

Government of Anguilla



August 2003 Visitor Survey Report

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

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Preface

This report is one of a series. The Statistics Department has been carrying out Visitor Exit surveys for more than three years now. Where possible, the surveys have been conducted in both the winter months and summer months as visitors origins and activities are different between these two holiday periods. It was not possible to carry out a survey in the summer of 2002 so this report has compared the results with those of August 2001.

In addition the questions may change from one period to another. 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 identify the information collected. Should you have any suggestions of information that you think is needed please let us know.

We would like to take this opportunity to thank all those visitors who provided us with their information and those public servants and airline agents who made this report possible by handing out or collecting completed questionnaires for us.

Should you have any questions please do not hesitate to contact the Statistics Department either by e-mail at statistics@gov.ai or by telephone at 1(264)497-3901.

We also encourage you to go to the government web site to access our wide range of statistics which can be found at web site

www.gov.ai/statistics

Penny Hope-Ross
Chief Statistician

September 25, 2003

Methodology

The Survey was carried out during the month of August and for this period a total of 690 forms were completed and returned. Airline agents, the tax collectors at Blowing Point and 4 temporary interviewers were also involved in distributing questionnaires to all non-residents leaving Anguilla. Tax officers at the airport also gave out forms to those travelers who had not been given forms by the airline agents.

There were 533 forms completed by persons who left via the airport and 157 forms completed by those who left via the ferry. As the number of forms completed by the ferry boat respondents was so low, the tabulations are done by persons who left via the airport and the ferry separately. One person could complete the form on behalf of a group or family so the results are based upon questionnaires rather than actual numbers of travelers.

Summary

On average 71% of those who left from the airport gave vacation as their main reason for visiting compared to 75% during the first quarter of 2003. Anguilla's summer visitors gave marriage/honeymoon or festival as a more important reason than during the winter months.

The Caribbean is a more important source of visitors and Canada is a less important source during the summer than the winter. Summer visitors also tend to be return visitors with 60% of visitors from the U.S. saying that this was their first trip to Anguilla compared to 67% during the first quarter of this year.

For this survey and the winter survey conducted during the 1st quarter of this year, results indicated that the majority of tourists used American Airlines to travel to Anguilla either directly or taking American to St.Martin and then the ferry.

The most popular activity that visitors engaged in during their stay on Anguilla was snorkeling, where on average 43.8% indicated this. One third of those surveyed said they attended some of the carnival events and just over a quarter said that they indulged in spa treatments and took an island tour. The least popular activities were dolphin swim, bird watching, nature trail and scuba diving. Whereas for the winter 2003 survey, the majority of those surveyed said they engaged in trips to the neighboring island and cays and spa treatments.

Peace, Accommodation, Dining and Customer Service were rated highest by those who visited Anguilla during the first three months of this year and during August.

Just over half of the visitors stayed in hotels during this period and the 1st quarter of 2003. Family and friends are more important as a place to stay during the summer and 28% said they stayed with family or friends during the summer compared to 15% during the winter.

The survey results estimate that on average persons spend between US\$150-\$500 on accommodation, US\$50-\$100 on dining costs per person on a daily basis and between US\$500-\$3000 on flight costs.

SURVEY HIGHLIGHTS

1. PROFILE OF VISITORS

1.1 Purpose of Visit

Anguilla is marketed as a vacation destination by most people throughout the world. This perception can be seen from the results of the Visitor Survey conducted during August 2003. Results revealed that on average 71.8% of those who participated gave vacation as their main reason for visiting compared to 60% in the summer of 2001 when the last summer survey was conducted. Trends have shown that during this time of the year most visitors to Anguilla come from the Caribbean.

Also, as is expected, the island sees more visitors mainly coming for vacation during the Winter months than during the Summer. For the first quarter of 2003, 80% of persons surveyed gave vacation as their main purpose for visiting Anguilla.

