



February 2003 Visitor Survey Report

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

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Methodology

Airline agents and the tax collectors at Blowing Point were asked to hand out forms to all non-residents leaving Anguilla. One person could complete the form on behalf of the group or family. A total of 384 forms were completed and returned for February compared to 650 in January. The returns were as follows:

Source of Forms	Number completed	Percent
Caribbean Star Airline	5	1.3%
L.I.A.T.	64	16.6%
WinAir	40	10.4%
American Eagle	71	18.4%
Blowing Point Tax Officers	118	30.7%
Tax officers at Airport	86	22.3%
Total	384	100.0%

Tax officers at the airport gave out forms to those travelers who had not been given forms by the airline agents.

There were 344 forms completed by tourists i.e.: those who stay overnight. The forms were completed on behalf of 894 tourists and 129 excursionists. The tabulations are therefore mainly for tourists and not excursionists. The tabulations are based upon questionnaires rather than actual numbers of travelers as one questionnaire can represent more than one traveler.

Place of Residence

Country/Region of Residence	% February 2003 who completed survey	% Jan 2003 Tourist Arrivals
U.S. North East	52.0%	
U.S. North West	4.1%	
US Rest	15.1%	
Total United States	71.2%	70.4
United Kingdom	9.6%	6.2
Italy	1.2%	1.6
Germany	0.9%	1.0
France	0.9%	n.a.
Other Europe	2.3%	3.3
Total Europe	14.9%	12.1
St. Martin/St Maarten	0.6%	0.9
Caribbean	7.3%	11.6
Canada	4.1%	3.0
Other	2.0%	2.0
	14.0%	17.5
Total	100.0%	100.0

The representation of tourists who responded to the questionnaire by country of residence was similar to that of arrivals during the month of January 2003. Also, the questionnaire was completed by one member of a tourist party and not by all members of the party. The survey results show that 71% of tourists who left Anguilla in January were from the United States with the majority living in the North East. 9% were from the United Kingdom and 7% were from the Caribbean.

Age of Tourists

The 50 and over age group represented 43.7% of tourists who visited in February, for January this age group also represented the largest share of arrivals. 52% of tourists were males and 47% females.

Age Group	January			February		
	Males	Females	Total	Males	Females	Total
Under 18	13.8%	13.0%	13.4%	5.8%	18.9%	12.0%
18 - 29	20.6%	17.0%	18.9%	6.5%	7.7%	7.1%
30 - 39	15.1%	20.1%	17.6%	11.0%	14.3%	12.6%
40 - 49	18.1%	17.8%	18.0%	29.7%	19.1%	24.7%
50 & over	32.4%	32.1%	32.2%	47.0%	40.0%	43.7%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Travel Companions

For February, people who traveled alone stayed in hotels. Just under half of families stayed in hotels and villas and couples preferred staying in hotels.

Travel Companion	Friends/relatives	Hotel	Own property	Villa/apartment	Total
Alone	28.6%	42.9%	8.6%	20.0%	100.0%
Family	6.1%	40.8%	12.2%	40.8%	100.0%
Friend(s)	12.2%	46.9%	0.0%	40.8%	100.0%
Other	0.0%	33.3%	11.1%	55.6%	100.0%
Spouse/partner	3.5%	70.9%	1.0%	24.6%	100.0%
Total	7.6%	59.5%	3.5%	29.4%	100.0%

Airlines Used to Travel to Anguilla and Satisfaction

The majority of tourists used American Airlines to travel to Anguilla either directly or taking American to St. Martin and then the ferry. 47% of tourists used American in February compared to 61% in January 2003.

Airline	Percent
American	43.6%
American and Other	3.5%
Caribbean Star	1.5%
Caribbean Star and Other	2.6%
Liat	11.3%
Liat and Other	3.2%
Winair	3.2%
Winair and Other	2.3%
US Airways	9.0%
Air Canada	0.6%
Air France	2.0%
BWIA	0.3%
Delta	2.6%
Virgin Atlantic	0.9%
Private plane	1.2%
Charter	1.2%
Other	11.0%

US Airways, Winair and LIAT were used by 14% of those surveyed and 3% used Caribbean Star. 3% of tourists used either a private plane or charter to reach Anguilla.

