

ABACO EXIT SURVEY REPORT 2008



**MINISTRY OF TOURISM
RESEARCH AND STATISTICS DEPT.**

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EXECUTIVE SUMMARY

- ✚ The main reason visitors to Abaco came to the island was for a vacation.
 - 61% of them described their vacation as a beach/pool/relax vacation.
 - 12% of them described their vacation as a sailing/cruising vacation.
 - 3% of the stopover visitors to Abaco described their vacation as a game/deep sea/sport fishing/tournament vacation

- ✚ Visitors to Abaco were *influenced* to visit the island because of beaches, the climate, the rest and relaxation they expected to get there, the friendly people, the perceived safety of the islands, the perception that the islands were exotic and the sporting activities available on the island.

- ✚ Before arriving in Abaco, some of the visitors intended to enjoy the beaches rest and relax, go snorkeling, do a little shopping, go sailing, go diving, go deep sea fishing, go on an island tour, and/or go bonefishing.

- ✚ More visitors to Abaco wanted to enjoy *sailing and snorkeling* than visitors to The Bahamas overall. More visitors to Abaco wanted to enjoy *diving, deep sea fishing and bonefishing*, than visitors to the The Bahamas overall.

- ✚ More visitors to Nassau/Paradise Island and Grand Bahama wanted to go shopping and to the casinos than visitors to Abaco.

- ✚ Visitors to Abaco really liked the beaches, the ocean, the friendly and helpful people on the island, the relaxing they were able to do, the weather, the safety they felt, the landscape/scenery and they liked that Abaco was clean.

- ✚ Visitors to Abaco disliked that the island was expensive/pricy.

- ✚ Although visitors to Abaco did not primarily choose the island for shopping some of them did intend to enjoy some shopping while on island doing the things that made them come to the destination. Some of the visitors disliked that the shops closed too early and some of them disliked the limited variety of shops available in Abaco.

- ✚ Some of them disliked the slow service on Abaco
- ✚ Visitors to Abaco Island complimented the island on the friendly people, the scenery, the beaches, and the relaxation on the island.
- ✚ They complained about the high prices, the airlines flying into the island, the airport, litter and the weather.
- ✚ Over three-quarters (77%) of the visitors to Abaco Island were repeat visitors. 19% of them were first time visitors.
- ✚ More than half (54%) of the visitors to Abaco had visited the Bahamas 4 or more times before.
- ✚ Visitors to Abaco appeared to be very loyal about returning and recommending the Bahamas. The majority of the stopover visitors to Abaco said that they would return (97% of them) to the Bahamas in 1-5 years. The majority of them also said that they would recommend (98% of them) the Bahamas to friends and relatives.
- ✚ Visitors to Abaco primarily came to the island by commercial airline or private plane. Most of them stayed in a hotel, apt/villa, on a private boat, on their own property or with friends or relatives. The average length of stay of the stopover visitors to Abaco was 9.8 nights.
- ✚ The visitors to Abaco do not tend to use travel agents very much to book their reservations. One of the reasons for this is the fact that many of the visitors are repeat visitors who book their travel plans directly. Some of them book online and others book their reservations directly.
- ✚ The peak months for visitors to visit Abaco Island was March, April, May, June and July.
- ✚ 71% of the stopover visitors to Abaco used the Internet when they were planning their vacations.
- ✚ 86% of the stopover visitors to Abaco indicated that they watched television.

- ✚ The stopover visitors to Abaco who did watch television listed NBC, ABC, CNN, FOX, CBS, FOOD Network, HGTV (Home & Garden Network), TBS and ESPN among their favorites.
- ✚ 27% of the stopovers to Abaco said that they used print media when they were planning their vacations. Of the 27% of the stopover visitors who used print media to plan their vacations, the preferred print media that was used was magazines. 61% of the stopover visitors to Abaco used magazines when they were planning their vacations and 42% used newspapers.
- ✚ 55% of the stopover visitors to Abaco read magazines for their reading enjoyment or edification. The stopover visitors to Abaco who read magazines read magazines on entertainment, travel, business, health & fitness, fashion, fine dining, home décor, and sailing.
- ✚ 50% of the stopovers to Abaco read newspapers either printed or online. The most popular newspapers read by visitors to Abaco included: the New York Times, USA Today, the Wall Street Journal, & the Miami Herald.
- ✚ Most of the stopover visitors to Abaco tended to be over 25 (with a higher percentage of people over 55 than the Bahamas as a whole), and white. More than half of them were college educated, and male. More than half of them had household incomes well over \$75,000. In fact, a large percentage of them had household incomes of \$100,000 or more. Many of the stopover visitors to Abaco were repeat visitors who travelled in groups of two or more. In fact Abaco received more visitors who travelled as a party of three or more than the Bahamas overall. The majority of the visitors to Abaco were from the United States.
- ✚ The top States for Abaco included Florida, Georgia, New York, South Carolina, North Carolina, Texas, and California. The top DMA markets were West Palm Beach-Ft. Pierce, Miami-Ft. Lauderdale, Orlando-Daytona Bch-Melbrn, New York, Tampa-St. Pete (Sarasota), Jacksonville, Boston (Manchester), Atlanta, Washington Dc (Hagrstwn), Charleston Sc, Philadelphia, Chicago, Denver, Ft. Myers-Naples, Los Angeles, Dallas-Ft. Worth, Houston, and Baltimore.

INTRODUCTION

Abaco is located in the northern region of the Bahamas archipelago. To many of the world's sailing enthusiasts it is known as the "Boating/Sailing Capital of the World." Abaco is more than just one island. It is really a chain of islands and cays that stretches like jewels for 120 to 130 miles through beautiful turquoise sea.¹ Each island in the chain offers a different experience. The island of Abaco is 650 sq. miles with a population of approximately 16,000 residents.² Because there are so many islands in Abaco it is also known as The Abacos.

Abaco is unlike any other island in the Bahamas. It was settled by the Loyalists in the 1700's. The Loyalists left behind their legacy in the form of the architecture scattered all across the Abacos. The Abacos have quaint little settlements that take you back in time to New England fishing villages with beautiful wooden houses and cute picket fences all adorned in pastel colours. The Loyalists also left behind a skill for boat building. Some natives of Abaco are known for their incredible boat building skills. These skills have been passed down for generations and can be seen in Man-O-War Cay.

Abaco is not only known for its boat building. Once upon a time in Abaco, shipwrecking was a big business for the island residents. The ships that did not wreck on their own sailing through the treacherous reefs were encouraged to do so by the residents who were not above giving false signals to unsuspecting ships. When ships would wreck on the nearby reefs the residents of Abaco would salvage what they could for their own use.³

Shipwrecking off the coast of The Abacos was once big business. Now the island economy earns a healthy living from Tourism. The Abacos have many attractions that are unique to the island archipelago. There are two lighthouses that are located in the island chain. One of them is the famous 120 ft. kerosene operated candy striped lighthouse in Hope Town, Abaco that was built in the 1800's.⁴ It was originally built to guide boaters around the reef in Elbow Cay to a safe harbour. This lighthouse is manual and is often featured in photos of the

¹ Jeritzan Outten-Sr. Director, Abaco Tourist Office & www.myoutislands.com/natural-vacations/abaco-attractions.cfm

² Jeritzan Outten-Sr. Director, Abaco Tourist Office

³ www.myoutislands.com/natural-vacations/abaco-attractions.cfm

⁴ www.myoutislands.com/natural-vacations/abaco-attractions.cfm

island. There is another lighthouse that is located in “Hole in the Wall” Abaco. This lighthouse is automatic. Some of the attractions of today like the lighthouses were once the bane of the residents of the islands. Abaco’s other attractions include Historical Museums, national parks, incredible wildlife with wild boars, Bahama parrots, wild horses (Spanish Barbs), ocean holes and caves.⁵

There are many activities that are available to visitors to The Abacos. There is snorkeling, sailing/boating, diving, deep sea fishing, bone-fishing, golfing on PGA rated courses, bird-watching, wild boar hunting and surfing available on the island. Abaco has a number of festivals that are held from March to July of each year. Between the months of March and July of each year Abaco has fishing tournaments which attracts visitors to the island chain. In July of each year there is a special event called “Regatta Time in Abaco” which also attracts visitors every year. In addition, there are concerts at Nipper’s Bar in Guana Cay Abaco in both March and July called the “Barefoot Man Concert,” which attracts its own following. Golf tournaments are also held throughout the year in Treasure Cay and Winding Bay, Abaco.⁶

In order to enjoy all of the wonderful activities in the Abacos, selecting the right transportation is easy. One of the major forms of transportation in Abaco is the golf cart which is used to navigate through the small quaint streets in the settlements. It is also used as a great off road vehicle to reach beautiful beaches that are tucked away in little hidden places along the island. There is also a ferry service that runs between the islands and Cays of the Abacos and Grand Bahama.

The Abacos are indeed a vacationer’s paradise. With so much to see and so much to do, it is no surprise that it attracts so many repeat visitors year after year.

METHODOLOGY

The Research & Statistics Unit of the Ministry of Tourism conducts a survey of stopover visitors to The Bahamas to gather information about their characteristics. The Exit Survey samples consist of stopover visitors to The Bahamas. Stopover Visitors consists of non-residents travelling in the islands to stay in land-based accommodations and/or pleasure crafts other than cruise ships for 24 hours or more. In 2008, Abaco Island received an estimated 97,671

⁵ Jeritzan Outten-Sr. Director, Abaco Tourist Office & www.myoutislands.com/natural-vacations/abaco-attractions.cfm

⁶ Jeritzan Outten-Sr. Director, Abaco Tourist Office

stopover visitors compared to 110,753 in 2007, a decline of 11.8%. The majority of stopover visitors 91.6% (89,445) were from the U.S.A. The other stopovers to The Bahamas were: 3.4% (3,340) from Canada, 3.5% (3,375) from Europe, 0.3% (248) from the Caribbean, 0.3% (320) from Latin America and 1.0% (943) from Other Countries.

The information contained in this report was derived from several different Exit Surveys and the Immigration Card. The surveys used to compile this report include the Tour Operator and Media Exit Survey (177 surveys, Abaco), and the Visitor Satisfaction Survey (331 surveys, Abaco). All of these surveys used a two-staged Systematic Probability Sampling. With this method every kth element in the sampling frame was selected. Interviews of exiting stopover visitors were conducted on a year round basis at major airports and marinas throughout the country. The islands in the surveys included Nassau/Paradise Island, Grand Bahama, Eleuthera, Exuma, Abaco, Bimini, and San Salvador. Interviews during the sampling process were conducted in the mornings, afternoons and evenings.

**SAMPLING TOLERANCES
FOR PERCENTAGES AT OR NEAR THESE LEVELS*
2008**

Place of Stay	Base	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
All Bahamas	5,279	± 0.8%	± 1.1%	± 1.2%	± 1.3%	± 1.4%
Nassau/P.I.	1,565	± 1.5%	± 2.0%	± 2.3%	± 2.4%	± 2.5%
Grand Bahama	2,160	± 1.3%	± 1.7%	± 1.9%	± 2.1%	± 2.1%
Abaco	177	± 4.4%	± 5.9%	± 6.8%	± 7.2%	± 7.4%

* 95% Confidence level

Source: Tour Operator and Media Exit Survey 2008

**SAMPLING TOLERANCES
FOR PERCENTAGES AT OR NEAR THESE LEVELS*
2008**

Place of Stay	Base	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
All Bahamas	5,680	± 0.8%	± 1.0%	± 1.2%	± 1.3%	± 1.3%
Nassau/P.I.	1,852	± 1.4%	± 1.8%	± 2.1%	± 2.2%	± 2.3%
Grand Bahama	2,184	± 1.3%	± 1.7%	± 1.9%	± 2.1%	± 2.1%
Abaco	331	± 3.2%	± 4.3%	± 4.9%	± 5.3%	± 5.4%

* 95% Confidence level

Visitor Satisfaction Exit Survey 2008

MAIN REASON FOR VISIT

**MAIN REASON FOR THIS VISIT TO THE BAHAMAS
STOPOVER VISITORS
2008**

	Bahamas	Nassau/P.I	Grand Bahama	<i>Abaco</i>
Vacation	70%	71%	68%	65%
Visiting Friends/Rel.	4%	4%	4%	14%
Business Trip	7%	7%	9%	6%
Honeymoon	5%	6%	4%	4%
To Attend Wedding	2%	2%	4%	3%
To Get Married	1%	2%	0%	0%
Convention/Conf.	3%	3%	4%	0%
Casino Excursion	0%	1%	0%	0%
Other	2%	1%	2%	3%

No Response not listed in the table above. Source:Tour Media Exit Survey Report 2008.

- 65% of the stopover visitors to Abaco were on vacation.
 - 61% of them described their vacation as a beach/pool/relax vacation.
 - 12% of them described their vacation as a sailing/cruising vacation.
 - 3% of the stopover visitors to Abaco described their vacation as a game/deep sea/sport fishing/tournament vacation
 - 2.4% described it as a casino vacation
 - 2.1% described it as diving vacation.
 - 1.8% of them described it as a bone/fly fishing vacation
 - 1.5% of them described it as a golfing vacation
- 14% of the stopovers were visiting friends/relatives
- 6% of the stopovers were on a Business trip
- 4% of them were on a honeymoon.

WHAT INFLUENCED THEIR DECISION TO VISIT?

TOP INFLUENCES FOR DECIDING TO VISIT THE BAHAMAS ISLANDS OF THE BAHAMAS 2008

	Bahamas	Nassau/P.I.	Grand Bahama	<i>Abaco</i>
Beaches	60%	60%	60%	65%
Climate	51%	51%	50%	52%
Rest and Relaxation	43%	43%	43%	44%
Friendly People	26%	24%	24%	42%
Safety of Islands	15%	14%	14%	28%
Exotic Islands	13%	12%	11%	25%
Sports	11%	6%	12%	25%
Easy to Get to	21%	21%	21%	22%
Had Friends in Bah.	8%	7%	8%	20%
Friend recommended Bah.	11%	11%	10%	18%
Other	11%	9%	13%	14%
Never Been Here Before	21%	21%	23%	13%
Heard a lot about Bahamas	9%	11%	8%	12%
Best Value for Money	8%	7%	14%	8%
Nightlife	4%	5%	4%	6%
Hotel Facilities	28%	34%	15%	6%
Shopping	6%	7%	6%	3%
Bahamas Website	4%	4%	3%	2%
Good Package Deals	11%	13%	13%	2%
Saw Ad in Magazine	1%	1%	1%	1%
Travel Agent/Tour Operator	4%	5%	3%	1%
Casinos	12%	16%	8%	1%
Saw Ad on TV	2%	2%	1%	1%
No Response	5%	5%	6%	6%

Source: Tour Operator and Media Exit Survey 2008

- 65% of the stopover visitors to Abaco were influenced to visit the island because of the beaches. 52% of them were influenced by the climate. 44% were influenced by the rest and relaxation they expected to get there. 42% of them were influenced by the friendly people, 28% by the perceived safety of the islands, 25% by the perception that the islands were exotic and 25% were influenced by the sporting activities available on the island.

WHAT ACTIVITIES DID THEY INTEND TO DO WHILE IN ABACO?

ACTIVITIES VISITORS INTENDED TO DO ON THIS VISIT TO THE BAHAMAS ISLANDS OF THE BAHAMAS 2008

	Bahamas	Nassau/P.I.	Grand Bahama	<i>Abaco</i>
Enjoy Beaches	83%	84%	84%	82%
Rest and Relax	74%	75%	75%	72%
Go Snorkeling	32%	27%	34%	60%
Shop	37%	41%	45%	24%
Go Sailing	7%	5%	7%	22%
Go Diving	10%	7%	10%	16%
Go Deep Sea Fishing	6%	4%	7%	15%
Go on Island Tour	16%	15%	19%	14%
Go Bonefishing	5%	2%	3%	13%
Other Activities	8%	8%	10%	8%
Go Golfing	5%	4%	8%	7%
Go Birdwatching	3%	2%	3%	4%
Go to Casinos	28%	36%	25%	0%
No Response	5%	5%	5%	8%

Source: Tour Operator and Media Exit Survey 2008

- Visitors to Abaco wanted to enjoy a number of things while on the island. They primarily wanted to enjoy the beaches (82% of them), rest and relax (72%), go snorkeling (60%), do a little shopping (24%), go sailing (22%), go diving (16%), go deep sea fishing (15%), go on an island tour (14%), and/or go bonefishing (13%).
- *Visitors to Abaco differed from the rest of the Bahamas on the following:*
 - More visitors to Abaco wanted to enjoy *sailing and snorkeling* than visitors to The Bahamas overall.
 - More visitors to Abaco wanted to enjoy *diving, deep sea fishing and bonefishing*, than visitors to the The Bahamas overall.
 - More visitors to Nassau/P.I. and Grand Bahama wanted to go *shopping and play in the casinos* than visitors to Abaco.

WHAT DID THEY LIKE ABOUT THE BAHAMAS?

WHAT PEOPLE SAID THAT THEY LIKED STOPOVER VISITORS 2008

	Abaco	Andros	Bimini	Eleuthera	Exuma	Nassau/P.I	GBI	All Bah.
Beaches	77%	53%	76%	93%	90%	79%	81%	81%
Ocean	72%	81%	85%	83%	87%	76%	73%	77%
Friendly people	68%	84%	72%	86%	82%	74%	74%	76%
Relaxing	60%	59%	61%	72%	74%	64%	67%	66%
Weather	49%	43%	44%	66%	60%	59%	57%	57%
Felt safe	45%	48%	43%	60%	46%	33%	43%	41%
Helpful people	42%	50%	44%	56%	51%	45%	47%	47%
Landscape/Scenery	42%	35%	33%	50%	39%	38%	30%	36%
Clean	34%	18%	10%	26%	25%	26%	35%	29%
Just as I hoped	22%	20%	14%	24%	17%	15%	15%	16%
Plenty to do	20%	16%	13%	14%	8%	27%	19%	20%
Architecture	16%	3%	4%	24%	6%	15%	8%	11%
Unusual-not like anywhere else	15%	15%	21%	23%	10%	7%	6%	9%
Value for money	12%	11%	7%	7%	5%	9%	15%	11%
Variety of shops	5%	0%	3%	7%	1%	9%	12%	8%
Cheap to shop/Good deals	2%	1%	1%	2%	1%	6%	8%	6%
Other	3%	11%	8%	5%	5%	4%	4%	5%
Didn't like anything in particular	1%	0%	0%	0%	0%	0%	0%	0%

Source: Visitor Satisfaction Exit Survey 2008

- Visitors to Abaco seemed to like a number of things about the island.
- 77% of the stopovers to Abaco liked the beaches
- 72% said that they liked the ocean in Abaco
- 68% liked the friendly people on the island.
- 60% liked the relaxing they were able to do
- 49% liked the weather
- 45% liked the safety they felt
- 42% liked the helpful people
- 42% liked the landscape/scenery and 34% liked that it was clean

WHAT DID THEY DISLIKE ABOUT THE BAHAMAS?

