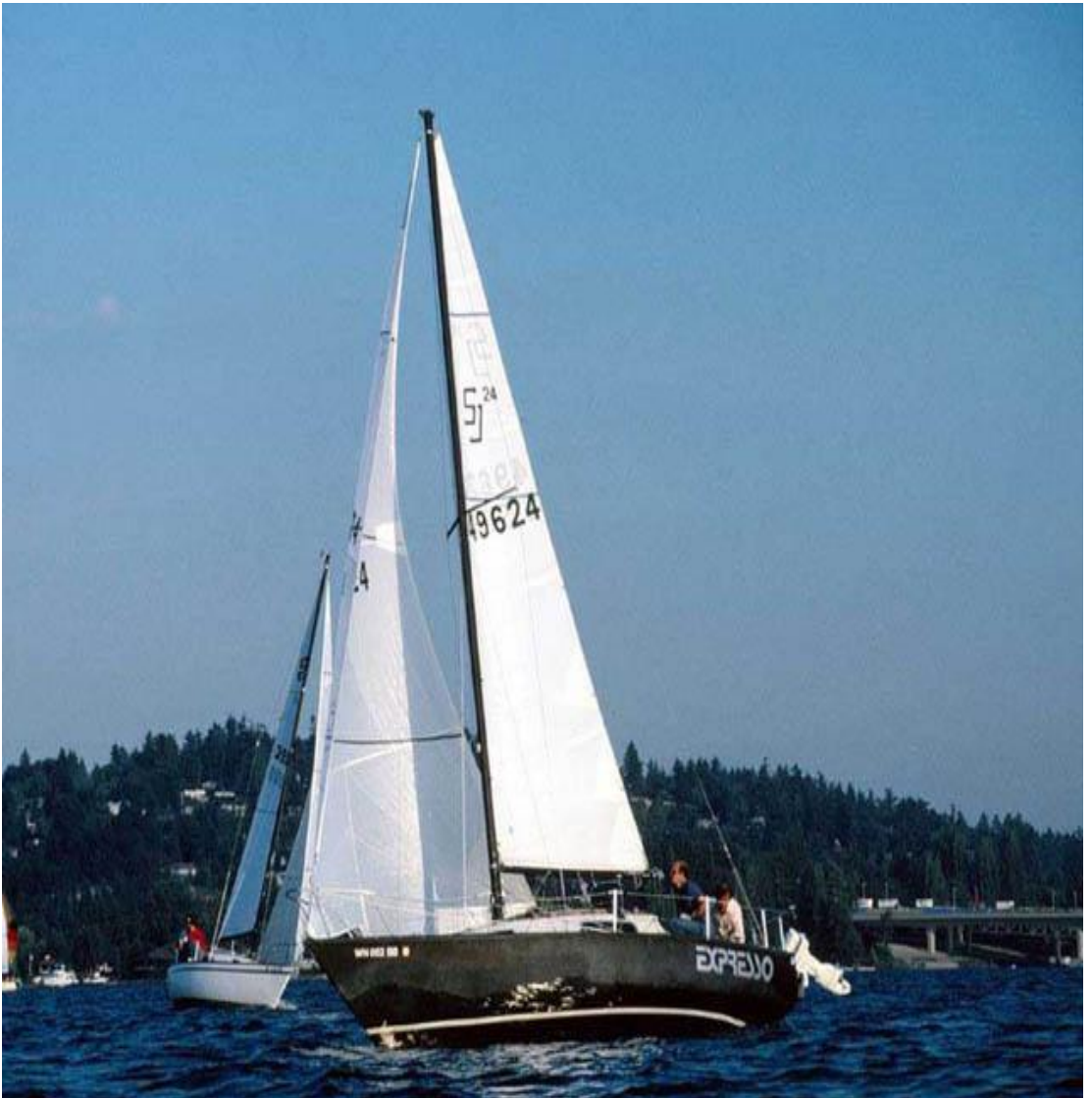


# ABACO



**RESEARCH AND STATISTICS DEPARTMENT  
MINISTRY OF TOURISM  
2013**

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.<sup>1</sup> 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.<sup>2</sup> 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.<sup>3</sup>

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.<sup>4</sup> 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 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.<sup>5</sup>

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<sup>1</sup> Jeritzan Outten-former Sr. Director, Abaco Tourist Office & [www.myoutislands.com/natural-vacations/abaco-attractions.cfm](http://www.myoutislands.com/natural-vacations/abaco-attractions.cfm)

<sup>2</sup> Jeritzan Outten- former Sr. Director, Abaco Tourist Office

<sup>3</sup> [www.myoutislands.com/natural-vacations/abaco-attractions.cfm](http://www.myoutislands.com/natural-vacations/abaco-attractions.cfm)

<sup>4</sup> [www.myoutislands.com/natural-vacations/abaco-attractions.cfm](http://www.myoutislands.com/natural-vacations/abaco-attractions.cfm)

<sup>5</sup> Jeritzan Outten- former Sr. Director, Abaco Tourist Office & [www.myoutislands.com/natural-vacations/abaco-attractions.cfm](http://www.myoutislands.com/natural-vacations/abaco-attractions.cfm)

## 1. Why Did Stopover Visitors Come to Abaco?

- Approximately three in every four (74%) stopover visitors came to Abaco for a vacation;
- Approximately one in ten (9%) stopovers came to visit friends & relatives;
- 4% of them came to attend a wedding;
- 3% of them came on a business trip;
- 2% of them came on a honeymoon and 0.3% to get married.

