

Visitor Exit Survey

April 2004 Report

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

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Preface

This report contains information about the Visitor Exit Survey conducted during April 2004. As with previous surveys a joint committee comprising individuals from 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.

This report was designed for investors, planners and programme developers in the tourism and related sectors. The data collected is published in an easy to read format so persons interested in the report 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's website, www.gov.ai/statistics, to access a wide range of statistical information relating to Anguilla.

Acknowledgements

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

We would also like to extend thanks to the Dispatch and Departure Tax Officers and the hired Interviewers for distributing and collecting the questionnaires.

Methodology

The Visitor Exit Survey was carried out during the month of April 2004. The Survey was carried out at the Wallblake Airport and the Blowing Point Seaport, as these ports are the major ports for Visitor Arrivals, only these two ports were used to distribute questionnaires to departing passengers.

Dispatch Officers at the Blowing Point Ferry Terminal, Departure Tax Officers at the Airport and hired interviewers administered and collected the questionnaires, which were distributed 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 was to complete a questionnaire on behalf of a group or family. With this in mind the tabulations are based upon number of questionnaires rather than actual numbers of travelers as one questionnaire can represent more than one traveler.

A total of 682 questionnaires were completed and returned. These completed questionnaires were then edited and scanned prior to the report analysis.

Summary

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

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

Flight arrangements for travel to Anguilla, is made with very little hassle. Only a small percentage of visitors either encounter problems when it comes to time of travel and cost of the flight. 90% of the visitors said they would definitely return to Anguilla and would definitely recommend a friend or friends to come along.

Visitors during April traveled with their spouse or partners. The majority of the visitors were 30 years and over. Just under half of the visitors who came to Anguilla stayed in one of the hotel properties on the island. The remaining percentage stayed with family and friends, in villas or apartments or in their own homes.

Leisure, snorkeling and island tours were the main activities visitors did while on Anguilla; 8% said they attended the Moonsplash festival, which was held during the first weekend of April. Many said that they felt very peaceful, relaxed and safe during their stay on Anguilla. 97% rated this as good. Accommodation, Taxi services, Dining and Customs and Immigration all received high ratings by those visiting.

Travel costs to get to Anguilla on average, was US\$1204.42. US\$85 was the most money spent on dining per day for visitors during this period. Visitors spent on average US\$278.63 per day on accommodation.

Introduction - Visitor Exit Survey

During the month of April, Sunday was the most popular day for visitors departing the island as 28% of the questionnaires were completed on this day. Most likely airlines offer special rates to travelers if they leave their country of residence, for example, on a Wednesday and return on a Saturday or Sunday hence the reason for the weekend being the busiest days for distribution of the questionnaire. From the results it is shown that the middle days of the week had lower distribution rates.

Table A: Distribution of Questionnaires by Day of the Week

Distribution Rate				
Day of the Week	% April 2004			
Sunday	28%			
Monday	8%			
Tuesday	8%			
Wednesday	12%			
Thursday	11%			
Friday	18%			
Saturday	16%			
Total	100%			

Blowing Point Seaport had the higher percentage in questionnaire distribution and completion of 57% during April compared to 37% at the Wallblake Airport.

Table B: Return Distribution by Port of Exit

Port of Exit	Percentage
Blowing Point Seaport	57%
Wallblake Airport	37%

Wallblake Airport had the higher response rate of 57% and the Blowing Point Seaport with 43% of all non-national departures from Anguilla during April.

Table C: Response Rate by Port of Exit

Port of Exit	Response Rate
Blowing Point Seaport	43%
Wallblake Airport	57%

Description and Analysis of the Data Collected

1. Visitor Profiles

1.1 Place of Residence

As is expected 60% of persons surveyed lived in the United States of America mainly the North Eastern half of this country where 49% of the respondents said they reside. The U.S.A. has always been Anguilla's stronger market for visitor arrivals. 11% came from Europe with the United Kingdom accounting for 5% of Europe's overall number of respondents departing during April. Canada accounted for 4% of departures during this survey period, while the Caribbean (*including St. Martin/St. Maarten*) represented 22% of visitors surveyed.