**Table 1. Distribution by Main Purpose of Visit
August 2003 and 2001 & 1st Qtr 2003**

Purpose	August 2003		August 2001 All Visitors	1st Qtr 2003	
	Tourists leaving by Air	Tourists leaving by Sea		Tourists leaving by Air	Tourists leaving by Sea
Vacation/leisure	70.5%	73.1%	60.0%	74.8%	87.6%
Visit family/friends	10.2%	7.7%	12.0%	8.4%	3.0%
Business	7.5%	3.8%	8.0%	10.8%	3.7%
Honeymoon	4.7%	3.8%	7.0%	1.8%	1.0%
Festival	3.2%	3.2%	12.0%	0.6%	N/A
Marriage/honeymoon	1.7%	7.1%		1.3%	0.4%
Health	0.6%	0.0%	0.0%	0.6%	N/A
Religion	0.4%	0.0%	0.0%	N/A	N/A
Scuba Diving/snorkeling	0.4%	0.6%	0.0%	N/A	N/A
Spa	0.2%	0.0%	0.0%	N/A	N/A
Sports	0.2%	0.0%	0.0%	N/A	N/A
Total	100.0%	100.0%	100.0%	100.0%	100.0%

This survey was geared towards the Summer Festival to see how many of those traveling actually came for that purpose. Results revealed that only 3.2% said they came for the festival this year compared to 12% in 2001, Vacation/leisure increased in importance.

1.2 Place of Residence

Anguilla's major tourist market is the United States of America. The distribution of tourists who came from this region was about the same for both this survey and the 2001 survey. However, the Caribbean is a more important source during the summer than during the winter months. 56.4% of those who left in August 2003 were from the United States with the majority (35.1%) coming from the North Eastern United States, while during the first quarter of 2003, 67.3% of those who left were from the U.S. with the majority also coming from the North East.

Just under a quarter came from the Caribbean during this period compared to 26% in 2001. 19% came from Europe and 3% came from Canada. Comparing this with the 1st quarter of 2003, on average 67.2% came from the U.S. with the majority as well coming from the north Eastern U.S., 3% came from Canada, 14% came from Europe and 10% came from the Caribbean.

Table 2. Distribution by Country of Residence August 2003 and 2001 & 1st Qtr 2003

Country/Region of Residence	August 2003		August 2001 All Visitors	1st Quarter 2003	
	leaving by Air	leaving by Sea		leaving by Air	leaving by Sea
U.S. North East	38.9%	31.4%	0.0%	46.2%	51.2%
U.S. North West	6.4%	6.4%	0.0%	5.4%	3.5%
US Rest	13.7%	16.0%	0.0%	12.2%	15.9%
Total United States	59.0%	53.8%	57.0%	63.8%	70.6%
Canada	1.1%	3.8%	2.0%	3.3%	0.0%
Caribbean	23.7%	7.7%	0.0%	14.3%	1.6%
St. Martin/St Maarten	0.2%	8.3%	0.0%	0.4%	3.9%
Total Caribbean	23.9%	16.0%	26.0%	15.0%	5.5%
United Kingdom	4.5%	9.0%	7.0%	10.5%	3.7%
France	0.9%	3.8%	0.0%	0.5%	4.9%
Germany	0.9%	0.0%	0.0%	0.8%	1.2%
Italy	5.3%	10.3%	0.0%	1.3%	0.8%
Other Europe	0.6%	2.6%	5.0%	1.6%	2.6%
Total Europe	12.2%	25.6%	12.0%	14.8%	13.2%
Other	3.8%	0.0%	3.0%	3.5%	2.6%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

1.3 Age of Tourists

More tourists were female who left by air than by sea. 53.7% were female and 46.3% were male compared to those leaving by sea, 50.4% were male and 49.6% were female. During the summer more younger people especially families tend to travel as opposed to winter time when the visitors that come are mainly couples, especially those in their retirement years. August 2003

saw 37% of those surveyed falling into the under 30 age group compared to 26.5% in August 2001 and 28% during the first quarter of this year.