In February 10% of visitors said they had trouble booking their flights compared to 20% in January. 3% said they had problems due to cost and 7% had problems because the flights they wanted were not available due to the time when the reservations were made.

Travel Route to Anguilla

9% of Anguilla's tourists travel to St. Martin first to reach Anguilla and close to half took the ferryboat from St. Martin to reach Anguilla. 12% travelled via Antigua and 30% travelled to Anguilla via Puerto Rico during February compared to almost half in January.

	<i>January</i> Percentage	<i>February</i> Percentage
St Maarten, then ferry	22.7%	41.0%
St Maarten, then fly	10.0%	9.0%
Via Puerto Rico	48.0%	29.9%
Via Antigua	9.7%	11.9%
Other	9.7%	8.2%
Total	100.0%	100.0%

Length of Tourists' Stay

The majority of tourists who departed in February stayed for 4 –7 days. Only 10% stayed for less than a week. 32% stayed for 2 weeks or more in February compared to 52% in January.

Length of Stay	January	February
	Percentage	Percentage
1 - 3 days	11.7%	9.4%
4 - 7 days	35.6%	51.3%
8 - 15 days	43.1%	25.5%
16 - 23 days	5.9%	1.6%
24 or more days	3.7%	1.8%
Total	100.0%	100.0%

Sources of Information About Anguilla

The majority of tourists heard about Anguilla from relatives or friends. Travel agents and the Internet had the same degree of importance for first time visitors in hearing about Anguilla. 13% of first time tourists heard about Anguilla from the Internet and 14% through a travel agent.

Source of Information About Anguilla	Repeat Visitors	First Visit	Total
Friends or relatives	51.6%	45.8%	48.8%
The Internet	1.1%	13.7%	6.7%
Travel Agent	12.1%	14.4%	13.1%
Other	35.3%	26.1%	31.1%
Total	100.0%	100.0%	100.0%

Where do Tourists Stay?

More than half of Anguilla's tourists stayed in hotels in February. Around 30% stayed in villas or apartments and 11% stayed either with family and friends or their own property.

Accommodation Type	January	February
	Percent	Percent
Hotel	53.6%	59.3%
Villa/apartment	22.4%	29.6%
Friends/relatives	17.1%	7.5%
Own property	6.6%	3.8%
Boat	0.4%	0.3%
Total	100.0%	100.0%

Main Purpose of Visit

The main purpose of tourists for visiting Anguilla was for vacation. 88% came for this purpose, while 5% came on business.

	January	February
Vacation/leisure	78.0%	88.4%
Visit family/friends	8.5%	2.3%
Business	7.1%	5.2%
Scuba Diving/Snorkelling	2.2%	0.0%
Honeymoon	2.0%	2.3%
Health	0.5%	0.6%
Other	1.7%	1.5%
Total	100.0%	100.0%

Potential Attractions

Respondents were asked if they were considering a return visit to Anguilla how certain attractions would affect their decision. The responses given reiterated those in January. None of the four attractions listed would attract visitors to make a return visit but most were in favour of a Yacht Marina for which 30% said they would be attracted to make a return visit. The attractions that would most deter them to make a return visit were a casino and cruise ships. 66% and 70% respectively said these attractions would be a deterrent. 51% said they would be deterred by time-shares.

Tourist Expenditures

Just under half of tourists who visited Anguilla in February spent more than US\$300 per person per night on accommodation and 10% stayed for free. As is to be expected, those staying in their own property or staying with friends or relatives tend to pay nothing. 62% of tourists staying at hotels paid more than US\$300 per night per person while just only over a quarter staying in villas paid this amount.

Accommodation cost per person per night	Friends/relatives	Hotel	Own property	Villa/apartment	Total
\$0	65.4%	2.5%	41.7%	5.9%	9.6%
US\$1 - \$49	3.8%	1.5%	0.0%	3.0%	2.0%
US\$50 - \$99	3.8%	6.9%	8.3%	19.8%	10.5%
US\$100 - \$149	3.8%	4.4%	0.0%	13.9%	7.0%
US\$150 - 199	0.0%	5.4%	0.0%	7.9%	5.8%
US\$200 - 249	0.0%	6.4%	0.0%	11.9%	7.3%
US\$250 - \$299	0.0%	7.8%	0.0%	7.9%	7.0%
US\$300 or more	3.8%	62.7%	8.3%	27.7%	45.9%
NS	19.2%	2.5%	41.7%	2.0%	4.9%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

Few tourists spend nothing on eating with only 2% falling into this group. 17% spent less than US\$50 per person per day and one fifth spent more than US\$200 per person per day.