Table 1.1.1 Departures by Country of Residence

G () () ()	0/ 4 11 2004
Country of Residence	% April 2004
U.S. North East	41%
U.S. North West	5%
US Rest	14%
Total United States	60%
United Kingdom	5%
Italy	1%
Germany	1%
France	0%
Other Europe	3%
Total Europe	11%
St. Martin/St Maarten	10%
Caribbean	12%
Canada	4%
Other	4%
Total All Other Countries	29%
Total	100%

1.2 Country of Residence by Length of Stay

Persons visiting from the U.S. North East stayed in Anguilla for the longest period of time than any other country during this period ranging from 4 days to 24 or more days. 24% of those from the United Kingdom visited for 12-15 days. Some Caribbean nationals spent 1 – 3 days on Anguilla during this month. During April around the Easter weekend, Anguilla hosted the Regional Inland Revenue Sports Clubs. This activity brought quite a number of persons from the region to Anguilla's shores. 2% of the tourists surveyed from Germany stayed for just around two weeks. 3% of visitors from France stayed on Anguilla for a period ranging from 3 days to 15 days.

Table 1.2.1 Country of Residence by Length of Stay

	Length of Stay						
Country of Residence	Less than 24 Hours	1 - 3 days	4 - 7 days	8 - 15 days	16 - 23 days	24 or more days	Total
Canada	3%	6%	4%	2%	0%	7%	4%
Caribbean	9%	18%	17%	2%	0%	14%	12%
France	3%	1%	0%	2%	0%	0%	1%
Germany	1%	0%	0%	2%	0%	0%	0%
Italy	2%	0%	0%	0%	0%	0%	0%
Other	3%	9%	2%	2%	10%	7%	4%
Other Europe	3%	8%	2%	3%	0%	7%	3%
St. Martin/St Maarten	20%	26%	1%	1%	0%	0%	10%
U.S. North East	39%	20%	49%	48%	50%	21%	41%
U.S. North West	1%	4%	4%	10%	20%	21%	5%
US Rest	13%	4%	19%	15%	10%	7%	14%
United Kingdom	3%	6%	2%	15%	10%	14%	5%
Total	100%	100%	100%	100%	100%	100%	100%

1.3 Travel Route

From this survey and previous exit surveys it can be seen that St.Martin is becoming an important port of arrival for visitors whose last port of embarkation is Anguilla. 56% of those surveyed said they used this travel route as a means of getting to Anguilla and then took the ferry over to Anguilla. The second largest travel route that visitors took to get to Anguilla was via Puerto Rico, 27% of those surveyed indicated this. 9% of travelers came to Anguilla via Antigua.

Table 1.3.1 Travel Route to Anguilla

Travel Route				
	% April 2004			
St Maarten, then ferry to Anguilla	56%			
Puerto Rico	27%			
Antigua	9%			
St Maarten, then fly to Anguilla	3%			
Boat/ship	2%			
Other	3%			
Total	100%			

1.4 Airline used to travel to Anguilla

American Airline/Eagle was the airline of choice for most travelers to Anguilla during April. 40% of the respondents used this carrier. British Airways, KLM and Air France were the preferred airlines for travelers from Europe. The regional airlines (LIAT, Winair and Caribbean Star) carried 13% of the visitors to Anguilla during April.

Table 1.4.1: Airline Used to Travel

Airline	% April 2004
American	37%
American and Other	2%
Caribbean Star	3%
US Airways	7%
LIAT	5%
LIAT and Other	2%
Winair	3%
British Airways	1%
KLM	2%
Air France	3%
Charter	1%
Other	12%
Total	100%

1.5 Booking Arrangements

89% of persons traveling during this period indicated that they did not have any problems booking their flights. 7% said they encountered problems when it came to the time they wanted to travel and 4% found it costly and had to shop around for cheaper fares.

Table 1.5.1 Booking Arrangements

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

1.6 Travel Companion by Accommodation

During this survey, persons traveling with their spouses who either stayed in their own property or hotels shared the same degree of importance. 56% stayed in their own homes while 52% stayed at hotels. Villas/Apartments were also a popular place of stay for couples. Persons traveling alone chose to stay either with their friends or relatives or in their own homes.

Table 1.6.1 Travel Companion by Accommodation

	Accommodation				
Travel Companion	Friends/ Own V Relatives Hotel property		Villa/ Apartment/ Boats	Total	
Spouse/partner	21%	52%	56%	31%	39%
Family	16%	18%	11%	15%	19%
Family & friends	10%	5%	11%	17%	9%
Friend(s)	25%	13%	0%	21%	16%
Alone	23%	7%	22%	14%	12%
Other	5%	5%	0%	3%	4%
Total	100%	100%	100%	100%	100%

1.7 Ages and Sex of Visitors

The majority of visitors to Anguilla during April were in the 30 years old and over. In April just over half of the respondents were 40 years and older and 33% were between the ages of 18-39 years. This time of year would see more visitors in the older age range as children are still in school and families tend to travel more during the summer months.

