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Preface

This document contains information about the Visitor Exit Survey conducted in February 2004. A joint committee of the Chief Minister's Office, the Anguilla Tourist Board, the Anguilla Hotel and Tourism Association and the Statistics Department of the Government of Anguilla identified the information that needed to be collected. Collection of this information is adjusted as necessary.

This publication was designed for investors, planners and programme developers in the tourism sector and related sectors. The data collected is published in an easy to read format so other sectors or persons interested in the publication can use it. However, 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 enter the government website, www.gov.ai/statistics, to access a wide range of statistical information relating to Anguilla.

Methodology

The February 2004 Visitor Exit Survey questionnaire (see appendix) was based upon the survey questionnaire used in the previous years surveys but was re-arranged and adjusted to better facilitate the data collection process, while still collecting all the necessary data.

For the month of February the Dispatch Officers, Security Officers and Departure Tax Officers were trained in the procedure of administering and collecting the survey questionnaires. The survey questionnaires along with other equipment, such as pencils and sharpeners, were distributed to all interviewers prior to the commencement of the survey. A questionnaire report was kept to monitor the number of forms printed and distributed to Wallblake and Blowing Point Terminal.

On February 1st 2004, the Visitor Exit Survey commenced. All non-residents of Anguilla were given a questionnaire to complete before departure, that is all persons who do not live in Anguilla for more than six (6) months of each year. This also includes persons with Anguillian citizenship who do not reside in Anguilla for at least 6 months of the year.

One person was allowed to complete the form on behalf of a group or family. Therefore, the number of forms distributed does not equal the actual number of persons leaving Anguilla. The tabulations are based upon questionnaires rather than actual numbers of travellers as one questionnaire can represent more than one traveller. Both excursionists (day-trippers) and tourists (stay-over) visitors received the identical survey instrument.

The Security Officers at the Wallblake Airport were required to collect the completed questionnaire(s) from departing visitors.

1,310 forms were completed and returned. The number of questionnaires completed by individuals leaving the island via the seaport, as accustomed, registered higher as more persons disembarked via this port. The completed forms were edited and scanned prior to the analysis of the data collected.

Acknowledgments

The statistics department would like to thank all the visitors who kindly cooperated and completed the survey questionnaires. Their time and patience were greatly appreciated.

We would also like to sincerely thank the Dispatchers, Tax Collectors and Security Officers who distributed and collected the forms.

Mrs. Charmine Fleming-Liburud should also be recognised for her persistence and determination in organising and training all persons involved in the distribution of the surveys. Mrs. Fleming-Liburud also managed the Visitor Exit Survey in Anguilla for February 2004. She also undertook the analysis and wrote this report. Thanks should also be expressed to Ms. Rhina Meade for her assistance in the analysis of the data.

Statistical History of Tourism in Anguilla

The Tourism sector includes all short-stay means of accommodation such as hotels, villas, etc. and restaurants. This sector's activity is a major contributor to Anguilla's Gross Domestic Product (GDP) figure.

The Statistics Department defines a visitor in Anguilla as any person travelling to Anguilla who is not a citizen or resident of Anguilla. A resident is any person residing in Anguilla for more than six (6) months of a year.

Tourism activity in Anguilla is seasonal. There is a high season, which includes the winter months that starts on December 16th and ends April 15th. The low season or summer occurs during April 16th to December 15th. Visitor arrivals are usually high during the winter months or high season. During the August month visitor arrivals also increase, this can be accredited to the annual Anguilla Summer Festival. The table below shows the number of visitor arrivals by month for the period 1993-2003.

Table A: VISITOR ARRIVALS BY MONTH 1993-2003

MONTH	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003
January	10,547	11,670	14,056	6,790	11,791	13,099	11,337	9,399	11,794	9,030	9,193
February	11,204	12,647	13,854	8,205	11,413	12,429	10,671	11,299	11,486	10,533	10,164
March	9,871	12,524	14,412	7,341	14,282	13,099	12,580	12,939	11,316	13,482	10,808
April	10,923	11,274	13,279	8,086	9,396	11,525	10,803	11,857	11,694	10,903	9,736
May	8,296	9,243	9,472	7,473	8,869	9,867	8,630	9,504	8,914	9,841	10,016
June	7,048	7,650	8,794	5,810	6,966	7,600	7,833	9,183	8,003	8,004	7,725
July	9,190	10,271	9,914	6,193	9,383	9,344	9,409	9,747	8,919	9,835	11,020
August	10,622	12,180	12,299	8,600	10,497	10,448	11,777	10,350	9,710	11,132	11,947
September	5,600	6,398	1,702	3,642	3,804	3,840	4,873	3,661	3,241	3,767	3,482
October	7,379	8,770	1,694	5,983	6,769	6,138	5,801	5,302	4,354	5,850	5,447
November	9,550	10,846	2,764	8,331	9,627	7,192	5,592	8,259	7,103	8,445	8,244
December	11,120	12,307	4,846	9,785	11,068	9,215	7,423	10,969	8,440	10,296	11,500
TOTAL	111,350	125,780	107,086	86,239	113,865	113,796	106,729	112,469	104,974	111,118	109,282
% Change	19.50%	13.00%	-14.90%	-19.50%	32.00%	-0.10%	-6.20%	5.40%	-6.70%	5.90%	-1.70%

Visitors enter Anguilla via airport and seaports. The majority of visitors enter via the seaports. However, the main seaport entrants are excursionists. An excursionist is a visitor who spends less than 24 hours in the country, that is, the person does not overnight in Anguilla. The table below shows visitor arrivals by air and sea for the period 1993- 2003. As shown, for a 12-year period the total visitor arrivals by sea have far exceeded those who enter Anguilla by air.