Table 3: Age and Sex of Visitors Leaving from the Airport, August and 1st Quarter, 2003

Age Group	August 2003			January - March, 2003		
	Males	Females	Total	Males	Females	Total
Under 18	16.2%	17.5%	16.9%	7.6%	6.7%	14.3%
18 - 29	17.9%	21.0%	19.6%	4.4%	9.9%	14.2%
30 - 39	23.9%	25.0%	24.5%	8.0%	9.9%	17.9%
40 - 49	21.7%	21.2%	21.4%	11.0%	8.8%	19.8%
50 & over	20.3%	15.3%	17.6%	18.3%	15.5%	33.8%
Total	46.3%	53.7%	100.0%	49.2%	50.8%	100.0%

1.4 First Visit to Anguilla

In August, 65.7% of visitors from the U.S. said this was their first trip to Anguilla. For the 1st quarter of 2003, the percentage was higher at 70% indicating that we have more return visitors during the summer months. Meanwhile 16% of visitors from other Europe, which includes France, Italy and Germany said this was their first trip to Anguilla during this survey compared to 9% in the winter. First time visitors from Canada followed with 2.6% this summer compared to 7% in winter.

1.5 Airlines used to Travel and Satisfaction

For this survey and the winter survey conducted during the 1st quarter of this year, results indicated that the majority of tourists used American Airlines to travel to Anguilla either directly or taking American to St.Martin and then the ferry.

Table 4: Airlines used for Travel to Anguilla by those leaving from the Airport, August and 1st Quarter, 2003

Airline	August 2003	Jan-March 2003
American	61.5%	57.1%
American and Other	3.8%	3.9%
Caribbean Star	9.2%	4.9%
Liat	16.3%	21.0%
Air France	0.8%	1.0%
Winair	5.8%	5.5%
Private plane	0.2%	0.7%
US Airways	1.1%	2.3%
Virgin Atlantic	0.6%	0.6%
BWIA	0.2%	0.2%
Other	0.6%	3.00%
Total	100.0%	100.0%

The percentage of American usage is higher in winter than in the summer months when more visitors come from other Caribbean islands and Canada. However Caribbean Star usage has increased from the first quarter of this year more than LIAT and Winair has remained steady. On average 16% used LIAT and 9% used Caribbean Star for traveling during August compared to 21% and 5% respectively during the 1st quarter.

In August 2003, 14.4% of visitors said they had trouble booking their flights. 10.3% said they had problems due to timing and 4.1% had problems due to cost. This is an improvement from January when 20% of our visitors said they had problems with booking their flights.

1.6 Length of Stay

Table 5: Length of Stay on Anguilla, August and 1st Quarter 2003

Length of Stay	August 2003		1st quarter 2003	
	Tourists leaving by Air	Tourists leaving by Sea	Tourists leaving by Air	Tourists leaving by Sea
1 - 3 days	10.0%	16.7%	12.9%	7.9%
4 - 7 days	47.9%	35.3%	40.8%	36.4%
8 - 15 days	29.5%	16.7%	37.0%	24.0%
16 - 23 days	5.6%	4.5%	4.5%	2.5%
24 or more days	7.0%	3.2%	2.6%	3.3%
Less than 24 hours		23.7%	1.8%	26.2%
Total	100.0%	100.0%	100.0%	100.0%

In general people tend to stay for longer during August than during the winter months. Just under half of visitors who left during August spent close to a week on Anguilla compared to 38% during the 1st quarter of 2003, while 33.3% stayed for a period of 2 weeks or more in August compared to 37% during the 1st quarter of 2003 when the winter survey was conducted.

1.7 Travel Companions

Of those leaving by air, people traveling alone were slightly less than in 2001 but more than during the winter months. Those traveling with their partner made the most numerous group in August this year at 37% but were less than during the winter. Family and or friends made up 39% of the travel companions in August 2003, up slightly from 38% in August 2001 and higher than the winter months of 2003 when this group represented 34% of travel companions.