WHAT PEOPLE SAID THAT THEY DISLIKED STOPOVER VISITORS 2008

	Abaco	Andros	Bimini	Eleuthera	Exuma	Nassau/P.I	GBI	All Bah.
Expensive/Pricy	26%	13%	8%	30%	21%	39%	22%	28%
Shops closed early	15%	5%	10%	10%	8%	13%	19%	14%
Slow service	9%	7%	25%	8%	15%	15%	18%	15%
Limited variety of shops	9%	12%	15%	13%	27%	8%	16%	14%
Not clean	4%	10%	25%	8%	9%	9%	6%	8%
Weather	4%	5%	3%	2%	4%	4%	5%	4%
Felt ripped off	3%	3%	1%	2%	2%	9%	6%	6%
Boring, not enough to do	2%	3%	1%	2%	7%	2%	5%	4%
Unhelpful/rude people	1%	0%	0%	0%	0%	5%	5%	4%
Salespeople were pushy	1%	1%	3%	1%	1%	9%	15%	9%
Unfriendly people	1%	0%	0%	0%	1%	4%	4%	3%
Architecture	1%	4%	7%	1%	3%	1%	2%	2%
Landscape/Scenery	1%	0%	4%	1%	3%	2%	3%	2%
Beaches	1%	3%	3%	0%	2%	2%	2%	2%
Wasn't anything special	1%	0%	1%	0%	2%	1%	3%	2%
Ocean	1%	1%	3%	1%	1%	1%	1%	1%
Not what I expected	0%	0%	0%	0%	1%	1%	3%	2%
Felt hassled	0%	2%	0%	0%	0%	7%	8%	5%
Didn't feel safe	0%	0%	1%	1%	1%	3%	2%	2%
Other	4%	11%	18%	8%	9%	10%	11%	10%
Didn't dislike anything in particular	29%	37%	28%	30%	29%	22%	22%	24%

Source: Visitor Satisfaction Exit Survey 2008

- 29% of the stopover visitors to the island said that they did not dislike anything in particular.
- *The things that visitors to Abaco disliked included things like:*
 - It was expensive/pricy (26% of them said this, 28% All Bah.)
 - Shops closed too early (15% of them said this, 14% All Bah.)
 - Slow service (9% of them said this, 15% All Bah.)
 - Limited variety of shops (9% of them said this, 14% All Bah.)

MEDIA HABITS

WHAT WERE THE MEDIA HABITS OF VISITORS TO ABACO?

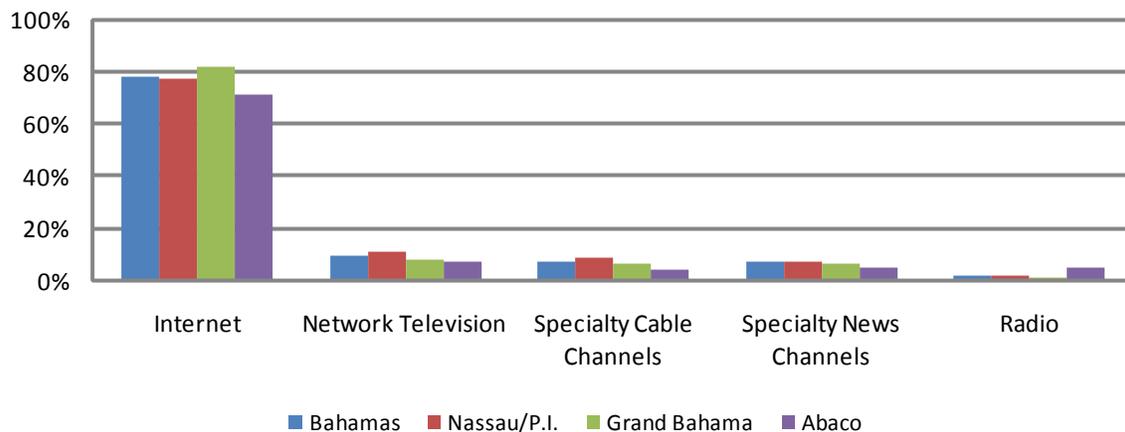
**ELECTRONIC MEDIA MOST FREQUENTLY USED
WHEN PLANNING YOUR VACATION
ISLANDS OF THE BAHAMAS
2008**

	Bahamas	Nassau/P.I.	Grand Bahama	<i>Abaco</i>
Internet	78%	77%	82%	71%
Network Television	9%	11%	8%	7%
Specialty Cable Channels	8%	9%	6%	5%
Specialty News Channels	7%	8%	7%	5%
Radio	2%	2%	1%	5%

No Response not listed in above table

Source: Tour Operator and Media Exit Survey 2008

Electronic Media Frequently Used



- 71% of the stopover visitors to Abaco used the Internet when they were planning their vacations.

DO VISITORS TO ABACO WATCH TELEVISION?

DO YOU WATCH TELEVISION ISLANDS OF THE BAHAMAS 2008

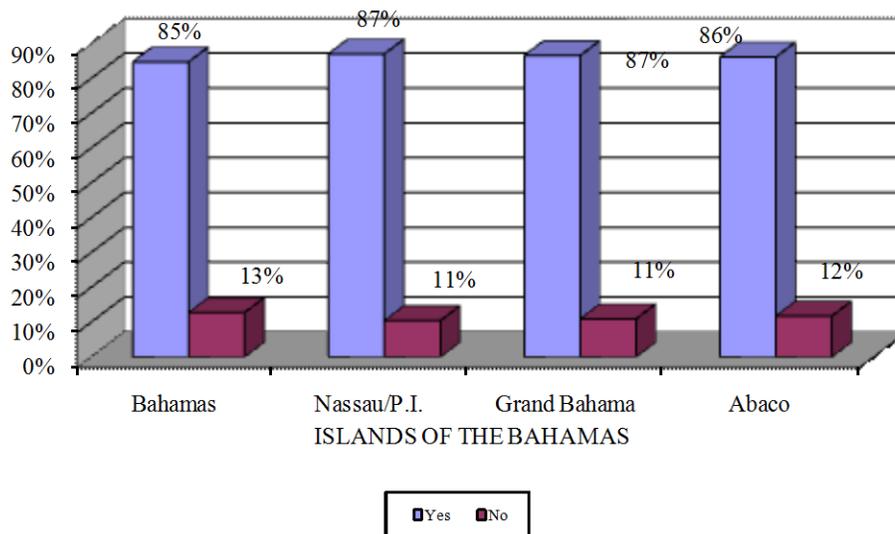
	Bahamas	Nassau/P.I.	Grand Bahama	Abaco
Yes	85%	87%	87%	86%
No	13%	11%	11%	12%
No Response	2%	2%	2%	2%
Total	100%	100%	100%	100%

Visitors to the Out Islands in general watch less television than those to Nassau/P.I. and Grand Bahama.

75% of the stopover visitors to the Out Islands indicated that they watched television.

Source: Tour Operator and Media Exit Survey 2008

DO YOU WATCH TELEVISION ISLANDS OF THE BAHAMAS



- 86% of the stopover visitors to Abaco indicated that they watched television.

**TOP 16 FAVORITE TELEVISION NETWORKS/STATIONS/CHANNELS
ISLANDS OF THE BAHAMAS
2008**

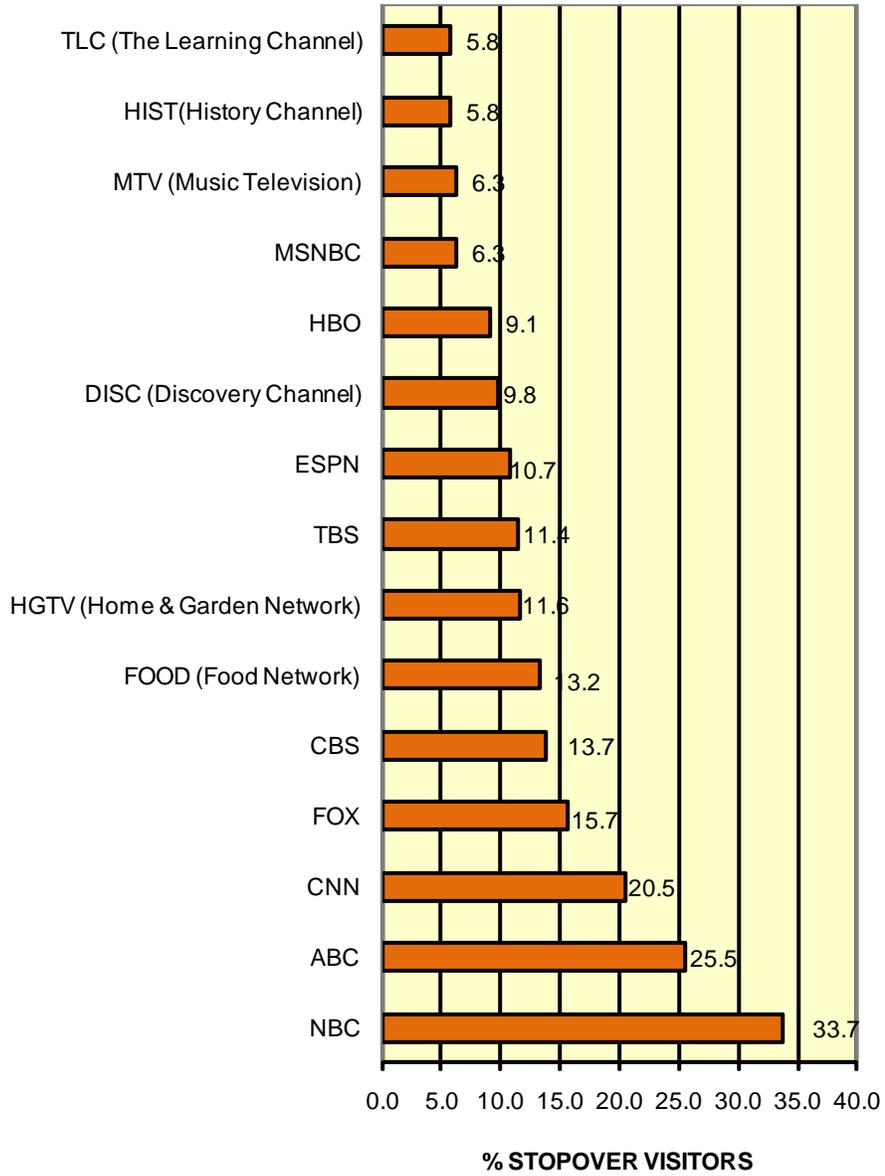
	Bahamas	Nassau/P.I.	Grand Bahama	<i>Abaco</i>
1	CNN	CNN	CNN	NBC
2	NBC	ESPN	NBC	ABC
3	ESPN	NBC	ABC	CNN
4	ABC	ABC	ESPN	FOX
5	FOX	FOX	FOX	CBS
6	CBS	CBS	CBS	FOOD (Food Network)
7	HBO	HBO	DISC (Discovery Channel)	HGTV (Home & Garden Network)
8	DISC (Discovery Channel)	DISC (Discovery Channel)	HBO	TBS
9	HGTV (Home & Garden Network)	HGTV (Home & Garden Network)	HGTV (Home & Garden Network)	ESPN
10	FOOD (Food Network)	FOOD (Food Network)	FOXN	DISC (Discovery Channel)
11	FOXN	FOXN	MTV (Music Television)	HBO
12	MTV (Music Television)	TNT	FOOD (Food Network)	MSNBC
13	TNT	MTV (Music Television)	TNT	MTV (Music Television)
14	MSNBC	USA	HIST(History Channel)	HIST(History Channel)
15	USA	MSNBC	Other Local Channels	TLC (The Learning Channel)
16	TBS	TBS	Travel Channel	Travel Channel

Source: Tour Operator and Media Exit Survey 2008

- The stopover visitors to Abaco who did watch television listed NBC, ABC, CNN, FOX, CBS, FOOD Network, HGTV (Home & Garden Network), TBS and ESPN.
- CNN was a popular station for stopover visitors to Abaco and most of the other islands of the Bahamas.
- The Discovery Channel (a station that caters to science, history, culture, nature) was also one of their top television stations.

FAVORITE TELEVISION NETWORKS/STATIONS
ABACO

FAVORITE TV STATIONS/NETWORKS



DID THEY USE PRINT MEDIA TO PLAN THEIR VACATIONS?

DO YOU USE PRINT MEDIA TO PLAN YOUR VACATION?

ISLANDS OF THE BAHAMAS

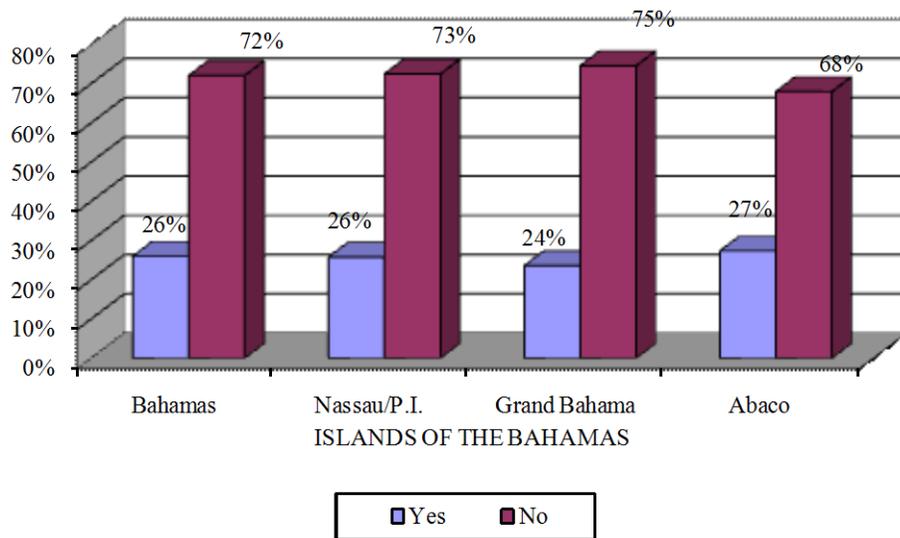
2008

	Bahamas	Nassau/P.I.	Grand Bahama	<i>Abaco</i>
Yes	26%	26%	24%	27%
No	72%	73%	75%	68%
No Response	2%	2%	2%	5%
Total	100%	100%	100%	100%

Source: Tour Operator and Media Exit Survey 2008

DO YOU USE PRINT MEDIA TO PLAN YOUR VACATION?

ISLANDS OF THE BAHAMAS



- 27% of the stopovers to Abaco said that they used print media when they were planning their vacations.

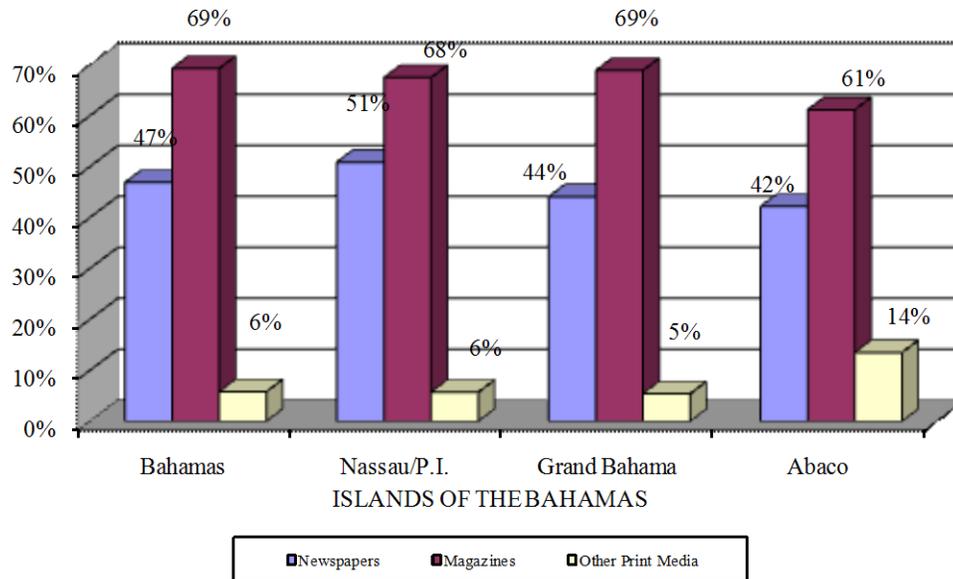
**PRINT MEDIA USED WHEN PLANNING YOUR VACATION
ISLANDS OF THE BAHAMAS
2008**

	Bahamas	Nassau/P.I.	Grand Bahama	<i>Abaco</i>
Newspapers	47%	51%	44%	42%
Magazines	69%	68%	69%	61%
Other Print Media	6%	6%	5%	14%

Stopover visitors to the Bahamas were more likely to use magazines when planning their vacations than newspapers.

No Response has been factored out of the responses. Source: Tour Operator and Media Exit Survey 2008.

PRINT MEDIA USED WHEN PLANNING YOUR VACATION



- Of the 27% of the stopover visitors who used print media to plan their vacations, the preferred print media that was used was magazines.
- 61% of the stopover visitors to Abaco used magazines when they were planning their vacations and 42% used newspapers.

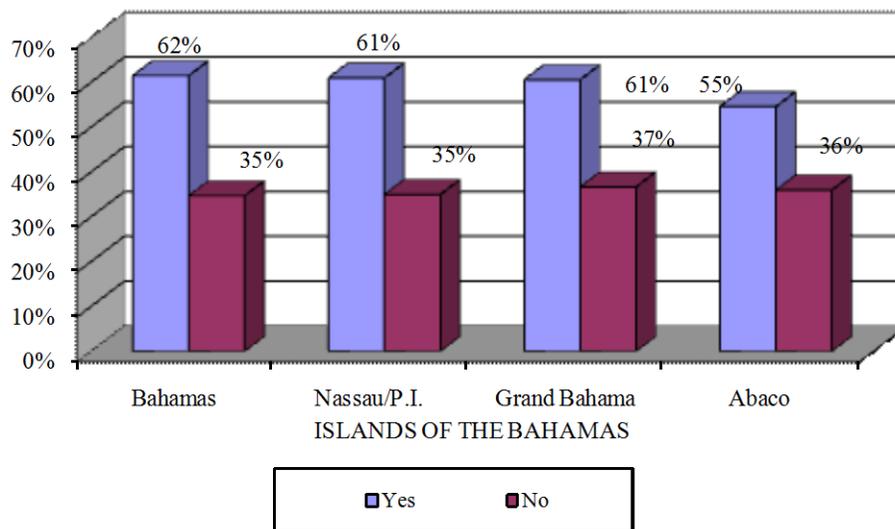
DO THEY READ MAGAZINES?

DO YOU READ MAGAZINES ISLANDS OF THE BAHAMAS 2008

	Bahamas	Nassau/P.I.	Grand Bahama	<i>Abaco</i>
Yes	62%	61%	61%	55%
No	35%	35%	37%	36%
No Response	4%	4%	3%	9%
Total	100%	100%	100%	100%

Source: Tour Operator and Media Exit Survey 2008

DO YOU READ MAGAZINES ISLANDS OF THE BAHAMAS



- 55% of the stopover visitors to Abaco read magazines for their reading enjoyment or edification.

