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ANGUILLA: A TOURISM SUCCESS STORY?

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ABSTRACT

Anguilla is a Caribbean island microstate that has undergone dramatic tourism growth, passing through the early stages of Butler's tourist cycle model to the "development" stage. This pattern is related to deliberate government policy and planning decisions, including a policy of not having a limit to tourism growth. The resulting economic dependence on tourism has led to positive economic benefits (e.g., high GDP per capita, low unemployment, and significant local involvement in the industry).

Significant further growth in tourism, however, could lead to considerable environmental stress in both biophysical (e.g., water, sewage, electricity) and social (e.g., expatriate labour, multinational corporations) terms. In order to avoid such problems associated with a path toward mass tourism even on a small scale, the government should adjust its tourism policy and planning to create a "consolidation" stage that would prepare this fragile island system for a "stabilization" stage of little or modest growth.

More than any other Caribbean community, the Anguillans [sic] have the sense of home. The land has been theirs immemorially; no humiliation attaches to it. There are no Great houses; there are not even ruins. (32)

INTRODUCTION

Anguilla is a Caribbean island microstate that has undergone dramatic tourism growth, passing through the early stages of Butler's (3) tourist cycle model to the "development" stage. This pattern is related to deliberate government policy and planning decisions, including a policy of not having a limit to tourism growth. The resulting economic dependence on tourism has led to positive economic benefits (e.g., high Gross Domestic Product [GDP] per capita, low unemployment, and significant local involvement in the industry).

The question arises, however, as to whether this new-found prosperity represents a "success story." An analysis of the history of the Anguillian tourism sector and its related policy and planning context
demonstrates that the significant economic benefits resulting from tourism may be offset by negative environmental and social impacts if growth of the sector continues on its current path.

The paper begins with a brief description of the physical and historical setting of Anguilla, followed by its economic development, the growth of the tourism sector, the development of tourism policy and planning, and finally conclusions.

THE SETTING

One of the five remaining British dependencies in the English-speaking Caribbean, Anguilla has an area of 91 km² (excluding several small offshore islands which are uninhabited), with maximum dimensions of 25 x 5 km, and is the most northerly of the Leeward Islands. (See Figures 1, 2.) Its nearest neighbour—the Dutch-French dependencies of St. Maarten-St Martin— is only eight km to the south.

This coral-limestone island, which is sheltered by a number of healthy coral reefs (well-suited to snorkelling and Scuba-diving), is flat (the highest point being 65 m asl) and rocky. Vegetation is sparse due to low levels of rainfall (ranging from 550-1250 mm) and consists mainly of low-lying xerophytic (drought-resistant) plants. There are several small saline ponds, but no sources of freshwater other than ground water. The mean monthly temperature is 27°C, with monthly ranges from 23-30°C; moderated by the northeast trade winds, the average relative humidity is a pleasant 75%. There are 33 beaches (comprising about 20 km of shoreline) of white or light pink sand, several of which are regarded as among the finest in the world.

The island's eel-like shape led both the Caribs and the Spanish to use their words for "eel" to name the island: Malliouhana and Anguilla (40). On his second voyage in 1493, Columbus sighted the island, but no attempt was made by the Spanish to colonize it, perhaps because of the presence of the Caribs, who had taken over the island from the Arawaks some time around 1200 AD. The first European settlers were English from nearby St. Kitts, followed by Irish invaders in 1688 who were fleeing from Cromwell and religious persecution. Other than unsuccessful invasion attempts by the French in 1745 and 1796, the island remained at peace until 1969 when 300 British troops invaded the island in the wake of the colonial government's refusal to become independent of Great Britain.

The early settlers tried to establish a plantation system similar to other Caribbean islands, but it failed to take hold because of the poor soil, erratic rainfall, and the consequent low quality and quantity of sugar and cotton.

Sugar-cane used to grow in some places, but even in the days of slavery it was never an island of plantations. In 1825, nine years before the abolition of slavery in the British Empire, there were about three hundred white people and three hundred free coloureds, people of mixed race. Between them they kept about three thousand Negroes. The Negroes were a liability. On other Caribbean islands Negroes were let off on Saturdays to work on their own plots. In Anguilla they were turned
loose for half the week to forage for themselves. (32)

Droughts and famines were not uncommon in the nineteenth century (34). Plantation owners had begun a long history of out-migration by allowing many slaves to search for work in such places as the nearby British Virgin Islands and Antigua, and as far south as Trinidad. The slaves then bought their freedom and that of their families and returned to Anguilla to settle on lands that eventually were deserted by plantation owners. By the time of emancipation in 1834, the island's population consisted of free people and independent landowners (40). Until the 1970s, the economy remained basically dependent on salt production and fishing, with remittance income from Anguillians living abroad either temporarily or permanently being a major factor.

Because colonial rule of small islands was difficult to manage effectively from London, "federations" were established by the British Government. Anguilla and St. Kitts were brought together as such a federation in 1871, with Nevis being added in 1882. Feeling ignored and misunderstood, Anguilla petitioned in 1875 and 1958 for direct British rule and finally declared itself independent in 1967 just as the three-island unit of St. Kitts-Nevis-Anguilla was granted statehood. The matter remained in dispute until 1969 when there were rumours that international gangsters were about to descend on Anguilla. The British Government sent a paratroop battalion to the island, an "invasion" which delighted the Anguillians (41)—although regional political leaders denounced what they considered British recolonization (37). Subsequently, a separate, direct administration was formed, but formal separation from St. Kitts-Nevis did not occur until 1978 when, by a British Order-in-Council at the request of the Anguillian people, Anguilla again became a Crown Colony in the form of a Dependent Territory: "What many regarded as turning back the hands of time, the Anguillians heralded as the first step to real political freedom" (40). The secession movement was both a quest for identity and a search for local control over increased economic development: "... the 'better life' which Anguillians had to seek abroad would be brought home to Anguilla's shores after a period of managing their own affairs. There would be no more need to roam the region and indeed the world to secure the benefits of a modern society" (22).

The Government consists of a Governor representing the British Crown and a Chief Minister and other Ministers appointed from the elected members of the Legislative Assembly. The legal and legislative system is based on that of Britain, supplemented by local statutes. There is no income tax, corporate tax, or currency exchange control; as a result, there is a small but growing offshore banking industry.

