



Visitor Exit Survey

Report

June 2005

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

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Preface

This report is the second in a series of Visitor Exit Surveys to be conducted during 2005. The surveys are conducted during two months of the “high season” (November – April) and two months within the “slow season” (May – October) as visitors origins and activities vary during these times of the year.

The survey is designed to identify the main countries where visitors to Anguilla reside, as well as to gather information about the characteristics of these visitors to Anguilla. Visitor characteristics are used to determine how it may be associated with the goods or services they tend to utilize. This includes their spending level, their spending preferences, activities engaged in and the level of satisfaction with the entire experience of being in Anguilla.

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 willingly cooperated and completed the survey questionnaires. Your cooperation was greatly appreciated.

We would also like to extend thanks to 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 2005. The survey was carried out at both the Blowing Point Seaport and the Wallblake Airport as these ports are the major ports for visitor arrivals.

Hired interviewers stationed at both ports 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 travellers as one questionnaire can represent more than one traveller.

A total of 711 questionnaires were completed and returned. These completed questionnaires were then edited and scanned prior to the report analysis.

Table A, shows the response rate by port of exit.

Table A: Response Rate by Port

Port	%
Wallblake Airport	55%
Blowing Point Seaport	45%

Summary

This report focuses on three main areas:

- Visitor Profile,
- Marketing Implications
- Visitor Expenditure.

The analysis of this report covers mainly on tourists rather than excursionists. It is the tourists who are more likely to contribute significantly to the economy of Anguilla. However, details of excursionists' country of origin, is included. The findings of this survey are summarized below

Visitor Profile

- Of the surveyed visitors departing Anguilla during June, 75% resided in the United States of America.
- Most popular route travelled to get to Anguilla was via Puerto Rico (66%)
- Most popular carrier of tourists to Anguilla was American Airlines/ American Eagle (64%)
- The majority of tourists vacationing in Anguilla during June travelled with their spouse (53%)
- Most persons visiting (31%) Anguilla were in the age group 30-39.
- Just around half (50%) of tourists spent between 4 to 7 days in Anguilla, while just under a quarter (25%) stayed for a period of 11 days.
- Three quarters of the tourists who visited during June stayed in one of the hotel establishments on the island.
- Most Excursionists (19%) originated out of St. Martin/St. Maarten as they usually are vacationing in that country and perhaps decide to visit Anguilla for the day.

Marketing Implications

- The three most popular activities engaged in by tourists were Leisure (26%), followed by Snorkelling (18%) and Spa Treatment, (14%).
- Feeling a sense of Peace, one of the many characteristics that Anguilla boasts about, was most highly rated by tourists (91%) followed by Accommodation (85%), Safety (83%) and Dining (82%).
- Most persons heard about Anguilla through friends living on the island and overseas as well as via the internet.
- 80% of the tourists surveyed reported having no difficulty making their own booking.
- 87% indicated that they would visit Anguilla again and also recommend Anguilla to a friend for a holiday.

Visitor Expenditure

- The average expenditure by tourists for Transportation (ground transport), airfare, dining and accommodation was US\$59.23, US\$1666.61, US\$104.62 and US\$284.47 respectively.

Description and Analysis of the Data Collected

I. Visitor Profiles

I.1 Place of Residence

During June 2005, of the tourists that departed Anguilla and who took part in the survey, the majority of them were from the United States of America. The US North East accounted for just under half of the US visitors. Tourists from the Caribbean made up 11% of those surveyed compared to 12% during the same period in 2004. Europe accounted for 5% of the visitors departing, with the United Kingdom being the main country of residence. 1% listed Canada as their country of residence.

Table I.1 Departures by Country of Residence

Country of Residence	% June 2004	% June 2005
U.S. North East	44%	46%
U.S. North West	12%	11%
US Rest	19%	19%
Total United States	75%	75%
United Kingdom	5%	3%
France	0%	1%
Germany	2%	0%
Italy	0%	1%
Other Europe	1%	1%
Total Europe	8%	5%
St. Martin/St Maarten	1%	4%
Caribbean	12%	11%
Canada	1%	1%
Other	2%	2%
Total	100%	100%

I.2 Country of Residence by Length of Stay

Visitors from the North East United States stayed in Anguilla for the longest period of time than those from any other section of the U.S. The majority (57%) stayed for a period of 4 – 11 days on the island. 38% of those visiting from the United Kingdom stayed for just around 3 weeks. 20% from the Caribbean also spent around three weeks on the island.