## 2. What Influenced Stopover Visitors to Visit Abaco?

### TOP INFLUENCES FOR DECIDING TO VISIT THE BAHAMAS ISLANDS OF THE BAHAMAS 2013

|                           | Bahamas | Nassau/P.I. | Grand Bahama | Out Islands | <i>Abaco</i> |
|---------------------------|---------|-------------|--------------|-------------|--------------|
| Beaches                   | 64%     | 63%         | 65%          | 67%         | 63%          |
| Climate                   | 55%     | 57%         | 52%          | 52%         | 49%          |
| Rest and Relaxation       | 40%     | 38%         | 45%          | 44%         | 44%          |
| Friendly People           | 29%     | 27%         | 27%          | 35%         | 37%          |
| Safety of Islands         | 18%     | 16%         | 15%          | 24%         | 23%          |
| Had Friends in Bah.       | 9%      | 8%          | 11%          | 14%         | 23%          |
| Exotic Islands            | 13%     | 12%         | 10%          | 21%         | 21%          |
| Sports                    | 10%     | 6%          | 12%          | 21%         | 21%          |
| Friend recommended Bah.   | 11%     | 10%         | 9%           | 14%         | 18%          |
| Easy to Get to            | 22%     | 22%         | 23%          | 20%         | 17%          |
| Never Been Here Before    | 21%     | 21%         | 25%          | 20%         | 16%          |
| Other                     | 10%     | 10%         | 11%          | 8%          | 8%           |
| Heard a lot about Bahamas | 9%      | 9%          | 8%           | 9%          | 8%           |
| Best Value for Money      | 8%      | 8%          | 13%          | 6%          | 5%           |
| Hotel Facilities          | 23%     | 27%         | 14%          | 17%         | 4%           |
| Nightlife                 | 4%      | 5%          | 3%           | 2%          | 3%           |
| Shopping                  | 4%      | 5%          | 4%           | 2%          | 2%           |
| Good Package Deals        | 13%     | 14%         | 16%          | 8%          | 2%           |
| Bahamas Website           | 2%      | 2%          | 2%           | 2%          | 1%           |
| Travel Agent/TO           | 5%      | 5%          | 2%           | 5%          | 1%           |
| Saw Ad on TV              | 2%      | 3%          | 0%           | 1%          | 1%           |
| Saw Ad in Magazine        | 1%      | 1%          | 1%           | 1%          | 0%           |
| Casinos                   | 9%      | 13%         | 4%           | 1%          | 0%           |

Source: Tour Operator and Media Exit Survey 2013, Research and Statistics Dept. Ministry of Tourism

- Roughly six in ten (63%) stopover visitors to Abaco were influenced to visit the Bahamas because of the beaches and approximately half (49%) of them were influenced to visit by the climate;
- Roughly four in ten (44%) stopovers were influenced to visit by the rest and relaxation that they expected to enjoy in Abaco and roughly four in ten (37%) were influenced to visit because of the friendly people;
- Roughly two in ten stopovers were influenced to visit by the perceived safety of the island (23%) and/or because they had friends (23%) in Abaco;
- Approximately two in ten stopovers were influenced to visit by the sporting activities (21%, e.g. snorkeling, sailing, diving etc.) available in Abaco; the perception that the Abacos were exotic (21%), the fact that friends had recommended it (18%) and it was easy to get to (17%).

### 3. What Activities Did Visitors Intend to Do While in Abaco?

#### ACTIVITIES VISITORS INTENDED TO DO ON THIS VISIT TO THE BAHAMAS ISLANDS OF THE BAHAMAS 2013

|                     | Bahamas | Nassau/P.I. | Grand Bahama | Out Islands | <i>Abaco</i> |
|---------------------|---------|-------------|--------------|-------------|--------------|
| Enjoy Beaches       | 84%     | 84%         | 84%          | 85%         | 84%          |
| Rest and Relax      | 73%     | 73%         | 74%          | 71%         | 74%          |
| Go Snorkeling       | 34%     | 29%         | 34%          | 51%         | 59%          |
| Shop                | 31%     | 34%         | 43%          | 17%         | 24%          |
| Go Sailing          | 8%      | 6%          | 6%           | 16%         | 22%          |
| Go Deep Sea Fishing | 5%      | 3%          | 6%           | 11%         | 17%          |
| Go on Island Tour   | 16%     | 14%         | 18%          | 20%         | 17%          |
| Go Diving           | 9%      | 6%          | 8%           | 19%         | 14%          |
| Go Bonefishing      | 5%      | 3%          | 4%           | 10%         | 8%           |
| Go Birdwatching     | 3%      | 2%          | 4%           | 4%          | 5%           |
| Other Activities    | 5%      | 5%          | 9%           | 5%          | 5%           |
| Go Golfing          | 5%      | 4%          | 4%           | 8%          | 5%           |
| Go to Casinos       | 19%     | 25%         | 16%          | 1%          | 1%           |
| Non Response        | 4%      | 4%          | 8%           | 4%          | 5%           |

Source: Tour Operator and Media Exit Survey 2013 Research and Statistics Dept., Ministry of Tourism

- Roughly eight in ten (84%) stopover visitors to Abaco intended to enjoy the beaches and roughly seven in ten (74%) intended to rest and relax;
- Sporting activities in the Abacos were of particular interest to visitors to the island chain. Approximately six in ten (59%) stopovers to Abaco wanted to go snorkeling. Roughly two in ten wanted to go sailing (22%) or deep sea fishing (17%) and one in every seven (14%) stopovers wanted to go diving. Other stopovers to Abaco wanted to do other sporting activities like go bonefishing (8%) and golfing (5%);
- Approximately one in four (24%) stopovers intended to go shopping;

