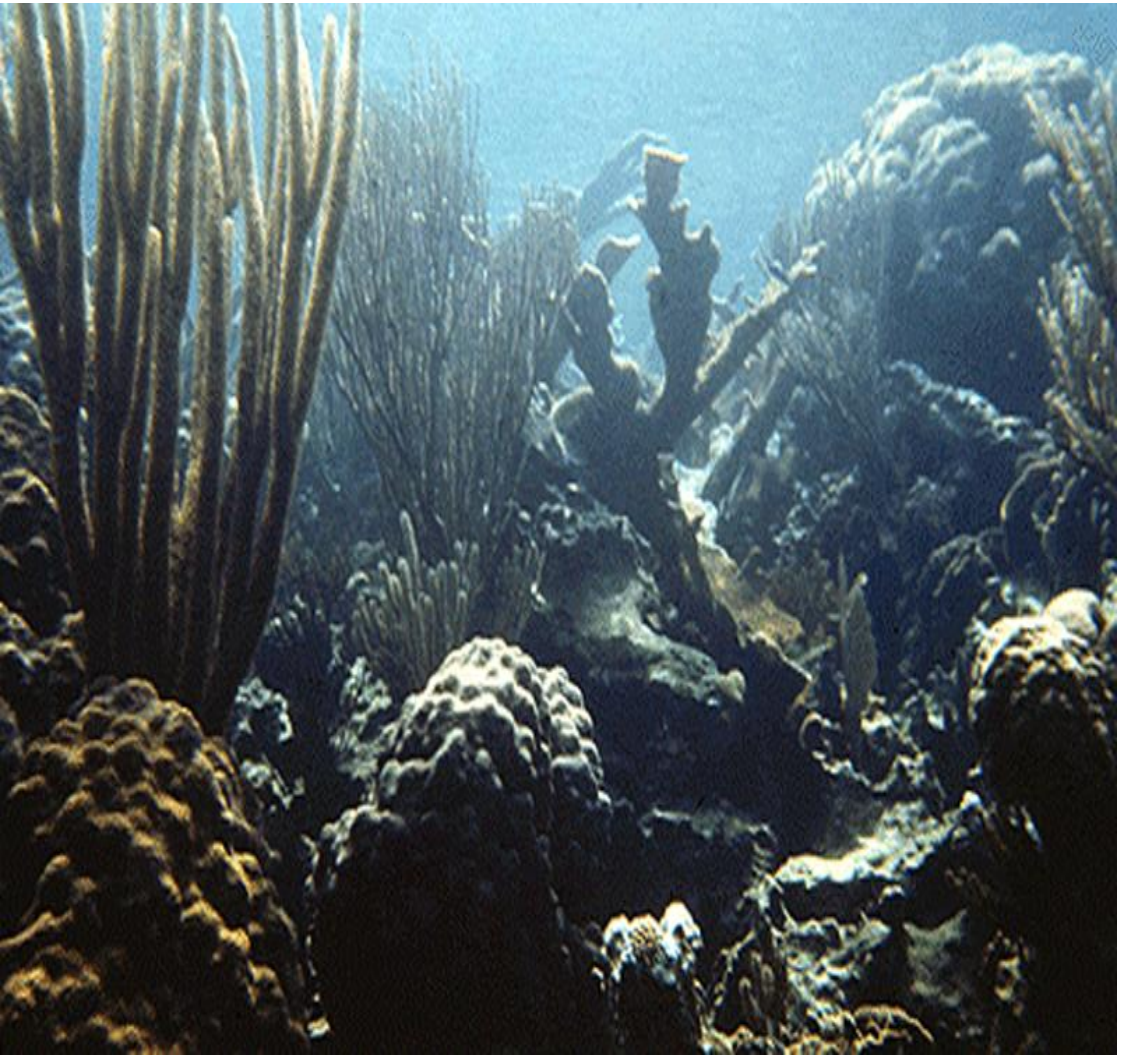


ANDROS



**RESEARCH AND STATISTICS DEPARTMENT
BAHAMAS MINISTRY OF TOURISM
2014**

The island of Andros is the largest island in the Bahamas and lies west of the island of New Providence and south of Bimini and the Berry Islands. It is approximately 2,300 sq. miles or 104 miles long and 40 miles wide.¹ The population of Andros is approximately 8,000 and is small compared to the size of the island.² Much of the water used in the island of New Providence and other islands in the Bahamas is barged in from the island of Andros.