With a resident population of only 8960 in 1992 (25), there is virtually no population growth due to the traditional out-migration to neighbouring islands, North America, and the United Kingdom; while the exact number is unknown, there are probably more Anguillians living in other countries than reside on the island. A peculiar feature of Anguilla is the absence of a clearly identifiable urban area: "Anguilla is ... an island of numerous small settlements--in effect, a true village society. It has no large capital town.... Where settlements have developed, the population is dispersed in mixed residential patterns with little
distinction between low and high income areas" (25). Major districts where small pockets of the population have settled include The Valley (which is also the main shopping, commercial, and administrative centre), Stoney Ground, Island Harbour, South Hill, Blowing Point, and West End.

THE ECONOMY

Limited growth occurred in Anguilla during the 1970s as production in salt, the main economic sector until 1980, stagnated and as lobster output generally declined. By 1987, the manufacturing sector accounted for only 0.5% of GDP, as a result of the virtual collapse of the salt industry due to high-cost production, an economic downturn in the main market of Trinidad and Tobago, and large swings in production levels (5). Despite minor upswings in 1989 and 1990 (16), there appears to be a continued sharp decline in fishing, but it cannot be ascertained whether this development is related to an increase in unrecorded exports, a decline in resources (related to over-fishing, increased fishing by foreign vessels, and increased recreational fishing) or a lower level of activity by fishermen (5).

Given that there are only 15 km² of arable land on the island (19), there is little agricultural production, except for recent increases in corn due to higher levels of precipitation (5) and vegetables through experimental plots using drip irrigation and pond reservoirs (16). Overall, the situation in fishing and agriculture suggests little potential for internal linkages between these sectors and tourism (29).

As a result of this lack of exports, Anguilla has a comparatively large trade deficit for such a small population. A reversal in the declining economic trend emerged towards the end of the 1970s when Government policy began to emphasize the development of tourism. The Government spearheaded the rapid growth of economic activity through investment in a number of large infrastructure projects which complemented investment by the private sector in hotel, construction, and other tourist-related activities. Funds for private sector development were derived mainly from external sources due to inadequate levels of savings in the public sector and the absence of an entrepreneurial class. Official financing has been in the form of budgetary and capital grants and, more recently, concessionary loans, while private inflows have been mainly in the form of direct investment in the tourism sector.

Emerging as the main economic activity and as the principal growth sector, the tourism sector has also been the vehicle for improved performance in other sectors, notably construction and services (7): "The expansion of the economy ... is directly related to the growth of tourist related activities which stimulated high growth rates in other sectors of the economy, especially construction, transport and hotel and restaurant" (16). Since 1984, the economy has grown rapidly and steadily (16): the GDP increased from US$11.4M in 1982 to US$56.5M in 1993, with real growth rates averaging over 10% pa. Now among the highest in the Caribbean, the GDP per capita at current prices increased from US$1991 in 1984 to US$7500 in 1993.

The Government has consistently realised surpluses on its recurrent operations since the termination of British budgetary assistance in 1983, as a result of not only the strong tourism industry, but also improved revenue collections and, to a lesser extent
(because of increases in civil service wages), the control of expenditure growth (5). After tourism receipts, the second most important contribution to GDP derives from remittances from nationals living abroad, capital aid flows mainly from the United Kingdom, and to a lesser extent from other donors including Caribbean Development Bank (CDB) concessional loan funds, and foreign private investment (19). It is expected that external aid flows will have a continuing major role in Anguilla's development (19).

Based on what it calls optimistic but well-founded forecasts for growth in tourism, Laventhal and Horwath (29) conclude that

Despite its lack of traditional wealth-generating resources, Anguilla appears well-placed to benefit greatly from its tourism potential. Although leakage of tourism spending is large and will probably grow with time, the country can probably look forward to full employment and a fiscal situation which should allow it to finance its own development thus, from a donor standpoint, freeing aid capital for more effective use elsewhere. However, the government will be under considerable pressure due to the scarcity of domestic resources, notably of private capital, and labour. If it fails to control market forces in the best interests of the local population, they risk finding themselves mere spectators in a process which in the long run could lead to destruction of the natural environment and a dangerous degree of alienation of the local population.

The Government has stated that it intends to deal with the resource scarcity problem by encouraging the private sector to help meet the Government's main development objectives, which are

... the correction of any social and economic imbalances which may exist, and the harnessing of the resources of the country towards building a stable society and a sound economy. The private sector is expected to be the main engine of growth. GOA's role will be largely to provide the supportive infrastructural facilities and the policy framework which will encourage greater private sector involvement in economic activity. (4)

The fact that private investors have been responding to this call to assume a critical role in improving the living standards of Anguillians demonstrates the confidence that exists in the economic future of the island. The Government believes that its major responsibility, therefore, is to maintain or increase this level of confidence (5; E. Gumbs 1989, pers. comm.). In an attempt to increase local participation in the growing tourist market, Government emphasis in manufacturing is currently on handicraft production, but it remains a very minor industry (19).

There are, however, potential constraints on the continuation of the trends in growth. Anguilla is in a unique situation in the Caribbean, for there are signs that the growing level of economic activity (particularly in tourism and construction) puts considerable strain on the labour force. While unemployment was estimated at only 5% in 1993, there is a degree of seasonality
in employment, mainly related to the tourism industry. Construction—which accounts for about 12% of GDP—has been vibrant largely because of major tourism, airport, government, and hospital developments. In fact, the construction of the hospital had to be delayed in 1988 because of the lack of available labour. The growth of agriculture continues to be constrained by the limited availability of labour, largely because of intense competition from other sectors; the problem is exemplified by the fact that the majority of farmers in Anguilla are between 50 and 60 years old.

There are also constraints on development due to the limited land base and the availability of electricity (the island has no indigenous energy sources) and water. While 50% of the island's water needs are met by the public sector from ten public wells (the use of which is more or less at their maximum), there is widespread use of cisterns; moreover, a government-operated reverse osmosis desalination plan is inoperative due to technical problems. In fact, it has been argued that the Government's policy of small hotels is partly based on water requirements; building regulations require hotels to be self-sufficient in water by installing reverse osmosis desalination plants which use seawater from shoreline boreholes as feed water (25). The seriousness of the water situation is highlighted in the final reports (11-12) of a Canadian International Development Agency (CIDA)-funded project begun in 1983 examining water resource planning and system design which note rising levels of nitrates in groundwater due to chemical pollution arising from some combination of agricultural fertilizer and/or animal wastes, plus wastewater effluent run-off from domestic and commercial septic tanks. Recognizing the limited potential for expanded catchment and cistern production, the reports recommend that the Government begin planning a desalination plant, probably a multiple-flash distillation system utilizing waste heat from the diesel units at the power plant, and that it consider the phase-out of reverse osmosis plants at hotels because they create a brine concentrate discharge problem. While these and other major changes have not yet been implemented, the Government continues to seek Canadian and British aid to upgrade the water system (R. Hodge 1991, pers. comm.).