TABLE B: VISITOR ARRIVALS BY AIR AND SEA 1993 – 2003

YEAR	AIR	SEA	TOTAL	% By Sea
1993	28,714	82,636	111,350	74.2
1994	32,889	92,891	125,780	73.9
1995	29,478	77,608	107,086	72.5
1996	27,919	58,320	86,239	67.6
1997	32,614	81,251	113,865	71.4
1998	28,953	84,843	113,796	74.6
1999	28,537	78,192	106,729	73.3
2000	28,575	83,894	112,469	74.6
2001	32,070	72,904	104,974	69.4
2002	29,654	81,464	111,118	73.3
2003	28,331	80,951	109,282	74.1

Visitors usually come to Anguilla for business, excursion or vacation. The table below depicts the purpose of travel to Anguilla for the period 1991-2003. As shown the majority of visitors are excursionists and most tourists came to Anguilla for the purpose of vacation.

Table C: VISITOR ARRIVALS BY PURPOSE OF VISIT 1991-2003

Year	PURPOSE OF VISIT						Total Visitors
	Vacation	% Change	Business	% Change	Excursion	% Change	
1991	29,078	-0.5%	1,924	-2.3%	59,542	0.4%	90,544
1992	30,062	3.4%	2,014	4.7%	61,104	2.6%	93,180
1993	36,237	20.5%	1,421	-29.4%	73,692	20.6%	111,350
1994	42,352	16.9%	1,353	-4.8%	82,075	11.4%	125,780
1995	36,280	-14.3%	2,251	66.4%	68,555	-16.5%	107,086
1996	35,413	-2.4%	2,085	-7.4%	48,741	-28.9%	86,239
1997	40,506	14.4%	2,675	28.3%	70,684	45.0%	113,865
1998	41,092	1.4%	2,782	4.0%	69,922	-1.1%	113,796
1999	43,726	6.4%	3,056	9.8%	59,947	-14.3%	106,729
2000	40,642	-7.1%	3,147	3.0%	68,680	14.6%	112,469
2001	44,051	8.4%	3,914	24.4%	57,009	-17.0%	104,974
2002	40,233	-8.7%	3,736	-4.5%	67,149	17.8%	111,118
2003	43,096	7.1%	3,819	2.2%	62,367	-7.1%	109,282

The table below shows the number of stay over visitors by Country of Residence. As shown in the table, the United States of America followed by the rest of the Caribbean, provides the greatest number of tourist arrivals.

Table D: TOURIST ARRIVALS BY COUNTRY OF RESIDENCE 1990 – 2003

YEAR	U.S.A.	CANADA	U.K	ITALY	GERMANY	Other					TOTAL
						Europe	F.W.I	D.W.I.	CARIB.	OTHER	
1990	20,046	896	2,002	-	-	-	-	-	7,675	562	31,181
1991	20,379	915	2,077	-	-	-	-	-	6,985	646	31,002
1992	20,544	915	2,105	-	-	-	-	-	7,718	794	32,076
1993	25,210	962	2,405	-	-	-	-	-	8,183	898	37,658
1994	28,800	1,188	2,742	-	-	-	-	-	9,848	1,127	43,705
1995	24,149	1,107	2,405	-	-	-	-	-	10,016	854	38,531
1996	22,963	1,258	2,552	178	196	-	-	-	9,527	824	37,498
1997	26,659	1,492	2,880	1,790	785	-	-	-	8,491	1,084	43,181
1998	26,297	1,444	2,738	3,983	1,265	2,124	-	-	4,793	1,230	43,874
1999	25,960	1,487	2,703	5,335	1,267	2,415	-	-	6,002	1,613	46,782
2000	24,799	1,512	2,786	3,737	522	2,377	405	327	6,084	1,240	43,789
2001	30,099	1,258	2,789	2,746	546	1,946	236	451	6,682	1,212	47,965
2002	28,755	1,301	2,529	707	537	1,610	233	297	6,925	1,075	43,969
2003	30,644	1,289	2,962	945	649	1,752	236	296	6,830	1,312	46,915

Excursionists usually outnumber tourists. Tourists however are increasing as a percentage of all visitors. In 2003, tourists made up closer to half of all visitors at 42%. The table below shows the number of excursionists by country of origin for 1991-2003. The United States makes up 42% of all excursionists.

Table E: EXCURSIONIST ARRIVALS BY COUNTRY OF RESIDENCE 1991-2003

YEAR	U.S.A	CANADA	U.K.	ITALY	GERMANY	Other					TOTAL
						Europe	F.W.I.	D.W.I.	CARIB	OTHER	
1991	36,003	2,710	1,166	-	-	-	-	-	18,256	1,407	59,542
1992	33,241	3,548	1,306	-	-	-	-	-	21,287	1,722	61,104
1993	33,164	3,930	1,374	-	-	-	-	-	32,760	2,464	73,692
1994	36,366	4,856	1,667	-	-	-	-	-	34,713	4,473	82,075
1995	28,149	3,481	1,365	-	-	-	-	-	30,062	5,498	68,555
1996	17,279	1,565	1,020	273	2,489	-	-	-	22,193	3,922	48,741
1997	28,481	3,110	1,384	1,933	5,044	-	-	-	24,521	6,211	70,684
1998	29,743	3,102	1,345	3,104	700	10,721	-	-	14,276	6,831	69,822
1999	25,853	2,983	1,335	2,312	522	8,496	-	-	14,070	4,376	59,947
2000	28,309	3,517	1,645	1,781	1,413	10,242	5,827	7,543	3,345	5,058	68,680
2001	24,506	2,645	1,562	1,293	954	7,098	5,735	7,019	3,458	2,739	57,009
2002	30,806	3,124	2,318	1,196	839	6,804	7,450	8,944	3,524	2,144	67,149
2003	26,348	3,007	2,119	1,170	775	7,120	8,228	8,446	3,214	1,940	62,367