### 4. When Did the Stopover Visitors to Abaco Make Their Reservations?

#### WHEN DID YOU MAKE YOUR RESERVATIONS STOPOVER VISITORS 2013

|                                   | All Bah. | Nassau/P.I. | Grand Bah. | Out Isl. | <i>Abaco</i> |
|-----------------------------------|----------|-------------|------------|----------|--------------|
| Same Week of Travel               | 7%       | 7%          | 6%         | 7%       | 7%           |
| Same Month of Travel              | 17%      | 18%         | 18%        | 13%      | 14%          |
| 1 to 3 Months Before Travel       | 47%      | 48%         | 47%        | 42%      | 44%          |
| 4 to 7 Months Before Travel       | 22%      | 21%         | 22%        | 25%      | 23%          |
| 8 to 12 Months Before Travel      | 5%       | 5%          | 4%         | 8%       | 7%           |
| More than 12 months Before Travel | 1%       | 1%          | 1%         | 2%       | 2%           |
| Non-Response                      | 2%       | 2%          | 2%         | 2%       | 3%           |

Source: Tour Operator and Media Exit Survey 2013, Research and Statistics, Dept Ministry of Tourism

- Stopover visitors to Abaco primarily booked their reservations anywhere from the same month of travel to seven months in advance of travel.

Approximately one in seven (14%) stopovers booked their reservations the month of travel. Roughly four in ten (44%) stopover visitors booked their reservations one to three months before travel and roughly two in ten (23%) stopovers booked four to seven months in advance of travel.

**5. Did Stopovers Use an Online Service to Book Their Reservations to Abaco?**

- Approximately seven in ten (70%) stopover visitors to Abaco used an online service to book some or all of their reservations.

**a) Which Online Services Were Used Most by Stopover Visitors to Abaco?**

**MOST POPULAR ONLINE BOOKING SERVICES USED**

**ABACO**

**2013**

|                             |                              |                        |
|-----------------------------|------------------------------|------------------------|
| Expedia.com                 | Aircanada.com                | Hotels.com             |
| United.com                  | Airjourney.com               | Hotwire.com            |
| Orbitz.com                  | Americanexpress.com          | Interturnet.com.br     |
| Aa.com                      | Angleradventures.com         | Itravel2000.com        |
| Bahamasair.com              | Atlantis.com                 | Jetblue.com            |
| Travelocity.com             | Carlsonwagonlit.com          | Onetravel.com          |
| Celebration-cruise-line.com | Cheapair.com                 | Opodo.com              |
| Cheapoair.com               | Cheapcaribbean.com           | Rci.com                |
| Moorings.com                | Cheapflights.com             | Spiritair.com          |
| Vrbo.com                    | Cheaptickets.com             | Sunsail.com            |
| Priceline.com               | Continental.com              | Tdtravelrewards.com    |
| Kayak.com                   | Delta.com/deltavacations.com | Trailfinders.com       |
| Bahamas.com                 | Frontierstravel.com          | Tui.com                |
| Watermakersair.com          | Gradcity.com                 | Usairwaysvacations.com |
| Ba.com/british airways.com  | Homeaway.com                 | Westjet.com            |

Some online services listed for Abaco were also used by visitors to book their reservations for Nassau and Grand Bahama because of the fact that some stopovers visited more than one destination during their visit. Online services with the yellow background were the top 15 and the other top online services are listed in alphabetical order. RBCtravelmanagement.com was also a popular online booking site for stopover visitors to Abaco. (Source: Immigration Cards and Tour Media Exit Survey, 2013).

**6. Did Stopover Visitors to Abaco Use a Tour Operator/Travel Agent to Book Any of Their Reservations?**

**ISLANDS OF THE BAHAMAS**

**USE OF TRAVEL AGENT**

**2013**

|                          | All Bah. | Nassau/P.I. | Grand Bahama | Out Islands | <i>Abaco</i> |
|--------------------------|----------|-------------|--------------|-------------|--------------|
| Used Travel Agent        | 29%      | 31%         | 22%          | 26%         | 10%          |
| Did Not Use Travel Agent | 70%      | 68%         | 76%          | 72%         | 87%          |

Source: Tour Operator and Media Exit Survey 2013, Research and Statistics, Dept Ministry of Tourism

- One in ten (10%) stopover visitors used a travel agent to book some or all of their reservations to Abaco. The percentage of stopovers who booked their reservations to Abaco using a tour operator/travel agent was low due to the fact that the island chain has a large repeat visitor rate. Many stopover visitors to Abaco already knew before they came how and where they wanted to book their reservations and did so online or directly.

- Some stopovers to Abaco who used tour operators/travel agents used the following: American Express Travel, AAA Travel, RCI Travel, Flight Center, Odessey Travel, Tzell Travel Group, VIP Travel, Classic Travel, Travel Leaders, Liberty Travel, Airtran, Marlin Travel and Pro Travel, etc.

## 7. What Electronic Media Did Stopover Visitors to Abaco Use Most When Planning Their Vacation?

- Roughly eight in ten (83%) stopover visitors to Abaco used the Internet as the electronic media most frequently used when planning their vacation.
- 6% of them used Network television, 4% of them used Specialty Cable Channels when planning their vacations and 3% used Specialty News Channels the most when planning their vacations.