Eating costs per person per day	% January	% February
\$0	2.3%	1.7%
US\$1 - \$49	20.8%	17.4%
US\$50 - \$99	22.1%	23.5%
US\$100 - \$149	21.4%	22.7%
US\$150 - \$199	10.4%	11.3%
US\$200 or more	17.4%	19.2%
Total	100.0%	100.0%

The cost of the flight paid per person will vary significantly by the country from which tourists come. Tourists traveling from the United Kingdom have the widest range of costs for their flights. Less than a quarter paid less than US\$500 and at the other end of the scale close to 15% paid more than US\$3,000. On the other hand those from the United States tend to pay between US\$500 - \$1,000. As is expected visitors from the Caribbean pay less than US\$500 to travel to Anguilla.

Cost of Flight

Residence	Less than \$500	\$500 - \$999	\$1,000 - \$1,999	\$2,000 - \$2,999	\$3,000 or more	N.S.	Total
Canada	28.6%	28.6%	35.7%	0.0%	0.0%	7.1%	100.0%
Caribbean	85.2%	0.0%	0.0%	0.0%	0.0%	14.8%	100.0%
Europe	16.7%	38.9%	22.2%	5.6%	5.6%	11.1%	100.0%
U.S North East	14.5%	63.1%	12.8%	2.8%	3.9%	2.8%	100.0%
U.S North West	42.9%	28.6%	21.4%	7.1%	0.0%	0.0%	100.0%
U. S. Rest	13.5%	53.8%	17.3%	5.8%	0.0%	9.6%	100.0%
U.K.	18.2%	24.2%	33.3%	6.1%	15.2%	3.0%	100.0%
Other	0.0%	14.3%	42.9%	28.6%	0.0%	14.3%	100.0%

Activities

There were eleven activities on the questionnaire that visitors were asked if they had engaged in. The most popular activity for both months so far was snorkeling where just around 40% of the tourists said they enjoyed in February compared to 50% in January. One fifth took a tour of Anguilla and 26% took a trip to our neighboring islands. 26% indulged in a spa treatment in February compared to 28% in January. 14% visited the offshore cays.

Activities	% who participated in January	% who participated in February
Bird watching	10.0%	4.0%
Dolphin swim	8.8%	7.2%
Fishing	5.0%	1.7%
Island tour	35.1%	20.7%
Museum	2.9%	2.6%
Nature trail	8.6%	8.6%
Scuba diving	7.9%	4.3%
Snorkelling	49.8%	39.1%
Spa treatment	28.7%	26.1%
Trip to neighboring islands	32.8%	25.9%
Trip to offshore cays	21.5%	14.7%

Satisfaction with Services

Tourists were most satisfied with Peace and tranquility, with 95% rating it as good, Safety and security and Accommodation were rated as good by over three quarters of the tourists. 20% said that the roads needed some work. 63% rated the Island's cleanliness as good.

	Good	OK	Poor	Total
Cleanliness	62.5%	31.7%	4.1%	100.0%
Peace	94.8%	3.5%	0.0%	100.0%
Service	86.0%	9.6%	0.9%	100.0%
Safety	89.8%	5.2%	0.6%	100.0%
Roads	17.2%	59.0%	19.8%	100.0%
Dining	81.4%	8.7%	0.0%	100.0%
Accommodation	91.0%	3.8%	1.2%	100.0%
Taxi	77.3%	6.4%	0.6%	100.0%
Telephone & Internet	52.6%	27.9%	7.6%	100.0%
Customs & Immigration	86.9%	9.3%	0.3%	100.0%

Appendix 1. Questionnaire

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Official Use only

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Please take a minute to complete this questionnaire. Only one questionnaire need be completed per group and only those who do not live in Anguilla for at least 6 months of the year should answer it.. The information will help us to improve our visitor services. Use only the pencil provided and shade circles completely. Form will be machine scanned. Return your completed questionnaire to the official as you depart for your trip.

