



# Visitor Exit Survey

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## Preface

This report is the third 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](mailto: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](http://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 August 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 1,349 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 of Exit

Port	%
Wallblake Airport	57%
Blowing Point Seaport	27%

This report focuses on three main areas:

- Visitor Profile,
- Marketing Implications
- Visitor Expenditure.

The analysis of this report covers mainly tourist activity 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 and expenditure, is included in the summary. The findings of this survey are summarized below

### **Visitor Profile**

- Of the surveyed visitors departing Anguilla during August, 50% reside in the United States of America.
- Most popular route travelled to get to Anguilla was via Puerto Rico (90%)
- Most popular carrier of tourists to Anguilla was American Airlines/ American Eagle (35%)
- Most persons visiting (27%) Anguilla was in the age group 30 – 39.
- 38% of tourists spent between 4 to 7 days in Anguilla, while 31% spent around 2 weeks. 8% stayed for 24 or more days on Anguilla.
- 60% of the tourists who participated in the survey indicated that they stayed in one of the hotel establishments on the island.
- Most excursionists (38%) listed their country of residence as the U.S. 14% said they live in Europe and 5% listed Canada as their country of residence. 38% came from other Caribbean countries.

### **Marketing Implications**

- The three most popular activities engaged in by tourists were Leisure (28%), followed by Snorkelling and Scuba Diving (14%) and Summer Festival (11%).
- Feeling a sense of Peace, one of the many characteristics that Anguilla boasts about, was most highly rated by tourists (84%) followed by Accommodation and Dining (74%) and Cleanliness (69%).
- Most persons heard about Anguilla through friends living on the island and overseas as well as via the internet.
- 78% of the tourists surveyed reported having no difficulty making their own booking.
- 85% 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\$53.14, US\$660.47, US\$84.38 and US\$270.31 respectively.
- The average expenditure by Excursionists for transportation, travel and dining was US\$48.70, US\$79.18 and US\$33.95 respectively.

## Description and Analysis of the Data Collected

### I. Visitor Profiles

#### I.1 Place of Residence

The distribution of tourists that came from the U.S. was seven percentage points lower when compared to August 2004. Of those who departed during August and who participated in the Visitor Exit Survey, 50.0 % were from the U.S. with the North Eastern quadrant accounting for just over a quarter of the U.S. visitors.

Tourists from the Caribbean made up 28.0% of those surveyed the same distribution as in 2004. Europe accounted for 15.0% of the visitors departing, with the United Kingdom being the main country of residence. 3.0% listed Canada as their country of residence.

Table I.1 Departures by Country of Residence

<b>Country of Residence</b>	<b>% August 2004</b>	<b>% August 2005</b>
Canada	2%	3%
U.S. North East	34%	27%
U.S. North West	6%	7%
US Rest	13%	16%
<b>Total United States</b>	<b>53%</b>	<b>50%</b>
Caribbean	17	16%
St. Martin/St Maarten	11%	12%
<b>Total Caribbean</b>	<b>28%</b>	<b>28%</b>
United Kingdom	6%	5%
France	2%	3%
Germany	0%	1%
Italy	4%	4%
Other Europe	2%	2%
<b>Total Europe</b>	<b>14%</b>	<b>15%</b>
All Other Countries	3%	4%

#### I.2 Country of Residence by Length of Stay

In general tourists now have a tendency to stay for longer periods of time during both the summer and winter months. Results from this survey indicate that visitors from the North East United States spent on average, one to three weeks on the island 30.0% of those visiting from the other Caribbean islands spent 24 or more days, while 22.0% visiting from the United Kingdom stayed for approximately 3 weeks.