Introduction – Visitor Exit Survey

This survey is one in a series of Visitor Exit Surveys that are carried out by the Statistics Department. The questionnaire used in February 2004 is not identical to that used in February 2003 as the survey instrument is adjusted as needed and such adjustments are documented. Because of this, responses made in 2004 may not be comparable to those in 2003. In these cases, the reader will notice 'N/A' denoting when data is not applicable, please take note.

There are three ports in Anguilla: Wallblake Airport, Sandy Ground Seaport and Blowing Point Seaport. The most significant of these ports for visitor arrivals/departures are the Blowing Point and Wallblake ports. For this reason only the Wallblake and Blowing Point ports were targeted. The majority of visitors enter Anguilla via the seaports, as mentioned previously. Excursionists and tourists received the same questionnaire, therefore, some questions may not be applicable to the visitor(s), and in these cases a 'not applicable' option will be listed.

More visitors normally come to Anguilla during the winter months, as this is the 'high' season. The winter months range from December 16th to April 15th. However, compared to February 2003 when there were only 384 completed forms collected, there was a significant increase to 1,310 being collected in February 2004.

The response rate of visitors departing Anguilla was generally very good for most of the questions. The highest frequency of responses were received from questions relating to revisiting and recommendation of Anguilla to a friend, which both registered 98%. **Table F** below shows the response rate of visitors for selected questions in the questionnaire.

Table F: RESPONSE RATE FOR SELECTED QUESTIONS BASED UPON NUMBER OF QUESTIONNAIRES RECEIVED

Response Rate	
Booking Arrangements	92%
Type of Accommodation	95%
Airline Used	88%
Eating Cost	92%
Recommend Anguilla	98%
Revisit Anguilla	98%

The visitors departing Anguilla mostly left on Sunday, as the number of forms completed on Sundays was higher than any other day of the week, and Friday was the lowest. The table below shows the distribution of forms completed by visitors by day of the week.

Table G: DISTRIBUTION OF FORMS BY DAY OF THE WEEK

Distribution Rate	
Day of the Week	Percentage
Sunday	22%
Monday	12%
Tuesday	15%
Wednesday	18%
Thursday	13%
Friday	9%
Saturday	10%
Total	100%

Blowing Point Terminal had the higher number of completed forms being returned by a difference of 12 percentage points.

Table H: RETURN DISTRIBUTION BY PORT OF EXIT

Return Distribution	
Port of Exit	Percentage
Wallblake Airport	44%
Blowing Point Seaport	56%

Wallblake airport had the higher response rate of the two ports, capturing 46% of all departures through this port, while Blowing Point captured 30%. Thereby giving us an overall response rate of 35% of all non-nationals departing Anguilla during the month of February by the two ports.

Table I: RESPONSE RATE BY PORT OF EXIT

Port of Exit	Total Captured	Total Departures (Non- Nationals)	Response Rate
Wallblake	1318	2881	46%
Blowing Point	1922	6458	30%
Total	3240	9339	35%

Description and Analysis of Data Collected

1.Profiles

1.1 Place of Residence

Anguilla's major tourist market is the United States of America (U.S.A). For the purpose of this survey the U.S.A is divided into three (3) geographical areas U.S. North East, U.S. North West and U.S. Rest (see glossary).

Table 1.1.1: DISTRIBUTION OF DEPARTURES BY COUNTRY OF RESIDENCE

Country of Residence	% February 2003	% February 2004
U.S. North East	52%	49%
U.S. North West	4%	4%
US Rest	15%	15%
Total United States	71%	68%
United Kingdom	10%	5%
Italy	1%	1%
Germany	1%	0%
France	1%	2%
Other Europe	2%	2%
Total Europe	15%	10%
St. Martin/St Maarten	1%	7%
Caribbean	7%	5%
Canada	4%	7%
Other	2%	2%
All Other Countries	14%	21%
Total	100%	100%

As shown in **Table 1.1.1** the U.S.A has continued to be Anguilla's main market source for visitor arrivals and has accounted for 68% of all visitors, a decline of 3 percentage points from last year February's percentage. Again, the majority comes from U.S. North East with 49% of visitor departures.

The European market fell by 5 percentage points in February 2004, as the United Kingdom and Germany lost market share while France increased their market share by 1 percentage point.

However, the all other countries market is growing, their market share has increased by the 7 percentage points lost by the other categories. Within this

category, St. Martin/St Maarten and Canada have also depicted signs of an increasing visitor market for Anguilla both sharing the same contribution of 7%.

1.2 Travel Route to Anguilla

For the February 2004 Visitor Exit Survey, the results indicated that visitors mostly travelled to St. Martin, and then took the ferry to Anguilla. This is a 14-percentage points increase over February 2003. The second highest travel route chosen by visitors was via Puerto Rico and into Wallblake airport. While flights through: St Maarten, then a flight to Anguilla along with flights direct from Antigua have fallen as choice travel routes to Anguilla. Antigua registered a significant decrease by 5 percentage points. The most significant decrease from February 2003's percentage, occurred in all "other" means of getting to Anguilla by 7 percentage points.