Table 6: Travel Companions, August and 1st quarter 2003 and August 2001

Travel Companions	August 2003		August 2001 All Visitors	1st Quarter 2003	
	Tourists leaving by Air	Tourists leaving by Sea		Tourists leaving by Air	Tourists leaving by Sea
Spouse/partner	36.8%	32.1%	11.7%	43.4%	56.5%
Family	23.5%	33.3%	33.5%	23.6%	20.9%
Alone	22.0%	9.6%	24.4%	17.9%	5.9%
Family & friends	9.0%	10.9%	--	0.0%	0.0%
Friend(s)	6.6%	13.5%	4.2%	10.9%	11.2%
Other	1.3%	0.6%	26.2%	2.6%	3.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

1.8 Choice of Accommodation

This summer more visitors stayed in hotels than in 2001 and fewer stayed in villas and apartments. On average 52.4% of visitors stayed in hotels during this period. This is slightly less than during the 1st quarter of 2003 when the proportion was 55%. In August 2001 the proportion staying in hotels was lower at 43%.

As is to be expected, during the winter time, the island sees a different type of visitor from those visiting in the summer and it is expected that during the winter the choice of accommodation would be hotels rather than family/friends. During the 1st quarter of 2003, 15% of those surveyed said they stayed with family or friends while for August the percentage of those staying with friends or relatives was 28% which was the same proportion as in August 2001. Visitors staying in apartments/villas dropped from 19.3% in 2001 to 13.5% in 2003, while persons staying in this type of accommodation was much higher during the time when the winter survey was conducted 24% % chose this type of accommodation.

Table 7: Accommodation where Visitors Stayed, August and 1st quarter 2003 and August 2001

Type of Accommodation	August 2003	1st Quarter 2003	August 2001
Hotel	52.4%	54.6%	43.0%
Friends/relatives	28.0%	15.5%	27.6%
Villa/apartment	13.5%	23.8%	19.3%
Own property	5.5%	6.2%	10.3%
Total	100.0%	100.0%	100.0%

Visitors who live in the Caribbean have a greater tendency to stay with family and friends while those from Europe and the UK have the greatest tendency to stay in hotels. The growth market for staying in villas has come from Canadian residents where 50% of visitors from this country stayed in villas or apartments.

Table 8: Accommodation by Country of Residence, August 2003 and 2001

Type of Accommodation	August 2003						August 2001				
	United States	United Kingdom	Canada	Other Europe	Caribbean	Total	United States	Canada	Other Europe	Caribbean	Total
Hotel	53.9%	70.8%	33.3%	81.4%	31.5%	52.4%	49.5%	25.0%	73.7%	23.5%	43.0%
Friends/relatives	19.7%	20.8%	16.7%	15.9%	55.1%	28.0%	19.3%	37.5%	0.0%	53.9%	27.6%
Villa/apartment	18.5%	4.2%	50.0%	10.7%	9.4%	13.5%	22.4%	12.5%	21.1%	21.2%	19.3%
Own property	6.4%	4.2%	0.0%	0.0%	3.9%	5.5%	8.8%	25.0%	5.2%	2.3%	10.3%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

2. MARKETING IMPLICATIONS

2.1 Sources of Information

Of the sources listed in the questionnaire, close to 60% of first time visitors said that friends or relatives were very important in affecting their decision to visit Anguilla. This source was also important for those that completed the survey during the first three months of 2003 and as grown significantly from the summer of 2001.

Table 9: Sources of Information that Visitors Learnt About Anguilla From, August and 1st Quarter 2003 and August 2001

Sources of Information about Anguilla	August 2003		August 2001	1st quarter 2003
	Tourist leaving by Air	Tourists leaving by Sea	All Visitors	Tourists leaving by Air
Friends or relatives	53%	67%	38%	52%
The Internet	23%	9%	22%	5%
Travel Agent	16%	14%	22%	13%
Magazine/Newspaper	0%	1%	13%	N/A
Other	9%	9%	5%	30%
Total	100%	100%	100.00%	100%

The Internet has not grown in importance as much as one would expect over the past two years but is much more important for summer visitors than those who visit in the winter months. Magazines and newspapers have decreased significantly over the past two years as a source of information for learning about Anguilla. This response was not offered during the winter survey.

2.2 Potential Attractions

For this survey, respondents were asked if they were considering a return visit to Anguilla how certain attractions would affect their decision. None of the five attractions listed would attract visitors to make a return visit but most were in favour of a Yacht Marina and Golf courses for which 40% and 37% respectively 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. Only 20% of respondents indicated that these would attract them to Anguilla.