Table I.2 Country of Residence by Length of Stay

Country of Residence	Length of Stay				
	1 - 3 days	4 - 7 days	8 - 15 days	16 - 23 days	24 or more days
U.S. North East	13%	35%	31%	16%	14%
U.S. North West	5%	8%	11%	2%	5%
US Rest	10%	23%	15%	11%	9%
Canada	3%	4%	1%	7%	2%
United Kingdom	4%	2%	8%	22%	14%
France	4%	2%	3%	2%	5%
Germany	2%	1%	0%	0%	0%
Italy	2%	5%	4%	13%	5%
Other Europe	3%	2%	1%	0%	5%
St. Martin/St Maarten	34%	5%	4%	4%	7%
Caribbean	16%	12%	20%	20%	30%
Other	4%	1%	2%	3%	4%
Total	100%	100%	100%	100%	100%

### I.3 Travel Route

90.0% 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					
	Antigua	Boat/ship	Other	Puerto Rico	St Maarten, then ferry	St Maarten, then fly
Canada	1%	11%	0%	2%	4%	4%
Caribbean	64%	5%	11%	2%	8%	16%
France	0%	0%	11%	1%	3%	8%
Germany	0%	0%	0%	0%	1%	0%
Italy	2%	5%	0%	1%	5%	11%
Other	3%	5%	11%	1%	3%	5%
Other Europe	0%	5%	0%	1%	3%	4%
St. Martin/St Maarten	1%	11%	0%	0%	19%	12%
U.S. North East	5%	32%	16%	50%	27%	18%
U.S. North West	4%	0%	26%	10%	7%	5%
United Kingdom	9%	0%	0%	2%	5%	8%
US Rest	11%	26%	26%	30%	15%	8%
Total	100%	100%	100%	100%	100%	100%

#### I.4 Airline used to travel to Anguilla

The majority of visitors who participated in this survey used American Airlines to get to Anguilla. The distribution was similar in comparison to August 2004, where this airline was also the mode of choice for transportation. Another U.S. carrier, US Airways transported 9.0% of the travellers from this region at the time this survey was conducted. Carriers, LIAT, Winair and Caribbean Star accounted for 13.0% and 7.0% and 4.0% of the tourists travelling to Anguilla respectively compared to 10.0%, 5.0% and 4.0% during August 2004.

**Table I.4 Airlines Used for Travel**

<b>Airline</b>	<b>% August 2004</b>	<b>% August 2005</b>
American	36%	35%
American & Other	2%	4%
US Airways	9%	9%
Delta	0%	1%
Air Canada	0%	0%
Air France	4%	6%
British Airways	0%	1%
Caribbean Star	4%	4%
LIAT	10%	13%
Winair	5%	7%
KLM	3%	2%
Private Plane	1%	2%
Charter	2%	1%
Other	20%	16%
<b>Total</b>	<b>100%</b>	<b>100%</b>

In August 2005, 8.0% of the respondents said they encountered problems securing a ticket when it came to the time they wanted to travel and 6.0% found it costly. 78.0% 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 81.0% of these couples opted to stay in hotels while 6.0% stayed in a villa. 4.0% of couples were owners of their own residences on the island. The majority of those travelling alone (54.0%) stayed with friends or relatives or in a hotel (36.0%). Families visiting either stayed with their friends or relatives on the island or at a hotel establishment.

**Table I.5 Travel Companion by Accommodation**

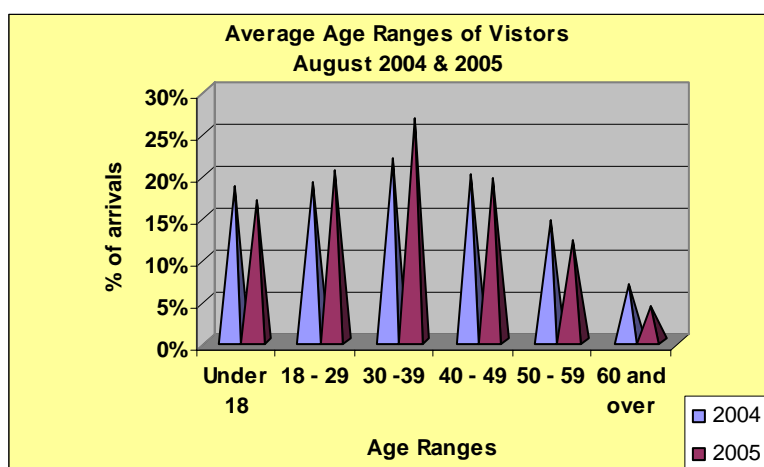
Travel Companion	Accommodation Type					
	Friends/relatives	Hotel	Own property	Villa/apartment	Boat	Total
Spouse/partner	9%	81%	4%	6%	1%	100%
Family	33%	53%	4%	9%	1%	100%
Family & friends	41%	43%	3%	13%	0%	100%
Friend(s)	31%	59%	3%	7%	0%	100%
Alone	54%	36%	5%	5%	0%	100%
Other	14%	71%	0%	14%	0%	100%