1. Where do you live?

- U.S. A. North East Germany
- U.S. A. West France
- U.S.A. Rest Other Europe
- Canada St. Martin/St Maarten
- United Kingdom Other Caribbean
- Italy Other

2. Is this your first visit to Anguilla?

- Yes No

3. How long did you stay in Anguilla?

- Less than 24 hours
- 1 - 3 days
- 4 - 7 days
- 8 - 15 days
- 16 - 23 days
- 24 or more days

4. How did you travel to Anguilla?

- Via St Maarten, ferry to Anguilla
- Via St Maarten, fly to Anguilla
- Via Puerto Rico
- Via Antigua
- Other

5. On which Airline(s) did you travel?

- American Airlines/Eagle Virgin Atlantic
- Caribbean Star Air Canada
- Liat Private plane
- Winair Charter plan
- US Airways BWIA
- Air France British Airways
- KLM Other
- Delta

6. Did you have any trouble booking your flights?

- Yes (due to availability) Yes (due to cost) No

7. How did you hear about Anguilla?

- The Internet web address? _____
- Travel Agent
- Friends or relatives
- Other

8. How many people are in your party by age and sex?

	Males	Females
Under 18 years	<input type="text"/>	<input type="text"/>
18 - 29 years	<input type="text"/>	<input type="text"/>
30 - 39 years	<input type="text"/>	<input type="text"/>
40 - 49 years	<input type="text"/>	<input type="text"/>
50 and over	<input type="text"/>	<input type="text"/>

9. With whom did you travel?

- Spouse/partner Alone
- Family Other
- Friend(s)

10. What activities did you engage in?

- Scuba diving Museum
- Snorkelling Spa treatment
- Island tour Fishing
- Dolphin swim Trip to offshore cays
- Bird watching Trip to neighboring islands
- Nature trail

11. If you are a day tripper, would you return for an overnight stay?

- Yes No May be Not applicable

12. Would you visit Anguilla again?

- Yes No Maybe

Please turn page and answer questions overleaf. Thank you

13. What type of accommodation did you stay in?

- Hotel
 Own property
 Friends/relatives
 Villa/apartment (rented)
 Boat

14. What was the main purpose of your visit?

- Vacation/leisure Marriage
 Business Scuba Diving/snorkelling
 Visit family/friends Health
 Festival Honeymoon

15. If you were considering a return visit to Anguilla, how would the following potential developments influence your decision?

- Casino** Attract Deter
Cruise ships Attract Deter
Yacht Marina Attract Deter
Time Share Attract Deter

16. How would you rate the following?

- Island's cleanliness** Good Fair Poor
Peace & tranquility Good Fair Poor
Customer Service Good Fair Poor
Safety & Security Good Fair Poor
Roads Good Fair Poor
Dining Good Fair Poor
Accommodation Good Fair Poor
Taxi service Good Fair Poor
Telephone & Internet Good Fair Poor
Customs & Immigration Good Fair Poor

17. Would you recommend Anguilla to a friend?

- Yes No Maybe

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The following information will assist us in calculating the economic activity of Anguilla. Your information will be kept confidential.

18. What was the flight cost per person?

- Less than US\$500
 \$500 - \$999
 \$1,000 - \$1,999
 \$2,000 - \$2,999
 \$3,000 or more

19. How much did you pay per person per night for accommodation?

- \$0 US\$150 - 199
 US\$1 - \$49 US\$200 - 249
 US\$50 - \$99 US\$250 - \$299
 US\$100 - \$149 US\$300 or more

20. How much did you spend on eating and drinking per person per day?

- \$0 US\$40 - \$49
 US\$1 - \$9 US\$50 - \$99
 US\$10 - \$19 US\$100 - \$149
 US\$20 - \$29 US\$150 - \$199
 US\$30 - \$39 US\$200 or more

21. How much did you spend on things other than accommodation, eating and drinking in total for your whole group and stay?

- Less than US\$20 US\$300 - \$399
 US\$20 - \$49 US\$400 - \$499
 US\$50 - \$99 US\$500 - \$999
 US\$100 - \$199 More than US\$1,000
 US\$200 - \$299

22. Date today

Day		Month		Year		

Thank you and Bon Voyage, please hand in completed questionnaire and pencil