While the Government has indicated repeatedly that it wants to diversify the economy, the CDB (6) warns that diversification would put stress on limited human and natural resources. While Anguilla's economy appears to be stronger than many other countries in the region, the limits imposed by small size are reflected in its vulnerability to external forces, e.g., the Gulf War, the American recession (25).

In recognition of these problems, the Government undertook two significant steps. First, in 1992 it entered into a three-year project agreement with United Nations Development Program (UNDP) for execution of a program dealing with the "Management of Natural Resources and the Environment." The first result is an environmental profile which provides a basic resource management framework for the island (25); later, there will be an "Environmental Manifesto" which will be directed at a wider audience. The project is designed to address a basic problem: "how can a very small place with very limited resources, a small government and a small private sector adequately deal with the management of commonly-shared resources?" (25).
Second, the Government has hired a consulting firm to begin a long-term strategic planning process. In its first report, Mokoro Ltd. focuses on the limited resource base and the fragility of the island system and notes specific pressures on resources: increased numbers of tourists using beaches and the coastal environment, conflicting uses of marine resources, the need for upgrading solid waste disposal practices, lack of control over livestock grazing, overfishing of inshore waters, and the need for better management of the marine environment. It will take some time, however, before the impacts of this planning process are seen.

THE TOURISM SECTOR

The following section provides a history of the evolution of the tourism sector. Growth has been rapid, foreign interests dominate the hotel sector (although establishments remain relatively small), and the island has a growing international reputation as a luxury destination—fostered by a favourable tax situation. Concerns about marked seasonality are resulting in encouraging the development of particular market niches.

Tourist Arrivals

Ranking first in growth since 1980 in tourist arrivals among 30 countries in the Caribbean region, Anguilla has seen its number of stayover tourist arrivals jump from 4800 in 1979 to 36,700 in 1993, an increase of 664.6%, in contrast to the overall Caribbean figure of 94.4%. Another way of expressing this growth is through the number of tourist arrivals per 1000 local population per year: from 863 in 1980 to 4087 in 1993.

In terms of absolute number of tourists, however, Anguilla remains one of the smallest destinations in the Caribbean. In 1980, of 30 destinations in the region, it had the smallest number of tourist arrivals, while in 1993 it had risen only to 28th. With the exception of a significant increase in rank as a destination for visitors from the United States over this time period, it ranks similarly low for its other major (extra-regional) markets of Canada and Europe. In contrast to these figures on relative ranking of Anguilla as a destination when compared to other Caribbean destinations, Anguilla is clearly becoming absolutely more popular in its major markets. Its market performance compared to other destinations has been significant: between 1980 and 1993, American visitors to Anguilla increased by 1222.2%, the highest figure for American tourists to 29 Caribbean destinations, while Anguilla saw the third largest increase for Europeans at 350.0%, and the seventh largest increase for Canadians at 88.0%. This increase in the number of Americans has resulted in the United States being the dominant market since 1982; however, the Caribbean remains an important market. Along with the United Kingdom, these three markets account for a very high market concentration ratio of 87.4 (i.e., 87.4% of stayover tourists came from these three markets).

Because the island's Wallblake Airport can handle only small aircraft, 90% of all tourists arrive by ferry from nearby St Martin. The principal air gateways to Anguilla are St. Maarten (for international flights from the United States and Europe) and Antigua (for Canada, United Kingdom, and Europe); connections from St. Maarten are primarily by ferry, while Antigua requires a connecting flight. There are no direct scheduled flights from Wallblake
outside of the Caribbean. The expansion of Wallblake to accommodate larger planes is unlikely, given the small size of the current airport site and the proximity of St. Maarten.

To the stayover tourists must be added an even larger absolute number of excursionists who visit the island for a day from St. Martin. The growth in their numbers has been even more dramatic: from 1297 in 1979 to 73,700 in 1993—a 5569.2% increase or 8207 arrivals per 1000 local population, both figures being higher than for any other Caribbean destination. This expansion has been fueled by greatly improved and increased ferry service in recent years, including the provision of night service. Excursionists are mainly attracted to the fine beaches and reefs, as there is no duty-free shopping and only simple handicrafts. While their per capita expenditure is much less than stayover tourists, they are an important source of income for taxis, restaurants, dive operations, etc., but data on their expenditures are not available.

There is no marina in Anguilla and no anchorage that is protected during hurricane weather; consequently, yacht tourism is minimal (except for day-trip visits by boats from neighbouring islands) and cruiseship tourism is non-existent.

When all three types of visitors are aggregated, Anguilla's position as a rapidly expanding destination becomes even clearer. Between 1980-1993, total visitor arrivals increased 1246.3% to 110,400 or 12,294 visitor arrivals per 1000 local population.

Accommodations

Related to the increased number of tourists has been a growth of the accommodation stock, from 150 rooms in 1980 to 978 in 1993. In the same period, the number of rooms/km² rose from 1.6 to 10.7 and the number of tourist rooms per 1000 local population rose from 22.9 to 108.9. This growth in the accommodations stock has been paralleled by a near doubling in average length of stay from 5.5 to 10.3 nights. This combination of factors resulted in a region-leading 1103.8% increase in the annual number of tourist nights, from 31,400 to 378,000.

Establishments are quite small, with the largest hotel having 52 rooms and the average being about 27 rooms. About half of the tourists stay in the 13 hotels (only two of which are Anguillian-owned), with the rest being split between private or unregistered accommodations and apartment/guest houses (which are mostly Anguillian-owned).

With twin themes of exclusiveness (and, thus, intended distinctiveness) of Anguilla and the amenities of specific hotels, it is ironic that many of the hotels have themes and attractions that have little to do with Anguilla (13). For example, the Casablanca Resort claims that "as time goes by ... you must remember this"—Rick's Cafe Americae (/sic/) recreates the fabled but fictional international rendezvous, complete with Moroccan dancers (which were not, however, featured in the original cinematic Rick's) and "Sam" on the Baby Grand. On an island without French influence, one small hotel is named La Petite Maison d'Amour. The Anguilla Great House—on an island with no great houses—has a gallery of Haitian art. Cap Juluca's Pimm's Restaurant
offers continental and Mediterranean cuisine, while Coconuts Restaurant offers Mexican quesadillas, Texas-size hamburgers, the "original" Swiss cheese fondue, and a "pastarama." Connell argues that, in seeking an elite, international market, the Anguillian tourism industry has itself become international, abandoning any focus on the specific features of Anguilla, though not, of course, excluding references to the Caribbean—icon and setting for the tourism experience (13).