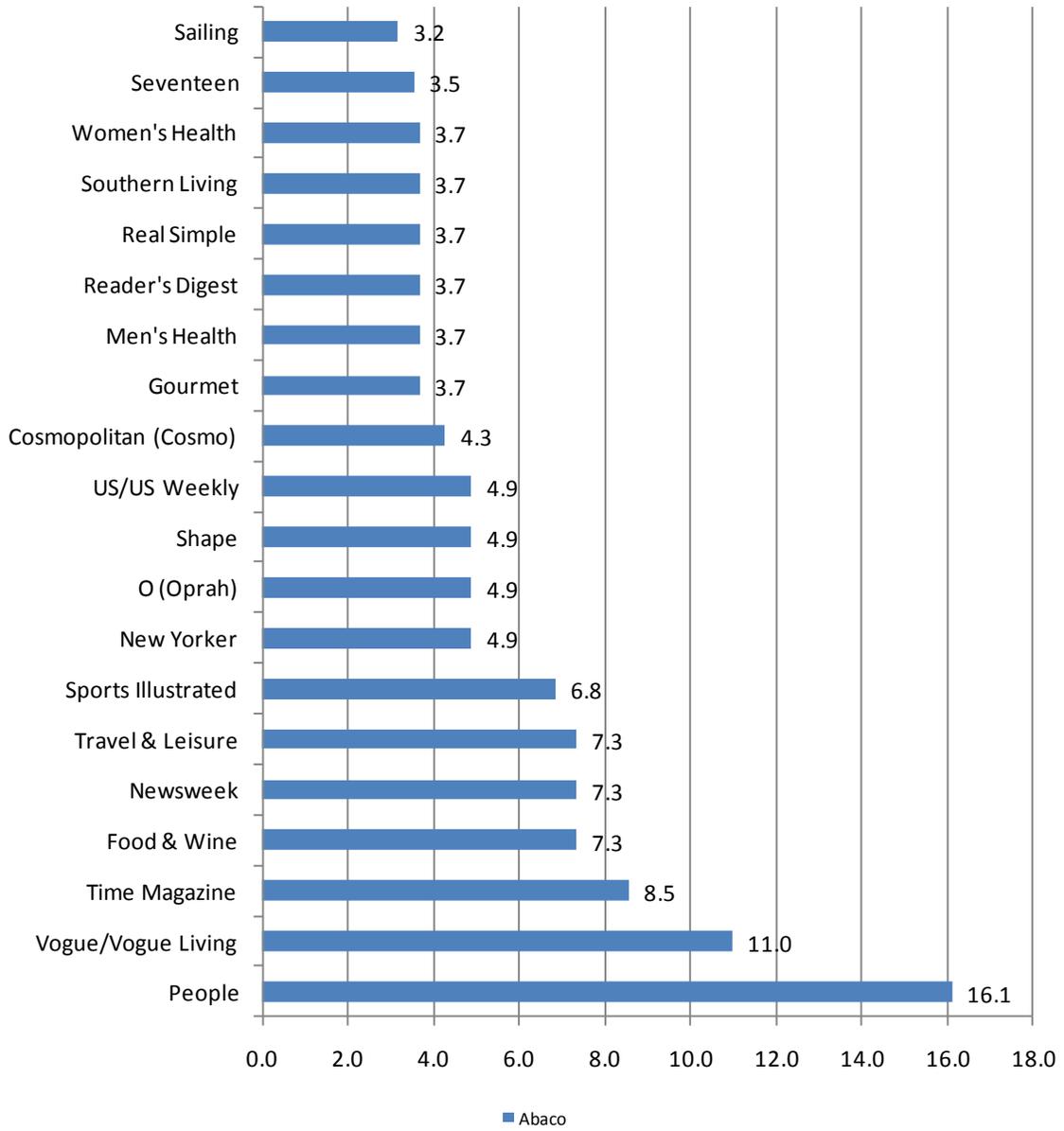
WHAT WERE THE MOST POPULAR MAGAZINES READ BY VISITORS TO ABACO?

TOP 20 FAVORITE MAGAZINES READ BY VISITORS ISLANDS OF THE BAHAMAS 2008

	Bahamas	Nassau/P.I.	Grand Bahama	Abaco
1	People	People	People	People
2	Time Magazine	Cosmopolitan (Cosmo)	Time Magazine	Vogue/Vogue Living
3	Cosmopolitan (Cosmo)	Time Magazine	Cosmopolitan (Cosmo)	Time Magazine
4	US/US Weekly	US/US Weekly	US/US Weekly	Food & Wine
5	Newsweek	Glamour	Newsweek	Newsweek
6	Sports Illustrated	Sports Illustrated	O (Oprah)	Travel & Leisure
7	Glamour	Newsweek	Sports Illustrated	Sports Illustrated
8	O (Oprah)	Men's Health	National Geographic (Explorer)	New Yorker
9	Vogue/Vogue Living	In Style	Glamour	O (Oprah)
10	National Geographic (Explorer)	O (Oprah)	Good Housekeeping	Shape
11	Men's Health	Good Housekeeping	Vogue/Vogue Living	US/US Weekly
12	In Style	Vogue/Vogue Living	Better Homes & Gardens (BHG)	Cosmopolitan (Cosmo)
13	Vanity Fair	Vanity Fair	Southern Living	Gourmet
14	Economist (The)	Better Homes & Gardens (BHG)	Ebony	Men's Health
15	Good Housekeeping	GQ	Men's Health	Reader's Digest
16	Better Homes & Gardens (BHG)	National Geographic (Explorer)	In Style	Real Simple
17	New Yorker	Essence	Essence	Southern Living
18	GQ	Fitness	Reader's Digest	Women's Health
19	Fitness	Economist (The)	Conde Nast Travel	Seventeen
20	Essence	OK! Magazine	Fitness	Sailing

- The stopover visitors to Abaco who read magazines read magazines on entertainment, travel, business, health & fitness, fashion, fine dining, home décor, and sailing.

Abaco (2008)



DO THEY READ NEWSPAPERS?

DO YOU READ NEWSPAPERS

ISLANDS OF THE BAHAMAS

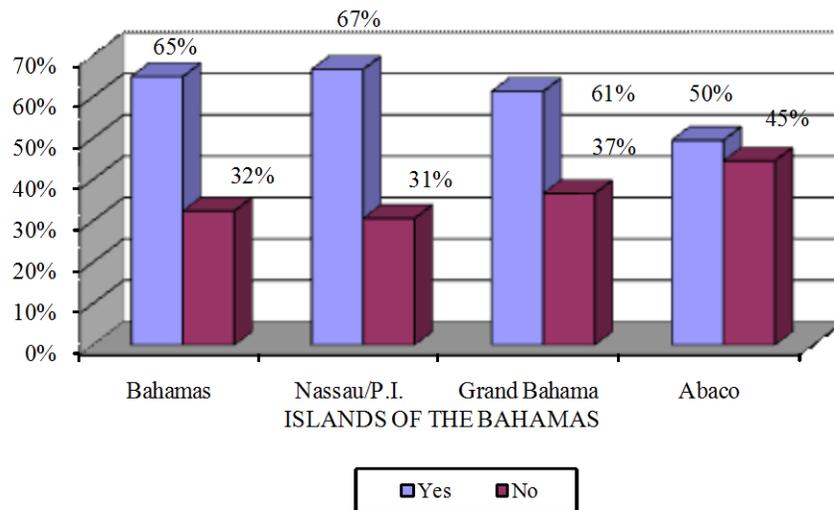
2008

	Bahamas	Nassau/P.I.	Grand Bahama	<i>Abaco</i>
Yes	65%	67%	61%	50%
No	32%	31%	37%	45%
No Response	3%	3%	2%	6%
Total	100%	100%	100%	100%

Source: Tour Operator and Media Exit Survey 2008

DO YOU READ NEWSPAPERS

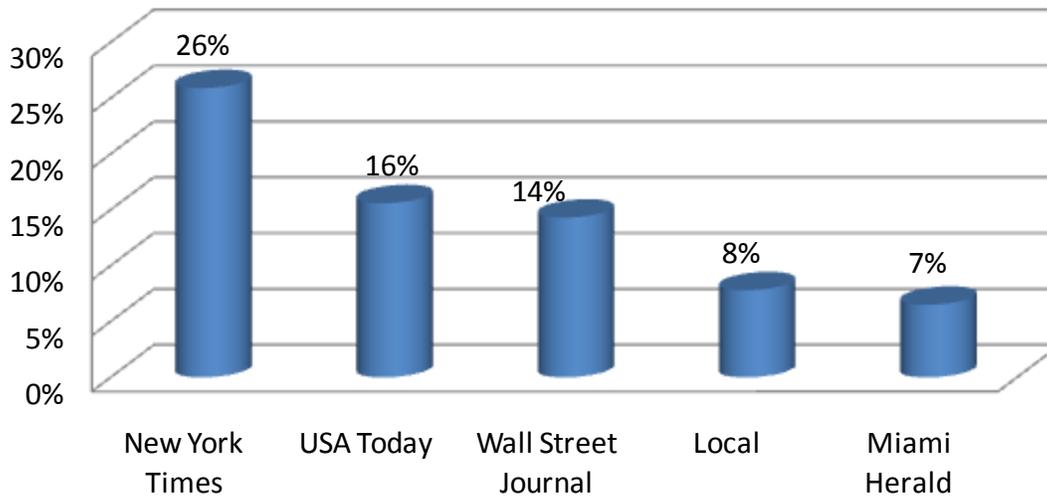
ISLANDS OF THE BAHAMAS



- 50% of the stopover visitors to Abaco read newspapers either printed or online.
- In the United States printed newspaper readership has been declining for years. Americans have found other ways to obtain the news that they want. Many of them get the news they need through television stations like CNN, FOXN, MSNBC, etc., or through the Internet via online newspapers & news (for example the Associated Press, CNN News online, Reuters News, etc.) and web portals like Yahoo and MSN.

WHAT WERE THE MOST POPULAR NEWSPAPERS READ BY VISITORS TO ABACO?

Abaco (2008)



- The most popular newspapers read by visitors to Abaco included: the New York Times, USA Today, the Wall Street Journal, and the Miami Herald.

DID VISITORS TO THE ISLAND HAVE E-MAIL ADDRESSES?

DO YOU HAVE E-MAIL ADDRESS?

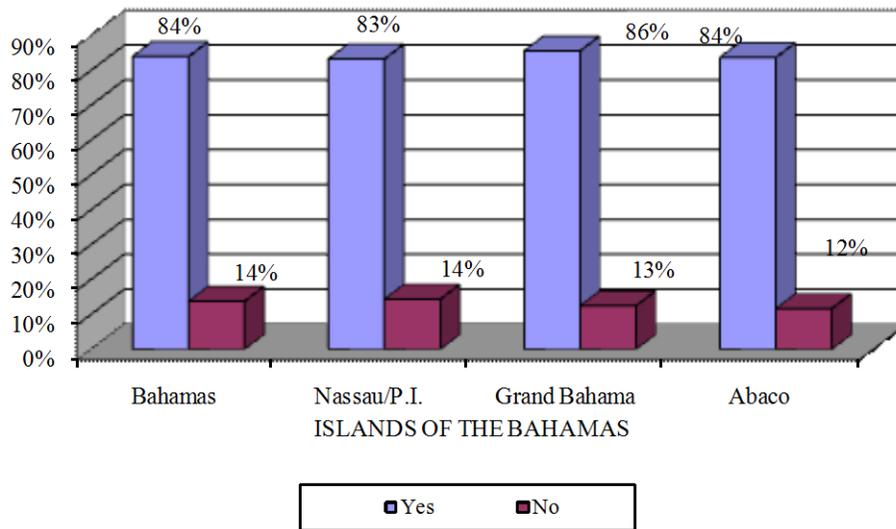
ISLANDS OF THE BAHAMAS

2008

	Bahamas	Nassau/P.I.	Grand Bahama	<i>Abaco</i>
Yes	84%	83%	86%	84%
No	14%	14%	13%	12%
No Response	2%	2%	2%	5%
Total	100%	100%	100%	100%

Source: Tour Operator and Media Exit Survey 2008

DO YOU HAVE E-MAIL? ISLANDS OF THE BAHAMAS



- 84% of the stopover visitors to Abaco said that they had an e-mail address.

DID VISITORS TO THE ISLAND SURF THE INTERNET?

DO YOU SURF THE INTERNET?

ISLANDS OF THE BAHAMAS

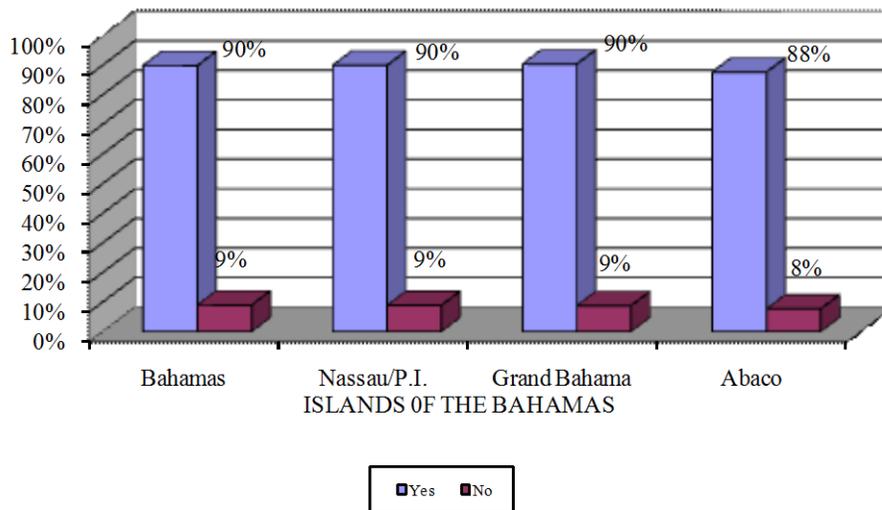
2008

	Bahamas	Nassau/P.I.	Grand Bahama	<i>Abaco</i>
Yes	90%	90%	90%	88%
No	9%	9%	9%	8%
No Response	1%	1%	1%	5%
Total	100%	100%	100%	100%

Source: Tour Operator and Media Exit Survey 2008

DO YOU SURF THE INTERNET?

ISLANDS OF THE BAHAMAS



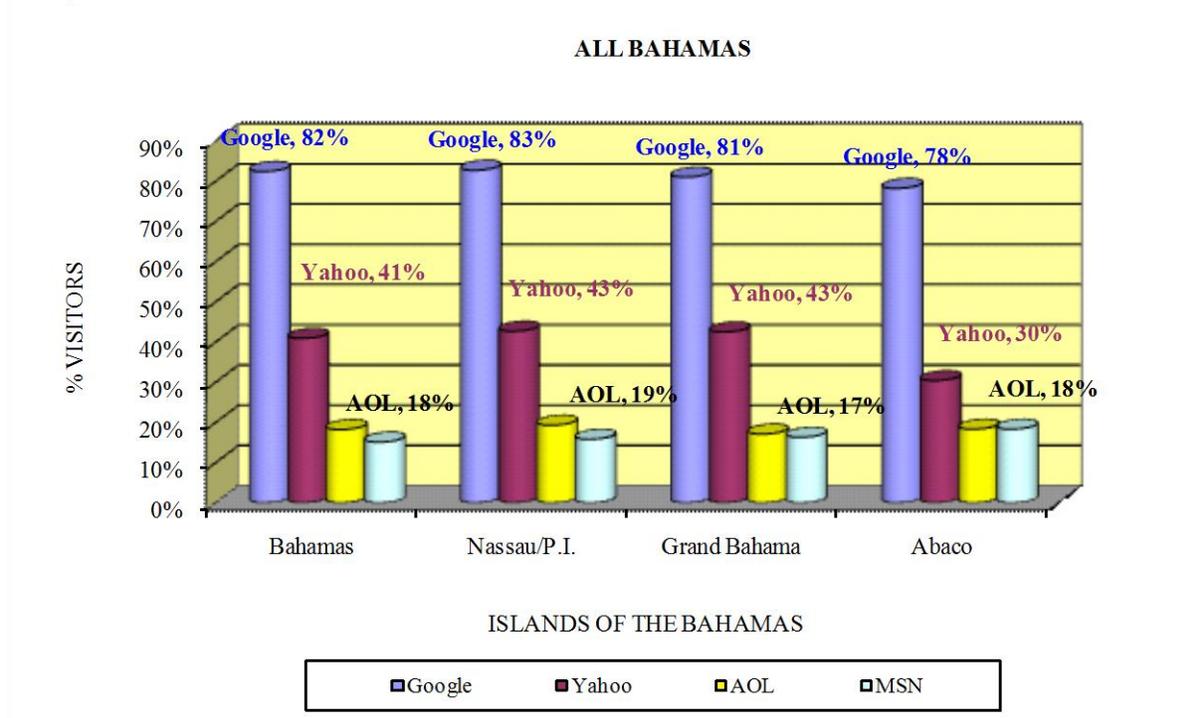
- 88% of the stopover visitors to Abaco said that they “surfed” the Internet.

WHAT SEARCH ENGINES AND/OR CONTENT PROVIDERS DID THEY USE WHEN THEY SURFED THE INTERNET?

**INTERNET SEARCH ENGINES &/OR CONTENT PROVIDERS
ISLANDS OF THE BAHAMAS
2008**

		Bahamas	Nassau/P.I.	Grand Bahama	Abaco
1	Google	82%	83%	81%	78%
2	Yahoo	41%	43%	43%	30%
3	AOL	18%	19%	17%	18%
4	MSN	15%	16%	16%	18%

Source: Tour Operator and Media Exit Survey 2008



- The most popular Internet search engines &/Or Content provider for visitors to Abaco was Google.
- Yahoo was the next most popular search engines &/Or Content provider for visitors to Abaco.

BOOKING HABITS

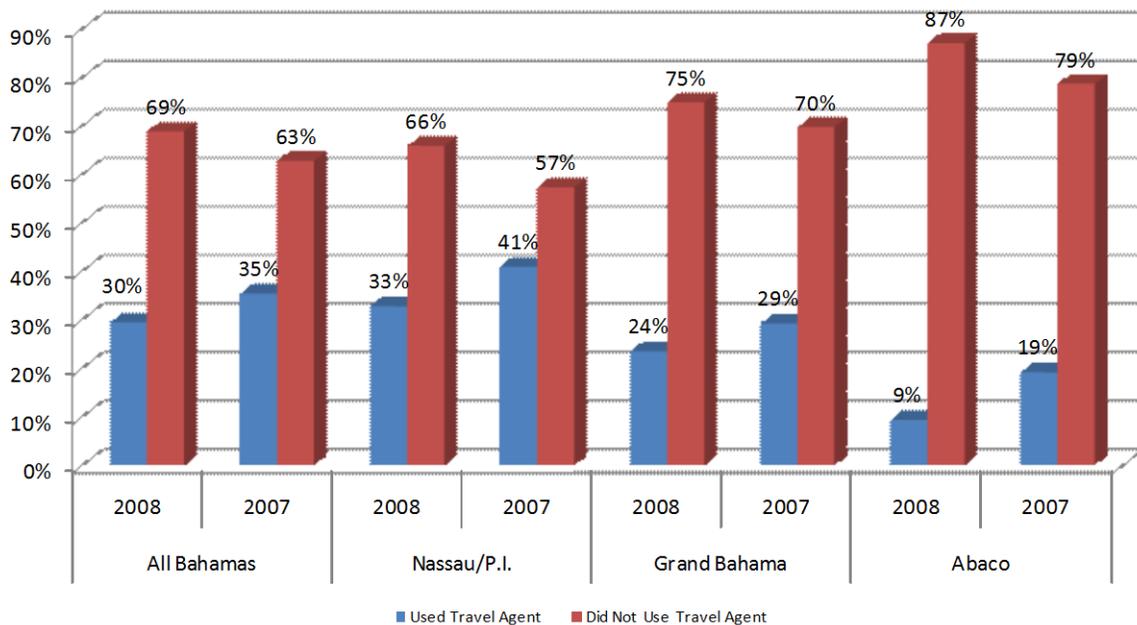
DID VISITORS TO ABACO USE A TRAVEL AGENT?

ISLANDS OF THE BAHAMAS USE OF TRAVEL AGENT 2008

	All Bahamas		Nassau/P.I.		Grand Bahama		<i>Abaco</i>	
	2008	2007	2008	2007	2008	2007	2008	2007
Used Travel Agent	30%	35%	33%	41%	24%	29%	9%	19%
Did Not Use Travel Agent	69%	63%	66%	57%	75%	70%	87%	79%

Source: Tour Operator and Media Exit Survey 2008 & Exit Survey 2007

USE OF TRAVEL AGENT 2008



- The use of travel agents has been declining rapidly over the years. The Internet has revolutionized the Travel Industry by making it so easy for people to search out their vacation experiences and then book them online.
- In 2008 only 9% of the stopover visitors to Abaco said that they had used a travel agent to book their reservations.