Table 1.7.1 Age and Sex of Visitors

% April 2004					
Age Group	Males	Total			
Under 18	13%	14%	14%		
18 - 29	9%	13%	11%		
30 - 39	23%	22%	22%		
40 - 49	22%	28%	25%		
50 - 59	23%	16%	19%		
60 and over	10%	7%	9%		
Total	100%	100%	100%		

1.8 Source of Information about Anguilla

"Word of mouth" was an important source for people hearing about Anguilla. 38% of repeat visitors and 32% of first-time visitors surveyed said they heard about the island from Friends and Relatives.

Travel Agents and the Internet had the same degree of importance for first time visitors hearing about Anguilla. 14% indicated that these were the sources of information for them hearing about Anguilla

41% of first time visitors said they heard about Anguilla from other sources.

Table 1.8.1 Source of Information about Anguilla

	% April 2004					
Source of Information about Anguilla	Repeat Visitors	First-time Visitors	Total			
Friends or Relatives	38%	32%	34%			
The Internet	2%	14%	9%			
Travel Agent	6%	14%	10%			
Other	54%	41%	47%			

1.9 Length of Stay

The majority of visitors who departed in April stayed for 4-7 days, while 15% stayed for 1-3 days. 26 % of the visitors surveyed during April stayed for less than 24 hours. This type of visitor is known as an excursionist, where they come to an island and spend a couple of hours enjoying what the island has to offer. The remainder of the visitors spent over 2 weeks or more in Anguilla.

Table 1.9.1 Length of Stay

Length of Stay	% April 2004
Less than 24 hours	26%
1 - 3 days	15%
4 - 7 days	37%
8 - 15 days	14%
12 - 15 days	4%
16 - 23 days	1%
Total	100%

1.10 Accommodation

Just under half of the visitors who came to Anguilla in April stayed in one of the island's hotels as 46% indicated this. 14% stayed in villas or apartments and 12% stayed either with family and friends or their own property.

Table 1.10.1: Type of Accommodation

Type of Accommodation	% April 2004
Hotel	46%
Villa/Apartment	14%
Friends/Relatives	11%
Own Property	1%
Total	100%

1.11 Activities Visitors Engaged In

As is expected and the usual main reason for visiting Anguilla was reiterated in this April survey where the most popular activity persons engaged in. 31% of the responses indicated this. Snorkeling was the second most popular activity engaged in by those visiting the island.

The Moonsplash Festival was held during the first weekend of this month and 8% of the visitors said they attended. 7% treated themselves to a day at the Spa. Bird watching, Fishing, Scuba diving and taking a walk along a nature trail was engaged in by 7% of tourists. For April, 6% of departing visitors said they came to Anguilla for business purposes.

Table 1.11.1: Activities Visitors Engaged In

Activity	% April 2004
Leisure	31%
Snorkeling	13%
Island tour	11%
Moonsplash	8%
Trip to neighboring Islands	8%
Spa treatment	7%
Business	6%
Dolphin swim	5%
Trip to Offshore Cays	4%
Bird watching	2%
Fishing	2%
Scuba diving	2%
Nature Trail	1%
Golf	0%
Total	100%

1.12 Rating of Services

Tourists were satisfied with how peaceful, relaxed and safe they felt during their stay on Anguilla. 97% rated this as good. Accommodation was also given a good rating by 90% of departing visitors.

Other high ratings of good services offered to visitors were Taxi, Dining, Customs and Immigration, Ferryboat, Customer Service and Cleanliness with 83%, 82%, 81%, 73%, 77% and 66% respectively. Just over half said the Telephone and Internet service met their needs. Roads had the highest poor rating of 18%. This infrastructure always get a poor rating as noted in previous exit surveys.

Table 1.12.1: Rating of Services

% April 2004							
		Rating					
Service	Good	OK	Poor	Total			
Peace	97%	3%	0%	100%			
Safety	90%	10%	1%	100%			
Accommodation	90%	10%	0%	100%			
Taxi	83%	14%	4%	100%			
Roads	82%	52%	18%	100%			
Dining	81%	16%	3%	100%			
Customs & Immigration	81%	17%	2%	100%			
Ferryboat	73%	25%	2%	100%			
Service	77%	15%	2%	100%			
Cleanliness	66%	31%	3%	100%			
Telephone & Internet	58%	32%	10%	100%			

1.13 Revisiting Anguilla

90% of departing visitors said they would definitely return to Anguilla. 9% indicated that they might consider returning while 1% said they have no plans of ever returning to Anguilla.