Despite the growing number of tourists, the average annual occupancy rate of tourist rooms appears to be low, with the only available figures being for 1989 and 1990, when, the rates for hotels were 58.0% and 67.0% and the rates for guest houses and apartment/villas ranged from 22-29% (17). (Similarly, the rates for small hotels were earlier estimated to be as low as 15% [19].) The only annual occupancy rate available is 57.0% for 1989.

Seasonality is another major problem. The CDB (4) notes that the average occupancy rate for the summer months is 42% compared to 87% in the winter months. Similarly, de Albuquerque and McElroy (15) calculate an index of seasonality in tourist arrivals of 1.467 in 1988 for Anguilla, the fifth highest figure for 23 destinations in the Caribbean. In 1993, the index was 1.429, still one of the highest in the region.

If the number of tourists and their average length of stay continues to increase, there would be phenomenal pressure on the existing accommodation stock (even if occupancy rates were significantly raised) and demands for its expansion—which could result in extreme changes in biophysical, social, and economic impact, both positive and negative. For example, the small local population could not meet the employment needs of the sector, but would clearly benefit economically. On the other hand, increased construction and the electricity and water demands of an expanded accommodation stock would put great pressure on the environment.

**Expenditures**

Visitor expenditure has risen from US$1.0M in 1979 to US$43.3M in 1993. While still having one of the smallest total visitor expenditures (29th in 1980 and 25th in 1993) in the region, this 4230.0% increase was the greatest in the Caribbean. Similarly, estimated visitor expenditure per capita of local population rose 1880.9% from US$199 in 1980 to US$4822 in 1993. Clearly, much of this growth is related to the increasing numbers of tourists, but it is also a function of most of the accommodation stock being aimed at the high end of the market: of 31 countries in the Caribbean region in 1987-88, Anguilla ranked seventh highest in average winter room rates at US$133.80/night and fourth highest in average summer rates at US$108.00 (14). (The 23.9% difference between winter and summer rates is quite low, ranking 24th in the region. This raises the question of whether there is a cause or an effect relationship between high summer rates and the apparently low summer occupancy rates.)

Obviously, the economy is increasingly being dominated by tourism, as gauged by several measures. Visitor expenditure rose as a percentage of GDP from 21.1% in 1982 to 62.3% in 1993. Not all of this expenditure, however, remains in the Anguillian economy. The heavy depen-
idence of the tourism industry on imported goods and services is indicated by the fact that Laventhal & Horwath (28) estimate a leakage rate of 63.4%. Anguilla's lack of significant alternative merchandise exports is indicated by the fact that in 1987 there was a ratio of 7.8:1 between estimated visitor expenditure and the value of merchandise exports; Anguilla clearly has a "one-industry" economy. Such large expenditures, however, indicate Anguilla's relatively healthy fiscal situation, as estimated visitor expenditure was equal to 440.0% of external debt in 1992 (although this percentage had fallen dramatically in the few years previously). Finally, the Government (16) states that the hotel and restaurant sector, the major contributor to the GDP, accounted for 33.3% of the GDP or US$18.8M in 1992 at current prices, an increase from 23.2% or US$2.9M in 1984.

In 1985, it was estimated that the tourism sector employed 600 people directly and 600 indirectly (10); a 1992 estimate was 1000 people directly and more than 1000 indirectly (25), while a 1993 estimate of direct jobs was 1064 (8).

**Future Development**

There have been several proposals in recent years to build huge resorts. One called for 3000 condominiums on the north end of the island; however, the time limit on the development proposal has lapsed—it probably was a case of speculation. Another proposal from a consortium of French, British, and American companies calls for a US$420M development on Scrub Island consisting of 2200 beds in two hotels and 30 villas, a yacht harbour, restaurants, shops, residences for staff, etc.; however, the proposal calls for a casino, which is contrary to Government policy. A development of this size would necessitate increasing the capacity of the airport to handle wide-body aircraft—an unlikely event, as noted above—or a vastly increased ferry service to St Martin.

**TOURISM POLICY AND PLANNING**

Explanations for the success of the Anguillian tourism sector focus on the advantages arising out of Anguilla's late start, its superb beaches, its image as a fresh newcomer compared to other islands in the region, and the simultaneous tourism boom in neighbouring St Martin/St. Maarten which resulted in up-graded sea and air transport facilities making nearby Anguilla more accessible. Equally important, however, was ...

... the calculated and orderly evolution of a positive tourism development policy by the Anguillian Government, helped shape both the physical and economic framework and the marketing strategy for the new tourism sector. The policy aimed at an up-scale market niche of discriminating (later called "green") visitors who favored a low-key, high-quality non-urban, small island setting. (25)

Such a policy worked, it is argued, because of the environmental "truthfulness" of the Anguilla tourism product and from the sales package offered for that product, both of which were based on two factors: Anguilla provides a proper backdrop for an idealized, tropical island experience; and Anguillians have a culture inseparable from the landscape and its surrounding seascapes (25). Indeed, with respect to the effectiveness of the marketing effort, Mather and
Todd (30) note that, using public sector expenditures only, in terms of expenditure growth of national tourism organizations from 1986-1990 compared with the increase in the number of stopover arrivals, public sector promotion of Anguilla (along with that of Dominica and the Cayman Islands) was the most effective of all destinations in the Caribbean.

The Policy and Planning Context

Local attitudes toward land have had a strong effect on shaping the Anguillian policy and planning context. There is a long tradition of private ownership, with 95% of the island's area being privately-owned, but 70% of the 9000 parcels of private land are less than one hectare in size. There is a prevailing view among Anguillians that landowners are entitled to use privately-held land as they choose; as a result, the imposition of development control measures is often strongly resisted, with attempts by Government to introduce regulations or guidelines to control growth or manage resources being perceived as a loss of individual rights and personal sovereignty over private property (25). As a result, land development in Anguilla has occurred largely in an ad hoc and unregulated manner, in the absence of an official land use policy and an established tradition of development control. This is a pattern prevalent throughout the OECS countries, where governments generally function without a formally accepted framework for planning. Therefore, decisions about changes in land use and approval of major development activities tend to be based on short-term considerations; they are generally executed on a case-by-case basis, usually at the highest levels of government, and may overlook the serious environmental, social, and infrastructure implications of development projects. (25)