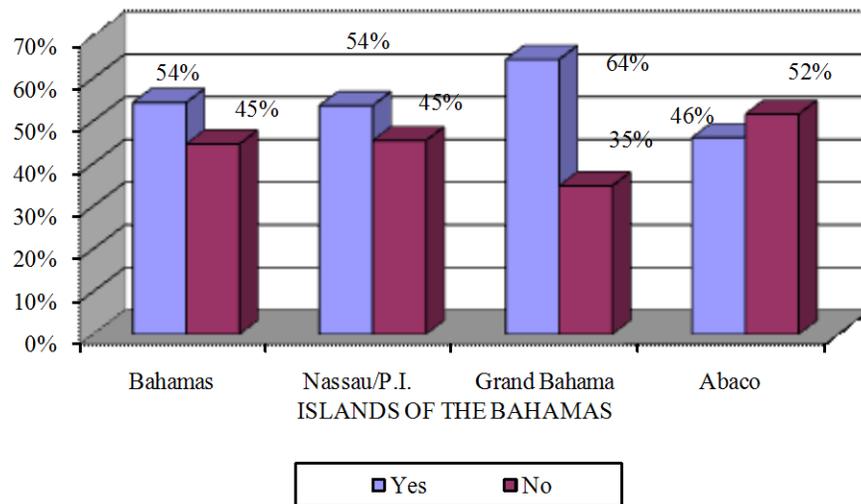
**DID VISITORS TO ABACO USE AN ONLINE SERVICE TO BOOK
THEIR RESERVATIONS?**

**DID YOU USE AN ONLINE SERVICE TO BOOK ANY OF YOUR RESERVATIONS
ISLANDS OF THE BAHAMAS
2008**

	Bahamas	Nassau/P.I.	Grand Bahama	<i>Abaco</i>
Yes	54%	54%	64%	46%
No	45%	45%	35%	52%
No Response	1%	1%	1%	2%
Total	100%	100%	100%	100%

Source: Tour Operator and Media Exit Survey 2008 & Exit Survey 2007

**DID YOU USE AN ONLINE SERVICE TO BOOK ANY OF YOUR RESERVATIONS
ISLANDS OF THE BAHAMAS**



- 46% of the stopover visitors to Abaco used an online service to book their travel reservations to the Bahamas.
- Because many of the visitors to Abaco were repeat visitors (77%), many of them already knew what was available on the island before they got there and were also able to book their travel plans directly.

**TOP 35 TOUR OPERATORS/TRAVEL AGENTS/ONLINE SERVICES USED BY VISITORS
ISLANDS OF THE BAHAMAS
2008**

	Abaco	Andros	Bimini	Total Eleuthera
1	ORBITZ.COM	EXPEDIA.COM	CONTINENTAL.COM	CONTINENTAL.COM
2	EXPEDIA.COM	CONTINENTAL.COM	EXPEDIA.COM	ORBITZ.COM
3	CONTINENTAL.COM	ORBITZ.COM	TRAVELOCITY.COM	EXPEDIA.COM
4	TRAVELOCITY.COM	TRAVELOCITY.COM	ORBITZ.COM	TRAVELOCITY.COM
5	AA.COM	USAIRWAYSVACATIONS.COM	USAIRWAYSVACATIONS.COM	DELTA.COM
6	BAHAMASAIR.COM	JETBLUE.COM	RCI TRAVEL	AMERICAN EXPRESS TRAVEL
7	CHEAPTICKETS.COM	AMERICAN EXPRESS TRAVEL	CHEAPTICKETS.COM	CHEAPTICKETS.COM
8	AMERICAN EXPRESS TRAVEL	CHEAPTICKETS.COM	AA.COM	JETBLUE.COM
9	AAA TRAVEL	DELTA.COM	SPIRITAIR.COM	BAHAMAS.COM
10	CARLSONWAGONLIT.COM	AIRCANADA.COM	AIRCANADA.COM	CARLSONWAGONLIT.COM
11	BAHAMAS.COM	BA.COM	JETBLUE.COM	BA.COM
12	LIBERTY TRAVEL	AAA TRAVEL	DELTA.COM	AA.COM
13	USAIRWAYSVACATIONS.COM	BAHAMASAIR.COM	AMERICAN EXPRESS TRAVEL	AAA TRAVEL
14	DELTA.COM	CARLSONWAGONLIT.COM	BAHAMAS.COM	USAIRWAYSVACATIONS.COM
15	RCI TRAVEL	AA.COM	CARLSONWAGONLIT.COM	BAHAMASAIR.COM
16	NWA.COM	BAHAMAS.COM	AAA TRAVEL	BAHAMASVACATIONS.COM
17	BA.COM	SPIRITAIR.COM	BAHAMASAIR.COM	LIBERTY TRAVEL
18	AIRCANADA.COM	GARBER TRAVEL	BA.COM	NWA.COM
19	FIRSTCHOICE.CO.UK	UNITED.COM	LIBERTY TRAVEL	VIRGIN-ATLANTIC.COM
20	SPIRITAIR.COM	FIRSTCHOICE.CO.UK	YAHOO.COM	AIRCANADA.COM
21	JETBLUE.COM	THOMAS COOK	STA TRAVEL	VIP TRAVEL
22	UNIGLOBE TRAVEL	VIP TRAVEL	THOMAS COOK	THOMAS COOK
23	YAHOO.COM	UNIGLOBE TRAVEL	AOL.COM	UNITED.COM
24	THOMAS COOK	DISCOVERY CRUISE LINE	TRAVEL IMPRESSIONS	LINDEN TRAVEL
25	VIRGIN-ATLANTIC.COM	LIBERTY TRAVEL	VIRTUALLYTHERE.COM	DESTINATIONS TRAVEL
26	VIRTUALLYTHERE.COM	YAHOO.COM	UNIGLOBE TRAVEL	UNIGLOBE TRAVEL
27	UNITED.COM	MACYSTRAVEL.COM	ATLANTIS.COM	GOGO TOURS
28	VIP TRAVEL	AOL.COM	DESTINATIONS TRAVEL	SPIRITAIR.COM
29	BAHAMASVACATIONS.COM	n/a	NWA.COM	ATLANTIS.COM
30	AOL.COM	n/a	PARADISEISLANDVACATIONS.COM	GARBER TRAVEL
31	DESTINATIONS TRAVEL	n/a	DISCOVERY CRUISE LINE	RCI TRAVEL
32	CI TRAVEL	n/a	GOGO TOURS	FOUR SEASONS TRAVEL
33	STA TRAVEL	n/a	FIRSTCHOICE.CO.UK	NAVIGANT
34	GOGO TOURS	n/a	FOUR SEASONS TRAVEL	WYNDHAM.COM
35	SEARS TRAVEL	n/a	n/a	SPRING BREAK TRAVEL

**TOP 35 TOUR OPERATORS/TRAVEL AGENTS/ONLINE SERVICES USED BY VISITORS
ISLANDS OF THE BAHAMAS
2008**

	Bahamas	Nassau/P.I.	Grand Bahama	Out Islands
1	EXPEDIA.COM	EXPEDIA.COM	DISCOVERY CRUISE LINE	CLUB MED
2	ATLANTIS.COM	ATLANTIS.COM	EXPEDIA.COM	EXPEDIA.COM
3	ORBITZ.COM	LIBERTY TRAVEL	ORBITZ.COM	CONTINENTAL.COM
4	LIBERTY TRAVEL	ORBITZ.COM	TRAVELOCITY.COM	ORBITZ.COM
5	TRAVELOCITY.COM	AMERICAN EXPRESS TRAVEL	SECURITY TRAVEL	AA.COM
6	AMERICAN EXPRESS TRAVEL	TRAVELOCITY.COM	USAIRWAYS VACATIONS.COM	TRAVELOCITY.COM
7	DISCOVERY CRUISE LINE	JETBLUE.COM	SPIRITAIR.COM	AMERICAN EXPRESS TRAVEL
8	AA.COM	AAA TRAVEL	AA.COM	CHEAPTICKETS.COM
9	JETBLUE.COM	AA.COM	RCI TRAVEL	BAHAMASAIR.COM
10	AAA TRAVEL	SANDALS.COM	CHEAPTICKETS.COM	CARLSONWAGONLIT.COM
11	USAIRWAYS VACATIONS.COM	USAIRWAYS VACATIONS.COM	LIBERTY TRAVEL	DELTA.COM
12	CLUB MED	CARLSONWAGONLIT.COM	STUDENT CITY	AAA TRAVEL
13	CONTINENTAL.COM	DELTA.COM	CONTINENTAL.COM	BAHAMAS.COM
14	SANDALS.COM	SPIRITAIR.COM	DELTA.COM	THOMAS COOK
15	SPIRITAIR.COM	BAHAMASAIR.COM	AMERICAN EXPRESS TRAVEL	USAIRWAYS VACATIONS.COM
16	CARLSONWAGONLIT.COM	CONTINENTAL.COM	AAA TRAVEL	FOUR SEASONS TRAVEL
17	DELTA.COM	CHEAPTICKETS.COM	BAHAMAS.COM	JETBLUE.COM
18	CHEAPTICKETS.COM	AIRCANADA.COM	SPECIAL T TRAVEL	LIBERTY TRAVEL
19	BAHAMASAIR.COM	BAHAMAS.COM	CARLSONWAGONLIT.COM	BA.COM
20	BAHAMAS.COM	GOGO TOURS	MARITZ TRAVEL	SPIRITAIR.COM
21	AIRCANADA.COM	BA.COM	JETBLUE.COM	AIRCANADA.COM
22	RCI TRAVEL	FIRSTCHOICE.CO.UK	BAHAMASAIR.COM	RCI TRAVEL
23	SECURITY TRAVEL	APPLE VACATIONS	GARBER TRAVEL	NWA.COM
24	GOGO TOURS	GRADCITY.COM	GRANDBAHAMA VACATIONS.COM	UNIGLOBE TRAVEL
25	BA.COM	RCI TRAVEL	WYNDHAM.COM	COLPITTSWORLDTRAVEL.COM
26	APPLE VACATIONS	THOMAS COOK	GOGO TOURS	VIRGIN-ATLANTIC.COM
27	FIRSTCHOICE.CO.UK	UNIGLOBE TRAVEL	APPLE VACATIONS	FIRSTCHOICE.CO.UK
28	STUDENT CITY	TRAVEL IMPRESSIONS	AIRCANADA.COM	BAHAMAS VACATIONS.COM
29	GRADCITY.COM	NWA.COM	THOMAS COOK	YAHOO.COM
30	THOMAS COOK	BEL AIR TRAVEL	VIP TRAVEL	DESTINATIONS TRAVEL
31	UNIGLOBE TRAVEL	SEARS TRAVEL	VIRGIN-ATLANTIC.COM	VIP TRAVEL
32	TRAVEL IMPRESSIONS	FUNJET VACATIONS	UNIGLOBE TRAVEL	UNITED.COM
33	NWA.COM	VIRGIN-ATLANTIC.COM	BLACKBEARDS CHARTERS	VIRTUALLYTHERE.COM
34	MARITZ TRAVEL	MARITZ TRAVEL	YAHOO.COM	GOGO TOURS
35	BEL AIR TRAVEL	YAHOO.COM	BA.COM	MARITZ TRAVEL

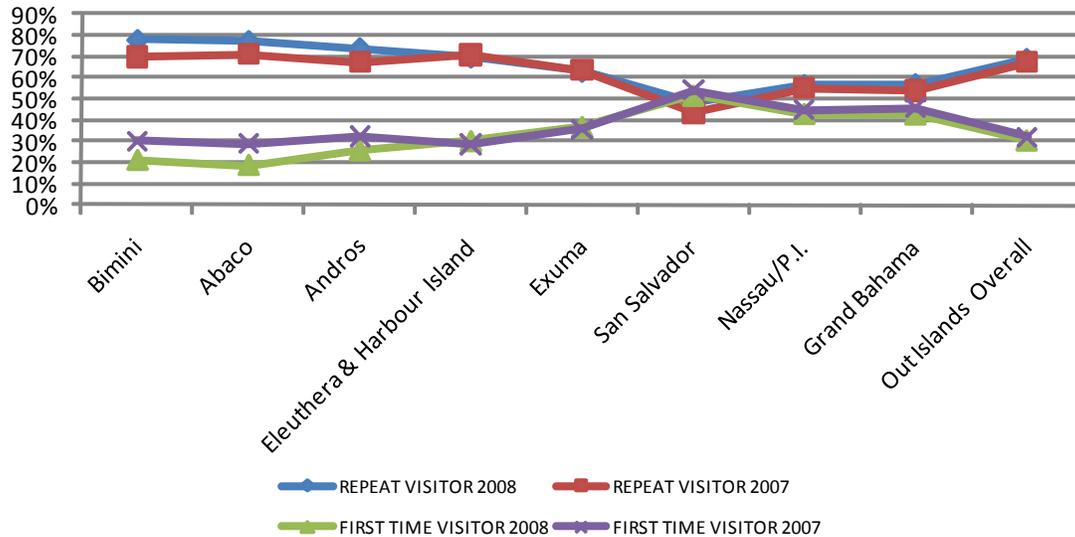
WHAT IS THE REPEAT VISITOR RATE FOR THE ISLAND?

ISLANDS OF THE BAHAMAS REPEAT VS. FIRST TIME VISITOR STOPOVER VISITORS 2008

	REPEAT VISITOR		FIRST TIME VISITOR	
	2008	2007	2008	2007
Bimini	78%	70%	21%	30%
Abaco	77%	71%	19%	29%
Andros	74%	67%	26%	32%
Eleuthera & Harbour Island	70%	71%	30%	29%
Exuma	63%	64%	37%	36%
San Salvador	48%	44%	52%	54%
Nassau/P.I.	57%	55%	43%	45%
Grand Bahama	57%	54%	43%	46%
Out Islands Overall	69%	67%	30%	32%
All Bahamas	59%	58%	41%	42%

Source: Tour Media Exit Survey 2008 and Exit Survey 2007

REPEAT VS. FIRST TIME VISITOR 2008



- Abaco Island has a high repeat visitor rate compared to some of the other Islands of the Bahamas.
- 77% of the stopovers to Abaco were repeat visitors to the Bahamas. Only 19% were first time visitors.
- 59% of the stopover visitors to The Bahamas as a whole were repeat visitors and 41% were first time visitors.

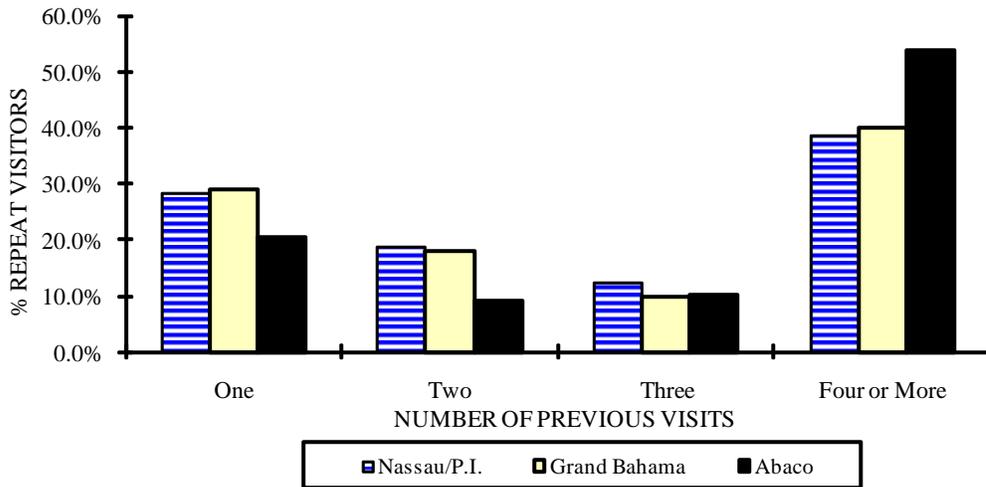
HOW MANY TIMES HAD VISITORS TO ABACO BEEN TO THE BAHAMAS?

NUMBER OF PREVIOUS VISITS EVER MADE TO THE BAHAMAS REPEAT VISITORS 2008

	Number of Times			
	One	Two	Three	Four or More
Nassau/P.I.	28.4%	18.7%	12.3%	38.4%
Grand Bahama	29.2%	18.2%	10.0%	40.1%
Abaco	20.5%	9.2%	10.3%	53.8%
All Bahamas	26.9%	17.9%	12.1%	40.9%

Source: Tour Operator and Media Exit Survey 2008

NUMBER OF PREVIOUS VISITS EVER MADE TO THE BAHAMAS REPEAT VISITORS 2008



- More than half (54%) of the stopover visitors to Abaco had visited the Bahamas 4 or more times compared to 39% of those to the Bahamas as a whole.

DID VISITORS SAY THEY WOULD RETURN TO THE BAHAMAS?

ISLANDS OF THE BAHAMAS LIKELIHOOD TO RETURN STOPOVER VISITORS 2008

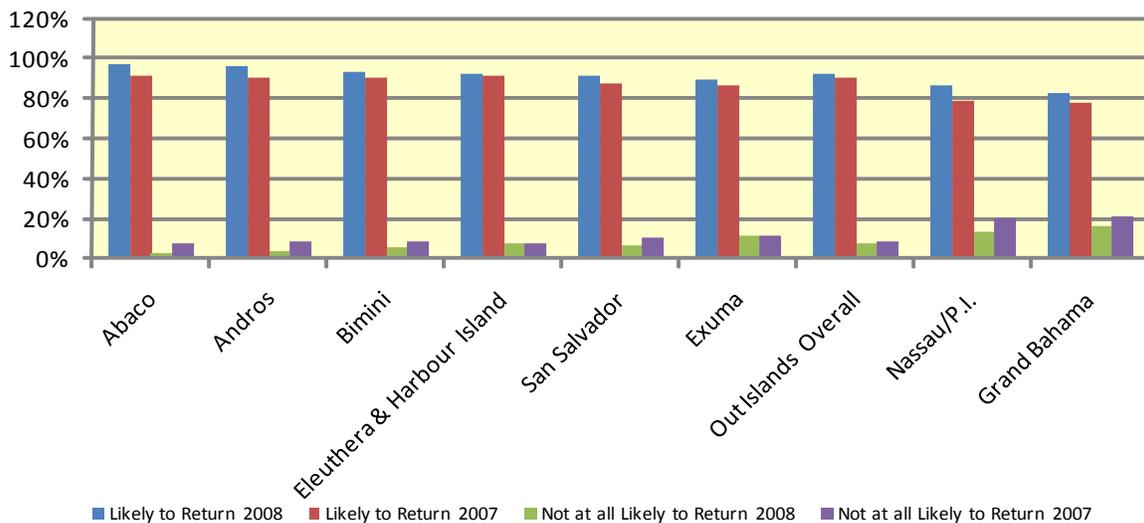
	Likely to Return		Not at all Likely to Return	
	2008	2007	2008	2007
Abaco	97%	91%	3%	8%
Andros	96%	90%	4%	8%
Bimini	94%	90%	5%	9%
Eleuthera & Harbour Island	92%	92%	7%	7%
San Salvador	91%	87%	7%	10%
Exuma	89%	87%	11%	12%
Out Islands Overall	92%	90%	7%	9%
Nassau/P.I.	86%	79%	13%	20%
Grand Bahama	82%	78%	17%	21%
All Bahamas	87%	81%	13%	18%

Likely Return percentages include those persons who said they were **very likely or somewhat likely** to return.