## 8. What Were the Favorite TV Stations Watched by Stopovers to Abaco?

### TOP 15 FAVORITE TELEVISION STATIONS BY VISITORS ISLANDS OF THE BAHAMAS 2013

|    | <b>Bahamas</b>              | <b>%Informants</b> | <b>Abaco</b>                         | <b>%Informants</b> |
|----|-----------------------------|--------------------|--------------------------------------|--------------------|
| 1  | ESPN                        | 20%                | ESPN                                 | 23%                |
| 2  | NBC                         | 19%                | ABC                                  | 19%                |
| 3  | ABC                         | 18%                | NBC                                  | 18%                |
| 4  | CNN                         | 16%                | CNN                                  | 15%                |
| 5  | CBS                         | 15%                | CBS                                  | 14%                |
| 6  | FOX                         | 14%                | FOX                                  | 13%                |
| 7  | HBO                         | 12%                | FOXN                                 | 11%                |
| 8  | HGTV(Home & Garden Network) | 10%                | HBO                                  | 11%                |
| 9  | DISC (Discovery Channel)    | 8%                 | HGTV (Home & Garden Network)         | 8%                 |
| 10 | TNT                         | 8%                 | DISC (Discovery Channel)             | 8%                 |
| 11 | FOXN                        | 7%                 | FOOD (Food Network)                  | 7%                 |
| 12 | FOOD (Food Network)         | 6%                 | BRAVO                                | 7%                 |
| 13 | USA                         | 6%                 | USA                                  | 4%                 |
| 14 | HIST (History Channel)      | 6%                 | MSNBC                                | 4%                 |
| 15 | BRAVO                       | 5%                 | HIST(History Channel)                | 4%                 |
|    | <b>Nassau/P.I.</b>          | <b>%Informants</b> | <b>Grand Bahama</b>                  | <b>%Informants</b> |
| 1  | NBC                         | 19%                | ABC                                  | 20%                |
| 2  | ESPN                        | 19%                | NBC                                  | 19%                |
| 3  | ABC                         | 18%                | ESPN                                 | 18%                |
| 4  | CNN                         | 16%                | CNN                                  | 16%                |
| 5  | CBS                         | 15%                | CBS                                  | 14%                |
| 6  | FOX                         | 15%                | HBO                                  | 13%                |
| 7  | HBO                         | 12%                | HGTV (Home & Garden Network)         | 11%                |
| 8  | HGTV(Home & Garden Network) | 10%                | FOX                                  | 11%                |
| 9  | TNT                         | 9%                 | USA                                  | 8%                 |
| 10 | DISC (Discovery Channel)    | 7%                 | DISC (Discovery Channel)             | 8%                 |
| 11 | FOXN                        | 6%                 | FOXN                                 | 7%                 |
| 12 | HIST (History Channel)      | 6%                 | TWC (The Weather Channel)            | 6%                 |
| 13 | FOOD (Food Network)         | 6%                 | TNT                                  | 6%                 |
| 14 | TLC (The Learning Channel)  | 6%                 | A & E (Arts & Entertainment Network) | 6%                 |
| 15 | USA                         | 5%                 | LIFE (Lifetime)                      | 5%                 |

Source: Tour Operator and Media Exit Survey 2013. Percentages based on informants who watched TV.

- Approximately two in ten stopovers watched ESPN (23%), ABC (19%), and NBC (18%). Roughly one in seven stopovers watched CNN (15%), CBS (14%) and FOX (13%).

## **9. What Time Were Stopover Visitors Most Likely to Watch Television?**

- Stopover visitors to Abaco were most likely to watch television between the hours of 7:00 am to 8:59 am and 6:00 pm to 10:59 pm at night. The hours of 8:00 pm to 8:59 pm were of course the most popular time and roughly one-half (47%) of stopovers watched television during that time.

## **10. Did Stopover Visitors Use Print Media When They Were Planning Their Vacations?**

- Approximately two in ten (22%) stopover visitors to Abaco used print media when they were planning their vacations. Of the stopover visitors to Abaco who used print media to plan their vacations, roughly one half (46%) used newspapers and approximately seven in ten (72%) used magazines.