### I.6 Ages and Sex of Visitors

As it is summer time, visitors during this time of year tend to be families/parents traveling with their children. Results of the survey indicate that the majority of persons visiting were within the 18- 39 age group (17.0% of males and 24.0% females were within the 18 – 29 age group while 28.0% males and 26.0% females were within the 30 – 39 age group) 22.0% of males and 17.0% were in the 40 – 49 age-group, 11.0% of males and 13.0% of females fell within the 50 - 59 age-group. Children and young adults (persons under the age of 18), accounted for 17.0% equally of the tourists departing and who participated in the survey during August 2005.

**Table I.6 Ages and Sex of Visitors**

% August 2004			% August 2005	
Age Group	Sex		Sex	
	Males	Females	Males	Females
Under 18	19%	18%	17%	17%
18 - 29	15%	23%	17%	24%
30 - 39	22%	22%	28%	26%
40 - 49	21%	19%	22%	17%
50 - 59	16%	13%	11%	13%
60 and over	9%	5%	5%	4%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>



### I.7 Length of Stay

Tourists tend to stay longer on vacation during this time of year. Results indicate that 38.0% of visitors who departed in August stayed for just under a week, 1.0 percentage point lower than those visiting during August 2004. 31.0% stayed on average for two weeks while, 8.0% stayed for 24 or more days. The remainder of the visitors spent 3 days on the island.

Table I.7 Length of Stay

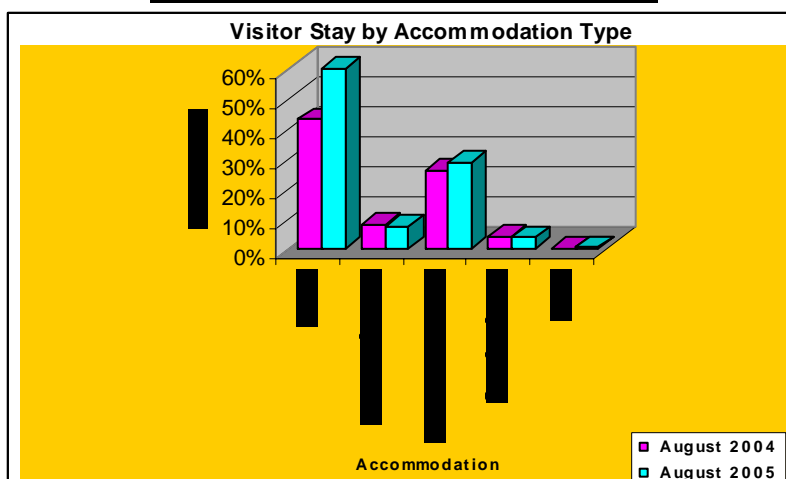
<b>Length of stay</b>	<b>% August 2004</b>	<b>% August 2005</b>
1 - 3 days	22%	26%
4 - 7 days	39%	38%
8 - 15 days	28%	27%
16 - 23 days	6%	4%
24 or more days	5%	4%
<b>Total</b>	<b>100%</b>	<b>100%</b>

### I.8 Accommodation

Hotels were still a popular choice of accommodation for visitors during August. 60.0% of those who participated in the survey said that they stayed in one of the islands hotel establishments. 7.0% stayed in villas or apartments and 29.0% chose to stay with friends or relatives.

Table I.8 Accommodation Type

<b>Type of Accommodation</b>	<b>% August 2004</b>	<b>% August 2005</b>
Hotel	43%	60%
Villa/apartment	8%	7%
Friends/relatives	26%	29%
Own property	4%	4%
Boat	0%	1%
N.A	16%	2%
<b>Total</b>	<b>100%</b>	<b>100%</b>



## 2. Marketing Implications

### 2.1 Source of Information about Anguilla

13.0% of first-time tourists heard about Anguilla from both their friends in Anguilla or a travel agent, while 20.0% heard about the island from the internet. 38.0% heard about Anguilla from other media sources.