Table 1.2.1: PERCENTAGE OF SAMPLE BY TRAVEL ROUTE

Travel Route		
	% February 2003	% February 2004
St Martin, then ferry to Anguilla	41%	55%
St Maarten, then fly to Anguilla	9%	8%
Via Puerto Rico	30%	29%
Via Antigua	12%	7%
Other	8%	1%
Total	100%	100%

1.3 Airline used to travel to Anguilla

American Airlines remains the most popular airline used to travel to Anguilla as shown in **Table 1.3.1**. This period has indicated an increase of 11 percentage points, over last year's percentage for American Airlines. With the increase in number of flights offered by Winair from St. Maarten, their market share increased by 2 percentage points to 5 % when compared to last year's for the same period. 15% of the respondents used other means of travel not elsewhere listed to get to Anguilla, whether by a different airline, aircraft or sea craft. Liat and Caribbean Star, the regional airlines, have both fallen for this period, as have the visitors travelling to Anguilla who reside in the Caribbean for this period; the transferral of these travellers can be seen in American Airlines.

Table 1.3.1: AIRLINE USED FOR TRAVEL TO ANGUILLA

AIRLINE USED TO TRAVEL TO ANGUILLA		
AIRLINE	% FEBRUARY 2003	% FEBRUARY 2004
American	44%	55%
American and Other	4%	2%
Caribbean Star	2%	2%
Caribbean Star and Other	3%	1%
Liat	11%	5%
Liat and Other	3%	1%
Winair	3%	5%
Winair and Other	2%	2%
US Airways	9%	9%
Delta	3%	1%
Private plane	1%	0%
Charter	1%	3%
Other	15%	15%
Total	100%	100%

1.4 Booking Arrangements

89% of the visitors, who were responsible for making their booking arrangements, responded that they did not have any problems booking their flights to Anguilla. 7% of the visitors said that they had problems due to timing, the same as in February 2003 when visitors made reservations. 4% had problems due to cost an increase of 1 percentage point.

Table 1.4.1: BOOKING ARRANGEMENTS

DIFFICULTY	% FEBRUARY 2004
No	89%
Yes due to cost	4%
Yes due to timing	7%
Total	100%

1.5 Travel Companions By Accommodation

In February 2003, visitors travelling with their spouse or partner mostly stayed in hotels, 71% as shown in **Table 1.5.1**. **Table 1.5.2** showing travel companions by type of accommodation in February 2004 below shows that this continues to be the case again, where 56% of visitors travelled with their spouse or partner and stayed in hotels. Friends were the second most popular travel companions and they too mostly stayed in hotels.

Table 1.5.1 TRAVEL COMPANIONS BY ACCOMMODATION FEBRUARY 2003

Travel Companion	% FEBRUARY 2003				
	Friends/ Relatives	Hotel	Own Property	Villa/ Apartment	Total
Alone	29%	43%	9%	20%	100%
Family	6%	41%	12%	41%	100%
Friend(s)	12%	47%	0%	41%	100%
Other	0%	33%	11%	56%	100%
Spouse/partner	4%	71%	1%	25%	100%
Total	8%	60%	4%	29%	100%

1.5.2 TRAVEL COMPANIONS BY ACCOMMODATION FEBRUARY 2004

TRAVEL COMPANION BY ACCMMODATION					
Travel Companion	% FEBRUARY 2004				
	Friends/ Relatives	Hotel	Own Property	Villa/ Apartment / Boats	Total
Alone	4%	6%	1%	1%	12%
Family	3%	8%	1%	4%	16%
Friend(s)	2%	3%	0%	3%	8%
Family & friends	1%	2%	0%	3%	6%
Spouse/partner	4%	42%	2%	8%	56%
Other	0%	1%	0%	0%	2%
Total	14%	63%	4%	18%	100%

1.6 Age and Sex of Visitors

As the visitors' age increases, the number of visitors visiting Anguilla's shores also increases. Again, visitors from 50-59 years represented the largest share of visitors with 29%, but it registered a decline of 3 percentage points from last year February 2003. 10% of the visitors were children, this falls 2 percentage points from last year's corresponding period. Compared to 2003, where there were generally more females than males, there is a relatively equal balance this year. Visitors 18-29 years showed an increase of 4 percentage points, from last years February's percentage of young males and females visiting Anguilla.

Table 1.6.1: AGE AND SEX OF VISITORS

	% February 2003			% February 2004		
	Sex			Sex		
Age Group	Males	Females	Total	Males	Females	Total
Under 18	6%	19%	12%	10%	11%	10%
18 - 29	7%	8%	7%	10%	11%	11%
30 - 39	11%	14%	13%	18%	16%	17%
40 - 49	30%	19%	25%	19%	23%	21%
50 and Over	47%	40%	44%	43%	39%	41%
Total	100%	100%	100%	100%	100%	100%

1.7 Source of Information about Anguilla

Friends and Relatives, with 42%, continue to be the most important source of information about Anguilla to visitors. However, this total has fallen by 7 percentage points from February 2003. While other media sources not listed, through which visitors heard about Anguilla, increased by 7 percentage points from last year February 2003.

Most of the first time visitors heard of Anguilla from friends and family, mostly in Anguilla, or by some other media sources not stated. The smallest number of persons as in February 2003, who made up 8%, heard of Anguilla through the Internet, which is up by a single (1) percentage point from last year February 2003.