2.3 Activities

The most popular activity that visitors engaged in during their stay on Anguilla during August 2003 was snorkeling, where on average 43.8% indicated this. This was a much more popular activity than during the winter months. One third of those surveyed said they attended some of the carnival events and boat racing was the fourth most popular activity. Close to a quarter said they indulged in spa treatments which were also popular among our winter visitors. Island tours were popular among both winter and summer visitors. The least popular activities were dolphin swim, bird watching, nature trail and scuba diving.

Table 10: Percentage of Respondents Who Indicated that they Participated in Activities by Activity, August and January 2003.

Activities	August 2003		January 2003
	Tourists leaving by Air	Tourists leaving by Sea	All Tourists
Carnival	33.1%	28.8%	N/A
Scuba diving	5.5%	9.0%	7.9%
Bird watching	7.3%	5.1%	10.0%
Boat Racing	22.6%	15.4%	N/A
Dolphin swim	8.6%	10.9%	8.8%
Island tour	25.6%	29.5%	35.1%
Nature Trail	6.6%	5.8%	8.6%
Snorkeling	40.8%	46.8%	49.8%
Spa treatment	25.9%	11.5%	28.7%
Trip to neighboring islands	31.2%	12.8%	32.8%
Trip to Offshore Cays	17.3%	11.5%	21.5%

2.4 Satisfaction with Services

Visitors were most satisfied with Peace and tranquility, with on average 92.1% rating it as good. This was up slightly from the winter survey when 90.2% of those who traveled Peace and Tranquility as good. Safety, Accommodation, Customer service and Dining were rated as good by over three quarters of the visitors surveyed. One third said the island's roads were poor, this was higher than during the winter survey when 18.7% said the roads were poor.

Table 11: Visitor Satisfaction with Services, August 2003

Services	Tourists leaving by Air				Tourists leaving by Sea			
	Good	Fair	Poor	Total	Good	Fair	Poor	Total
Peace	92.5%	4.7%	0.4%	100.0%	91.7%	5.1%	3.2%	100.0%
Safety	89.1%	6.2%	1.7%	100.0%	86.5%	8.3%	1.3%	100.0%
Accommodation	87.0%	6.4%	0.6%	100.0%	75.0%	9.0%	0.6%	100.0%
Customer Service	82.0%	10.9%	3.6%	100.0%	78.8%	13.5%	2.6%	100.0%
Dining	81.8%	11.3%	0.9%	100.0%	71.8%	17.3%	1.9%	100.0%
Customs & Immigration	76.7%	16.5%	2.8%	100.0%	70.5%	17.9%	1.3%	100.0%
Taxi	68.0%	10.7%	2.1%	100.0%	74.4%	11.5%	1.3%	100.0%
Cleanliness	64.3%	25.8%	6.0%	100.0%	64.1%	25.0%	6.4%	100.0%
Telephone & Internet	62.2%	20.1%	7.3%	100.0%	49.4%	22.4%	6.4%	100.0%
Roads	50.0%	17.7%	29.7%	100.0%	52.6%	17.3%	26.3%	100.0%

3. VISITOR EXPENDITURE

3.1 Accommodation

For this survey, one quarter of tourists who visited Anguilla in August spent nothing on accommodation. This can be expected because during this time as 28% of visitors indicated that they stayed with family or friends. Summer visitors are usually Anguillans returning home or relatives of Anguillans and they mostly stay in their own property or with friends or relatives. Just over half stayed with friends or relatives and 68% stayed in their own residences for this survey. Of all visitors only 7% of those surveyed said they spent US\$500 or more for their accommodation. 9% said they spent between US\$150 to US\$200 for accommodation whereas during the wintertime 34.4% spent US\$300 or more for accommodation.

Those visiting during the winter pay less for both hotel and villa accommodation. During the first quarter of 2003, 53% of visitors leaving from the airport who stayed in hotels indicated that they spent US\$300 or more on accommodation per person per night compared to 38% during August. For those who stayed in apartments or villas, 23% said they spent US\$300 per person per night during the first quarter of 2003 compared to 19% during August of this year. Villa accommodation for a group is usually less costly.