## 11. Use of Newspapers

### TOP 20 FAVORITE NEWSPAPERS READ BY VISITORS ISLANDS OF THE BAHAMAS 2013

|    | <b>Bahamas</b>               | <b>% Informants</b> | <b><i>Abaco</i></b>                 | <b>% Informants</b> |
|----|------------------------------|---------------------|-------------------------------------|---------------------|
| 1  | <b>USA Today</b>             | <b>30%</b>          | <b>New York Times</b>               | <b>33%</b>          |
| 2  | <b>New York Times</b>        | <b>25%</b>          | <b>USA Today</b>                    | <b>32%</b>          |
| 3  | <b>Wall Street Journal</b>   | <b>17%</b>          | <b>Wall Street Journal</b>          | <b>29%</b>          |
| 4  | <b>Washington Post</b>       | <b>6%</b>           | <b>Washington Post</b>              | <b>6%</b>           |
| 5  | <b>Daily News</b>            | <b>6%</b>           | <b>Miami Herald</b>                 | <b>6%</b>           |
| 6  | <b>New York Post</b>         | <b>6%</b>           | <b>Atlanta Journal Constitution</b> | <b>4%</b>           |
| 7  | Toronto Star                 | 5%                  | New York Post                       | 4%                  |
| 8  | Globe & Mail                 | 5%                  | Palm Beach Post                     | 4%                  |
| 9  | Boston Globe                 | 4%                  | Orlando Sentinel                    | 3%                  |
| 10 | Times                        | 3%                  | Sun Sentinel                        | 3%                  |
| 11 | Local                        | 3%                  | Globe & Mail                        | 3%                  |
| 12 | Miami Herald                 | 3%                  | Boston Globe                        | 3%                  |
| 13 | New York Daily News          | 3%                  | Daily News                          | 3%                  |
| 14 | Newsday                      | 2%                  | Denver Post                         | 2%                  |
| 15 | Chicago Tribune              | 2%                  | Abaconian                           | 2%                  |
| 16 | Atlanta Journal Constitution | 2%                  | Chicago Tribune                     | 2%                  |
| 17 | Orlando Sentinel             | 1%                  | Times                               | 2%                  |
| 18 | Dallas Morning News          | 1%                  | Toronto Star                        | 2%                  |
| 19 | Sun/The Sun News             | 1%                  | Local                               | 1%                  |
| 20 | Denver Post                  | 1%                  | New York Daily News                 | 1%                  |
|    | <b>Nassau/P.I.</b>           | <b>% Informants</b> | <b>Grand Bahama</b>                 | <b>% Informants</b> |
| 1  | <b>USA Today</b>             | <b>31%</b>          | <b>USA Today</b>                    | <b>27%</b>          |
| 2  | <b>New York Times</b>        | <b>23%</b>          | <b>New York Times</b>               | <b>23%</b>          |
| 3  | <b>Wall Street Journal</b>   | <b>16%</b>          | <b>Wall Street Journal</b>          | <b>14%</b>          |
| 4  | <b>New York Post</b>         | <b>6%</b>           | <b>Boston Globe</b>                 | <b>7%</b>           |
| 5  | <b>Daily News</b>            | <b>6%</b>           | <b>Local</b>                        | <b>6%</b>           |
| 6  | <b>Toronto Star</b>          | <b>6%</b>           | <b>Daily News</b>                   | <b>6%</b>           |
| 7  | Washington Post              | 6%                  | Washington Post                     | 5%                  |
| 8  | Globe & Mail                 | 6%                  | Miami Herald                        | 4%                  |
| 9  | Times                        | 4%                  | New York Daily News                 | 4%                  |
| 10 | Boston Globe                 | 4%                  | Toronto Star                        | 4%                  |
| 11 | Local                        | 3%                  | Globe & Mail                        | 4%                  |
| 12 | Newsday                      | 3%                  | Times                               | 2%                  |
| 13 | New York Daily News          | 3%                  | New York Post                       | 2%                  |
| 14 | Chicago Tribune              | 2%                  | Sun Sentinel                        | 2%                  |
| 15 | Miami Herald                 | 2%                  | Denver Post                         | 2%                  |
| 16 | Atlanta Journal Constitution | 1%                  | Sun/The Sun News                    | 2%                  |
| 17 | Orlando Sentinel             | 1%                  | Newsday                             | 2%                  |
| 18 | Post                         | 1%                  | Chicago Tribune                     | 2%                  |
| 19 | Sun/The Sun News             | 1%                  | Dallas Morning News                 | 2%                  |
| 20 | Dallas Morning News          | 1%                  | Atlanta Journal Constitution        | 1%                  |

Source: Tour Operator and Media Exit Survey 2013. Percentages based on informants who read newspapers.

- Although only 22% of stopover visitors to Abaco used print media when planning their vacations, approximately six in ten (58%) stopovers read newspapers for their personal enjoyment and edification.
- One in every three stopovers to Abaco read the New York Times (33%), USA Today (32%) or the Wall Street Journal (29%).



## 12. Use of Magazines

- Although only 22% of stopover visitors to Abaco used print media when planning their vacations approximately two in three (65%) stopovers read magazines for their enjoyment or personal edification.