Table I.2 Country of Residence by Length of Stay

Country of Residence	Length of Stay						
	1 - 3 days	4 - 7 days	8 - 11 days	12 - 15 days	16 - 23 days	24 or more days	Total
U.S. North East	20%	57%	57%	38%	25%	33%	46%
U.S. North West	3%	11%	14%	22%	25%	20%	11%
US Rest	17%	22%	18%	16%	0%	13%	19%
Canada	2%	0%	0%	9%	0%	0%	1%
United Kingdom	2%	1%	5%	6%	38%	0%	3%
France	2%	0%	1%	3%	0%	0%	1%
Germany	0%	0%	0%	0%	0%	0%	0%
Italy	2%	0%	3%	0%	0%	0%	1%
Other Europe	1%	0%	2%	3%	0%	0%	1%
St. Martin/St Maarten	17%	1%	0%	0%	0%	0%	4%
Caribbean	31%	6%	3%	3%	13%	20%	11%
Other	4%	0%	1%	3%	0%	13%	2%
Total	100%	100%	100%	100%	100%	100%	100%

I.3 Travel Route

92% of the visitors from the U.S travelled to Anguilla via Puerto Rico. Travelling via St. Martin was also a popular route for U.S travellers. Travelling via Antigua to get to Anguilla was the preferred route for tourists originating out of the United Kingdom and other Caribbean countries.

Table I.3 Travel Route to Anguilla

Country of Residence	Travel Route						
	Puerto Rico	Antigua	St Maarten, then fly	St Maarten, then ferry	Boat/ship	Other	Total
U.S. North East	66%	7%	50%	32%	45%	14%	46%
U.S. North West	11%	7%	5%	13%	5%	43%	11%
US Rest	15%	10%	18%	27%	10%	29%	19%
United Kingdom	0%	19%	2%	3%	0%	0%	3%
Canada	0%	0%	2%	2%	0%	0%	1%
France	0%	0%	0%	2%	0%	0%	1%
Germany	0%	0%	0%	0%	0%	0%	0%
Italy	0%	2%	2%	1%	0%	0%	1%
Other Europe	0%	0%	0%	2%	0%	0%	1%
St. Martin/St Maarten	0%	0%	0%	10%	10%	0%	4%
Caribbean	7%	52%	16%	6%	30%	0%	11%
Other	0%	2%	5%	2%	0%	14%	2%
Total	100%	100%	100%	100%	100%	100%	100%

I.4 Airline used to travel to Anguilla

From this survey, results indicated that the majority of visitors used American Airlines to get to Anguilla. In comparison with the same period in 2004 this airline was also the mode of choice for transportation. Carriers, Winair and LIAT accounted for 6% and 7% of the tourists travelling to Anguilla respectively compared to 5% and 9% during June 2004.

Table I.4 Airlines Used for Travel

Airline	% June 2004	% June 2005
American	59%	64%
American & Other	4%	3%
US Airways	8%	8%
Delta	1%	2%
British Airways	1%	1%
Air France	2%	2%
KLM	2%	1%
LIAT	9%	7%
Winair	5%	6%
Charter	0%	1%
Private Plane	0%	0%
Other	5%	8%
Total	100%	100%

In June 2005, 7% of the respondents said they encountered problems securing a ticket when it came to the time they wanted to travel and 5% found it costly and had to shop around for cheaper fares. 80% said they had no trouble booking their flights.

I.5 Travel Companion by Accommodation

Tourists, who participated in the survey and who travelled with their spouses, indicated that they stayed in one of the hotel establishments on the island. Analysis showed that 64% of these couples opted to stay in hotels while 40% stayed in a villa. 21% were owners of their own residences on the island. The majority of those travelling alone stayed with friends or relatives or at their own property.