The island of Andros has a rich history. Some of the residents of the island were descendents of Seminole Indians and Seminole Blacks who settled in Red Bays, Andros Island after migrating from Florida because of the oppression that they felt there. The talent of the people of Red Bay which includes many of these Seminole descendents is famous. Red Bays, Andros is known for its internationally renowned authentic basket weaving and wood carvings some of which are now on display in the Smithsonian.³ Many of the people in Red Bays live off the land by farming their own food, fishing and crabbing and following the traditions of their ancestors. In addition to the descendants of the Seminoles, the Mennonites out of the United States have set up a farm where they grow fruits and vegetables and make honey from the bees. The Mennonites also operate a carpentry shop where they build furniture, etc. and a mechanic shop where they fix cars.⁴

The island of Andros is not like any other island in the Bahamas. Visitors to the island have a plethora of activities that they can enjoy. They can go bone-fishing, diving, snorkeling, bird-watching, deep sea fishing, sailing, kayaking, windsurfing, or go on nature or eco-tours.

Andros is a sports enthusiast's paradise and is the ideal dream of the visitor who wants to escape from everyday life to a bone-fishing, diving, and snorkeling paradise. Andros is known as the "Bone-fishing Capital of the World." The bone-fishing flats of Andros are well known among the Fly Fishing aficionados and Anglers of the world and are thought to be some of the best for fly fishing and angling. Andros is also great for deep sea fishing. Fish like Wahoo, tuna, mahi-mahi, dolphin, marlin and snapper abound off the coast of Andros.⁵

In addition to the bone-fishing flats of Andros and the deep sea fishing opportunities that abound on the island, there are many underwater attractions that attract visitors to the island from all over the world. Visitors to Andros can dive in the beautiful underwater world and swim through the underwater caves of the island. The cerulean water off the island of Andros is the home of the third largest barrier reef in the world. This reef is resplendent with coral, sponges and underwater wildlife. The waters off Andros Island are also home to the Tongue of the Ocean (6,000 ft in depth and 100 miles long) which is a very deep canyon in the ocean floor between the islands of New Providence and Andros.⁶ The Andros Barrier Reef and the Tongue of the Ocean are spectacular sites to visit for divers who want to explore a whole new world under the sea.

Andros is an eco paradise for all of the eco enthusiasts who have already discovered the natural eco system of the island. In addition to the natural underwater eco-system Andros has blue holes, mangroves and marshlands all over the island. The

¹ www.bahamas.com/out-islands/andros & Wikipedia, the Free Encyclopedia

² Peter Douglas, Andros Tourist Office

³ Peter Douglas, Andros Tourist Office

⁴ Francia Oliver, former resident of Andros

⁵ www.bahamas.com/out-islands/andros

⁶ Wikipedia, the Free Encyclopedia

island has iguanas, wild boars, land crabs and a myriad of birds. Andros is also an ideal island to enjoy bird-watching. Birds like *flamingoes, hummingbirds, ibis, spoonbills, the Bahama Parrot, Woodstars, “the West Indian Woodpecker, Loggerhead Kingbird, LaSagre's Flycatcher, the Great Antillean Pewee, the Bahama Swallow, the Bahama Mockingbird, The Red-legged Thrush, the Thick-billed Vireo, the Black-whiskered Vireo, the Olive-capped Warbler, Kirtland Warbler, the Bahama Yellowthroat, the Black-cowled Oriole, the Great Antillean Bullfinch, the Black-faced Grassquit, the Melodious Grassquit, the Least Grebe, Olivaceous Cormorant, the Flamingo, the Bahama Pintail, Osprey, Kestel, Sooty Tern, Roseate Tern, Noddy Tern, White Crowned Pigeon, Zenaida Dove, White-bellied Dove, the Key West Quail Dove, the Great Lizard Cuckoo, the Smooth-billed Ani and the Cuban Emerald Hummingbird”* can be discovered in the forests and near the mangroves in Andros.⁷

Andros is home to the International Field Studies Organization field station and the Atlantic Undersea Testing and Evaluation Centre (AUTECH). The International Field Studies Organization is a “public non-profit scientific and educational organization established in 1970.”⁸ The Forfar Research Field Station which is a part of the International Field Studies Organization is a field training facility for High-school and college students who are conducting field research in education and the sciences.⁹ “Andros provides an outstanding environmental setting for a weeklong (or longer) program. Studies such as marine biology, archeology, oceanography, botany, ornithology, ecology, tropical studies, etc. can be covered in a broad overview or broken into individual topics.”¹⁰ Andros is also home for the Atlantic Undersea Testing and Evaluation Centre (AUTECH) which conducts extensive underwater testing for the US Navy antisubmarine research programs.¹¹ Because of its natural eco-system and geological makeup Andros is also known to have the potential to be great as a carbon sink. Carbon sinks absorb CO₂ out of the atmosphere. Scientists are researching Andros’ potential as a carbon sink now.¹²