Table 1.7.1: SOURCE OF INFORMATION ABOUT ANGUILLA BY FIRST TIME VISITORS

Source of Information About Anguilla	% February 2003			% February 2004		
	Repeat Visitors	First-time Visitors	Total	Repeat Visitors	First-time Visitors	Total
Friends or relatives	52%	46%	49%	46%	39%	42%
The Internet	1%	14%	7%	4%	12%	8%
Travel Agent	12%	14%	13%	11%	14%	12%
Other	35%	26%	31%	40%	36%	38%
Total	100%	100%	100%	100%	100%	100%

1.8 Length of Stay

Most of the visitors to Anguilla for this period came for excursion, as 31% of the overall visitors were excursionists, followed by 27% who spent 4-7 days. This group of visitors spending 4-7 days in Anguilla has declined drastically by 24 percentage points this February. 24% spent 8-15 days, and 11% spent 1-3 days, this group of tourists was up by 2 percentage points from February 2003, the remainder of the tourists spent over 2 weeks in Anguilla, which also increased.

Table 1.8.1: LENGTH OF STAY

Length of Stay	% February 2003	% February 2004
Less than 24 hrs	10%	31%
1 - 3 days	9%	11%
4 - 7 days	51%	27%
8 - 15 days	26%	24%
16 - 23 days	2%	4%
24 or more days	2%	3%
Total	100%	100%

1.9 Accommodation

More than half of the visitors, 64%, stayed in hotels compared to 59% last year February, an increase of 5-percentage points. 17% stayed in villas or apartments, this type of accommodation experienced a decrease of 13 percentage points from last year February's. 4% stayed at their own property and has not experienced any change when compared to last year for the same corresponding period.

Table 1.9.1: TYPE OF ACCOMMODATION

Type of Accommodation	% February 2003	% February 2004
Hotel	59%	64%
Villa/apartment	30%	17%
Friends/relatives	8%	15%
Own property	4%	4%
Total	100%	100%

1.10 Activities Visitors Engaged In

Two new categories of activity were added to the survey instrument for 2004: "Leisure" and "Golf", which were represented by 35% and 1% respectively of all respondents as an activity that they participated in. A visitor may wish to engage in several activities of their choice during their stay in Anguilla. Among the 14 choices of activities listed in the table below, leisure was the most popular activity that visitors engaged in during their stay in Anguilla.

The most popular activity in 2003 was snorkelling, then spa treatment, trips to neighbouring islands, which share identical interest, and trip to offshore cays.

Snorkelling, Island Tours, Trips to Neighbouring Islands and Spa Treatment again were popular activities that visitors engaged in. Surprisingly the number of visitors who Snorkel has decreased by more than half from February 2003's participation percentage, and so has the Trips to Neighbouring Islands and Spa Treatment. All the activities for February 2004 have decreased since last year for the same corresponding period. This may be due to the addition of the two new activities offered this year that were not offered as a choice last year 2003.

Table 1.10.1: ACTIVITIES VISITORS ENGAGED IN DURING STAY

Activity	% February 2003	% February 2004
Bird watching	4%	3%
Dolphin swim	7%	4%
Fishing	2%	1%
Island tour	21%	12%
Museum	3%	0%
Nature trail	9%	2%
Scuba diving	4%	2%
Snorkelling	39%	17%
Spa treatment	26%	7%
Trip to neighbouring islands	26%	7%
Trip to offshore cays	15%	4%
Business	N/A	6%
Golf	N/A	1%
Leisure	N/A	35%

1.11 Rating of Services

Visitors to Anguilla's shores were most satisfied with peace and tranquillity, which did not receive a 'poor' rating by any of the departing visitors, 96% rated it as good. However, it has increased by one percentage point from February 2003's percentage. Other high ratings of good services offered to the visitors were Safety and Security, Accommodation, Taxi Service, Dining, Customs and Immigration, Customer Service and Island Cleanliness all shared 92%, 90%, 87%, 86%, 85% and 70% respectively.

Roads and telephone and Internet had the most significant poor rating, with 20% and 10% respectively. In comparison to February 2003, roads remained the same, while telephone and Internet increased by two percentage points. As indicated in the table below of all the services listed, Taxi services had the greatest improvement to a "good" rating from February 2003 by 10 percentage points, followed by Roads with 9 percentage points, then Island's Cleanliness and Telephone and Internet with 7 percentage points.

Table 1.11.1: RATING OF SERVICES

Service	% February 2003				% February 2004			
	Rating			Total	Rating			Total
	Good	OK	Poor		Good	OK	Poor	
Island's Cleanliness	63%	32%	4%	100%	70%	27%	3%	100%
Peace and Tranquillity	95%	4%	0%	100%	96%	4%	0%	100%
Customer Service	86%	10%	1%	100%	85%	14%	1%	100%
Safety and Security	90%	5%	1%	100%	92%	7%	1%	100%
Roads	17%	59%	20%	100%	26%	54%	20%	100%
Dining	81%	9%	0%	100%	87%	13%	1%	100%
Accommodation	91%	4%	1%	100%	90%	9%	1%	100%
Taxi	77%	6%	1%	100%	87%	11%	2%	100%
Telephone & Internet	53%	28%	8%	100%	60%	30%	10%	100%
Customs & Immigration	87%	9%	0%	100%	86%	12%	2%	100%
Ferryboat	N/A	N/A	N/A	-	78%	19%	3%	100%

1.12 Revisiting Anguilla

Respondents were asked if they would revisit Anguilla. The majority of visitors, 93%, would like to return to Anguilla's shores. 2% would not like to visit Anguilla again, however the reasons remain unknown, while 5% may consider returning to Anguilla.