Table I.5 Travel Companion by Accommodation

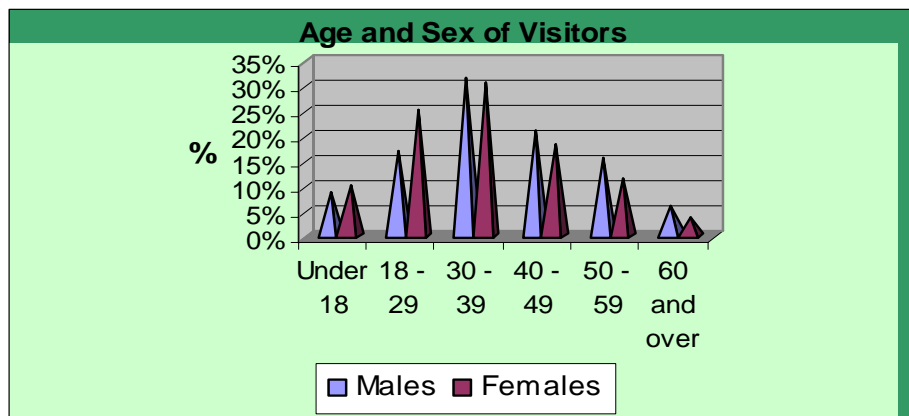
Travel Companion	Accommodation Type					
	Hotel	Villa/apartment	Friends/relatives	Own property	Boat	Total
Alone	8%	19%	43%	43%	100%	14%
Family	16%	17%	24%	21%	0%	17%
Family & friends	5%	10%	10%	7%	0%	6%
Friend(s)	4%	10%	9%	7%	0%	5%
Spouse/partner	64%	40%	12%	21%	0%	53%
Other	4%	0%	1%	0%	0%	3%
Total	100%	100%	100%	100%	100%	100%

I.6 Ages and Sex of Visitors

As it is Summer time, visitors during this time of year tend to be families traveling with their children. Results of the survey indicate that the majority of persons visiting fell within the 18- 39 age group. 20% were in the 40 – 49 age-group, 15% fell within the 50 - 59 age-group. Children and young adults, persons under the age of 18, accounted for 9% of the visitors departing during June 2005.

Table I.6 Ages and Sex of Visitors

Age Group	% June 2004			% June 2005		
	Sex		Total	Sex		Total
	Males	Females		Males	Females	
Under 18	9%	9%	9%	9%	10%	9%
18 - 29	16%	18%	17%	17%	25%	21%
30 -39	31%	41%	36%	31%	31%	31%
40 - 49	32%	22%	27%	21%	18%	20%
50 - 59	13%	11%	12%	16%	12%	14%
60 and over	0%	0%	0%	6%	4%	5%
Total	100%	100%	100%	100%	100%	100%

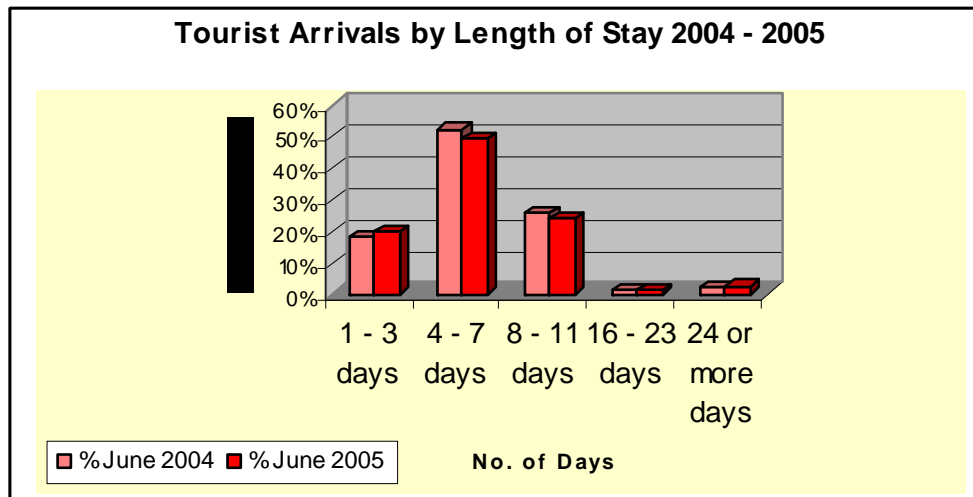


I.7 Length of Stay

Visitors tend to stay longer on vacation during this time of year. Results indicate that 50% of visitors who departed in June stayed for just under a week, 2% lower than those visiting during June 2004. 24% stayed for two weeks. On average 3% stayed for 16 or more days. The remainder of the visitors spent 3 days on the island.

Table I.7 Length of Stay

Length of stay	% June 2004	% June 2005
1 - 3 days	18%	20%
4 - 7 days	52%	50%
8 - 11 days	26%	24%
16 - 23 days	1%	1%
24 or more days	2%	2%
Total	100%	100%



I.8 Accommodation

During June more visitors opted to stay in hotels, up 2 %age points than those visiting in June 2004. 8% stayed in Villas and apartments and 10% chose to stay with Friends and Relatives.