Basic legislation is in place (e.g., the 1943 Building Ordinance providing for building regulations and an approval process, the 1949 Town and Country Planning Act establishing a Planning Authority), but current legislation makes no provision for the preparation of land use plans; in fact, there is not even a map of current land use. Despite a 1977 government "green paper" which argued strongly for the need for a development plan (for reasons related to development control, development potential identification, conservation, and congestion prevention), several attempts to remedy this situation were not enacted by the Government (e.g., the 1966 Land Development Control Ordinance providing for development planning functions and requiring preparation of development plans, the 1968 Outline Physical Development Plan produced under the auspices of the UNDP, technical assistance from the British Overseas Development Agency (ODA) for the preparation of a land use plan for The Valley). The only exceptions were the implicit acceptance of the overall physical development strategy and detailed proposals for nine tourism development areas proposed by Searle (39) (see below) and the 1991 Land Development Control Ordinance in which the Government, under pressure resulting from several major development proposals, "seems to have accepted the position that the right to develop private property is not unconditional and should not be at an unreasonable cost to an individual's neighbors, the community as a whole, or the environment" (25).
This history has resulted in a Government planning infrastructure that has come under severe criticism from several sources, including the CDB (4):

Anguilla's poor planning mechanism has been reflected by ad hoc project implementation, and the absence of a clear strategy for prioritising projects. This has resulted in inefficient resource utilisation and a strain on labour.... [T]echnical assistance provided in the past has had limited success because of inadequate arrangements for counterpart personnel....

The delays in project implementation likely to be imposed by labour shortage and the capacity constraints of both the electricity and water supplies highlight the need for improving the island's development planning machinery.

The DPU [Development Planning Unit] is unable to adequately perform its role because of the small size of the staff....

The Physical Planning Unit in the Department of Lands and Surveys has recently obtained technical assistance from UNDP to prepare a National Land Use Plan and local plans for four important growth areas (The Valley, Blowing Point, Sandy Ground, and Island Harbour). The project has the following objectives: suitability and capability criteria for land development and location; a coherent and comprehensive land use policy; and a framework for evaluating, guiding, managing and coordinating public and private sector development (25). The environmental profile project has also made major recommendations concerning policy and planning, including the creation of a "Ministry of Tourism, Natural Resources and the Environment" to improve coordination between departments, an Environmental Advisory Committee, a "National Environmental Policy," and reorganization and upgrading of the Physical Planning Unit (25). Nevertheless, the Government has been involved in planning for the tourism sector since 1976 when the faltering economy forced it to recognize tourism as a route to economic development.

Early Government Involvement

As the traditional industries of salt and fishing began to falter, the Government began to recognize that tourism was a potential route to economic development. The Shankland Cox Partnership, selected by the British ODA to prepare a tourism development plan, provides the first outline of Anguilla's tourism development potential (39). The report recognizes the need for developing the island's infrastructure, including an island-wide water system (which did not exist at the time) as well as infrastructure for electrical distribution, sewage disposal, roads, and communications. It recommends the creation of marine reserves, a "coastal land development authority" to control growth in the coastal zone, and education and training programs to prepare Anguillians for tourism-related employment. Despite its far-reaching recommendations, some of which remain valid to this day, the plan was far too complex--conceptually and financially--for Anguilla at that time (25) and only its recommendations on infrastructure were implemented.

The first direct involvement by the Government in tourism was a Marketing
Plan designed in 1976 to attract both foreign investment and tourists through an advertising campaign. Tourism development was encouraged in part through an intensive program of infrastructure development. By 1979, the Government felt that enough investment had been attracted to the island, so this aspect of marketing was dropped, while the modest (and quite successful) advertising campaign continued (21).

**Laying the Policy and Planning Foundations**

With the rapid growth of tourism, in the 1981-1983 Tourism Plan--the first formal tourism plan for the island--the Government (21) presents the following objective:

To enable the people of Anguilla to benefit from the development and promotion of tourism, by optimising tourism's contribution to the national economy with particular emphasis on:

a. The quality of life and the development of the community
b. The enhancement and preservation of Anguilla's cultural traditions
c. The conservation of Anguilla's natural resources
d. The generation of employment opportunities
e. The contribution towards Anguilla's revenue

The intentions are to emphasize the potential of the tourist industry and its capacity to contribute to national development and to try to ensure that a sufficient level of investment is secured to maximise the potential of tourism. This is to be accomplished through public and private sector co-operation and a vigorous promotion campaign in a set of target markets (i.e., Europe, United States, Canada, and Venezuela) which is diverse enough so that adverse economic and political climates in any one market source cannot affect tourism too drastically.

Promoting a tourism image of "small and selective," the Plan clearly states that development and marketing are being aimed at the upper end of the tourist market, in order to attract tourists with relatively long average lengths of stay and high daily expenditure. While the Plan covers only a short time period, it seems fair to suggest that it either achieved its objectives directly or confirmed a path which soon met many of them: increased local and foreign investment, decreased unemployment, increased tourist arrivals, market diversification, and consolidation at the upper end of the market.

Less successful, however, was the implementation of a number of actions that were to be taken, including marine conservation, careful control of development projects, training programs, reorganization of the Department of Tourism, creation of a Hotels Licensing Board and a Tourist Advisory Board, research, and a licensing system for related services (e.g., car hire, handicrafts) in order to maintain standards and to encourage local investment in such services. None of these steps was accomplished, largely due to the lack of finances and trained personnel and, in the case of marine conservation, public pressure (D. Carty 1991, pers. comm.; J. Hastings 1991, pers. comm.).

With the rapid growth of tourist arrivals in the mid-1980s, the Government recognized its lack of ability to manage the industry.
As a result, in a report prepared in response to a technical assistance request from the Government, the Caribbean Tourism Research and Development Centre (CTRC) prepared a Short-Term Action Plan for the tourism sector. Its purpose was seen to be a quick analysis of the situation, followed by actions that could be taken almost immediately to correct problems and to meet needs:

• problems: air and ferry access problems, being relatively unknown as a destination, limited budget and untrained staff, lack of complementary tourism attractions, standard of service not always matching the quality of the accommodation

• needs: production of collateral promotion material, brochure on "hide-away" tourism, appointing a tourism advisor, establishing an information booth in St. Maarten (for day excursionists), inventory and development for complementary tourist attractions (e.g., historic buildings, Amerindian sites, caves), institutional strengthening of the Department of Tourism.

Proposals are developed in the report to deal with all of these items; however, little action was taken, perhaps because most of the recommendations were seen by Government as involving long-term rather than short-term actions.