Table 12: Accommodation Expenditures Per Night Per Person of Those Who Left from the Airport by Type of Accommodation, US\$, August 2003

US\$	Friends/relatives	Hotel	Own property	Villa/apartment	Total
\$0	63.8%	1.4%	69.0%	2.8%	22.9%
US\$1 - \$49	27.5%	7.2%	27.6%	5.6%	13.9%
US\$50 - \$99	2.0%	1.1%	0.0%	4.2%	1.7%
US\$100 - \$149	1.3%	5.0%	0.0%	19.4%	5.6%
US\$150 - 199	1.3%	10.4%	3.4%	22.2%	9.0%
US\$200 - 249	0.7%	11.5%	0.0%	18.1%	8.6%
US\$250 - \$299	1.3%	10.8%	0.0%	4.2%	6.6%
US\$300 - \$399	0.7%	11.1%	0.0%	5.6%	6.8%
US\$400 - \$499	0.0%	18.3%	0.0%	8.3%	10.9%
US\$500 or more	0.0%	8.6%	0.0%	5.6%	5.3%
NS	1.3%	14.7%	0.0%	4.2%	8.6%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

3.2 Dining Costs

Visitors spent slightly less on dining during August than during the first quarter of this year. 66.7% spent more than US\$50 per person per day on dining in August compared to 73.7% during the first quarter of this year.

Table 13: Amount Spent on Eating Per Person Per Day by Those Flying out of Anguilla August and 1st Quarter 2003

Eating Costs	August 2003	1st Q 2003
\$0	7.6%	5.4%
US\$1 - \$9	2.3%	1.8%
US\$10 - \$19	4.7%	3.6%
US\$20 - \$29	0.2%	5.7%
US\$30 - \$39	4.5%	3.0%
US\$40 - 49	7.8%	6.7%
US\$50 - 99	19.9%	23.9%
US\$100 - \$149	19.9%	17.2%
US\$150 - \$199	10.5%	11.4%
US\$200 or more	16.4%	21.2%

3.3 Flight Costs

The cost of the flight paid per person will vary by the country from which tourists come. Tourists traveling from the United Kingdom have the widest range of costs for their flights. 2% paid less than US\$500 and at the other end of the scale 58% paid more than US\$3,000. On the other hand those from the United States tend to pay between US\$500 - \$2,000. 59.5% of persons from the North Eastern United States traveled to Anguilla on either miles or points gained from their

airlines for all their previous travels around the world. As is expected visitors from the Caribbean pay less than US\$500 to travel to Anguilla.

Table 14: Amount Spent on Flights Per Person of Those Flying out of Anguilla by Country of Residence, August 2003

Residence	Less than \$500	\$500 - \$999	\$1,000 - \$1,999	\$2,000 - \$2,999	\$3,000 or more	Miles or Points	N.S.	Total
Canada	0.7%	0.8%	5.7%	0.0%	0.0%	0.0%	0.0%	1.1%
Caribbean	63.0%	8.5%	5.7%	18.2%	0.0%	2.7%	38.1%	24.1%
Europe	2.1%	2.8%	24.5%	54.5%	25.0%	5.4%	33.3%	7.8%
U.S North East	16.4%	59.3%	17.0%	9.1%	8.3%	59.5%	14.3%	39.2%
U.S North West	4.1%	5.6%	17.0%	0.0%	0.0%	13.5%	0.0%	6.4%
U. S. Rest	7.5%	19.4%	15.1%	0.0%	0.0%	16.2%	0.0%	13.8%
U.K.	1.4%	2.0%	9.4%	18.2%	58.3%	2.7%	9.5%	4.5%
Other	4.8%	1.6%	5.7%	0.0%	8.3%	0.0%	4.8%	3.0%

In comparison to the winter survey, on average 20% of travelers from the U.K paid less than US\$500 and 23.5% paid more than US\$3000. Visitors from the United States paid between US\$500-\$1000 for their flights.