Table 1.12.1 PERCENTAGE OF SAMPLE BY REVISITING ANGUILLA

Revisit	
	% February 2004
Maybe	5%
No	2%
Yes	93%
Total	100%

1.13 Recommendation of Anguilla

93% of the visitors indicated that they would recommend Anguilla to a friend; disappointingly 2% said they would not, while 6% may consider recommending Anguilla to a friend.

Table 1.14.1: RECOMMENDING ANGUILLA TO A FRIEND

Recommend	
	February 2004
Maybe	6%
No	2%
Yes	93%
Total	100%

2.Visitor Expenditure

Visitors to Anguilla include both stay- over tourists and excursionists. The amount of money a visitor spends can be related to the length of time spent in the country. It can also be cross-related to the country of residence and other relating factors.

February 2004's average expenditure, travel costs and accommodation costs both increased significantly from last year February's costs. On average for travel, US\$1,349 was spent, a large increase from February 2003 which was US\$984. On accommodation, visitors spent on average US\$279 per day, more than in February 2003's, which was US\$207. The average expenditure per day on dining was US\$81, a decline from last year's total, which was US\$108 per day. For the entire stay, where most visitors spent less than 24 hours, their total average sundry expenditure was US\$272 while in February 2003, US\$290 was spent and tourists mostly stayed for 4-7 days. Visitors spent the least on food this year February, but spent much more on travel costs.

2.1 Travel Expense

The amount spent on a flight per individual, can differ depending on the starting point of the journey for the visitor coming to Anguilla, as a person travelling a few miles from St. Maarten will not pay the same amount as a person travelling from Canada or some other distant country. The table below shows the cost that persons paid for their flights by country of residence. As expected, persons residing in the Caribbean generally spent between US\$50 - \$999 on their flight. Visitors from the United Kingdom mainly spent \$3000 or more to get to Anguilla. Persons travelling from U.S. North East had a wide range of travel expenditure spending from US\$500 to US\$3,000 or more. Many of them also travelled on Miles or Points accumulated.

Table 2.1.1: TRAVEL COST BY COUNTRY OF RESIDENCE FEBRUARY 2004

Country of Residence	Travel Costs- February 2004								
	Less than US\$50	US\$50 – \$499	\$500 – \$999	\$1,000 – \$1,999	\$2,000 – \$2,999	\$3,000 or more	Miles or points	No Response	Total
Canada	9%	15%	7%	5%	3%	3%	9%	4%	7%
Caribbean	6%	11%	12%	4%	0%	1%	2%	4%	5%
St. Martin/St Maarten	24%	17%	1%	0%	1%	1%	2%	10%	7%
Europe	4%	3%	1%	2%	1%	0%	0%	4%	2%
United Kingdom	6%	3%	4%	5%	6%	6%	2%	4%	5%
U.S. North East	31%	34%	45%	60%	61%	65%	34%	50%	49%
U.S. North West	1%	2%	2%	6%	5%	5%	11%	5%	4%
US Rest	7%	9%	24%	15%	21%	17%	30%	7%	15%
Other	11%	5%	4%	5%	2%	3%	9%	9%	5%
Total	1%	0%	0%	0%	1%	0%	0%	2%	0%
	100%	100%	100%	100%	100%	100%	100%	100%	100%

In February 2003, persons coming from the US North East spent the most on travel expenses, US\$500-999 and persons residing in the Caribbean mostly spent less than US\$500. Visitors from the United States tended to pay anywhere starting from US\$500 to US\$1,000.

Table 2.1.2: TRAVEL COST BY COUNTRY OF RESIDENCE FEBRUARY 2003

Residence	Travel Costs - February 2003							Total
	Less than \$500	\$500 - \$999	\$1,000 - \$1,999	\$2,000 - \$2,999	\$3,000 or more	Non Response		
Canada	29%	29%	36%	0%	0%	7%	100%	
Caribbean	85%	0%	0%	0%	0%	15%	100%	
Europe	17%	39%	22%	6%	6%	11%	100%	
U.S North East	15%	63%	13%	3%	4%	3%	100%	
U.S North West	43%	29%	21%	7%	0%	0%	100%	
U. S. Rest	14%	54%	17%	6%	0%	10%	100%	
United Kingdom	18%	24%	33%	6%	15%	3%	100%	
Other	0%	14%	43%	29%	0%	14%	100%	

88% of visitors who spent less that 24 hours tended to spend less than US\$50 on travel costs. On the other hand, 43% of persons who spent between 4 – 7 days

tended to spend between US\$2,000 – US\$2,999 and another 46% spent US\$3,000 or over for the same length of time.

Table 2.1.3: TRAVEL COSTS BY LENGTH OF STAY

Length of Stay	Travel Costs								Total
	Less than US\$50	US\$50 –\$499	\$500 – \$999	\$1,000 – \$1,999	\$2,000 – \$2,999	\$3000 or more	Miles or Points	No Response	
Less than 24 hours	88%	70%	6%	11%	5%	3%	18%	32%	31%
1 - 3 days	10%	21%	19%	10%	5%	4%	2%	16%	11%
4 - 7 days	1%	6%	35%	36%	43%	46%	16%	21%	27%
8 - 15 days	1%	2%	30%	36%	34%	40%	43%	20%	24%
16 - 23 days	0%	0%	6%	4%	9%	5%	11%	1%	4%
24 or more days	1%	1%	5%	3%	5%	3%	9%	4%	3%
No Response	1%	0%	0%	0%	0%	0%	0%	5%	1%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%

2.2 Accommodation Cost

Visitor expenditure for accommodation may vary depending on the type of accommodation visitors occupied. Most of the visitors had stayed on their own property, or with friends and relatives these accounted for 24% and 49% correspondingly. Visitors who incur accommodation expenses for US\$600 or more per person each night of their occupancy mostly stayed in hotels.