Setting the Policy Path

For the information of the Anguillian people and as a guide for investors, the Government felt that it needed a formal policy on which it could base its actions for the next several years (E. Gumbs 1989, pers. comm.). Therefore, it (20) issued a Tourism Policy in 1985 which recognises that a carefully planned and executed tourism policy is essential to the future prosperity of the island. It will generate both foreign exchange and general revenue, reduce unemployment and improve the standard of living. Government realises that an increasing exposure of the people of the island to outside influences may produce adverse ethnic and sociological effects, and these will be carefully monitored and minimised.

The ultimate aim "through careful manpower planning, is to provide full and continuous employment for all Anguillians" (20). The Policy (20) ends by emphasising that tourism can "if carefully planned and regulated, become the lifeblood of the island...."

Recognising that the size of Anguilla, its workforce, and its related services cannot support mass tourism, the Policy emphasizes the Government's intention to encourage up-scale developments in hotels, villas, and apartments with the intent of maximising the earning of foreign exchange and increasing Government revenue through indirect taxation.

No maximum limit is set on the number of tourist rooms, but

The pace of development will be carefully monitored to avoid excess capacity, and a limit will be placed on the size of individual hotels and/or villa/apartment complexes, to ensure that smaller personalised hotels are created in keeping with the island's up-market image. These hotels will be low rise in character, and not more than three floors ... high. The maximum number of rooms in any one
development will in future be limited. (20)

The Policy (20) recognises Government's role in a number of areas:

- directing and controlling the development and standards of the tourist industry through statutory, economic, social, ecological, and physical planning measures
- adopting an active role in the industry, including marketing and sales promotion and encouraging investment in the private sector
- ensuring adequate infrastructural planning and provision of support services
- encouraging the co-operation of private and public sectors
- ensuring that the benefits of tourism are spread throughout the society
- encouraging local employment in the industry
- preserving and enhancing the natural environment
- using tourism as a means of inter-sectoral linkages
- requiring that developers provide on-going staff training and that expatriate work permits be granted for limited periods of time.

The Policy (20) forcefully states that casinos will not be permitted.

While welcoming both local and foreign investment, Anguillian ownership and control of the tourism industry is preferred and local investment is to be encouraged; joint ventures with overseas investors are possible. Time-sharing developments are specifically prohibited (because of the failure of several such projects in the region) and condominium projects are to be carefully controlled (because of their notoriously-low occupancy rates in general). Overseas investors are warned that, while Anguilla has no income or corporation tax and there are no foreign exchange restrictions, the Government has extensive powers to restrict speculative dealings in real estate or property.

Clearly, many of the Policy's objectives were met: virtually full employment, up-scale hotel development, improved marketing, co-operation between private and public sectors in investment. It also called for detailed research which would provide a strategy for achieving the many aspects of the policy; the result was the 1987 Hastings Report (23).

On the other hand, the Government's intention to become more active and capable in planning and development control was not met. In particular, the Policy calls for the preparation of a physical development plan, to include the zoning of areas of special development for tourist facilities, including national parks, marine parks, historical-cultural sites, and environmental protection. Such a plan has never been formulated, resulting in ad hoc decisions on a proposal-by-proposal basis. Moreover, the CDB (7) notes that the growth in hotel development that followed the 1985 Short-Term Action Plan's release was not always consistent with Government's stated objectives in the Tourism Policy (e.g., controlling the development of the industry and optimising contribution to the domestic economy through full local participation in all areas of the industry). Finally, attempts
at linkages with other sectors have achieved few results, as witnessed, for example, by a relatively high level of merchandise imports.

Many of the Tourism Policy's objectives are repeated in the National Development Strategy 1986-1991, in which the Government (19) clearly states that expansion of the tourism industry is a primary goal. This goal is supported by objectives dealing with competitiveness, decreased seasonality, high standards, expansion constrained by local labour force capabilities, and inter-sectoral linkages. In order to meet its development goal, the Government has chosen not to formulate a macro-economic development plan, preferring to use Throne and Budget Addresses to declare its intent to influence the economy's productive capacity within a policy framework which emphasizes increased tourism revenues, higher living standards, and employment for Anguillians (19). To a great extent, this policy framework has been successful, as measured by high employment, a strong fiscal position, and steady investment in public sector services. The related operational strategy is two-fold: (a) the upgrading of economic and social infrastructure as the basis for attracting foreign private sector tourism investment, and (b) the encouragement of greater local participation in all areas of the industry.

This latter point is somewhat problematic, given the Government's marketing strategy of promoting the island as a luxury destination for upper-income visitors; as a result, local ownership and managerial involvement is higher in the service industries than in luxury hotels (19). Since 1987 (based on recommendations by Hastings [23]), the Government has exclusively promoted the island as an up-market destination, a strategy aided by proximity to the United States as the main tourist market and to St. Maarten, a popular international destination. Major hotel developments\(^{10}\) in recent years have been in the 4-5 star range and have been operating at full or near-full capacity throughout the winter season (4); many have already undertaken modest expansion programs to meet demand. In contrast, smaller hotels (which represent about 20% of the island's total room accommodations) are generally locally-owned and have operated at extremely low rates of occupancy (estimated at 15%) even during the peak season (19). The Government has, therefore, recently accorded special attention to small hotels which face extremely low occupancy levels because of several problems:

- they are not equipped to meet the requirements of up-market tourists
- they do not have the financial resources for overseas promotion
- many are poorly managed (5).

Accordingly, the Government is attempting to secure soft funding to upgrade these facilities and expand overseas promotion to include specialised markets, e.g., sports and Scuba-diving clubs.\(^ {11}\) In addition, the Inns of Anguilla Association, a private-sector organization representing small establishments, was formed in 1990 to implement a joint marketing and reservation system to encourage up-grading and to increase occupancy rates (A. Edwards 1991, pers. comm.).

This shift in emphasis will not be without difficulties in the marketing of what has been called "the best-kept secret in the Caribbean" (35). In recent years, there have
been intensified overseas promotion efforts mounted by the Anguilla Tourist Board and the Anguilla Hotel Association, largely aimed at the North American market due to budget constraints. Transportation improvements have also had an impact on the growth in tourism, including the introduction of night-landing facilities at Wallblake Airport and the expansion of the ferry service to St Martin to include a night service.