Not Likely Return percentages include those persons who said they were **somewhat unlikely or Not at all likely** to return

Source: Tour Media Exit Survey 2008 & Exit 2007

LIKELY RETURN 2008



- The majority of the visitors (97%) to Abaco said that they would return to the Bahamas in 1-5 years. 82.7% said that they were very likely to return and 14.1% said that they were somewhat likely to return.

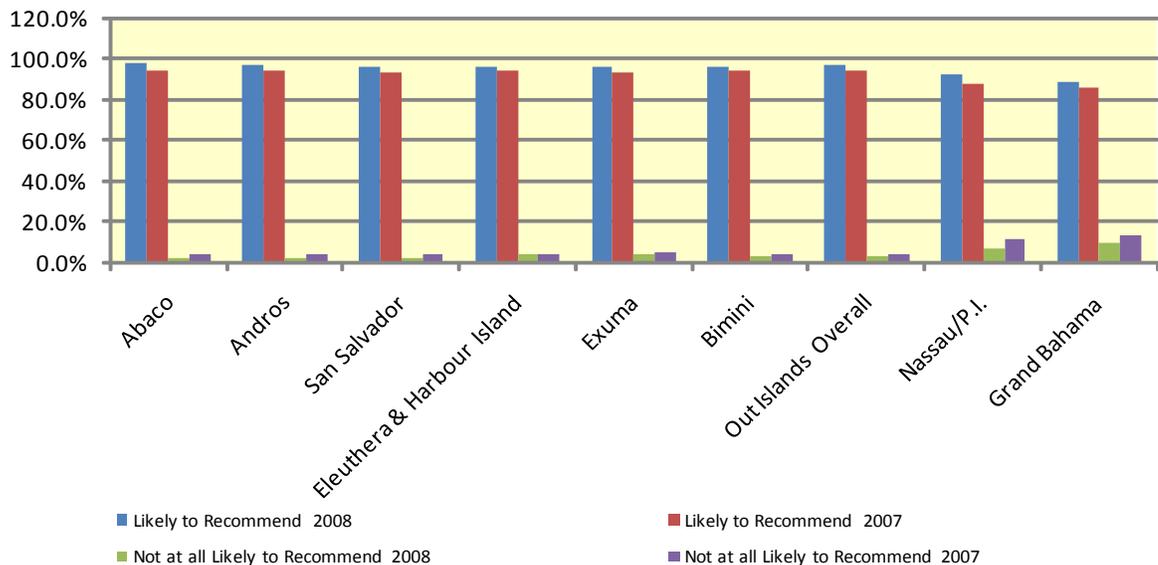
DID VISITORS SAY THEY WOULD RECOMMEND THE BAHAMAS?

ISLANDS OF THE BAHAMAS LIKELIHOOD TO RECOMMEND STOPOVER VISITORS 2008

	Likely to Recommend		Not at all Likely to Recommend	
	2008	2007	2008	2007
Abaco	98.0%	94.5%	2.0%	4.5%
Andros	97.3%	93.8%	2.5%	4.5%
San Salvador	96.2%	93.1%	2.1%	4.0%
Eleuthera & Harbour Island	96.0%	93.8%	4.0%	4.2%
Exuma	95.8%	93.4%	3.8%	5.3%
Bimini	95.6%	94.0%	3.3%	4.3%
Out Islands Overall	96.6%	94.0%	2.8%	4.5%
Nassau/P.I.	92.3%	87.9%	6.9%	11.2%
Grand Bahama	88.8%	85.9%	9.8%	13.3%
All Bahamas	92.5%	88.7%	6.6%	10.3%

Likely Recommend percentages include those persons who said they were **very likely or somewhat likely** to recommend. Not Likely to Recommend percentages include those persons who said they were **somewhat unlikely or Not at all likely** to recommend. **Source: Tour Media Exit Survey 2008 & Exit 2007**

LIKELIHOOD OF RECOMMENDING 2008



- The majority of the visitors (98%) to Abaco said that they would recommend the Bahamas to their friends or relatives. 85.1% to Abaco said that they were very likely to recommend and 12.9% said that they were somewhat likely to recommend the Bahamas to their friends or relatives.

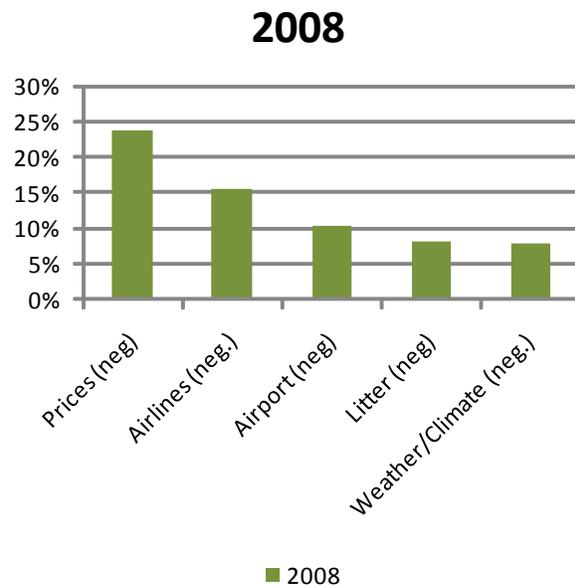
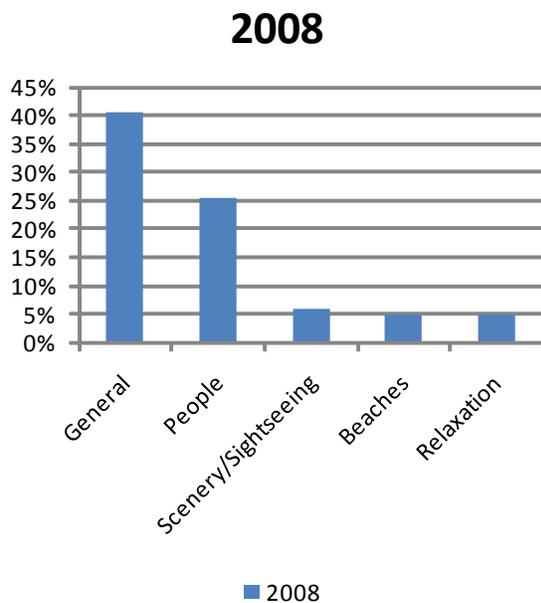
WHAT WERE VISITORS SAYING ABOUT ABACO?

TOURIST COMMENTS POSITIVE VS. NEGATIVE COMMENTS

ABACO

TOP 5 COMPLIMENTS		TOP 5 COMPLAINTS	
	2008		2008
General	40%	Prices (neg)	24%
People	25%	Airlines (neg.)	16%
Scenery/Sightseeing	6%	Airport (neg)	10%
Beaches	5%	Litter (neg)	8%
Relaxation	5%	Weather/Climate (neg.)	8%
No. of Comments	85	No. of Comments	20

Source: Tour Media Exit Survey 2008



- Visitors to Abaco complimented the island on the friendly people, scenery, the beaches, and the rest & relaxation available on the island.
- Some of the visitors to Abaco complained about the high prices.

- Some of the visitors to Abaco complained about the airlines flying into the island.
- Some of the visitors to Abaco complained about the airport.
- Some of the visitors to Abaco complained about the litter and some were not pleased with the weather.

WHAT DID VISITORS THINK OF THE VALUE FOR MONEY IN ABACO?

- The *overall value for money* in Abaco was better than in some of the other Islands of the Bahamas. 21% of the visitors to Abaco thought that the overall value for money that they got was much better or better than they had expected compared to 26% of the stopover visitors to the Bahamas as a whole.

HOW DID VISITORS TO ABACO GET THERE?

MODE OF ARRIVAL THE ISLANDS OF THE BAHAMAS STOPOVER VISITORS 2008

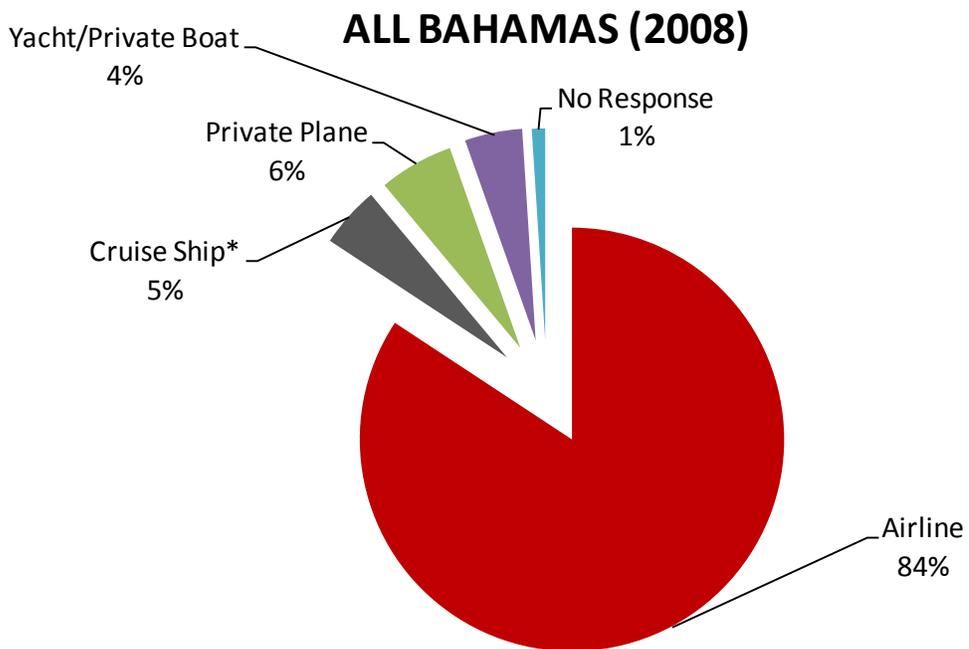
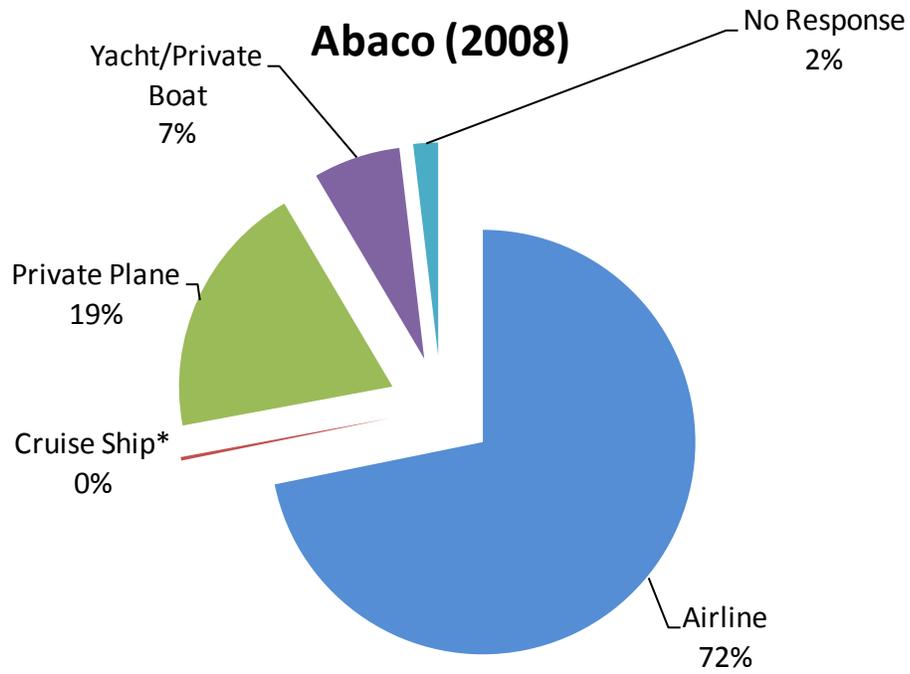
	Abaco		Andros		Bimini		Total Eleuthera		Exuma		San Salvador	
	2008	2007	2008	2007	2008	2007	2008	2007	2008	2007	2008	2007
Airline	70,130	82,265	6,114	6,356	10,092	9,958	27,573	31,138	27,013	29,779	15,805	16,840
Cruise Ship*	260	251	11	14	792	432	19	24	36	9	60	40
Private Plane	18,987	19,644	2,438	2,331	5,326	4,155	7,192	8,139	5,630	6,823	473	493
Yacht/Private Boat	6,465	6,694	199	280	25,187	25,355	721	716	887	923	264	176
No Response	1,829	1,899	442	461	1,034	937	522	763	343	387	1,738	649
Total	97,671	110,753	9,204	9,442	42,431	40,837	36,027	40,780	33,909	37,921	18,340	18,198

*These persons came by ship, stayed 24 hrs. or more in the destination, and did not use the ship for Accommodation purposes, i.e. they were stopovers.

**Above Eleuthera numbers include Harbour Island. In 2008, stopovers to Harbour Isl. By arrival mode: Airline=9,295, Cruise Ship=14, Private Plane=1,918,

Yacht/Private boat=280 & NR=131. In 2007 stopovers to Harbour Isl. By arrival mode: Airline=9,846 Cruise Ship=13, Private Plane=2,210, Yacht/Private boat=225 & NR=164.

- Most of the visitors to the island came via commercial airline or private plane.
- Abaco has a higher percentage of visitors who come by private plane than the Bahamas Overall.
- In 2008, 72% of the stopovers to Abaco came to the island on a commercial plane and 19% came on a private plane. In 2008, 84% of the stopover visitors to the Bahamas came on a commercial plane and 6% came on a private plane.



WHERE DID VISITORS TO ABACO STAY WHEN ON THE ISLAND?

STOPOVER VISITORS BY TYPE OF ACCOMMODATION THE ISLANDS OF THE BAHAMAS

	Abaco		Andros		Bimini		Total Eleuthera		Exuma		San Salvador	
	2008	2007	2008	2007	2008	2007	2008	2007	2008	2007	2008	2007
Apt/Villa	27,929	32,197	438	392	834	784	8,428	9,058	3,418	3,359	15	35
Hotel	27,365	33,210	4,627	5,124	28,291	26,420	14,438	17,836	20,892	24,368	15,669	15,835
Private/Boat	18,869	20,262	925	1,004	6,326	6,296	3,969	3,914	5,103	5,648	224	192
Own Property	9,185	9,153	455	500	3,522	3,329	3,103	3,233	1,375	1,384	85	83
Friends/Relatives	8,308	9,346	1,066	1,127	1,764	1,760	3,358	3,540	1,735	1,747	68	67
Timeshare	1,533	2,216	9	8	24	18	74	113	20	19	3	1
Other	1,236	1,383	480	404	446	546	721	993	372	432	1,597	1,561
Non-Response	3,246	2,986	1,204	883	1,224	1,684	1,936	2,093	994	964	679	424

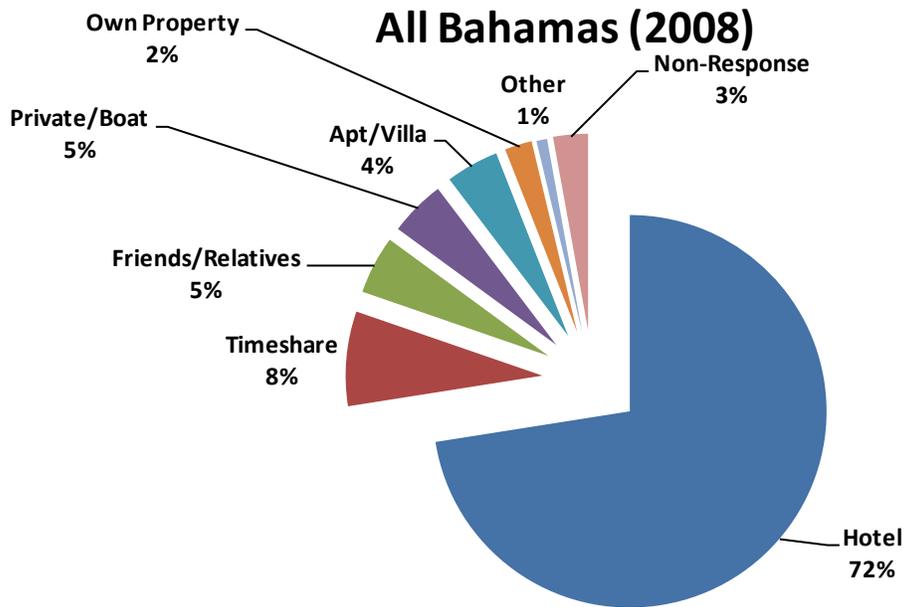
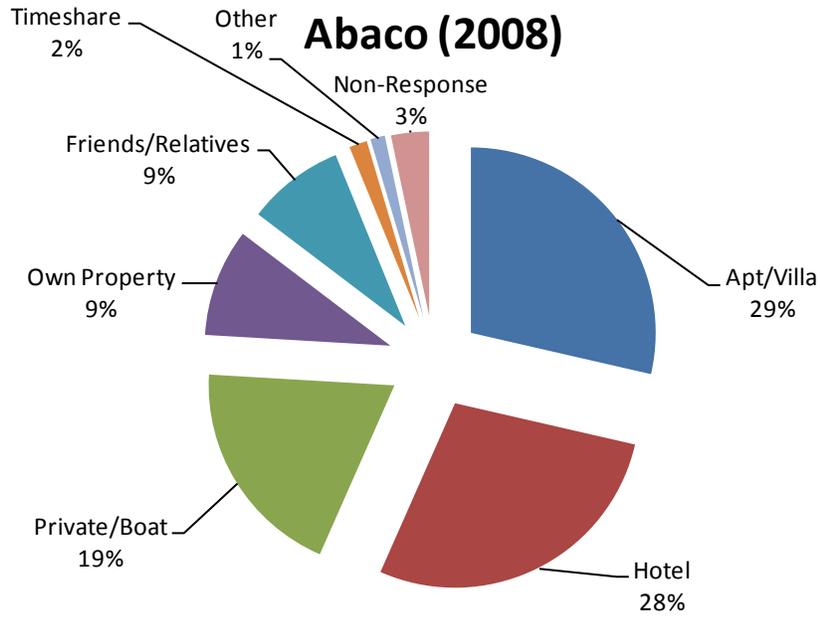
It is possible for stopover visitors to stay in more than one type of accommodation during their visit.

*Harbour Island stopovers are included in the overall numbers for Eleuthera. In 2008, stopovers to Harbour Isl. Stayed in: Hotel=9,965, Private/Boat=1,165, Apt/Villa=508

In 2007, stopovers to Harbour Isl. Stayed in: Hotel=11,118, Private/Boat=714, Apt/Villa=626

Source:Immigration Cards

- Stopover visitors to Abaco stay in various types of accommodation. The mix of accommodation use for this island varied greatly from that of any of the other Islands in The Bahamas.
- In 2008, 28% of the stopover visitors to Abaco stayed in a hotel, 28% of them stayed in an apt/villa, 19% stayed on a private boat, 9% of them stayed in their own property, and 8% stayed with friends/relatives.
- In 2008, 72% of the stopover visitors to The Bahamas Overall stayed in a hotel, 8% in a timeshare, 5% stayed with friends/relatives, 5% stayed on a private boat, 4% stayed in an apt/villa, and 2% in their own property.