Table 1.13.1: Percentage of Sample Regarding Revisiting Anguilla

Revisit				
	% April 2004			
Yes	90%			
Maybe	9%			
No	1%			
Total	100%			

1.14.1 Recommend Anguilla for a visit

When asked whether or not they would recommend their family and friends to visit Anguilla 90% said they definitely would, while 2% said they will not. 8% said they might consider recommending Anguilla to their friends/family.

Table 1.14.1: Recommending Anguilla to Friends

Recommend				
	% April 2004			
Yes	90%			
Maybe	8%			
No	2%			
Total	100%			

2. Visitor Expenditure

2.1 Travel Costs

Travel today is expensive no matter the distance as a result of the economic uncertainties that the world has been experiencing. For those traveling from the North Eastern half of the United States this cost was on average between US\$1000- US\$3000 to get to Anguilla with the majority spending over US\$3000.00. 58% of those traveling from this area used their frequent flyer miles to come to Anguilla. As can be expected persons traveling from within the region spent between US\$50 – US\$999 for their flight to come to Anguilla.

Visitors from Europe generally spent between US\$1000 – US\$2999 to get to Anguilla. 18% of U.K. visitors spent US\$2000 or more on their airline tickets to come to Anguilla.

Table 2.1.1: Travel cost by Country of Residence

	Travel Costs- April 2004								
Country of Residence	Less than US\$50	US\$50 - \$499	\$500 - \$999	\$1,000 - \$1,999	\$2,000 - \$2,999	\$3,000 or more	Miles or Points	Non response	Total
Canada	1%	5%	6%	2%	6%	5%	0%	0%	4%
Caribbean	10%	28%	23%	5%	5%	2%	3%	15%	12%
France	2%	3%	1%	1%	1%	0%	0%	3%	1%
Germany	1%	0%	0%	0%	0%	2%	0%	0%	0%
Italy	2%	1%	0%	0%	0%	0%	0%	0%	0%
Other	4%	6%	2%	2%	2%	1%	5%	9%	4%
Other Europe	8%	3%	1%	6%	0%	1%	3%	6%	3%
St. Martin/St Maarten	34%	20%	3%	0%	0%	0%	0%	18%	10%
U.S. North East	25%	26%	39%	57%	53%	49%	58%	21%	41%
U.S. North West	0%	2%	6%	7%	7%	7%	8%	3%	5%
US Rest	8%	6%	13%	19%	16%	22%	18%	15%	14%
United Kingdom	5%	2%	7%	2%	9%	9%	5%	9%	5%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%

2.1.2 Travel Costs by Length of Stay

Persons spending less time on the island will usually spend less than those who stay for longer on travel costs. 72% of excursionists spent less than US\$50 on travel costs. It is believed that this type of visitor is vacationing either in St. Martin or another nearby island and will usually take the ferry to come over to Anguilla for a couple hours.

While at the other end of the scale persons staying for a week or more spent considerably more ranging from US\$500 – US\$3000 or more on travel costs to get to Anguilla.

Table 2.1.2 Travel Costs by Length of Stay

		Travel Costs						
Length of Stay	Less than US\$50	US\$50 - \$499	\$500 - \$999	\$1,000 - \$1,999	\$2,000 - \$2,999	\$3,000 or more	Miles or Points	Total
Less than 24 hours	72%	50%	13%	8%	4%	3%	10%	25%
1 - 3 days	23%	29%	18%	6%	7%	11%	5%	15%
4 - 7 days	2%	15%	51%	47%	65%	46%	46%	37%
8 - 15 days	0%	2%	10%	25%	15%	29%	21%	14%
12 - 15 days	2%	0%	6%	8%	6%	7%	3%	4%
16 - 23 days	0%	1%	2%	2%	2%	0%	5%	1%
24 or more days	0%	2%	0%	3%	1%	3%	8%	2%
Total	100%	100%	100%	100%	100%	100%	100%	100%

2.2 Accommodation Cost

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

During April 34% of the visitors stayed with Friends or Relatives and half of the paying tourists those that spent between US\$ 100 – US\$399 stayed in Villas or apartments. 16% spent US\$600 or more for accommodation. These persons stayed in the various hotels on the island

