important or Very Important in their Decision to Visit Anguilla

	Stay-over
Beaches	76%
Not Commercialised	56%
Safety	56%
Accommodation	46%
Dining	38%
Diving	7%

2.2 Sources of Information

Friends/relatives was given as the most important source of information in making their decision to visit Anguilla for stay-over visitors. 49% gave this as their most important factor, the same percentage distribution was given for the previous winter 2001 survey. Travel Agents and the Internet, both with 37% of the distribution, were cited as the most important factors for day visitors. This percentage was up from the 29% for the 2001 winter survey.

For both type of visitors the Tourist Board was ranked the least important source of information in making their decision to visit Anguilla.

Table 9: Sources of Information that are Very Important or Important in Deciding to Visit Anguilla

	Day Visitors Feb. 2001	Stay-over Feb. 2001	Day Visitors Feb. 2002	Stay-over Feb. 2002
Friends/Relatives	49%	49%	28%	49%
Travel Agent	20%	29%	37%	19%
Internet	14%	29%	37%	24%
Newspaper/Magazine	13%	17%	12%	11%
Tourist Board	13%	7%	3%	5%

2.3 Advanced Planning

66% of the visitors surveyed said that their trip was planned for more than a month while 6.4% said that their trip was planned in less than a week. All other visitors said their trips were planned within a 1-4 week period.

2.4 Rating of Services

Beaches, accommodation and restaurants and taxi services in Anguilla were rated highest, ie excellent or good, by stay-overs whereas beaches, ferry services and Immigration were rated highest by day visitors. Ferry Services were rated highly by day visitors but not so by stay-over visitors. Tours and shopping and water sports on Anguilla were rated as only average, poor or very poor.

Table 10: Percentage of Day Visitors Rating Service as Excellent or Good

	Day		Stay-over
Immigration	97%	Accommodation	92%
Ferry Service	90%	Immigration	92%
Beaches	81%	Beaches	91%
Restaurants	74%	Restaurant	91%
Value for Money	65%	Taxis/Hired Cars	76%
Taxis/Hired Cars	56%	Water Sports	54%
Tours/Excursions	56%	Ferry Service	48%
Water Sports	53%	Night Life	43%
Shopping	40%	Shopping	39%
Tourist Information	37%	Tours/Excursions	31%

2.5 Rating of Value for Money for Stay-over Visitors

Visitors interviewed for this survey listed all items for this category which included accommodation to overall cost of visit as good values for money spent during their time on Anguilla.

Table 11: Percentage of Stay-over Visitors who Rated Value for Money Excellent or Good

Accommodation	84%
Overall Cost of Visit	84%
Meals and Drinks	82%
Local Transportation	78%

2.6 Recommend to a Friend or Return

95% of stay-over visitors from this survey said that they would definitely return and recommend a friend compared to 93% for the winter survey 2001, while 47% of the day visitors said they would definitely return and 62% said they would definitely recommend a friend.

3 VISITOR EXPENDITURE

Visitor expenditure varies according to a number of factors with the two most important being the length of stay and the number of persons in the party.

Table 12: Arrivals by intended length of Stay

Length of stay	Arrivals	Arrivals
	Oct-March 2000/2001	Oct-Mar 2001/2002
1 – 3 days	3,523	3,296
4 – 15 days	20,610	18,228
16 +	2,203	2,252
Total	26,336	23,776

As is to be expected, the survey results show that Stay-over visitors spent more than Day Visitors, with an average per group of US\$3,636 down from the US\$3,732 spent during the 2001 winter survey. Day visitors spent on average US\$112 for this survey compared to US\$141 during the 2001 winter survey.

The average number of people in a Day Visitor group was 2, which means the average expenditure per person was estimated to be \$56 per day visitor.

Table 13: Average Expenditure in US\$ of Day Visitors by Number of People in the Party

Number of Persons	Mean
1	\$150
2	\$108
3 +	\$215

The average number of people in a party of stay-over visitors was 2 therefore the estimated spending per person was US\$1,820.

Table 14: Average Expenditure of Stay-over Visitors by Number of People in Party, US\$

Number of Persons	Mean Expenditure
1	\$ 1,624
2	\$ 4,388
3	\$ 4,565
4 +	\$ 5,705

3.1 Visitor Expenditure by Category (US\$'000)

Expenditure by visitors during the two-week period the survey was conducted was estimated to be US\$1.5 million for stay-overs and US\$7,839.00 for day visitors.

Table 15: Estimated expenditure by category (US\$ '000)

	Day	Stay-Over
Accommodation		\$1,001.14
Meals and Drinks	\$2.28	\$304.34
Taxi/Car Rental	\$1.25	\$89.13
Entertainment/Recreation	\$0.67	\$38.20
Shopping	\$0.44	\$57.10
Other	\$3.18	\$73.63

Estimated expenditure by stop over visitors during the winter months (Oct to Mar) was US\$31.1 million for 2001/2002 compared to US\$35.2 million in 2000/2001

Estimates for Excursionist expenditure during the winter months (Oct to Mar) 2001/2002 was US\$1.2 million compared to US\$1.7 million in 2000/2001.

Appendix 1. Summary of Questions asked on the Survey Forms

Questions Common to all Visitors	Additional Questions to Stop Over Visitors
Place of Residence	Type of accommodation
Main purpose of visit.	Number of nights
Length of stay	Airline
First visit to Anguilla	Trip includes visits to other Caribbean Islands
First visit to Caribbean	Pre-paid package and costs
Age group	Expenditure on Accommodation
Travel companions	Value for money
Importance of sources of Information	
Factors affecting visit to Anguilla	Additional Question to Day Visitors
Period of advanced planning	Today's country of origin
Total expenditure	
Number of persons covered by expenditures	
Expenditure breakdown: Meals and drinks Transportation Shopping Entertainment Other	
Credit cards used	
Activities	
Rating of services offered	
Return to Anguilla?	

Length of Stay	Average Expenditure per Group	Average Daily Expenditure per Group	Arrivals Oct – Mar-2001/2002
1 – 3 days	\$1,101		
4 – 15 days			
16+ days			