**TOP 20 FAVORITE MAGAZINES READ BY VISITORS  
ISLANDS OF THE BAHAMAS  
2013**

|    | <b>Bahamas</b>                          | <b>%Informants</b> | <b>Abaco</b>                            | <b>%Informants</b> |
|----|---|--------------------|---|--------------------|
| 1  | <b>People</b>                           | <b>22%</b>         | <b>People</b>                           | <b>19%</b>         |
| 2  | <b>Better Homes &amp; Gardens (BHG)</b> | <b>16%</b>         | <b>Better Homes &amp; Gardens (BHG)</b> | <b>16%</b>         |
| 3  | <b>Good Housekeeping</b>                | <b>12%</b>         | <b>National Geographic (Explorer)</b>   | <b>14%</b>         |
| 4  | <b>In Style</b>                         | <b>11%</b>         | <b>Bon Appetit</b>                      | <b>13%</b>         |
| 5  | <b>Cosmopolitan (Cosmo)</b>             | <b>10%</b>         | <b>Food &amp; Wine</b>                  | <b>13%</b>         |
| 6  | <b>National Geographic (Explorer)</b>   | <b>10%</b>         | <b>Coastal</b>                          | <b>12%</b>         |
| 7  | Food & Wine                             | 10%                | In Style                                | 12%                |
| 8  | O (Oprah)                               | 9%                 | Southern Living                         | 11%                |
| 9  | Glamour                                 | 9%                 | Architectural Digest                    | 11%                |
| 10 | Bon Appetit                             | 9%                 | Conde Nast Travel                       | 11%                |
| 11 | Men's Health                            | 9%                 | Men's Health                            | 10%                |
| 12 | Time Magazine                           | 8%                 | Glamour                                 | 9%                 |
| 13 | Sports Illustrated                      | 8%                 | Sports Illustrated                      | 9%                 |
| 14 | Architectural Digest                    | 7%                 | Good Housekeeping                       | 8%                 |
| 15 | Travel & Leisure                        | 7%                 | Time Magazine                           | 8%                 |
| 16 | Economist                               | 7%                 | Cosmopolitan (Cosmo)                    | 8%                 |
| 17 | Conde Nast Travel                       | 7%                 | Economist                               | 7%                 |
| 18 | Southern Living                         | 6%                 | Real Simple                             | 7%                 |
| 19 | Golf Digest                             | 6%                 | New Yorker                              | 6%                 |
| 20 | Reader's Digest                         | 6%                 | Golf Digest                             | 6%                 |
|    | <b>Nassau/P.I.</b>                      | <b>%Informants</b> | <b>Grand Bahama</b>                     | <b>%Informants</b> |
| 1  | <b>People</b>                           | <b>22%</b>         | <b>People</b>                           | <b>21%</b>         |
| 2  | <b>Better Homes &amp; Gardens (BHG)</b> | <b>16%</b>         | <b>Better Homes &amp; Gardens (BHG)</b> | <b>20%</b>         |
| 3  | <b>Good Housekeeping</b>                | <b>13%</b>         | <b>Good Housekeeping</b>                | <b>15%</b>         |
| 4  | <b>In Style</b>                         | <b>11%</b>         | <b>Food &amp; Wine</b>                  | <b>11%</b>         |
| 5  | <b>Cosmopolitan (Cosmo)</b>             | <b>11%</b>         | <b>National Geographic (Explorer)</b>   | <b>11%</b>         |
| 6  | <b>O (Oprah)</b>                        | <b>10%</b>         | <b>Travel &amp; Leisure</b>             | <b>10%</b>         |
| 7  | National Geographic (Explorer)          | 9%                 | In Style                                | 10%                |
| 8  | Glamour                                 | 9%                 | Cosmopolitan (Cosmo)                    | 9%                 |
| 9  | Food & Wine                             | 9%                 | Time Magazine                           | 9%                 |
| 10 | Bon Appetit                             | 8%                 | O (Oprah)                               | 9%                 |
| 11 | Sports Illustrated                      | 8%                 | Ebony                                   | 8%                 |
| 12 | Men's Health                            | 8%                 | Bon Appetit                             | 8%                 |
| 13 | Architectural Digest                    | 7%                 | Glamour                                 | 8%                 |
| 14 | Time Magazine                           | 7%                 | Men's Health                            | 8%                 |
| 15 | Economist                               | 7%                 | Essence                                 | 7%                 |
| 16 | Travel & Leisure                        | 6%                 | Reader's Digest                         | 7%                 |
| 17 | Reader's Digest                         | 6%                 | Conde Nast Travel                       | 6%                 |
| 18 | Conde Nast Travel                       | 5%                 | Woman's Day                             | 6%                 |
| 19 | Forbes                                  | 5%                 | Southern Living                         | 6%                 |
| 20 | Vogue/Vogue Living                      | 5%                 | Architectural Digest                    | 6%                 |

Source: Tour Operator and Media Exit Survey 2013, Research and Statistics Dept. Ministry of Tourism  
Percentages based on informants who read magazines.

- Approximately two in ten (19%) stopovers to Abaco read People magazine and one in six (16%) read Better Homes & Gardens.
- Approximately one in seven (14%) stopovers read National Geographic Explorer and one in eight stopovers to Abaco read Bon Appetit (13%), Food & Wine (13%), Coastal (12%) and In Style (12%).

### 13. What Were the Top Compliments & Complaints Given by Visitors to Abaco?

#### TOURIST COMMENTS POSITIVE VS. NEGATIVE COMMENTS ABACO

| TOP 6 COMPLIMENTS                |            |            | TOP 6 COMPLAINTS       |            |            |
|----------------------------------|------------|------------|------------------------|------------|------------|
|                                  | 2013       | 2012       |                        | 2013       | 2012       |
| General Positive                 | 39%        | 42%        | Prices (neg)           | 16%        | 19%        |
| People                           | 19%        | 22%        | Airport (neg)          | 12%        | 2%         |
| Will Return/Can't wait to return | 7%         | n/a        | Litter (neg)           | 9%         | 3%         |
| Scenery/Sightseeing              | 7%         | 8%         | Airlines (neg)         | 8%         | 8%         |
| Beaches                          | 4%         | 5%         | Food (neg)             | 6%         | 10%        |
| Sea/Water                        | 3%         | 3%         | General (neg)          | 6%         | 6%         |
| <b>No. of Comments</b>           | <b>459</b> | <b>350</b> | <b>No. of Comments</b> | <b>147</b> | <b>115</b> |

Source: Tour Operator and Media Exit Survey, 2013. The 7th top compliment was boating/yachting in Abaco.

- Approximately one in every six (16%) complaints received from stopover visitors to Abaco were about the high prices in the island destination. High prices was the number one complaint made by stopover visitors to Abaco, i.e., services too expensive, taxi expensive, etc.;
- Approximately one in every eight (12%) complaints made by stopovers were about the airports in Abaco, i.e., Marsh Harbour Airport is a disaster, airport needs improvement, airport confusing, airport taxes are out of control, airport customs is unorganized, airport is too small, etc.;
- Approximately one in every 11 (9%) complaints made by stopovers was about litter;
- Approximately one in every ten (8%) complaints made by stopovers was about the Airlines flying into Abaco, i.e. airlines/airfare too expensive, canceled flights, lack of flights into Abaco;
- Approximately one in every sixteen (6%) complaints made by stopovers was about the food, i.e., food was expensive, food not good/mediocre.