Table I.8 Accommodation Type

Type of Accommodation	% June 2004	% June 2005
Hotel	72%	74%
Villa/apartment	14%	8%
Friends/relatives	5%	10%
Own property	1%	2%
Boat	0%	0%
Total	100%	100%

2. Marketing Implications

2.1 Source of Information about Anguilla

25% of first-time visitors heard about Anguilla from the internet the same distribution as in 2004, while 17% heard about the island from their friends living overseas. 39% heard about Anguilla from other media sources.

When asked if they would visit Anguilla again, 87% indicated they would.

Table 2.1 Source of Information

Source of Information about Anguilla	%June 2004			% June 2005		
	Repeat Visitors	First Time Visitors	Total	Repeat Visitors	First Time Visitors	Total
Friends in Anguilla	16%	10%	12%	27%	8%	15%
Friends overseas	15%	21%	19%	9%	17%	13%
Internet	6%	25%	20%	3%	25%	16%
Travel agent	11%	11%	11%	8%	9%	8%
Other media	9%	11%	10%	9%	16%	13%
Other	43%	22%	28%	39%	23%	29%
Total	100%	100%	100%	100%	100%	100%

2.2 Activities Engaged In

With over 30 beaches to explore, 21% of the visitors departing said they enjoyed the snorkelling and scuba diving that they did while vacationing on the island.

26% enjoyed a leisurely vacation while 14% indulged in a spa treatment. 9% enjoyed an island tour.

During this survey period 4% of those departing came to Anguilla for business purposes.

Table 2.2 Activities

Activities Engaged In	%June 2005
Leisure	26%
Snorkelling	18%
Spa Treatment	14%
Trip to neighboring Islands	9%
Island Tour	9%
Trip to Offshore Cays	7%
Business	4%
Dolphin Swim	3%
Scuba Diving	3%
Bird Watching	2%
Nature Trail	2%
Fishing	1%
Golf	1%
Museum Tour	1%
Total	100%

2.3 Rating of Services Offered

One of the many characteristics Anguilla boasts that they offer to visitors was the main service most appreciated by tourists surveyed during June. Peace and Tranquillity received a "Good" rating of 91%. Accommodation, Safety and Dining all received "Good" ratings of 85%, 83% and 82% respectively. Three quarters of the tourists indicated that they were treated well by the customer service personnel at all levels. The ferryboats received a "Good" rating of 44% while the road infrastructure received an 'OK' rating of 48 %.

Table 2.3 Rating of Services Offered

% June 2005				
Service	Rating			Total
	Good	OK	Poor	
Peace	91%	4%	0%	100%
Accommodation	85%	7%	0%	100%
Safety	83%	10%	1%	100%
Dining	82%	10%	2%	100%
Customer Service	75%	15%	4%	100%
Taxi	74%	11%	3%	100%
Customs & Immigration	73%	20%	2%	100%
Cleanliness	72%	22%	2%	100%
Telephone & Internet	58%	21%	7%	100%
Ferryboat	44%	20%	4%	100%
Roads	38%	48%	8%	100%

3. Visitor Expenditure

3.I Accommodation Costs by Type of Accommodation

Anguilla is world-renowned for its quality collection of upscale resorts and has a number of full-service moderate and competitively priced accommodations as well. Accommodations are available in a number of configurations - full-fledged and mini-resorts, hotels and apartment hotels; private and club-style villas, apartments and condos; small inns and guesthouses. This wide range of options caters to any person(s) who may wish to come to Anguilla for a vacation.

Table 3.I Accommodation Costs

Accommodation Costs (per person per night)	Type of Accommodation					Total
	Hotel	Villa/apartment	Friends/relatives	Own property	Boat	
\$0	2%	6%	63%	36%	0%	11%
US\$1 - \$49	1%	8%	0%	0%	0%	2%
US\$50 - \$99	7%	8%	3%	0%	0%	6%
US\$100 - \$199	23%	44%	1%	0%	0%	20%
US\$200 - 299	14%	13%	1%	0%	0%	12%
US\$300 - \$399	20%	6%	0%	0%	0%	15%
US\$400 - \$499	11%	0%	0%	0%	0%	8%
US\$500 - \$599	9%	0%	1%	0%	0%	7%
US\$600 +	8%	2%	1%	0%	0%	6%
NA	4%	10%	25%	57%	100%	8%
Total	100%	100%	100%	100%	100%	100%

During June 2005, 63% of the visitors stayed with family or friends and incurred no cost for accommodation. 91 % of the paying tourists who spent between US\$100 – US\$599 stayed in hotels, while 57 % stayed at a villa or apartment.