Table 2.2.1: ACCOMMODATION EXPENSES BY TYPE OF ACCOMMODATION FEBRUARY 2004

% February 2004						
Accommodation Costs (per person per night)	Type of Accommodation					Total
	Friends/ Relatives/ Boats	Hotel	Own property	Villa/ Apartment	Not Applicable / No Response	
\$0	49%	2%	24%	4%	18%	10%
US\$1 - \$49	1%	2%	2%	2%	0%	0%
US\$50 - \$99	2%	5%	2%	13%	0%	0%
US\$100 - \$199	3%	21%	0%	24%	0%	2%
US\$200 - 299	0%	13%	2%	18%	0%	1%
US\$300 - \$399	1%	10%	2%	8%	18%	0%
US\$400 - \$499	0%	6%	0%	7%	0%	2%
US\$500 o- \$599	2%	5%	0%	4%	0%	0%
US\$600 or more	1%	26%	5%	9%	0%	0%
Not applicable / No Response	41%	10%	61%	10%	64%	85%
Total	100%	100%	100%	100%	100%	100%

In February 2003, just under half of tourists staying at hotels paid more than US\$300 per night per person, 10% paid nothing, while only a quarter staying in villas and apartments paid this amount. Like 2003, hotels were the most highly paid for accommodation facilities. 63% of tourists staying at hotel paid more than US\$300 per night per person.

Table 2.2.2: ACCOMMODATION EXPENSES BY TYPE OF ACCOMMODATION FEBRUARY 2003

% February 2003					
Accommodation Costs (per person per night)	Type of Accommodation				Total
	Friends/ Relatives	Hotel	Own property	Villa/apartment	
\$0	65%	3%	42%	6%	10%
US\$1 - \$49	4%	2%	0%	3%	2%
US\$50 - \$99	4%	7%	8%	20%	11%
US\$100 - \$149	4%	4%	0%	14%	7%
US\$150 - 199	0%	5%	0%	8%	6%
US\$200 - 249	0%	6%	0%	12%	7%
US\$250 - \$299	0%	8%	0%	8%	7%
US\$300 or more	4%	63%	8%	28%	46%
No Response	19%	3%	42%	2%	5%
Total	100%	100%	100%	100%	100%

2.3 Dining Cost

Most excursionists who visited during February 2004 spent US\$10-19 on dining. 19% of the tourists spent between US\$50-99 on dining per day, per person. Followed by 16 % of the respondents who spent between US\$100- \$149 for dining cost. 11% of the respondents spent more than US\$200 per day per person on dining.

Table 2.3.1: DINING EXPENDITURE BY LENGTH OF STAY

Amount Spent	Length of Stay								Total
	Less than 24 hours	1 - 3 days	4 - 7 days	8 - 11 days	12 - 15 days	16 - 23 days	24 or more days	No Response	
\$0	9%	6%	3%	1%	2%	4%	8%	13%	5%
US\$1 - \$9	5%	2%	0%	1%	0%	2%	0%	0%	2%
US\$10 - \$19	20%	5%	2%	3%	4%	2%	16%	13%	9%
US\$20 - \$29	19%	8%	2%	1%	5%	6%	3%	0%	8%
US\$30 - \$39	8%	5%	2%	2%	8%	14%	8%	0%	5%
US\$40 - 49	7%	9%	3%	7%	6%	8%	8%	13%	6%
US\$50 - 99	12%	19%	20%	25%	24%	35%	32%	13%	19%
US\$100 - \$149	5%	17%	26%	24%	17%	10%	8%	0%	16%
US\$150 - \$199	1%	6%	18%	14%	12%	8%	3%	13%	9%
US\$200 or more	1%	11%	18%	18%	11%	8%	8%	0%	11%
No Response	12%	11%	5%	4%	11%	2%	8%	38%	8%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%

In February 2003, few visitors spent zero dollars on eating with only 2%. 24%, spent between US\$50 -\$99 on dining. 23% spent US\$100-149, while 19% spent US\$200 or more on dining each day per person during their stay.

Table 2.3.2: DINING EXPENDITURES FOR FEBRUARY 2003

Eating Costs (per person per day)	% February 2003
\$0	2%
US\$1 - \$49	17%
US\$50 - 99	24%
US\$100 - \$149	23%
US\$150 - \$199	11%
US\$200 or more	19%
Total	100%

2.4 Sundry Cost

Sundry expenses include all other expenditures incurred by visitors during their stay, whether it be souvenirs, a new pair of shades to replace the damaged ones, a rental car, gasoline, groceries etc. Unlike the previous expenditures, this is cumulative for the whole group for the entire time spent in Anguilla.

Most of the excursionists spent less than US\$20 during their stay. The table below shows visitor expenditure on sundry items by length of stay.