### 14. How Did Stopover Visitors Rate Their Product Experiences?

#### PRODUCT SATISFACTION RATINGS 2013

| Rating Area               | Much Better or Better |              |              |             |            | Not as Good or Worse |              |              |             |           |
|---------------------------|-----------------------|--------------|--------------|-------------|------------|----------------------|--------------|--------------|-------------|-----------|
|                           | The Bah.              | Nassau/ P.I. | Grand Bahama | Out Islands | Abaco      | The Bah.             | Nassau/ P.I. | Grand Bahama | Out Islands | Abaco     |
| Attitude of People        | 68%                   | 67%          | 67%          | 73%         | 68%        | 6%                   | 7%           | 6%           | 3%          | 2%        |
| Beaches                   | 63%                   | 60%          | 66%          | 70%         | 66%        | 3%                   | 4%           | 3%           | 2%          | 2%        |
| Climate                   | 56%                   | 56%          | 51%          | 58%         | 54%        | 6%                   | 6%           | 8%           | 6%          | 6%        |
| Food in Restaurants       | 47%                   | 47%          | 44%          | 50%         | 54%        | 8%                   | 8%           | 10%          | 7%          | 6%        |
| Restaurant Service        | 47%                   | 48%          | 42%          | 46%         | 46%        | 9%                   | 8%           | 11%          | 7%          | 8%        |
| Overall Value for Money   | 33%                   | 32%          | 36%          | 38%         | 32%        | 15%                  | 16%          | 12%          | 11%         | 13%       |
| Easy to Get to            | 41%                   | 43%          | 40%          | 38%         | 30%        | 7%                   | 6%           | 7%           | 9%          | 10%       |
| Hotel Rooms               | 38%                   | 39%          | 30%          | 36%         | 21%        | 11%                  | 12%          | 14%          | 4%          | 3%        |
| Hotel Service             | 44%                   | 47%          | 38%          | 39%         | 20%        | 8%                   | 9%           | 11%          | 4%          | 2%        |
| Food in Hotels            | 37%                   | 39%          | 28%          | 35%         | 20%        | 12%                  | 13%          | 16%          | 6%          | 4%        |
| Value for Money in Hotels | 26%                   | 26%          | 28%          | 26%         | 13%        | 16%                  | 19%          | 13%          | 7%          | 5%        |
| <b>Bahamas Overall</b>    | <b>63%</b>            | <b>61%</b>   | <b>60%</b>   | <b>68%</b>  | <b>66%</b> | <b>4%</b>            | <b>4%</b>    | <b>5%</b>    | <b>2%</b>   | <b>2%</b> |

Research & Statistics Dept., Ministry of Tourism, includes cruise stopover visitors e.g. Bah. Celebration & Baleria Bah. Express in GBI

Source: Tour Operator and Media Exit Survey 2013

- Attitude of the people received the highest rating of the 12 product ratings asked of stopover visitors to Abaco. Approximately seven in ten (68%) stopovers thought that the attitude of the people was much better or better than expected and 2% of them thought that it was not as good as or much worse than expected;
- Approximately two in every ten stopovers thought that the hotel rooms (21%), hotel service (20%) and the hotel food (20%) were much better or better than expected but some stopovers thought that the hotel rooms (3%), hotel service (2%) and hotel food (4%) were not as good as or worse than expected;
- Abaco like many islands in The Bahamas did have a problem with providing overall value for money to stopover visitors. Approximately one in every eight (13%) stopovers to Abaco thought that the overall value for money in the island was not as good as or worse than they had expected it to be. One in every 20 (5%) stopovers thought that the value for money in hotels was not as good as or worse than they had expected it to be.

### **15. How Did Stopover Visitors to Abaco Get There?**

- Approximately seven in ten (68%) stopover visitors to Abaco travelled to Abaco via a commercial airline.
- Two in ten (20%) stopovers travelled to the island destination via a private plane and 7% by a yacht/private boat.

### **16. Where Did Visitors to Abaco Stay While There?**

- Approximately three in ten stopovers to Abaco stayed in a hotel (32%) or in an apt/villa (28%) and approximately one in every six (16%) stopovers stayed on a private boat/yacht. Approximately one in ten stopovers stayed in their own property (8%) or with friends or relatives (8%).

### **17. Which Stopover Visitors to Abaco Tended to Stay the Longest?**

- Stopovers from Africa stayed 25.0 nights;
- On average, stopovers from the region known as Australasia stayed 23.7 nights;
- Stopover visitors from Asia stayed 22.9 nights;
- Stopovers from Canada stayed an average of 16.6 nights;
- Stopover visitors from Europe stayed 15.8 nights;
- Stopovers from the Caribbean stayed an average 13.5 nights, those from the United States 9.5 nights and those from Latin America stayed an average 8.9 nights.
- Stopover visitors to Abaco on average stayed 10.1 nights.

### **18. What Were the Busiest Months for Stopover Visitors to Abaco?**

- Although stopover visitors visit Abaco all year round, the busiest months are normally between the months of March to July. The summer months of June and July are normally the busiest months for Abaco but sometimes the month of March falls within the top two months of the year like in 2013.

## 19. What Were the Slowest Months for Stopover Visitors to Abaco?

- The slowest months for stopover visitors to visit Abaco were normally September and October. It is not unusual for some hotel properties to close during these months.

## 20. How Many Stopover Visitors Did Abaco Receive and Where Did They Come From (2013)?

- In total, Abaco received 91,804 stopover visitors.