Growing Concerns for the Environment

In order to implement the tourism objectives of the National Development Strategy, the Government in 1987 adopted as official policy nearly all of a series of proposals made by Hastings (23) for the years 1987-1991 related to the tourism sector (R. Hodge 1989, pers. comm.):

• no further hotel development projects to be approved until the end of 1991 to avoid over-taxing the water, electricity, and labour supplies

• strengthening the Development Board to be able to offer economic appraisal and marketing services to Anguillian investors

• creation of a Tourist Board

• appointing a marketing and sales promotion officer within the Department of Tourism

• directing marketing at Canada, the Caribbean, and Europe to diversify away from the dominance of the United States

• marketing support for older Anguillian-owned hotels and guest houses

• training of Anguillians for the hotel industry to be a priority

• creating tourism development zones, national and marine parks, and recreation reserves and thereafter protecting and patrolling them

• protecting archaeological and historical sites

• instituting an awareness campaign to enable Anguillians to understand the advantages and disadvantages of tourism development

• instituting a campaign to combat a serious garbage and litter problem.

While some were dealt with faster than others, action was taken on nearly all of these items. For example, the hotel trade program at the secondary level was upgraded and a curriculum developed to teach about tourism (E. Hughes 1990, pers. comm.). On the other hand, litter remains a serious problem.

An exception to the Government's acceptance of Hastings' recommendations concerns his point that, even after 1991, new projects should be restricted to Anguillian ownership. The Government does not agree with this recommendation, preferring a mixture of Anguillian and foreign developments—but does believe that all developments should be small and up-scale (R. Hodge 1991, pers. comm.).

Perhaps most significant was the fact that Government accepted Hastings' recommendation that the pace of hotel development be slowed because of environmental limits; however, while the moratorium held, the Government did not
act on his proposals for the strengthening of development planning mechanisms and institutions. Anguilla has some legislation which addresses planning and environmental concerns; however, much of it has not been enacted or enforced, e.g., Town and Country Planning Act, Land Development Ordinance, Litter Ordinance, National Trust Ordinance, Heritage Buildings Ordinance. In many instances, regulations are non-existent or out-dated; moreover, the fragmented nature of the legislation would make it very difficult to implement (36). Non-Anguillians do have to obtain a license, which could include any conditions, for any development, but Anguillians do not require a licence to develop; moreover, building permits are issued by Public Works and not by the Development Planning Unit (P. Clarke 1989, pers. comm.). Hastings (23) places great emphasis on the inadequacy of planning controls in Anguilla: "Despite this plethora of legislation there is no routine planning machinery in Government at the present time." He repeats the earlier recommendation of Williams (43) that a Planning Authority should be created, with its own Physical Planning Unit, working under a Planning Committee; a physical planning officer was appointed following Williams' report, but Hastings argues that this is not sufficient.

Even though little action was taken to strengthen the planning process for land, the Government took a different attitude toward the sea. It recognized that Anguilla's tourist industry and, therefore, its economy are directly related to the marine environment:

 Anguilla's primary attractions are its white sand beaches, seafood, and underwater scenic appeal; all directly related to coral reefs and coastal habitats. But, as is common, these resources are threatened by inshore fishing, as well as residue and erosion from coastal construction, increasing sewage load, and mechanical damage from boat anchors and visiting snorkellers and divers. The pace of development in Anguilla has created an immediate need to implement a strategy for long-term development and management of coastal resources. (18)

There have been several studies documenting Anguilla's dependence on her marine resources and describing a proposed marine resource management system comprising four parks and protected areas and three tourism management areas within a 275 km$^2$ multiple use reserve (out of a total marine area of 4700 km$^2$), as well as two fish nursery areas, two commercial ports, two fisheries management zones, and one "species management" zone (1, 26, 33, 38).

In 1982, a Marine Parks Ordinance had been passed, but there were institutional difficulties which impeded implementation of a marine parks system: small-island governments are understandably reluctant to increase their recurrent expenses through creation of additional infrastructure (18). In order to provide an effective organizational approach to marine park management, a Marine Parks Plan (18) was formulated in 1989, largely as a result of public concern over deteriorating fishing catches, increased recreational use of reefs, and the abandonment at anchor of several derelict small ships (D. Carty 1991, pers. comm). It calls for the provision of information and technical guidelines for coastal management, the establishment of the marine parks, the improvement of public awareness and understanding as a base of popular support for resource protection and development,
and the amelioration of known problems of beach erosion and visitor-caused damage to critical marine habitats. Regulations for the implementation of the Marine Parks Plan were approved in June 1993, but have not yet been implemented (25).

The Government appears to have taken these environmental issues very seriously. A Ministry of Fisheries and Marine Resources was created as a separate entity (formerly being part of the Ministry of Agriculture and Fisheries) and given increased responsibilities and trained staff. In 1990, the Government passed a Cruising Permit Ordinance, which requires cruising permits of any boat, local or otherwise, wanting to anchor in one of several designated areas, either on beaches or at diving sites. Also, permanent moorings have been set up at diving sites to minimise anchor damage. In addition, a Minister of Education and Environment was appointed in 1990; new programs include the teaching of marine and environmental education in the school system, the development of curriculum materials, and the removal of wrecked ships in Road Bay and sinking them off-shore to create artificial reefs (D. Carty 1990, pers. comm.). There will also be education programs for fishermen because a major obstacle to implementing marine parks will be changing the views and practices of local fishermen; for example, traditional fishing areas will need to be put off-limits and anchoring techniques changed to avoid damage to the reefs (M. Emmanuel 1990, pers. comm.).

Actions also took place outside government. A National Trust was formed with funding from an American foundation and a Marine Task Force formed, with members from both the public and private sectors.

**The 1992 Tourism Strategy**

As a follow-up to the Hastings Report, the proposals of which were to cover the period 1987-1991, the Government wanted another study which would follow the basic directions that it had subsequently adopted as general policy, e.g., the Government intention to continue to have no goal for the maximum number of tourist rooms, but rather to seek to direct development that is small-scale and up-market and that has a high level of local involvement (R. Hedge 1991, pers. comm.). The resulting Tourism Strategy provides overwhelming evidence that tourism has functioned as the engine of economic growth of Anguilla. It covers a broad spectrum of issues, similar to its predecessors, and reinforces rather than redirects most prior policy positions; however, it also offers more environmental specificity and addresses resource depletion, system overload, and environmental management needs linked to enhancing productivity within an industry increasingly at risk of losing its "newness" attraction in the global market place. Key suggestions in the report include:

- limiting hotel construction to 40 to 50 rooms per year;
- limiting hotel size (40 to 80 room range);
- leasing, rather than selling, land to foreigners;
- developing marine recreational facilities;
- discouraging the use of noisy, motorized activities such as jet skis;
- developing land use planning and zoning controls;
- encouraging building designs that reflect Caribbean architectural styles;
- promoting environmental education programs at various levels;
completing an "environmental profile" for the island;
- completing management plans for historic sites and parks;
- expanding marine resource management programs;
- encouraging tourism's linkages with other sectors;
- requiring waste water treatment and recycling; and
- developing sewage treatment for The Valley aquifer area. (25)

CONCLUSION

By most measures, the history of tourism policy and planning in Anguilla can be described as being successful in its overall goal of creating a strong tourism sector as an economic base. In 1976, the Government, recognising that the economy rested on out-migration and remittance income and that its main industries (salt and fishing) had a precarious future, deliberately chose a development path which focused on tourism in general, and up-market, small-scale, and exclusive tourism in particular. Many of its goals have been achieved (e.g., high employment, rising per capita income) as a result of being successful in attracting growing numbers of tourists spending growing amounts of money.