Analysis over the two years show that, for first timers to Anguilla, the traditional methods of hearing about the island (such as Friends in Anguilla, Friends overseas and Family) are not as popular as the other methods such as Travel agent, Internet and Other media(magazines, newspapers).

When asked if they would recommend Anguilla to a friend or relative, 86.0% indicated they would and 85% said they would return for another visit.

Table 2.1 Source of Information

Source of Anguilla about Anguilla	% August 2004		% August 2005	
	Repeat Visitors	First Time Visitors	Repeat Visitors	First Time Visitors
Friends in Anguilla	31%	16%	37%	13%
Friends overseas	9%	22%	8%	16%
Travel agent	3%	9%	3%	13%
Internet	3%	15%	3%	20%
Other media	54%	37%	49%	38%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

### 2.2 Activities Engaged In

With over 30 beaches to explore, 14.0% of the tourists departing and who participated in the survey said they enjoyed the snorkelling and scuba diving that they did while vacationing on the island.

28.0% enjoyed a leisurely vacation while 9.0% indulged in a spa treatment and 11.0% enjoyed an island tour. Of those who were surveyed, 11.0% indicated that they attended the Summer Festival.

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

Table 2.2 Activities

Activity	% August 2005
Leisure	28%
Snorkelling	12%
Business	4%
Island Tour	11%
Summer Festival	11%
Spa Treatment	9%
Trip to Neighboring Islands	9%
Trip to Offshore Cays	5%
Dolphin Swim	4%
Scuba Diving	2%
Fishing	2%
Nature Trail	2%
Golf	1%
Bird Watching	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 August. Peace and Tranquillity received a “Good” rating of 84.0%. Accommodation and Dining all received “Good” ratings of 74.0%, respectively. 67.0% of the tourists indicated that they were treated well by the customer service personnel at all levels. The ferryboats received a “Good” rating of 50.0% while the road infrastructure received an ‘OK’ rating of 50.0 %.

Table 2.3 Rating of Services Offered

% August 2004				% August 2005			
Service	Rating			Service	Rating		
	Good	OK	Poor		Good	OK	Poor
Peace	90%	7%	1%	Peace	84%	7%	1%
Accommodation	83%	7%	1%	Accommodation	74%	7%	0%
Dining	69%	29%	1%	Dining	74%	13%	1%
Cleanliness	65%	30%	3%	Cleanliness	69%	20%	3%
Safety	83%	11%	1%	Safety	67%	18%	3%
Customer Service	72%	25%	2%	Customer Service	67%	19%	3%
Customs & Immigration	74%	24%	2%	Customs & Immigration	67%	20%	2%
Taxi	60%	35%	2%	Taxi	54%	16%	1%
Ferryboat	57%	38%	4%	Ferryboat	50%	20%	2%
Telephone & Internet	39%	49%	8%	Telephone & Internet	46%	24%	4%
Roads	19%	55%	22%	Roads	27%	50%	14%

### 3. 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 Anguilla. The average expenditure by tourists for Transportation (ground transport), airfare, dining and accommodation was US\$53.14, US\$660.47, US\$84.38 and US\$270.31 respectively, while the average expenditure by excursionists for transportation, travel and dining was US\$48.70, US\$79.18 and US\$33.95 respectively.

#### 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**

<b>Accommodation Costs (per person per night)</b>	<b>Type of Accommodation</b>				
	<b>Hotel</b>	<b>Friends/relatives</b>	<b>Own property</b>	<b>Villa/apartment</b>	<b>Boat</b>
\$0	2%	47%	31%	3%	80%
NA	4%	45%	53%	8%	20%
US\$1 - \$49	3%	2%	0%	8%	0%
US\$50 - \$99	13%	2%	0%	26%	0%
US\$100 - \$199	22%	1%	6%	31%	0%
US\$200 - \$299	12%	0%	0%	8%	0%
US\$300 - \$399	19%	0%	0%	3%	0%
US\$400 - \$499	12%	0%	0%	0%	0%
US\$500- \$599	6%	0%	3%	7%	0%
US\$600 or more	5%	0%	3%	4%	0%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

During August 2005, 78.0% of the tourists who stayed with either family or friends or their own property incurred no cost for accommodation. 71.0 % of tourists who did not fall into the categories above and stayed in hotels and 49.0% who stayed at a villa or apartment spent between US\$100 – US\$599.

