

THE BAHAMAS

Visitor Arrival Summary

By the end of 2004, 1,561.3 thousand tourists had stay in the Bahamas. Arrivals had grown by 3.4 percent when compared to 2003. The year commenced with increase levels of tourist up to July, with the YTD performance showing arrivals up by 13.3 percent. In the following months, arrivals plummeted especially on the island of Grand Bahama due to the impact by two significant hurricanes, Francis and Jeanne.

- ◆ Air Arrivals from the both the United States and Canada markets grew and had an marginal increases in market share during 2004. In the USA market, arrivals accounted for 87.2 percent of the total and grew by 4.3 percent where as the Canadian market expanded by 8.4 percent while representing 4.4 percent of the total arrivals. Last year's best performing market, Europe, although it is small was this year worst. Arrivals dropped by 10.3 percent. The ROW has a relatively flat performance.
- ◆ While tourist arrivals have been declining, Cruise passenger arrivals have been performing well. For the fifth consecutive year, cruise passengers increased, 13.1 percent or some 390.0 thousand cruise passengers arrived at this destination in 2004 than in 2003. The total for the year was 3,360.0 thousand arriving in 2,068 cruise ship calls.

TOURISM HIGHLIGHTS FOR 2004

VISITOR ARRIVALS			
Tourist Arrivals ➔	1,561,312	Cruise Passenger Arrivals	3,360,012
➔ <i>Winter</i>	40.0%	➔ <i>Winter</i>	38.6%
➔ <i>Summer</i>	60.0%	➔ <i>Summer</i>	61.4%
Same Day Visitors	86,291	Cruise Ship Calls	2,068
VISITOR PROFILE			
Average Length of Stay (<i>nights</i>)	6.3	Tourist Arrivals by Place of Stay	
Tourist Arrivals by Purpose of Visit		➔ <i>Hotels</i>	73.8%
➔ <i>Holiday</i>	89.1%	➔ <i>Guest Houses/Apartments</i>	11.3%
➔ <i>Business</i>	9.5%	➔ <i>Private</i>	4.6%
➔ <i>Other</i>	1.4%	➔ <i>Other</i>	10.3%
TOURISM AND OTHER RELATED ECONOMIC STATISTICS			
Total Expenditure (<i>US\$ millions</i>)	\$1,884.5	GDP at Market Prices (<i>US\$ million</i>) ¹	\$5,260.0
Cruise Expenditure (<i>US\$ millions</i>)	\$185.8	Consumer Price Index (<i>%ch. 2004/'03</i>)	1.7%
Tourism Budget (<i>US\$ thousands</i>)	\$67,150		
ACCOMMODATION STATISTICS		SOCIO-ECONOMIC STATISTICS	
Rooms	15,508	Land Area (<i>square Kilometres</i>)	13,864
Room Occupancy Rates	65.1%	Population (<i>thousand mid year 2004</i>)	320.7