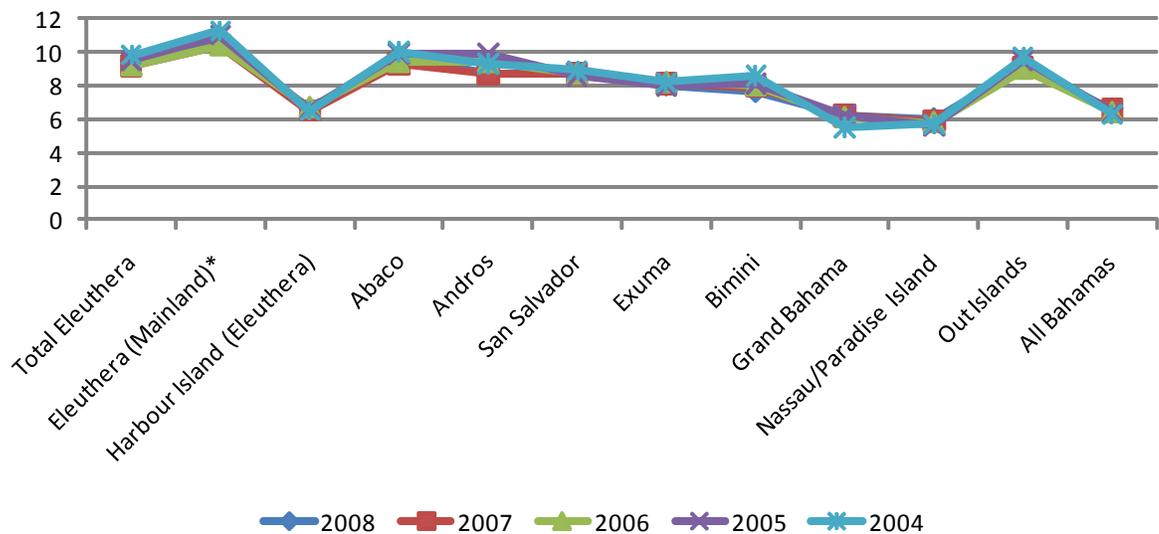


HOW LONG DID THE VISITORS STAY WHILE ON THE ISLAND?

AVERAGE LENGTH OF STAY ISLANDS OF THE BAHAMAS

	2008	2007	2006	2005	2004
Total Eleuthera	9.5	9.2	9.2	9.5	9.8
Eleuthera (Mainland)*	10.8	10.4	10.4	11.0	11.3
Harbour Island (Eleuthera)	6.6	6.5	6.7	6.6	6.5
Abaco	9.8	9.3	9.4	9.9	10.0
Andros	8.7	8.7	9.4	9.9	9.3
San Salvador	8.7	8.7	8.7	8.6	8.9
Exuma	8.0	8.1	8.2	8.0	8.2
Bimini	7.6	7.9	8.0	8.1	8.6
Grand Bahama	6.2	6.2	6.1	6.2	5.5
Nassau/Paradise Island	6.0	5.9	5.8	5.6	5.7
Out Islands	9.2	9.1	9.0	9.5	9.7
All Bahamas	6.6	6.6	6.4	6.4	6.3

The total Eleuthera average stay includes Mainland Eleuthera and Harbour Island Eleuthera.



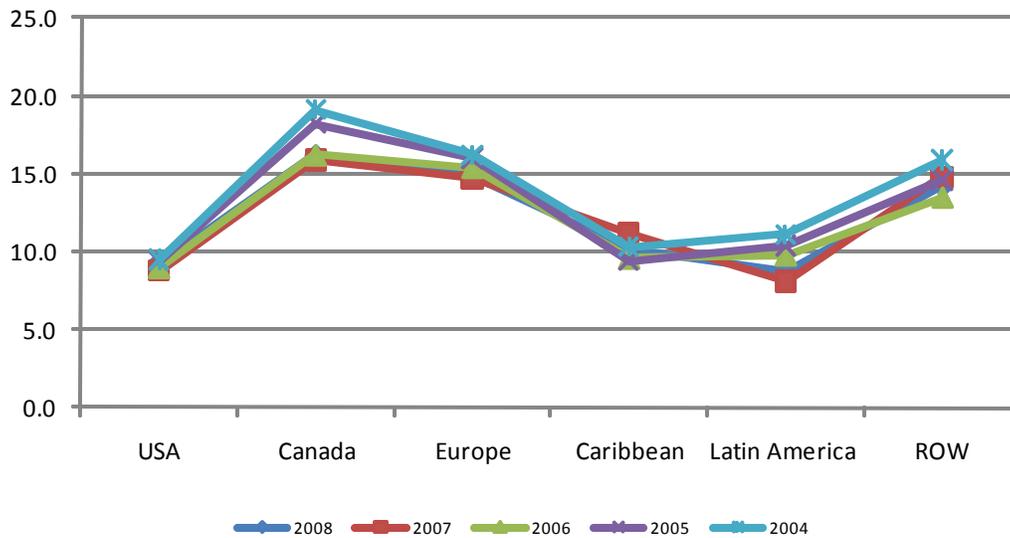
- Stopover visitors to Abaco stayed on average of 9.8 nights.

AVERAGE LENGTH OF STAY BY MAJOR REGION

AVERAGE LENGTH OF STAY ABACO

	2008	2007	2006	2005	2004
USA	9.3	8.8	9.0	9.4	9.5
Canada	16.2	15.9	16.2	18.2	19.1
Europe	14.8	14.7	15.4	16.0	16.2
Caribbean	10.1	11.2	9.6	9.4	10.3
Latin America	8.8	8.1	9.8	10.4	11.1
ROW	14.2	14.8	13.5	14.6	15.9

Source: Immigration Cards



- Stopover Visitors from the United States who visited Abaco stayed 9.3 nights in 2008 and those from Canada stayed 16.2 nights.
- Stopovers from Europe who visited Abaco stayed 14.8 nights in 2008 and those from the Caribbean stayed 10.1 nights.
- In 2008, stopover visitors from Latin America who visited Abaco stayed 8.8 nights.

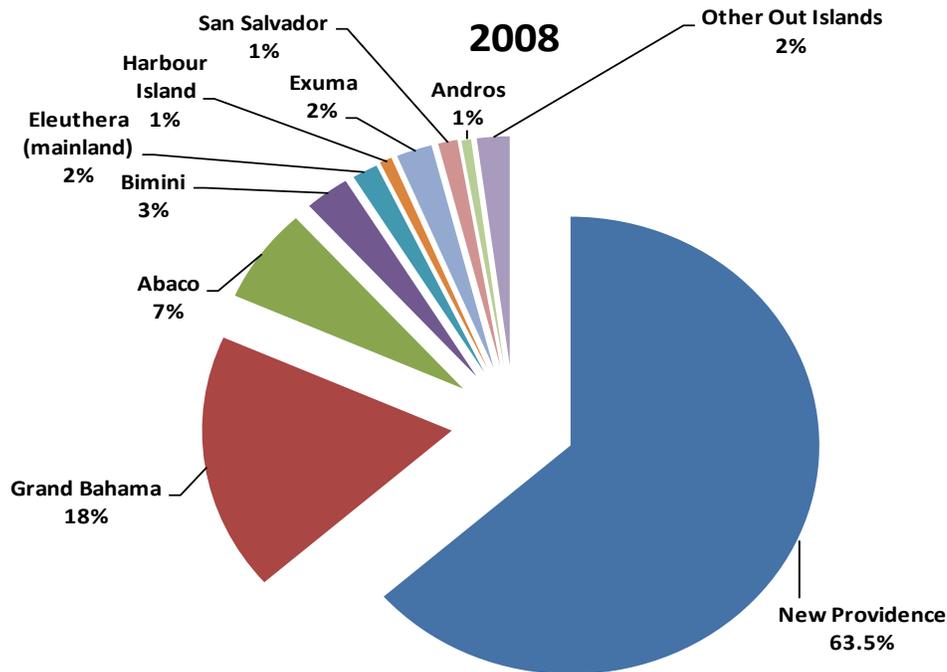
WHICH ISLAND IN THE BAHAMAS HAD THE HIGHEST PERCENTAGE OF THE MARKET SHARE OF STOPOVER VISITORS?

**ISLANDS OF THE BAHAMAS
STOPOVER VISITORS**

	2008	% SHR	2007	% SHR	% CHG
New Providence	929,249	63.5%	960,768	62.9%	-3.3%
Grand Bahama	265,176	18.1%	279,193	18.3%	-5.0%
Abaco	97,671	6.7%	110,753	7.2%	-11.8%
Bimini	42,431	2.9%	40,837	2.7%	3.9%
Eleuthera (mainland)	24,389	1.7%	28,322	1.9%	-13.9%
Harbour Island	11,638	0.8%	12,458	0.8%	-6.6%
Exuma	33,909	2.3%	37,921	2.5%	-10.6%
San Salvador	18,340	1.3%	18,198	1.2%	0.8%
Andros	9,204	0.6%	9,442	0.6%	-2.5%
Other Out Islands	30,999	2.1%	29,835	2.0%	3.9%
All Bahamas	1,463,006	100.0%	1,527,727	100.0%	-4.2%

*Eleuthera numbers exclude Harbour Island stopovers.

Source: Immigration Cards



- Stopover visitors to Nassau/P.I. had the highest percentage of the market share of visitors to the Bahamas.

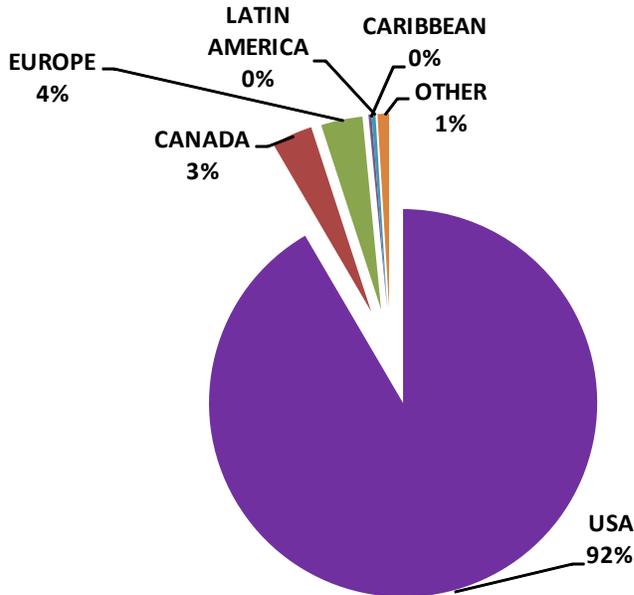
WHERE DID THE VISITORS TO ABACO COME FROM?

WHERE DO THE STOPOVER VISITORS COME FROM ABACO 2008

		2008	% SHR
1	USA	89,445	91.6%
2	CANADA	3,340	3.4%
3	EUROPE	3,375	3.5%
4	CARIBBEAN	248	0.3%
5	LATIN AMERICA	320	0.3%
6	OTHER	943	1.0%
TOTAL STOPOVERS		97,671	100.0%

Source: Immigration Cards

WHERE DO THE STOPOVER VISITORS COME FROM ABACO 2008



- Most of the visitors (92%) to Abaco came from the United States.
- 4% of them came from Europe and 3% came from Canada.

**ISLANDS OF THE BAHAMAS
ABACO**

		2008	2007	% CHG 08/07
1	USA	89,445	102,572	-12.8%
2	CANADA	3,340	3,491	-4.3%
3	EUROPE	3,375	3,171	6.4%
4	CARIBBEAN	248	241	2.9%
5	LATIN AMERICA	320	300	6.7%
6	OTHER COUNTRIES	943	978	-3.6%
	TOTAL STOPOVERS	97,671	110,753	-11.8%

- In 2008, Abaco did not receive any growth in stopover visitors from the United States, and Canada.
- Growth in stopover visitors was seen from Europe, the Caribbean, and Latin America.

STATES (UNITED STATES OF AMERICA)
ABACO
2001 TO 2008

State	2001	2002	2003	2004	2005	2006	2007	2008
FLORIDA	33,310	36,438	39,271	41,551	41,991	45,702	42,886	37,079
GEORGIA	3,563	3,690	3,926	4,098	4,130	4,769	4,959	3,991
NEW YORK	2,817	2,529	2,808	3,174	3,147	3,684	4,185	3,733
SOUTH CAROLINA	1,913	2,365	2,842	3,188	3,244	3,980	4,156	3,644
NORTH CAROLINA	2,581	2,948	3,033	3,415	3,636	3,820	3,932	3,261
TEXAS	1,960	2,344	2,227	2,564	2,643	2,786	3,461	3,081
CALIFORNIA	1,576	1,578	1,797	2,123	2,172	2,712	3,032	2,832
VIRGINIA	2,013	1,564	2,154	2,458	2,300	2,380	2,772	2,509
MASSACHUSETTS	1,852	1,566	1,960	2,364	2,243	2,354	2,422	2,361
NEW JERSEY	1,489	1,610	1,796	1,838	2,012	2,399	2,649	2,170
MARYLAND	1,574	1,097	1,418	1,754	1,756	1,978	1,953	1,731
PENNSYLVANIA	1,713	1,572	1,633	1,962	1,974	2,076	2,129	1,718
CONNECTICUT	1,126	1,023	1,139	1,413	1,462	1,557	1,593	1,661
OHIO	1,797	1,344	1,512	1,757	1,725	1,741	1,751	1,617
COLORADO	990	1,076	1,167	1,339	1,467	1,648	1,931	1,596
ILLINOIS	1,202	1,337	1,363	1,718	1,480	1,657	1,701	1,583
TENNESSEE	1,431	1,102	1,041	1,245	1,266	1,628	1,521	1,379
MICHIGAN	1,437	1,254	1,385	1,620	1,665	1,749	1,763	1,288
ALABAMA	807	847	740	860	966	1,046	1,163	1,016
MINNESOTA	713	619	712	922	802	924	1,013	936
MISSOURI	568	572	608	714	667	697	961	785
KENTUCKY	825	650	751	692	750	703	727	749
MAINE	580	494	694	769	780	787	803	733
WISCONSIN	487	510	593	582	596	675	723	657
LOUISIANA	697	534	440	578	630	644	735	636
INDIANA	719	763	787	703	737	642	802	596
WASHINGTON	350	399	395	433	467	510	542	551
NEW HAMPSHIRE	459	474	475	663	575	674	565	519
KANSAS	234	281	304	286	315	275	455	490
ARIZONA	282	260	321	363	406	417	583	417
MISSISSIPPI	333	241	341	333	398	434	483	350
OREGON	223	198	236	255	276	271	284	326
RHODE ISLAND	182	200	238	340	347	364	477	320
IOWA	171	144	149	202	189	278	280	304
OKLAHOMA	226	234	318	269	261	355	404	281
VERMONT	281	242	203	306	282	276	299	276
UTAH	165	152	188	200	203	221	220	250
WASHINGTON DC					205	270	254	229
DELAWARE	198	159	210	261	223	256	290	207
MONTANA	98	112	158	169	192	173	174	190
NEW MEXICO	109	135	130	152	152	160	188	177
ARKANSAS	275	183	163	198	234	197	191	172
IDAHO	129	99	106	150	116	168	134	160
NEVADA	103	111	123	125	168	184	216	158
WEST VIRGINIA	94	78	109	153	108	234	164	132
NEBRASKA	131	111	102	79	101	118	177	130

**STATES
STOPOVERS
2001 TO 2008**

State	2001	2002	2003	2004	2005	2006	2007	2008
WYOMING	124	129	126	130	130	163	129	115
ALASKA	40	43	94	102	70	90	52	70
HAWAII	11	11	29	27	31	26	43	30
NORTH DAKOTA	26	28	25	36	37	25	34	21
SOUTH DAKOTA	27	25	29	35	22	34	31	21
NON RESPONSE	3,949	5,522	5,818	2,451	180	225	180	207
TOTAL USA	77,960	80,997	88,187	93,119	91,929	101,136	102,572	89,445

DMA'S are designated market areas and may cover more than one state, hence, the DMA's will not necessarily equal the state totals.

District of Columbia (Washington DC) is technically not considered a state according to the US Embassy in Nassau, but because it is where the President resides it is included in the above numbers separately.

Source: Immigration Cards

- The state of Florida was by far the biggest supplier of stopover visitors from the United States.
- Florida has been the biggest supplier for Abaco for many years.

STOPOVER VISITORS:ABACO : BY MEDIA MARKET 2008

MEDIA MARKET (DMA)	2008	2007	2006	2005	2004	2003	2002
1 WEST PALM BEACH-FT. PIERCE	10,958	11,918	12,909	11,614	12,269	11,827	10,883
2 MIAMI-FT. LAUDERDALE	7,941	9,456	9,714	9,378	8,865	9,742	8,853
3 ORLANDO-DAYTONA BCH-MELBRN	7,555	8,477	9,290	8,391	7,772	7,353	6,746
4 NEW YORK	5,315	6,196	5,300	4,512	4,248	3,873	3,543
5 TAMPA-ST. PETE (SARASOTA)	3,861	4,714	4,980	4,747	4,595	4,181	4,101
6 JACKSONVILLE	3,400	4,040	4,455	3,908	3,878	3,428	3,338
7 BOSTON (MANCHESTER)	2,545	2,642	2,603	2,459	2,623	2,163	1,817
8 ATLANTA	2,454	3,161	2,897	2,493	2,435	2,579	2,363
9 WASHINGTON, DC (HAGRSTWN)	1,853	2,014	1,868	1,717	1,510	1,396	1,020
10 CHARLESTON, SC	1,658	1,933	1,870	1,460	1,399	1,189	944
11 PHILADELPHIA	1,631	1,933	1,851	1,814	1,766	1,546	1,408
12 CHICAGO	1,363	1,448	1,411	1,213	1,397	1,155	1,114
13 DENVER	1,332	1,580	1,409	1,271	1,162	1,076	935
14 FT. MYERS-NAPLES	1,289	1,805	1,784	1,601	1,567	1,511	1,419
15 LOS ANGELES	1,108	1,242	1,092	832	792	623	552
16 DALLAS-FT. WORTH	1,069	1,324	996	896	908	717	812
17 HOUSTON	1,029	1,107	865	875	825	773	816
18 BALTIMORE	1,014	1,089	1,138	943	1,027	818	689
19 RALEIGH-DURHAM (FA YETVLL)	917	959	983	904	845	816	735
20 CHARLOTTE	881	1,187	1,016	937	890	792	829
21 SAVANNAH	871	1,094	1,124	929	884	746	730
22 MINNEAPOLIS-ST. PAUL	848	920	821	730	834	692	562
23 SAN FRANCISCO-OAK-SAN JOSE	832	859	815	616	695	578	526
24 GREENVLL-SPART-ASHEVLL-AND	770	804	920	810	726	612	573
25 HARTFORD & NEW HAVEN	757	696	719	659	675	568	494
26 NORFOLK-PORTSMTH-NEWPT NWS	738	937	841	756	778	625	486
27 NASHVILLE	623	690	722	586	585	443	470
28 CLEVELAND-AKRON (CANTON)	619	701	657	632	749	643	515
29 TALLAHASSEE-THOMASVILLE	608	802	842	802	781	659	651
30 PORTLAND-AUBURN	598	688	732	705	724	611	450
31 GAINESVILLE	556	595	587	578	637	495	374
32 COLUMBIA, SC	545	636	519	476	422	523	389
33 ST. LOUIS	538	694	467	499	507	433	446
34 DETROIT	511	766	685	595	741	590	544
35 RICHMOND-PETERSBURG	498	507	476	449	476	454	266
36 KANSAS CITY	491	471	281	302	315	336	218
37 MOBILE-PENSACOLA (FT WALT)	486	722	703	659	718	478	475
38 SEATTLE-TACOMA	433	459	391	382	361	337	340
39 GRAND RAPIDS-KALMZOO-B.CRK	425	589	510	586	406	331	346
40 WILMINGTON	411	443	473	427	407	362	382
41 CINCINNATI	409	411	433	504	407	398	330
42 AUSTIN	408	424	357	283	294	273	253
43 PROVIDENCE-NEW BEDFORD	404	542	444	423	429	298	251
44 BIRMINGHAM (ANN AND TUSC)	381	445	442	439	359	274	358
45 KNOXVILLE	380	328	420	336	312	323	316
46 NEW ORLEANS	373	429	356	353	377	252	330
47 GREENVILLE-N.BERN-WASHNGTN	356	416	374	466	418	353	390
48 LOUISVILLE	347	374	418	411	366	436	359
49 GREENSBORO-H.POINT-W.SALEM	343	393	432	392	478	408	386
50 PHOENIX (PRESCOTT)	342	520	352	319	273	252	206
51 PITTSBURGH	340	425	567	436	454	326	326
52 SAN DIEGO	326	350	305	270	233	250	185