Table 2.4.1: SUNDRY EXPENSES BY LENGTH OF STAY

Amount Spent (for entire stay)	Length of Stay								Total
	Less than 24 hours	1 - 3 days	4 - 7 days	8 - 11 days	12 - 15 days	16 - 23 days	24 or more days	No Response	
Less than US\$20	35%	18%	8%	4%	2%	4%	5%	38%	17%
US\$20 - \$49	16%	19%	13%	11%	5%	10%	5%	13%	13%
US\$50 - \$99	13%	11%	14%	10%	14%	18%	8%	0%	13%
US\$100 - \$199	5%	10%	16%	15%	18%	14%	11%	13%	12%
US\$200 - \$299	2%	12%	8%	15%	8%	14%	5%	0%	8%
US\$300 - \$399	1%	3%	8%	13%	8%	2%	13%	0%	6%
US\$400 - \$499	1%	2%	6%	5%	6%	8%	13%	0%	4%
US\$500 - \$999	1%	2%	9%	10%	12%	10%	5%	0%	6%
US\$1,000 - \$1,999	1%	3%	6%	7%	6%	10%	5%	0%	4%
US\$2,000 or more	0%	0%	5%	5%	7%	2%	16%	13%	3%
No Response	23%	20%	5%	5%	12%	6%	13%	25%	13%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%

Summary

Visitors who departed Anguilla during February 2004 showed that, the U.S.A. was again the most important market for visitors to Anguilla, with North East U.S.A being the main source. However, tourist markets are increasing from St. Martin/ St. Marten and Canada.

The popularity of travel routes in February 2004 has experienced little change and shows that the ferry from St. Martin is continuing to be a more popular route to Anguilla than coming through Puerto Rico and into Wallblake Airport, which is the second, most popular travel route. Antigua has experienced that hardest fall as a travel route used by visitors. American Airlines is the most popular air carrier.

Booking arrangements, according to visitors are generally made with little to no difficulty. In a few cases, visitors may indicate that they had trouble due to timing/ availability or cost. 93% of the visitors said that they would return to Anguilla, and they also responded that they would recommend Anguilla to a friend.

Visitors mostly travelled with their spouse or partner. Most of the visitors were 50 years and over. There was a fairly equal balance of males and females this trip throughout the age groups. More than 60% of the visitors stayed in hotel accommodations. There has been a large increase in the proportion staying with family and friends and a sharp drop of those staying in villas or apartments this February.

Visitors were mostly occupied in Snorkelling, Island Tours, Trips to Neighbouring Islands, Spa Treatment; and many spent their time in Leisure. Of the services offered by Anguilla the following were rated as ' good', which is the highest rating, by over 85 % of the visitors: Peace and Tranquillity, Safety and Security, Accommodation, Taxi Services and Dining.

From the survey results it was estimated that on average visitors spent US\$1,349 for travelling to Anguilla, US\$279 per day on accommodation, expenditure per day on dining was US\$81 and for the duration of their stay US\$272 was spent on sundry items.

Many of the patterns and trends practised by visitors in February of 2003 were again repeated in February 2004, showing only gentle fluctuations. A few of the more obvious changes displayed by the visitors include changes in visitor expenditures and their length of stay as for this period 31% of all visitors were excursionists, a very significant increase.

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).

10. What type of accommodation did you stay in?

- Hotel Friends/relatives
- Own property Boat
- Rented property Not applicable

11. How would you rate the following that you experienced during your visit?

- | | | | |
|-----------------------|----------------------------|----------------------------|----------------------------|
| Island's Cleanliness | <input type="radio"/> Good | <input type="radio"/> Fair | <input type="radio"/> Poor |
| Peace & Tranquility | <input type="radio"/> Good | <input type="radio"/> Fair | <input type="radio"/> Poor |
| Customer Service | <input type="radio"/> Good | <input type="radio"/> Fair | <input type="radio"/> Poor |
| Safety & Security | <input type="radio"/> Good | <input type="radio"/> Fair | <input type="radio"/> Poor |
| Roads | <input type="radio"/> Good | <input type="radio"/> Fair | <input type="radio"/> Poor |
| Dining | <input type="radio"/> Good | <input type="radio"/> Fair | <input type="radio"/> Poor |
| Accommodation | <input type="radio"/> Good | <input type="radio"/> Fair | <input type="radio"/> Poor |
| Taxi Service | <input type="radio"/> Good | <input type="radio"/> Fair | <input type="radio"/> Poor |
| Telephone & Internet | <input type="radio"/> Good | <input type="radio"/> Fair | <input type="radio"/> Poor |
| Customs & Immigration | <input type="radio"/> Good | <input type="radio"/> Fair | <input type="radio"/> Poor |
| Ferryboat | <input type="radio"/> Good | <input type="radio"/> Fair | <input type="radio"/> Poor |

12. How did you first hear about Anguilla?

- Internet Friends in Anguilla
- Other media Friends overseas
- Travel agent Other

13. Would you visit Anguilla again?

- Yes No Maybe

14. Would you recommend Anguilla to a friend for a holiday?

- Yes No Maybe

15. How much did the trip cost per person?

- Less than US\$50 US\$2,000 - \$2,999
- US\$50 - \$499 US\$3,000 or more
- US\$500 - \$999 miles or points
- US\$1,000 - \$1,999

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

- \$0 US\$300 - \$399
- US\$1 - \$49 US\$400 - \$499
- US\$50 - \$99 US\$500 - \$599
- US\$100 - \$199 US\$600 or more
- US\$200 - 299 Not applicable

17. About 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

18. 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 US\$1,000 - \$1,999
- US\$200 - \$299 US\$2,000 or more

19. Date today

Day		Month		Year	

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