3.2 Airfare Costs

Airfare costs will vary by country from which tourists come. From those tourists coming from the North Eastern half of the United States this cost was on average ranging from US\$500- US\$3000. 68.0 % travelling from this area used their frequent flyer miles to come to Anguilla. As is expected, persons, travelling from St. Martin and within the region will pay much less than persons, travelling from further afar. On average these Caribbean nationals paid US\$50 – US\$999 for their trip to Anguilla. Visitors from Europe including the United Kingdom generally spent between US\$1000 – US\$1999 for their tickets.

Table 3.2 Flight Costs

Country of Residence	Flight Costs							Total
	miles or points	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	34%	4%	20%	46%	47%	57%	56%	46%
U.S. North West	14%	0%	2%	10%	13%	10%	15%	11%
US Rest	31%	9%	5%	15%	19%	22%	23%	19%
Canada	3%	0%	2%	0%	1%	1%	1%	1%
United Kingdom	0%	4%	5%	3%	4%	1%	2%	3%
France	0%	4%	5%	0%	1%	0%	0%	1%
Germany	3%	0%	0%	0%	0%	0%	0%	0%
Italy	3%	0%	2%	3%	0%	1%	0%	1%
Other Europe	0%	0%	2%	1%	1%	1%	0%	1%
St. Martin/St Maarten	0%	61%	14%	0%	1%	1%	0%	4%
Caribbean	6%	17%	39%	19%	13%	5%	1%	11%
Other	6%	0%	4%	1%	1%	1%	1%	2%
Total	100%	100%	100%	100%	100%	100%	100%	100%

3.3 Dining Costs

Anguilla’s dining scene offers visitors a variety of gastronomic diversions and a choice of dining ambiance and cuisine specialties. With over 70 restaurants, visitors can choose a dining experience based on an appetite impulse, a desire for a romantic or convivial setting, or their pocketbook. There are many restaurant cuisine specialties featured in the restaurants on this small island, ranging from Caribbean to Mediterranean, French, Continental, Creole, Italian, American and Indo-Chinese.

During June, US\$50 – US\$150 was the most money spent on eating per day indicated by 43 % of those responding. 10.0 % indicated that they spent between, US\$150 - US\$200 on dining expenses daily.

Table 3.3 Dining Costs

Dining Costs	%June 2004	%June 2005
\$0	1%	6%
US\$1 - \$9	1%	0%
US\$10 - \$19	2%	2%
US\$20 - \$29	5%	5%
US\$30 - \$39	4%	5%
US\$40 - \$49	7%	6%
US\$50 - \$99	22%	22%
US\$100 - \$149	23%	21%
US\$150 - \$199	13%	10%
US\$200 or more	15%	20%
Total	100%	100%

3.4 Transportation Costs

Ground transportation costs of tourists survey during June were in the range of US\$1- US\$49 daily. 43 % indicated this was what they paid. A further quarter spent between US\$50 – US\$99 per day.

Table 3.4 Inland Transportation Costs

Transportation Costs (per day)	Length of Stay						Total
	1 - 3 days	4 - 7 days	8 - 11 days	12 - 15 days	16 - 23 days	24 or more days	
\$0	20%	8%	5%	6%	13%	40%	11%
US\$1 - \$49	32%	46%	56%	50%	25%	33%	43%
US\$50 - \$99	24%	26%	26%	28%	13%	7%	25%
US\$100 - \$199	7%	8%	6%	6%	0%	0%	7%
US\$200 - 299	1%	3%	2%	3%	0%	0%	2%
US\$300 - \$399	1%	2%	1%	0%	0%	0%	1%
US\$400 - \$499	0%	0%	1%	0%	0%	0%	0%
US\$500 - \$599	0%	0%	0%	3%	13%	0%	0%
US\$600 +	0%	1%	0%	0%	0%	0%	0%
Total	100%	100%	100%	100%	100%	100%	100%

3.5 Sundry Costs

This cost includes all other expenditure incurred by the visitor during their stay on the island. These expenses can be souvenirs bought, T-shirts, admission costs to various attractions on the island etc.

Below is the visitor expenditure on sundry costs during June.

Table 3.5 Sundry Costs

Sundry Costs	% June 2005
Less than US\$20	11%
US\$20 - \$49	15%
US\$50 - \$99	14%
US\$100 - \$199	14%
US\$200 - \$299	10%
US\$300 - \$399	7%
US\$400 - \$499	5%
US\$500 - \$999	10%
US\$1,000 - \$1,999	6%
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).