MEDIA MARKET (DMA)	2008	2007	2006	2005	2004	2003	2002
53 BURLINGTON-PLATTSBURGH	309	327	322	320	355	231	267
54 FLORENCE-MYRTLE BEACH	306	408	412	343	401	389	332
55 INDIANAPOLIS	297	345	291	377	357	444	402
56 COLUMBUS, OH	266	328	316	325	342	265	269
57 MILWAUKEE	262	313	282	280	265	241	208
58 SALT LAKE CITY	249	234	240	206	216	203	155
59 PORTLAND, OR	247	190	220	194	165	184	156
60 PANAMA CITY	235	363	391	369	259	208	186
61 LEXINGTON	217	224	208	198	160	193	171
62 ALBUQUERQUE-SANTA FE	204	227	193	181	164	156	156
63 CHATTANOOGA	203	228	226	165	154	132	118
64 ROCHESTER, NY	198	175	205	236	221	198	180
65 ALBANY-SCHENECTADY-TROY	194	279	261	212	241	191	175
66 SACRAMENTO-STOKTON-MODESTO	185	189	163	127	125	142	130
67 SALISBURY	182	329	246	268	238	138	92
68 AUGUSTA	174	189	198	129	150	152	140
69 BUFFALO	169	146	161	151	169	181	135
70 DAYTON	166	134	182	112	153	102	150
71 SYRACUSE	156	118	107	76	110	105	96
72 MEMPHIS	152	272	260	197	230	207	221
73 BANGOR	145	143	102	101	91	112	71
74 TULSA	142	162	203	113	147	141	140
75 SAN ANTONIO	139	129	156	168	179	159	160
76 COLORADO SPRINGS-PUEBLO	136	160	82	89	105	55	101
77 COLUMBUS, GA	135	131	127	55	92	97	89
78 GREEN BAY-APPLETON	135	137	118	111	83	137	122
79 MACON	131	160	157	169	242	154	152
80 BILOXI-GULFPORT	131	187	160	177	124	117	76
81 CHARLOTTEVILLE	131	141	88	120	94	108	85
82 TOLEDO	129	158	149	123	145	125	130
83 JACKSON, MS	129	141	134	85	99	123	80
84 BATON ROUGE	128	91	74	129	79	81	63
85 MONTGOMERY (SELMA)	128	146	120	109	114	92	85
86 OKLAHOMA CITY	127	197	125	131	105	141	95
87 HARRISBURG-LNCSTR-LEB-YORK	124	247	204	248	211	182	157
88 DOTHAN	122	93	64	58	51	54	67
89 ALBANY, GA	121	168	137	89	72	75	72
90 ROANOKE-LYNCHBURG	116	153	165	159	183	189	120
91 TRAVERSE CITY-CADILLAC	116	152	226	199	214	204	153
92 DES MOINES-AMES	114	129	132	70	62	63	39
93 OMAHA	110	115	93	69	37	77	58
94 IDAHO FALLS-POCATELLO	108	114	145	88	95	82	91
95 MADISON	108	141	121	83	112	91	89
96 SOUTH BEND-ELKHART	102	125	73	127	139	119	103
97 TRI-CITIES, TN-VA	95	124	62	73	65	54	74
98 LAS VEGAS	93	105	99	92	70	77	55
99 LITTLE ROCK-PINE BLUFF	93	111	94	149	105	103	104
100 JOHNSTOWN-ALTOONA	91	74	96	36	59	35	46
101 WICHITA-HUTCHINSON PLUS	86	100	64	73	49	57	76
102 SPRINGFIELD, MO	85	79	89	64	66	49	64
103 PALM SPRINGS	85	88	42	64	48	25	43
104 CHARLESTON-HUNTINGTON	84	80	132	77	83	66	67
105 CEDAR RAPIDS-WTRLO-IWC&DUB	81	64	61	59	74	44	67
106 WAUSAU-RHINELANDER	77	46	64	58	62	77	40

MEDIA MARKET (DMA)	2008	2007	2006	2005	2004	2003	2002
107 WILKES BARRE-SCRANTON	76	107	120	97	121	124	116
108 PADUCAH-C.GIRD-HARBG-MT VN	76	74	38	54	57	74	64
109 FLINT-SAGINA W-BAY CITY	76	93	142	104	90	90	109
110 BUTTE-BOZEMAN	75	70	67	63	53	50	28
111 SHREVEPORT	71	101	97	76	58	45	59
112 SPRINGFIELD-HOLYOKE	71	104	127	103	130	121	94
113 TYLER-LONGVIEW (LFKN&NCGD)	69	82	65	82	49	38	40
114 HUNTSVILLE-DECATUR (FLOR)	66	101	96	95	118	93	121
115 MONTEREY-SALINAS	65	71	67	73	65	62	45
116 EUGENE	64	60	50	50	62	39	34
117 SIOUX CITY	62	44	43	26	23	8	12
118 SANTABARBRA-SANMAR-SANLUOB	60	91	66	66	71	57	43
119 CORPUS CHRISTI	59	54	69	62	36	30	33
120 DULUTH-SUPERIOR	58	53	51	49	60	16	28
121 SPOKANE	56	47	58	50	50	37	52
122 ODESSA-MIDLAND	55	40	54	31	22	47	21
123 ELMIRA	53	37	69	45	68	56	55
124 FT. WAYNE	53	86	66	83	61	71	92
125 RENO	53	92	84	74	57	50	57
126 MISSOULA	53	56	54	71	49	52	47
127 TUCSON (SIERRA VISTA)	53	47	52	77	77	68	54
128 CHAMPAIGN&SPRNGFLD-DECATUR	53	76	50	56	82	67	53
129 PEORIA-BLOOMINGTON	50	47	61	72	57	37	68
130 BOISE	43	71	63	50	73	50	36
131 ANCHORAGE	42	33	65	50	65	56	28
132 FT. SMITH-FA Y-SPRNGDL-RGRS	41	53	79	58	64	42	35
133 FARGO-VALLEY CITY	41	57	30	46	31	24	23
134 LANSING	41	86	82	74	64	86	52
135 LAFAYETTE, LA	40	84	84	51	44	38	61
136 WACO-TEMPLE-BRYAN	40	61	42	25	41	42	32
137 LINCOLN & HASTINGS-KRNY	39	66	34	38	35	33	51
138 HARRISONBURG	39	36	37	33	39	32	25
139 BEAUMONT-PORT ARTHUR	39	31	16	26	23	30	43
140 TWIN FALLS	38	12	41	34	33	32	18
141 EVANSVILLE	38	62	51	45	61	76	58
142 COLUMBIA-JEFFERSON CITY	38	52	57	27	42	26	27
143 FRESNO-VISALIA	37	16	51	43	17	19	31
144 ROCKFORD	36	33	28	46	74	38	54
145 LAFAYETTE, IN	35	56	30	32	32	23	38
146 GRAND JUNCTION-MONTROSE	34	42	44	31	36	19	29
147 BAKERSFIELD	34	27	12	23	7	3	5
147 LA CROSSE-EAU CLAIRE	34	39	39	24	33	27	33
149 BEND, OR	33	19	28	34	28	23	9
150 BILLINGS	32	38	35	39	34	24	36
151 WATERTOWN	31	35	47	26	42	38	30
152 UTICA	31	31	27	32	32	35	37
153 MONROE-EL DORADO	30	24	28	18	14	15	19
154 YOUNGSTOWN	29	43	15	58	37	53	23
155 BINGHAMTON	28	18	14	20	47	31	44
156 HONOLULU	26	39	24	31	27	29	11
157 YAKIMA-PASCO-RCHLND-KNNWCK	26	18	21	12	18	10	3
158 COLUMBUS-TUPELO-WEST POINT	26	20	23	19	17	16	9
159 DAVENPORT-R.ISLAND-MOLINE	24	33	30	31	40	34	42
160 SHERMAN-ADA	23	30	39	33	29	25	15

MEDIA MARKET (DMA)	2008	2007	2006	2005	2004	2003	2002
161 WHEELING-STEUBENVILLE	22	22	17	5	11	3	3
162 TERRE HAUTE	22	24	21	32	40	26	14
163 JOPLIN-PITTSBURG	22	11	9	21	9	26	27
164 ERIE	21	16	30	29	16	32	18
165 TOPEKA	19	25	18	33	24	31	37
166 EL PASO	19	40	9	13	27	23	18
167 MEDFORD-KLAMATH FALLS	18	22	18	28	28	21	22
168 HATTIESBURG-LAUREL	18	31	39	42	43	34	34
169 CASPER-RIVERTON	17	12	9	14	10	11	33
170 PRESQUE ISLE	17	8	6	4	7	16	8
171 VICTORIA	17	14	7	43	38	5	10
172 BLUEFIELD-BECKLEY-OAK HILL	16	23	32	20	9	12	13
173 AMARILLO	16	27	12	15	16	26	19
174 JUNEAU	15	7	17	13	14	17	4
175 ROCHESTR-MASON CITY-AUSTIN	14	14	42	26	31	18	19
176 SIOUX FALLS(MITCHELL)	14	19	22	18	30	21	15
177 QUINCY-HANNIBAL-KEOKUK	13	10	6	1	2	9	10
178 HARLINGEN-WSLCO-BRNSVL-MCA	13	22	16	11	5	18	8
179 MARQUETTE	13	15	29	24	35	39	13
180 BOWLING GREEN	13	10	4	20	21	2	11
181 ZANESVILLE	13	10	13	5		2	3
182 PARKERSBURG	12	12	14	4	12	9	3
183 LUBBOCK	12	19	19	24	14	11	24
184 LAKE CHARLES	12	11	10	11	12	16	6
185 CHICO-REDDING	11	20	17	14	17	20	12
186 WICHITA FALLS & LAWTON	10	20	14	16	19	27	22
187 RAPID CITY	10	14	11	4	5	12	18
188 FAIRBANKS	10	10	8	6	13	10	8
189 OTTUMWA-KIRKSVILLE	10	4	11	6	9	6	2
190 GREENWOOD-GREENVILLE	9	28	34	11	12	5	5
191 CHEYENNE-SCOTTSBLUF	8	11	12	13	17	12	5
192 MANKATO	8	12	19	8	11	1	15
193 GREAT FALLS	8	2	10	8	12	11	5
194 HELENA	8	5	3	10	19	17	
195 ABILENE-SWEETWATER	7	17	9	7	18	13	12
196 SAN ANGELO	7	2	3	2	1		1
197 JACKSON, TN	7	12	6	6	4	15	11
198 CLARKSBURG-WESTON	7	25	27	10	26	7	10
199 MINOT-BISMARCK-DICKINSON	6	15	7	6	17	11	20
200 JONESBORO	6	13	6	10	13	14	9
201 EUREKA	5	4	5	6		11	2
202 MERIDIAN	5	18	7	7	1	10	8
203 GLENDIVE	4						
204 ALEXANDRIA, LA	4	12	13	14	8	7	18
205 LIMA	4	3	7	20	8	2	4
206 ST. JOSEPH	3	6	13	8	4	3	6
207 YUMA-EL CENTRO	1	2	2	5	3	1	
208 LAREDO		3	1		1	1	7
209 ALPENA		2	1	1	6	9	
210 OTHER	2,416	2,226	2,151	1,751	4,101	5,829	5,526
GRAND TOTAL	89,445	102,572	101,136	91,929	93,119	88,187	80,997

Source:Immigration Cards

- The most important designated media markets for visitors to Abaco were West Palm Beach-Ft Pierce, Miami-Ft. Lauderdale, and Orlando-Daytona Bch-Melbrn.

WHERE ELSE DID VISITORS TO ABACO COME FROM?

STOPOVER VISITORS ABACO

	PROVINCES	2008	2007	2006	2005	2004	% CHG 08/07
1	ONTARIO	1,841	1,983	1,852	1,545	1,680	-7%
2	QUEBEC	422	401	428	397	440	5%
3	ALBERTA	285	334	313	286	231	-15%
4	BRITISH COLUMBIA	267	219	181	230	148	22%
5	NOVA SCOTIA	106	111	100	89	59	-5%
6	MANITOBA	37	24	30	45	25	54%
7	OTHER PROVINCES	382	419	342	353	389	-9%
	TOTAL CANADA	3,340	3,491	3,246	2,945	2,972	-4%

TOP EUROPEAN COUNTRIES STOPOVER VISITORS ABACO

		2008	2007	2006	2005	% Chg 08/07
1	UK	1,432	1,468	1,631	1,576	-2.5%
2	FRANCE	422	300	189	265	40.7%
4	GERMANY	403	364	345	433	10.7%
3	ITALY	289	186	133	161	55.4%
5	SWITZERLAND	126	126	131	151	0.0%
7	AUSTRIA	117	77	69	105	51.9%
6	SWEDEN	93	97	67	69	-4.1%
8	NETHERLANDS	80	59	67	56	35.6%
9	NORWAY	72	84	27	36	-14.3%
10	SPAIN	67	79	75	34	-15.2%
11	IRELAND	64	90	32	34	-28.9%
12	BELGIUM	59	40	31	39	47.5%
13	OTHER EUROPE	151	201	134	144	-24.9%
	TOTAL EUROPE	3,375	3,171	2,931	3,103	6.4%

- Ontario, Canada was the biggest supplier of stopover visitors from Canada to Abaco in 2008. However, this market to Abaco did not grow in 2008.
- The UK was the biggest supplier of stopover business from Europe to Abaco in 2008. However, this market to Abaco did not grow in 2008.

WHAT ARE THE PEAK MONTHS FOR THE ISLAND?

STOPOVER VISITORS BY MONTH ISLANDS OF THE BAHAMAS 2006 TO 2008

Month	Abaco			Andros			Bimini			Total Eleuthera*		
	2008	2007	2006	2008	2007	2006	2008	2007	2006	2008	2007	2006
Jan	5,117	4,903	5,164	663	584	577	1,356	1,311	1,180	2,673	2,553	2,183
Feb	7,939	7,103	7,341	880	885	835	2,074	1,403	1,736	3,597	3,634	3,762
Mar	12,533	13,733	12,605	1,343	1,195	1,523	3,224	2,254	2,512	5,838	6,123	5,700
Apr	10,916	11,912	12,712	1,169	1,199	1,234	3,165	3,674	3,743	3,968	4,939	5,078
May	11,540	12,032	13,853	1,070	1,088	1,282	6,140	3,064	7,474	3,518	4,450	4,292
Jun	14,360	16,659	17,285	1,065	950	1,165	5,994	6,851	6,453	3,946	4,619	4,277
Jul	12,125	14,385	13,063	864	638	877	7,560	7,006	5,894	3,358	3,464	3,368
Aug	6,567	8,222	6,237	477	562	468	5,507	6,135	4,470	2,169	2,313	1,750
Sep	1,632	3,216	3,041	126	249	284	1,246	2,683	4,535	584	788	724
Oct	3,076	3,790	3,415	412	438	480	1,338	1,558	1,898	908	1,126	1,303
Nov	4,841	6,053	5,724	544	778	819	2,241	2,440	1,756	2,254	2,643	3,299
Dec	7,025	8,745	8,191	591	876	781	2,586	2,458	2,309	3,214	4,128	3,968
Total	97,671	110,753	108,631	9,204	9,442	10,325	42,431	40,837	43,960	36,027	40,780	39,704

All of the individual Out Islands are not listed in the above table. Source: Immigration Cards

*Harbour Island included in above Eleuthera numbers.

- The peak months for stopover visitors to visit Abaco Island are March, April, May, June and July. There are many festivals that are held in the Abacos between March and July of each year. During this time Abaco has fishing tournaments which attracts visitors to the island chain. In July of each year the “Regatta Time in Abaco” which also attracts visitors every year is held. In addition, there are concerts at Nipper’s Bar in Guana Cay, Abaco in both March and July called the “Barefoot Man Concert,” which attracts its own following. Golf tournaments are also held throughout the year in Treasure Cay and Winding Bay, Abaco.