This path has been pursued in a continuous and linked set of relatively consistent policy and planning documents. Not all goals and objectives, however, have been achieved. For example, local participation in the tourism sector is largely confined to small-scale accommodation units (which suffer from low occupancy rates). Linkages to other sectors of the economy remain weak. Most notable, however, has been the lack of significant strengthening of the land-use planning and development sector—a factor which may have considerable environmental consequences if projected growth occurs in the tourism sector. There appears, therefore, to be a clear need for Government to re-assess its policy not to have an upper limit on growth in tourism but to assess each new proposal on its own merits. Continuous growth is simply not possible on such a small and fragile island.

Similarly, the CDB (4) notes that there are still some major issues which need to be addressed: seasonality, the low occupancy levels in the small hotels/guest houses, and the need to control the rate of expansion of the sector to minimise the pressures on the existing infrastructure and on labour availability. Although attempts have been made to secure "soft" funds for use by small hoteliers in the upgrading of their establishments and to introduce differential pricing, these have not significantly increased the summer traffic. Additionally, the Government's moratorium on the award of permits for new hotel projects did not affect plans to expand existing hotels and, as a result, pressures on the labour force have not been eased significantly.

This situation has been recognized in recent documents. For example, the Mokoro Ltd. (31) report argues that Anguilla's style of tourism has been pursued more by rejecting mass tourism, than by a concerted effort to conserve and improve the environment on which its particular tourist market depends. There are also warnings that continued growth based on past development models is not possible and that Anguilla's goal should be "to ensure the socioeconomic and environmental sustainability of this success story in the longer term" (25). The Island Resources Foundation (IRF) and Anguilla Archaeological and Historical Society
(AAHS) warn that the continued absence of even preliminary procedures for resource inventories, conservation planning, and environmental impact assessments has resulted in private sector development which has modified Anguilla's landscape and coastal zone, with virtually no baseline resource assessments, no monitoring of aggregate or cumulative environmental effects, and no attempts to analyse the lessons learned from the first phase of tourism growth that might help shape the next phase of development—all of which will place Anguilla's currently successful "unspoiled destination" tourism strategy at risk.

Arguing that the environmental impacts resulting from the tourism experiences of other Eastern Caribbean islands is well-documented (citing 2, 24, and 42), the report argues that the Government should take a leadership role to protect the environment on which the island's existing tourism style and market niche depend (25).

The first phase of Anguilla's extraordinary success story with tourism is about over. What lies ahead? The Territory now faces the less glamorous tasks of taking stock, evaluating the previous effort, planning the next steps, designing a product development plan, and shaping a marketing strategy that carefully provides gradual growth. "Growth" in this context refers not only to the number of hotel rooms or number of tourists to fill them, but orderly growth across a broad spectrum, including public services and amenities, human resources, and the Territory's institutional structure. It also includes development of an environmental protection strategy to support and contain changes in the tourism sector. (25)

The report goes on to make a number of detailed recommendations concerning the development of an environmental management policy framework, more and better-trained policy and planning personnel, a community-based resource inventory, examination of tourism's linkages to the environment, more emphasis on the quality of life of Anguillians, and the development of an effective natural and cultural park system.

In effect, the conclusion is that tourism has done much that is positive for Anguilla, but on a small island with limited resources, continued growth based on past development is simply not sustainable. Another path must be chosen. In order to avoid the problems associated with a path toward mass tourism even on a small scale, the government should adjust its tourism policy and planning to create, in Butler's (3) terms, a "consolidation" stage that would prepare this fragile island system for a "stabilization" stage of little or modest growth.

Acknowledgements

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REFERENCES


Footnotes

1. The proper term is Anguillians.

2. Except, incongruously, a hotel named "The Great House."

3. Richardson (37, p. 195) also notes that "Members of the international news media ... were delighted to report on what they considered an event of comic-opera proportions, and Time's article of March 28, 1969 ("Britain's Bay of Piglets"), was perhaps the winner in an unannounced competition among journalists for the most humorous article title describing the event."

4. An indication of increased economic activity and migration is that unemployment was 39.2% in 1974 and 26.4% in 1984 (7).

5. The electricity service was privatized in 1990 in order to promote efficiency and investment (R. Hodge 1991, pers. comm.).

6. Many of the statistics in the following section are based on data from the Caribbean Tourism Organization (8-9) and the Government of Anguilla (16-17).

7. The high rates of increase for Europe and Canada have other potential implications for Anguilla because European and Canadian tourists tend to have longer average lengths of stay in many Caribbean destinations than do Americans from marketing cost and tourist expenditure points of view.

8. The ferry dock for connections to Anguilla is located in the French part of the island, while the international airport is located in the Dutch part.

9. The introduction of a night ferry service, allowing tourists to travel for an evening of gambling in St. Maarten, appears to have contributed to the lack of pressure for a casino on Anguilla (J. Hastings 1991, pers. comm.).

10. It is important to note that, given the small size of the Anguillian tourism industry, terms such as "major" and "small" are relative; as noted above, the largest hotel in Anguilla has only 98 rooms.
11. While these specialised markets are relatively much smaller than others markets such as mass tourism, they are attractive because of potentially high per capita expenditures. For example, Laist et al. (27) report that recreational Scuba-divers in the United States spent an average of US$1151 per diving trip in 1983.
Figure 1: THE CARIBBEAN
Figure 2: ANGUILLA

- Dog Is.
- Prickly Pear Keys
- Island Harbour
- Shoal Bay
- Little Bay
- The Valley
- Sandy Is.
- Sandy Ground
- Wallblake Airport
- Blowing Point Harbour
- West End
- Ferry to St Martin

North

Scale: 0 km 5 km