**United States:** 90% (82,777) of the stopover visitors came from the United States. Stopovers to Abaco from the United States primarily came from the states of Florida (39%), Georgia (5%), Texas (5%), New York (4%), South Carolina (4%), California (4%) and North Carolina (3%).

**Canada:** 4% (3,734) of the stopover visitors came from Canada. Stopovers to Abaco from Canada primarily came from the Canadian Provinces of Ontario (44% of them), Quebec (13%), Alberta (8%), and British Columbia (7%).

**Europe:** 3% (2,998) of the stopover visitors came from Europe. Stopovers to Abaco from Europe primarily came from the UK (35% of them), Germany (15%), France (13%), Switzerland (6%), Italy (5%) and Austria (5%).

**Latin America:** 0.5% (498) of the stopover visitors came from Latin America. Stopover Visitors to Abaco from Latin America primarily came from Mexico (21%), Brazil (17%), Colombia (13%), Argentina (12%), Chile (11%) and Venezuela (7% of them).

**DEMOGRAPHIC & PSYCHOGRAPHIC PROFILE**  
**ISLANDS OF THE BAHAMAS**  
**2013**

|   | <b>Abaco</b> | <b>All Bah.</b> |
|---|--------------|-----------------|
| <b>MAIN PURPOSE OF VISIT</b>              |              |                 |
| Vacation                                  | 74%          | 73%             |
| Visiting friends and relatives            | 9%           | 5%              |
| Other                                     | 3%           | 3%              |
| Business                                  | 3%           | 6%              |
| Honeymoon                                 | 2%           | 4%              |
| <b>DECISION TO VISIT INFLUENCED BY:</b>   |              |                 |
| Beaches                                   | 63%          | 64%             |
| Climate                                   | 49%          | 55%             |
| Rest and Relaxation                       | 44%          | 40%             |
| Friendly People                           | 37%          | 29%             |
| Safety of the Islands                     | 23%          | 18%             |
| Exotic Islands                            | 21%          | 13%             |
| Sports                                    | 21%          | 10%             |
| <b>ACTIVITIES VISITORS INTENDED TO DO</b> |              |                 |
| Enjoy Beaches                             | 84%          | 84%             |
| Rest and Relax                            | 74%          | 73%             |
| Go Snorkeling                             | 59%          | 34%             |
| Shop                                      | 24%          | 31%             |
| Go Sailing                                | 22%          | 8%              |
| Go Deep Sea Fishing                       | 17%          | 5%              |
| Go on Island Tour                         | 17%          | 16%             |
| Go Diving                                 | 14%          | 9%              |
| <b>LIKELY RETURN IN 1-5 YEARS</b>         | <b>93%</b>   | <b>89%</b>      |
| <b>LIKELY RECOMMEND TO FRIENDS/REL</b>    | <b>97%</b>   | <b>94%</b>      |
| <b>USED ONLINE SERVICE</b>                | <b>70%</b>   | <b>66%</b>      |
| <b>USED TRAVEL AGENT</b>                  | <b>10%</b>   | <b>29%</b>      |
| <b>AGE*</b>                               |              |                 |
| 25 - 54 years old                         | 45%          | 53%             |
| 55 years old or older                     | 34%          | 23%             |
| <b>SEX*</b>                               |              |                 |
| Male                                      | 54%          | 49%             |
| Female                                    | 43%          | 48%             |
| <b>RACE</b>                               |              |                 |
| White                                     | 91%          | 82%             |
| Black                                     | 1%           | 6%              |
| Hispanic                                  | 3%           | 5%              |
| Mixed Race/Mixed Heritage                 | 2%           | 3%              |
| Asian/Pacific Islander                    | 1%           | 2%              |
| American Indian/Alaska Native             | 0%           | 1%              |
| Other                                     | 0%           | 1%              |
| <b>EDUCATION</b>                          |              |                 |
| College Graduate or Above                 | 70%          | 69%             |

**DEMOGRAPHIC & PSYCHOGRAPHIC PROFILE  
ISLANDS OF THE BAHAMAS  
2013**

|                                | <b>Abaco</b> | <b>All Bah.</b> |
|--------------------------------|--------------|-----------------|
| <b>ANNUAL HOUSEHOLD INCOME</b> |              |                 |
| \$25,001 to \$50,000           | 7%           | 8%              |
| \$50,001 to \$75,000           | 8%           | 9%              |
| \$75,001 or more               | 60%          | 58%             |
| <b>PREVIOUS VISITS</b>         |              |                 |
| First Time Visitor             | 27%          | 41%             |
| Repeat Visitor                 | 72%          | 58%             |
| <b>TRAVELLING PARTY SIZE</b>   |              |                 |
| One                            | 16%          | 17%             |
| Two                            | 29%          | 45%             |
| Three or more                  | 50%          | 34%             |
| <b>HOUSEHOLD SIZE</b>          |              |                 |
| One                            | 14%          | 12%             |
| Two                            | 43%          | 43%             |
| Three-Four                     | 30%          | 33%             |
| <b>COUNTRY OF ORIGIN</b>       |              |                 |
| USA                            | 90%          | 78%             |
| Canada                         | 4%           | 9%              |
| Europe                         | 3%           | 6%              |
| Other Countries                | 3%           | 7%              |
| <b>AVERAGE LENGTH OF STAY</b>  | 10.1 nts.    | 6.8 nts.        |

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

\*Source: Tour Operator & Media Exit Study 2013. Some rounding may have occurred

Information in this brochure is based on the Tour Operator & Media Exit Survey 2013, Immigration Card, The Bahamas Tourist Office Abaco, and myoutislands.com.



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