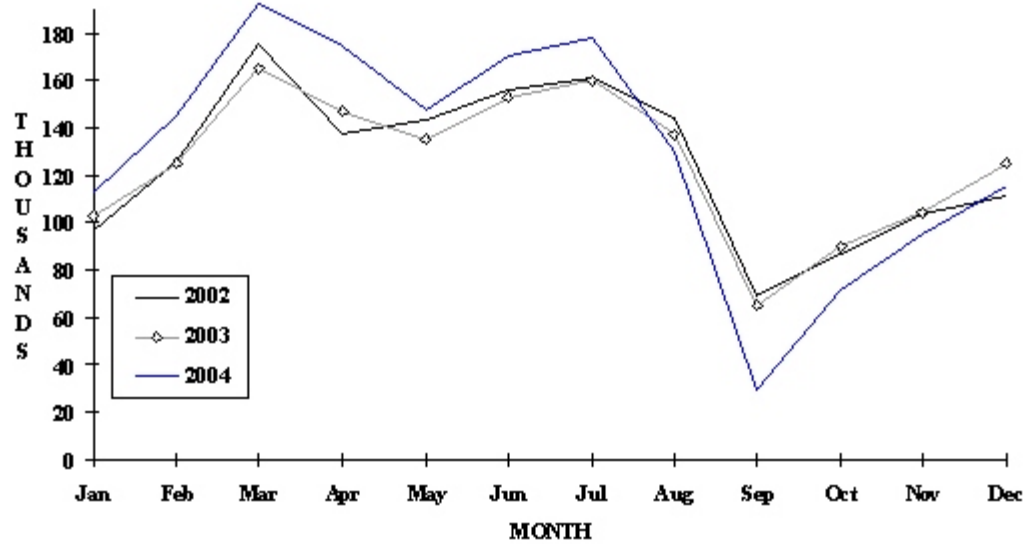
THE BAHAMAS

TOURIST ARRIVALS BY MAIN MARKETS

2004



MONTHLY TOURIST ARRIVALS



BAHAMAS

VISITOR ARRIVALS BY CATEGORY

Category	2000	2001	2002	2003	2004
Tourists	1543959	1537780	1513151	1510169	1561312
Cruise Passenger	2512626	2551673	2802112	2970174	3360012
Day Visitors	n.a	n.a	n.a	83921	86291
TOTAL	n.a	n.a	n.a	4564264	5007615

TOURIST ARRIVALS BY COUNTRY OF RESIDENCE

Country of Residence	2000	2001	2002	2003	2004	% Share 2004
United States	1294295	1308163	1310140	1305335	1360912	87.2
Canada	82840	79715	68592	63148	68462	4.4
Europe	104611	94047	79564	93170	83590	5.4
Rest of the World	62213	55855	54855	48516	48348	3.1
TOTAL	1543959	1537780	1513151	1510169	1561312	100.0

MONTHLY TOURIST ARRIVALS

Months	2000	2001	2002	2003	2004	% Change 2004/03
January	105024	113178	97425	102975	112604	9.4
February	126832	136503	125600	125034	144852	15.9
March	171887	178906	175662	165072	192455	16.6
April	151245	165381	138170	147212	174192	18.3
May	147653	147296	143818	135289	147997	9.4
June	157884	167865	155851	152797	170018	11.3
July	164725	169936	161545	160088	177872	11.1
August	123760	151620	144006	137445	129714	-5.6
September	82378	56549	69559	64981	28933	-55.5
October	85823	69335	86289	89782	71710	-20.1
November	108391	86640	103521	104574	95060	-9.1
December	118357	94571	111705	124920	115905	-7.2
TOTAL	1543959	1537780	1513151	1510169	1561312	3.4

BAHAMAS

TOURIST ARRIVALS BY AREA*

Area	2000	2001	2002	2003	2004
Grand Bahama	367724	400441	401582	376425	374433
Nassau\New Providence	900585	901911	882792	895612	921932
Family Islands	275650	235428	228777	238132	264947
TOTAL	1577066	1537780	1513151	1510169	1561312

* Intended address in The Bahamas

CRUISE PASSENGER ARRIVALS

Months	2000	2001	2002	2003	% Change	
					2004	2004/03
January	209278	232867	252011	268920	281142	4.5
February	219205	230949	250999	253670	280530	10.6
March	237707	270178	290523	282087	369690	31.1
April	239094	240345	243401	255661	363928	42.3
May	180251	188095	205102	234543	274785	17.2
June	198080	204079	220339	230630	262860	14.0
July	215608	207722	228980	228600	309423	35.4
August	174057	196355	223663	250431	296654	18.5
September	153663	132021	189425	183581	116977	-36.3
October	186613	184303	197791	216568	246867	14.0
November	224815	206498	243646	278966	276422	-0.9
December	274255	258261	256232	286517	280734	-2.0
TOTAL	2512626	2551673	2802112	2970174	3360012	13.1
Grand Bahama	248164	210709	196923	203312	327933	61.3
New Providence	1667903	1746540	1645904	1687851	1981883	17.4
Family Islands	596559	594424	959285	1079011	1050196	-2.7

TOURIST ACCOMMODATION (Rooms)*

Type of Accommodation	2000	2001	2002	2003	2004
Total Rooms	14701	15195	15145	15393	15508

*Licensed Properties

Source: Bahamas Ministry of Tourism