Table 2.2.1: Accommodation Cost by Type of Accommodation

% April 2004							
			Type of Acco	ommodation			
Accommodation Costs (per person per night)	Friends/ Relatives	Hotel	Own property	Villa/ Apartment/ Boat	Not applicable	Total	
\$0	34%	1%	33%	13%	6%	8%	
US\$1 - \$49	5%	6%	0%	2%	0%	4%	
US\$50 - \$99	0%	10%	0%	8%	1%	6%	
US\$100 -\$199	4%	21%	0%	25%	1%	15%	
US\$200 - 299	4%	15%	0%	20%	1%	11%	
US\$300 - \$399	0%	13%	0%	6%	0%	7%	
US\$400 - \$499	0%	6%	0%	1%	0%	3%	
US\$500 - \$599	0%	7%	0%	3%	0%	4%	
US\$600 or more	0%	16%	0%	0%	0%	7%	
NA	52%	4%	67%	22%	91%	34%	
Total	100%	100%	100%	100%	100%	100%	

2.3 Dining Cost

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

During April, US\$50 – US\$99 was the most money spent on eating per person per day for Tourists during April indicated by 26% of those responding. Just over a quarter indicated they spent close to US\$200 on dining expenses daily and these persons stayed for a period of 2 weeks.

Table 2.3.1: Dining Costs by Length of Stay

		Length of Stay						
Amount Spent	Less than 24 hours	1 - 3 days	4 - 7 days	8 - 15 days	12 - 15 days	16 - 23 days	24 or more days	Total
\$0	11%	9%	1%	1%	4%	0%	0%	3%
US\$1 - \$9	9%	1%	2%	1%	0%	0%	10%	1%
US\$10 - \$19	19%	6%	4%	0%	7%	11%	10%	4%
US\$20 - \$29	15%	14%	2%	2%	4%	11%	0%	5%
US\$30 - \$39	6%	6%	4%	1%	0%	0%	40%	4%
US\$40 - 49	11%	9%	9%	14%	21%	22%	10%	11%
US\$50 - 99	20%	26%	25%	30%	18%	44%	30%	26%
US\$100 - \$149	4%	10%	24%	27%	25%	11%	0%	21%
US\$150 - \$199	2%	8%	13%	14%	14%	0%	0%	12%
US\$200 or more	2%	10%	17%	11%	7%	0%	0%	13%
Non Response	10%	6%	2%	1%	4%	11%	40%	4%
Total	100%	100%	100%	100%	100%	100%	100%	100%

2.4 Sundry Costs

This cost includes all other expenditure incurred by the visitor during their stay on the island. These expenses can be souvenirs bought, a ticket to a program or nightclub, a trip to a neighboring island or T-Shirts.

Excursionists spent less than US\$20 on sundry items during their stay on the island during the April visitor exit survey. Below is the visitor expenditure on sundry items by length of stay.

Table 2.4.1: Sundry Expenses by length of Stay

	Tuble 2.1.1. Suitary Expenses by Tengan of Stay								
	Length of Stay								
						24 or			
Amount Spent for	Less than			8 - 15	16 - 23	more			
Entire Stay	24 hours	1 - 3 days	4 - 7 days	days	days	days	Total		
Less than US\$20	34%	30%	6%	5%	0%	0%	15%		
US\$20 - \$49	19%	19%	10%	5%	22%	0%	13%		
US\$50 - \$99	23%	16%	11%	12%	11%	9%	15%		
US\$100 - \$199	11%	14%	17%	20%	33%	9%	16%		
US\$200 - \$299	3%	9%	14%	19%	11%	27%	12%		
US\$300 - \$399	2%	2%	13%	12%	0%	0%	8%		
US\$400 - \$499	2%	2%	6%	9%	11%	9%	5%		
US\$500 - \$999	4%	2%	9%	8%	11%	9%	7%		
US\$1,000 - \$1,999	3%	3%	10%	8%	0%	9%	7%		
US\$2,000 or more	1%	1%	4%	2%	0%	27%	3%		
Total	100%	100%	100%	100%	100%	100%	100%		

Glossary

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

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

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

<u>Tourist:</u> 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>U.S. North East</u>: - Maine, New Hampshire, Vermont, Massachusetts, Connecticut and Rhode Island.

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

<u>U.S. Rest</u>: - 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).