#### 3.2 Airfare Costs

Airfare costs will vary depending on the country from which tourists are coming as well as seasonality. Of those tourists coming from the North Eastern quadrant of the United States this cost ranged from US\$500- US\$3000. 42.0 % of those travelling from this area used their

frequent flyer miles to purchase their tickets 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**

<b>Country of Residence</b>	<b>Flight Costs</b>						
	<b>miles or points</b>	<b>Less than US\$50</b>	<b>US\$50 - \$499</b>	<b>\$500 - \$999</b>	<b>\$1,000 - \$1,999</b>	<b>\$2,000 - \$2,999</b>	<b>\$3,000 or more</b>
U.S. North East	42%	8%	15%	47%	20%	18%	0%
U.S. North West	12%	2%	5%	8%	13%	11%	11%
US Rest	29%	8%	10%	27%	11%	7%	11%
Canada	7%	1%	0%	2%	8%	9%	6%
United Kingdom	1%	3%	2%	5%	13%	16%	28%
France	2%	3%	1%	1%	7%	7%	17%
Germany	1%	1%	0%	0%	3%	2%	0%
Italy	1%	3%	2%	2%	13%	11%	17%
Other Europe	2%	1%	2%	1%	5%	7%	6%
Caribbean	1%	11%	51%	5%	2%	2%	0%
St. Martin/St Maarten	0%	58%	7%	1%	0%	2%	0%
Other	2%	3%	4%	2%	3%	7%	6%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

### **3.3 Dining Costs**

Anguilla's dining scene offers visitors a variety of gastronomic diversions and a choice of dining ambiance. With over 70 restaurants and award-winning chefs Anguilla has a dining experience for every mood, taste and budget. West Indian, French, Italian, Creole, American, and other culinary styles are masterfully influenced by the flavours of the Caribbean to create an eclectic mix of mouth-watering delights.

During August 2005, between US\$40 – US\$150 was the most money spent on eating per day as indicated by 46.0 % of the respondents. 17.0 % indicated that they spent between, US\$150 - US\$200 or more on dining expenses daily.



**Table 3.3 Dining Costs**

Dining Cost (per person per day)	% August 2004	% August 2005
\$0	9%	10%
US\$1 - \$9	4%	2%
US\$10 - \$19	10%	6%
US\$20 - \$29	10%	9%
US\$30 - \$39	6%	9%
US\$40 - \$49	10%	12%
US\$50 - \$99	17%	21%
US\$100 - \$149	14%	13%
US\$150 - \$199	8%	7%
US\$200 or more	9%	10%
Total	100%	100%

### 3.4 Inland Transportation Costs

Ground transportation costs of tourists surveyed during August 2005 were in the range of US\$1- US\$49 daily. 42.0 % indicated this was what they paid. A little less than 20.0% spent between US\$50 – US\$99 per day.

**Table 3.4 Inland Transportation Costs**

Transportation Costs (per person per day)	% August 2004	% August 2005
\$0	11%	17%
US\$1 - \$49	43%	42%
US\$50 - \$99	25%	18%
US\$100 - \$199	7%	5%
US\$200 - \$299	2%	2%
US\$300 - \$399	1%	1%
US\$400 - \$499	0%	1%
US\$500 - \$599	0%	0%
US\$600 or more	0%	0%
Total	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 and events on the island etc.

Below is the visitor expenditure on sundry costs during August 2005.

Table 3.5 Sundry Costs

Sundry Expenses	% August 2004	% August 2005
Less than US\$20	14%	18%
US\$20 - \$49	12%	13%
US\$50 - \$99	13%	14%
US\$100 - \$199	17%	17%
US\$200 - \$299	11%	9%
US\$300 - \$399	8%	8%
US\$400 - \$499	7%	5%
US\$500 - \$999	10%	9%
US\$1,000 - \$1,999	5%	5%
US\$2,000 or more	3%	2%

## 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).