**STOPOVER VISITORS BY MONTH
ISLANDS OF THE BAHAMAS
2006 TO 2008**

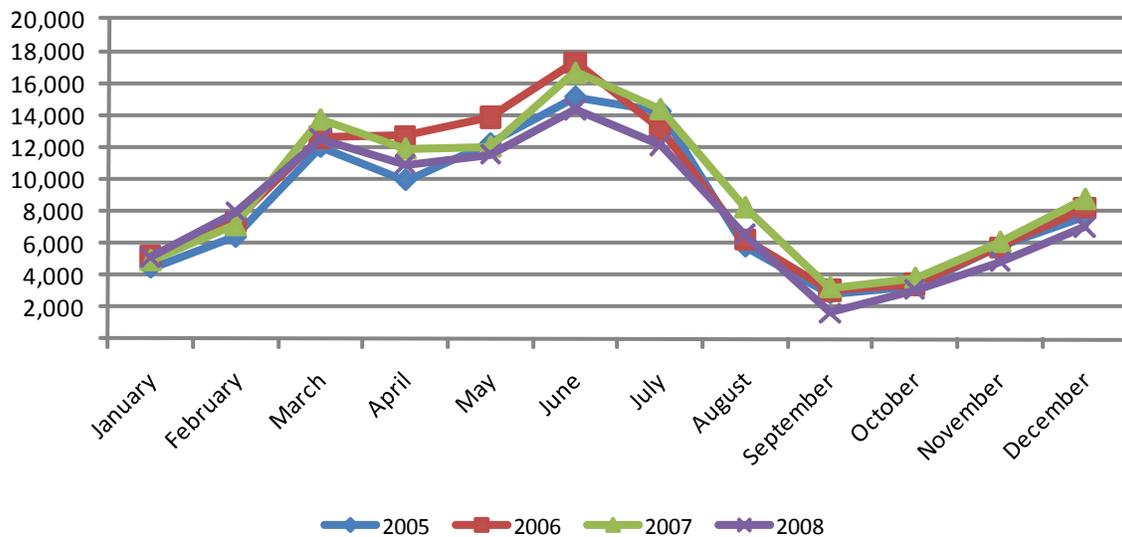
Month	Exuma			Harbour Isl.			San Salvador		
	2008	2007	2006	2008	2007	2006	2008	2007	2006
Jan	2,838	3,043	2,818	850	925	641	1,556	1,188	1,208
Feb	3,694	4,013	4,080	1,273	1,302	1,279	1,447	1,379	1,418
Mar	4,994	4,757	5,292	1,899	2,028	1,741	2,022	2,125	1,874
Apr	4,087	4,300	4,817	1,324	1,504	1,846	1,867	1,570	2,084
May	3,555	3,563	4,060	1,164	1,241	1,683	2,124	1,949	1,814
Jun	2,951	3,794	3,790	1,050	1,285	1,380	1,807	2,084	1,843
Jul	3,106	3,200	3,288	1,133	942	1,148	1,584	1,440	1,371
Aug	2,363	2,738	2,393	780	692	663	1,321	1,348	950
Sep	665	1,178	1,198	104	140	186	563	1,044	75
Oct	1,524	1,827	2,308	203	243	242	1,421	1,264	26
Nov	1,666	2,292	2,737	784	821	1,078	1,437	1,515	160
Dec	2,466	3,216	3,384	1,074	1,335	1,133	1,191	1,292	1,799
Total	33,909	37,921	40,165	11,638	12,458	13,020	18,340	18,198	14,622

All of the individual Out Islands are not listed in the above table. Source: Immigration Cards

**ABACO
STOPOVER VISITORS**

	2005	2006	2007	2008
January	4,464	5,164	4,903	5,117
February	6,367	7,341	7,103	7,939
March	11,981	12,605	13,733	12,533
April	9,921	12,712	11,912	10,916
May	12,178	13,853	12,032	11,540
June	15,092	17,285	16,659	14,360
July	14,186	13,063	14,385	12,125
August	5,771	6,237	8,222	6,567
September	2,855	3,041	3,216	1,632
October	3,349	3,415	3,790	3,076
November	5,807	5,724	6,053	4,841
December	7,587	8,191	8,745	7,025
Grand Total	99,558	108,631	110,753	97,671

Source: Immigration Cards



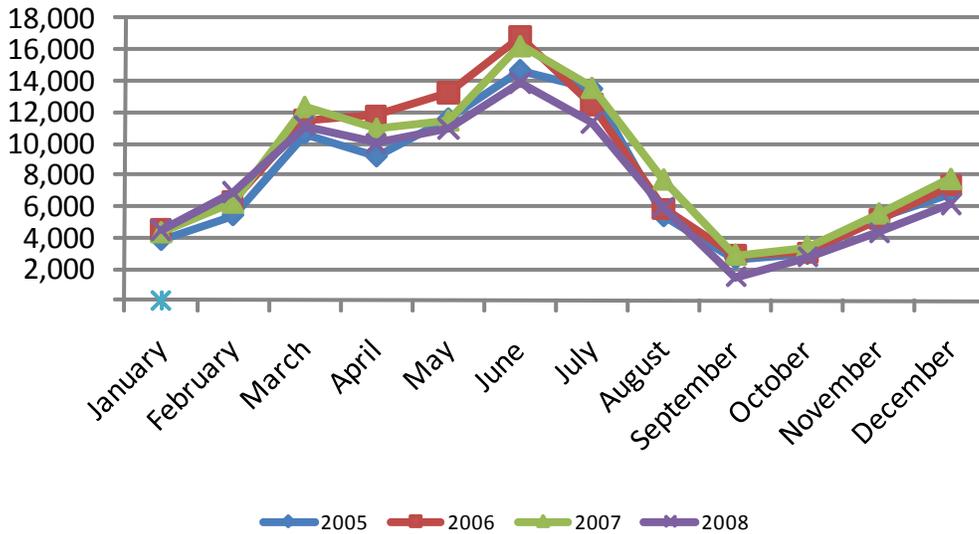
- March, April, May, June and July were the most popular months for stopover visitors to visit the island of Abaco.

**STOPOVERS
ABACO
USA**

	2005	2006	2007	2008
January	3,858	4,558	4,341	4,518
February	5,438	6,370	6,239	6,888
March	10,639	11,519	12,363	11,148
April	9,192	11,799	10,966	10,019
May	11,592	13,249	11,497	10,958
June	14,688	16,857	16,247	13,895
July	13,503	12,465	13,580	11,358
August	5,370	5,849	7,714	5,937
September	2,657	2,888	2,915	1,490
October	2,956	3,080	3,416	2,775
November	5,267	5,190	5,542	4,316
December	6,769	7,312	7,752	6,143
Grand Total	91,929	101,136	102,572	89,445

Source: Immigration Cards

**STOPOVERS
ABACO
USA**



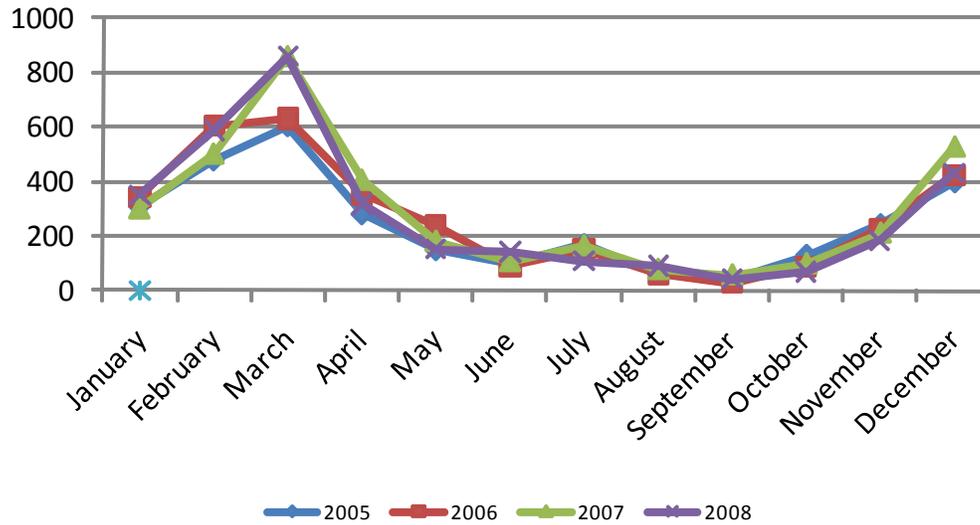
- March, April, May, June and July were the most popular months for stopover visitors from the United States to visit the island of Abaco.

**STOPOVERS
ABACO
CANADA**

	2005	2006	2007	2008
January	307	345	300	352
February	476	604	502	587
March	601	632	861	861
April	279	353	406	318
May	148	239	181	152
June	102	92	106	142
July	168	153	164	109
August	61	59	77	91
September	37	29	57	43
October	129	89	98	69
November	241	227	211	183
December	396	424	528	433
Grand Total	2,945	3,246	3,491	3,340

Source: Immigration Cards

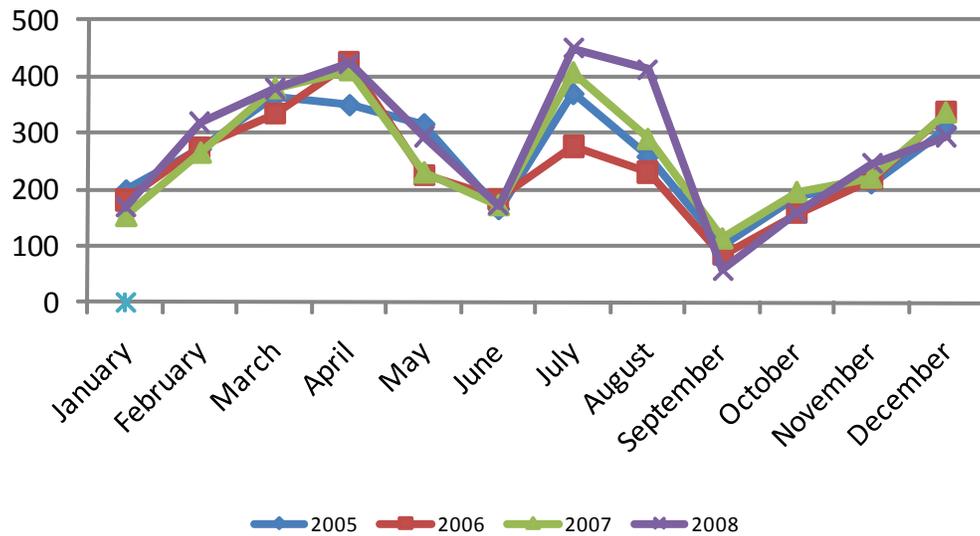
**STOPOVERS
ABACO
CANADA**



**STOPOVERS
ABACO
EUROPE**

	2005	2006	2007	2008
January	198	181	153	169
February	272	275	265	319
March	365	334	379	379
April	350	426	411	423
May	316	226	230	294
June	165	184	172	172
July	370	276	407	450
August	258	231	289	413
September	102	84	113	57
October	187	158	195	159
November	211	218	221	246
December	309	338	336	294
Grand Total	3,103	2,931	3,171	3,375

**STOPOVERS
ABACO
EUROPE**



**DEMOGRAPHIC & PSYCHOGRAPHIC PROFILE
ABACO ISLAND
2008**

	Abaco	All Bahamas
MAIN PURPOSE OF VISIT		
Vacation	65%	70%
Business	6%	7%
Honeymoon	4%	5%
Other	3%	2%
To Attend Wedding	3%	5%
DECISION TO VISIT INFLUENCED BY:		
Beaches	65%	60%
Climate	52%	51%
Rest and Relaxation	44%	43%
Friendly People	42%	26%
Safety of Islands	28%	15%
Exotic Islands	25%	13%
Sporting Attractions	25%	11%
Easy to Get to	22%	21%
Had Friends in the Bahamas	20%	8%
ACTIVITIES VISITORS INTENDED TO DO		
Enjoy Beaches	82%	83%
Rest and Relax	72%	74%
Go Snorkeling	60%	32%
Shop	24%	37%
Sailing	22%	7%
LIKELY RETURN IN 1-5 YEARS		
	97%	87%
LIKELY RECOMMEND TO FRIENDS/REL		
	98%	93%
USED TRAVEL AGENT		
	46%	30%
AGE*		
25 - 54 years old	48%	56%
55 years old or older	29%	19%
SEX*		
Male	54%	49%
Female	43%	48%
RACE		
White	91%	82%
Black	2%	7%
Hispanic	1%	4%
Mixed Race/Mixed Heritage	4%	3%
Asian/Pacific Islander	1%	3%
American Indian/Alaska Native	1%	0%
EDUCATION		
College Graduate or Above	54%	67%

**DEMOGRAPHIC & PSYCHOGRAPHIC PROFILE
ABACO ISLAND
2008**

ANNUAL HOUSEHOLD INCOME		
\$25,001 to \$50,000	8%	7%
\$50,001 to \$75,000	8%	10%
\$75,001 or more	51%	62%
PREVIOUS VISITS		
First Time Visitor	19%	41%
Repeat Visitor	77%	59%
TRAVELLING PARTY SIZE		
One	13%	16%
Two	31%	44%
Three or more	47%	37%
HOUSEHOLD SIZE		
One	16%	12%
Two	33%	38%
Three-Four	33%	38%
COUNTRY OF ORIGIN		
USA	92%	81%
Canada	3%	8%
Europe	4%	6%
Other Countries	2%	5%
AVERAGE LENGTH OF STAY	9.8 nts.	6.6 nts.

*Information on age, sex and avg. length of stay were obtained from immigration card data.

*Source: Tour Operator & Media Exit Study.

In 2008, Likelihood to return: Very Likely=82.7% and Somewhat Likely=14.1%, Likelihood to Recommend: VL= 85.1% and SL=12.9%. All numbers are subject to revision.

Conclusion

Most of the stopover visitors to Abaco came to the island to vacation. Many of them described their vacation as a beach/pool/relax vacation. Some of them described their vacation as a sailing vacation and others described it as a game/deep/sea/sport fishing/tournament vacation.

Stopover visitors to Abaco were influenced to visit because of the beaches, the climate, the desire to rest and relax, the friendly people on the island, the perceived safety of the island, the perception that the island was exotic, and the sporting attractions such as snorkeling, sailing, diving, deep sea fishing, and bone-fishing available on the island.

Before their arrival on the island, visitors to Abaco intended to do a number of activities while they enjoyed their stay. Most of them wanted to enjoy the beaches, and rest and relax. Many of them wanted to go snorkeling. Some of them wanted to do a little shopping, go sailing, diving, deep sea fishing, go on an island tour, and/or go bone-fishing. More visitors to Abaco wanted to enjoy sailing, snorkeling, diving, deep sea fishing and bone-fishing than visitors to both Nassau/Paradise Island and Grand Bahama.

Visitors to The Abacos liked a myriad of things about the island. Many of the visitors to The Abacos really liked the beaches and the ocean. More than two-thirds of them really like the friendly people on the island and some of them thought that the people were helpful. Many of the stopover visitors liked the relaxing they were able to do on the island. Some of them liked the weather, the safety they felt on the island, and the scenery. A few of the visitors thought that the island was clean and liked that. Other visitors did not agree that the island was clean and listed it as one of the top complaints of the island. Some of the stopover visitors thought that Abaco was just as they had hoped it would be and liked that fact. A few of them thought that there was plenty to do on the island and they liked that. A number of the stopover visitors liked the architecture in The Abacos and a few of them thought that the island was unusual-not like anywhere else and liked that fact. Visitors to Abaco complimented the island on the friendly people, scenery, beaches, and relaxation available on island.

Visitors to Abaco did dislike some things about the destination. Some of them thought that Abaco was expensive or pricey and disliked that. Some of them disliked that the shops closed too early and a few of them disliked that there were a limited variety of shops even though shopping for the most part was not the main reason for coming to the island. Some of the stopovers thought that the service on the island was slow and disliked that. A few of them thought that the island was not clean and disliked that. A few of them did not like the weather that they had during their trip. Some of the visitors to Abaco complained about: the high prices, airlines (need more direct flights, too many delays), airport, too much litter on the island, and the weather.

More than three-quarters of the visitors to The Abacos were returning visitors or repeat visitors. Visitors to Abaco appeared to be very loyal about returning and recommending the Bahamas. The majority of the stopover visitors to Abaco said that they would return to the Bahamas in 1-5 years and they did. The majority of them also said that they would recommend the Bahamas to friends and relatives and they did. (There were a number of people who said that they were influenced to visit as a result of the recommendation of a friend or relative).

Visitors to Abaco primarily came to the island by commercial airline or private plane and most of them stayed in a hotel, apt/villa or private boat. Some of them stayed in their own property, and some of them stayed with friends or relatives. The average length of stay of the stopover visitors to Abaco was 9.8 nights and the peak months for stopover visitors to visit Abaco (The Abacos) were March, April, May, June, and July.

The media habits of the stopover visitors to Abaco spanned a wide range. Many of them used the Internet and watched television. Some of them read magazines and newspapers.

Many of the stopover visitors to Abaco used the Internet when they were planning their vacations and the top search engine/content provider was Google. The visitors to Abaco did not tend to use travel agents very much to book their reservations because many of them either booked their plans on the Internet or directly. This was in part due to the fact that many of the visitors to Abaco were

returning visitors or second home owners who already knew what and where everything was on the Abaco chain of islands.

Most of the stopover visitors to Abaco watched television. Their favorite television stations were NBC, ABC, CNN, CBS, FOOD Network, HGTV, TBS and ESPN.

More than one-quarter of the stopover visitors to Abaco used print media when they were planning their vacations. The preferred print media used was magazines. Some of the stopover visitors just read magazines for their enjoyment and edification. The visitors who read magazines for their enjoyment and edification read a myriad of magazines on entertainment, travel, business, health & fitness, fashion, fine dining, home décor, and sailing. In addition to magazines, some of the visitors to Abaco who used print media to plan their vacations used newspapers. The most popular newspapers that they read were the New York Times, USA Today, the Wall Street Journal, and the Miami Herald.

Most of the stopover visitors to Abaco tended to be over 25 (with a higher percentage of people over 55 than the Bahamas as a whole), and white. More than half of them were college educated, and male. More than half of them had household incomes well over \$75,000. In fact, a large percentage of them had household incomes of \$100,000 or more. Many of the stopover visitors to Abaco were repeat visitors who travelled in groups of two or more. In fact Abaco received more visitors who travelled as a party of three or more than the Bahamas overall. The majority of the visitors to Abaco were from the United States.

APPENDIX

Abaco Positive Comments Report 2008

Islands
Abaco

Commentcategory

Positive Comments

Activities

We had a very nice, relaxing time. Plenty to do and see. Wanted to see the wild horses.

Airport

Airport security wonderful and friendly.

Beaches

Gorgeous beaches.

Beautiful beaches.

The beaches are incredible.

Gorgeous beaches!

Food

Great food.

Great food.

General

I love Treasure Cay! Always have a wonderful stay.

This truly is Paradise, I hate to leave.

Love it.

Wonderful place.

Great place always!

Islands
Abaco

Commentcategory

General

Positive Comments

Elbow Cay is Fantastic.

Really quiet. Love doing business here, love the people.

Amazing.

We had a fantastic time.

Long time second home owner Abaco Cays.

We had an amazing time.

It was awesome.

Welcome to Paradise.

Very enjoyable.

We had the greatest time here.

We love Abacos.

Love it!

Love it.

Thanks for the pen.

Love it!

Sand and sea.

It is great.

It's always hard to leave because it's so nice.

This place was awesome.

Fun!

Great.

We love Green Turtle Cay and its surrounding islands.

Islands
Abaco

Commentcategory

Positive Comments

General

Very nice.
We love it!
Everything is better in the Bahamas.
Good times.
Amazing!!
Ya'll rule!!!
See you next year!
Love this place!

Litter/Cleanliness

Very clean.
The island is clean.

People

The people are very kind.
The people are much friendlier and more helpful than I remember.

Island people are special.
The people are very friendly.
People are very friendly, everyone speaks to you.
Friendly people.
Wonderful people. Wish I could stay longer. Thank you.
People are very nice.
The people are so friendly here!
Friendly people, extremely helpful.

Islands
Abaco

Commentcategory

Positive Comments

People

People very friendly.
 People very friendly.
 The people at the best.
 Everyone was very friendly.
 People are very friendly.
 Nice people.
 Wonderful people.
 Very nice people.
 We love Brendal Stevens!

Relaxation

Usually go to Elbow Cay love the relaxing life in a beautiful environment! Enjoy Marsh Harbour area too.
 A relaxing place to visit.

Safety

The island is safe.
 The island felt safe.

Scenery/Sightseeing

Absolutely gorgeous.
 Beautiful.
 Abaco islands are beautiful.
 Enjoyed the island and climate and all its beauty.
 Very beautiful.

Islands
Abaco

Commentcategory

Positive Comments

Scenery/Sightseeing

Beautiful.

Sea/Water

Love the water.

Great snorkeling.

The water is beautiful.

Sports

Great Snorkeling at Mermaid Reef.

Weather/Climate

In March it sometimes very windy and rainy, but always nice.

I love the sun and tanning.

Abaco Negative Comments Report 2008

Islands
Abaco

Commentcategories

Negative Comment

Airlines

Will never fly Vintage Props and Jets ever again, very poor service.

Need direct flights from Orlando.

We were very disappointed in Continental/Gulfstream Airlines. Flight was 6 hours late departing Ft. L. and luggage arrived 48 hours after we landed. Frustrating start to vacation.

Airport

Then Marsh Harbour Airport needs renovating upgrading airstrip good, waiting area.

Marsh Harbour Airport needs better facilities.

General

The Bahamas was the pits!

Litter/Cleanliness

Clean trash from roadsides.

The Bahamas need better garbage disposal and recycling programs you are an island.

People

The natives need to be more friendly.

Prices

Expensive to get around and eat.

It would be lovely if there were more inexpensive options for lodging, such as hostels or efficiency rooms.

Islands
Abaco

Commentcategories

Negative Comment

Prices

Need better posting of prices.
It is too expensive.
Expensive.

Restaurants

Needs more fast food restaurants.

Weather/Climate

Stop global warming.

Suggestions Comments Report 2008

Islands

Abaco

Commentcategories

Suggestioncomment

Airport

Enlarge airport building.

Development

No building on Guana Key.

Environment

You guys really need an environmental agency and more protection of your reefs and natural assets.

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