1. Why Did Stopover Visitors Come to Andros?

- Approximately seven in ten (72%) stopover visitors came to Andros for a vacation;
- 9% of them came to Andros for other reasons;
- 4% of them came to attend a wedding;
- 3% of them came on a business trip;
- 3% came to attend a honeymoon.
- 2% came to visit friends and relatives;

⁷ www.smallhope.com/aboutandros.html & www.bahamas.com/out-islands/andros

⁸ www.intlfieldstudies.org

⁹ www.intlfieldstudies.org

¹⁰ www.intlfieldstudies.org

¹¹ Wikipedia, the Free Encyclopedia

¹² Peter Douglas, Andros Tourist Office

2. What Influenced Stopover Visitors to Visit Andros?

TOP INFLUENCES FOR DECIDING TO VISIT THE BAHAMAS ISLANDS OF THE BAHAMAS 2014

| | Bahamas | Nassau/P.I. | Grand Bahama | Out Islands | ANDROS |
|---------------------------|---------|-------------|--------------|-------------|--------|
| Beaches | 66% | 66% | 68% | 65% | 45% |
| Sports | 9% | 6% | 10% | 20% | 43% |
| Climate | 57% | 58% | 57% | 51% | 40% |
| Rest and Relaxation | 43% | 41% | 47% | 45% | 35% |
| Friendly People | 27% | 24% | 28% | 35% | 34% |
| Easy to Get to | 22% | 23% | 23% | 21% | 17% |
| Never Been Here Before | 23% | 23% | 28% | 18% | 17% |
| Other | 10% | 9% | 9% | 13% | 16% |
| Safety of Islands | 20% | 19% | 21% | 24% | 15% |
| Friend recommended Bah. | 12% | 12% | 10% | 14% | 14% |
| Exotic Islands | 13% | 11% | 11% | 19% | 13% |
| Hotel Facilities | 25% | 30% | 16% | 15% | 10% |
| Best Value for Money | 10% | 9% | 21% | 6% | 8% |
| Bahamas Website | 2% | 2% | 3% | 2% | 5% |
| Heard a lot about Bahamas | 9% | 10% | 9% | 7% | 5% |
| Had Friends in Bah. | 8% | 6% | 8% | 13% | 3% |
| Travel Agent/TO | 5% | 4% | 5% | 5% | 1% |
| Nightlife | 4% | 5% | 2% | 3% | 1% |
| Shopping | 4% | 5% | 6% | 2% | 1% |
| Good Package Deals | 16% | 16% | 27% | 7% | 1% |
| Saw Ad in Magazine | 1% | 1% | 1% | 1% | 1% |
| Casinos | 9% | 13% | 5% | 1% | 0% |
| Saw Ad on TV | 3% | 4% | 1% | 1% | 0% |
| Culture | 3% | 3% | 1% | 2% | 0% |
| Junkanoo/Other Festival | 0% | 0% | 0% | 1% | 0% |

Source: Tour Operator and Media Exit Survey 2014, Research & Statistics Dept.

- Almost half (45%) the stopover visitors to Andros were influenced to visit the Bahamas because of the beaches;
- Approximately four in ten stopover visitors to Andros were influenced to visit because of the sporting activities (43%) available on the island and the climate (40%);
- Approximately one in three (35%) stopovers to Andros were influenced to visit because of the rest and relaxation that they expected to experience and the friendly people (32%) on the island;
- Approximately two in ten stopovers to Andros were influenced to visit because of the ease of getting to the island (17%) and the fact that they had never been there before (17%).

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

ACTIVITIES VISITORS INTENDED TO DO ON THIS VISIT TO THE BAHAMAS ISLANDS OF THE BAHAMAS 2014

| | Bahamas | Nassau/P.I. | Grand Bahama | Out Islands | ANDROS |
|-------------------------------|---------|-------------|--------------|-------------|--------|
| Enjoy Beaches | 83% | 81% | 89% | 83% | 57% |
| Rest and Relax | 73% | 72% | 78% | 71% | 49% |
| Go Bonefishing | 4% | 2% | 3% | 12% | 40% |
| Go Snorkeling | 34% | 28% | 34% | 52% | 39% |
| Go Diving | 8% | 7% | 7% | 15% | 29% |
| Go on Island Tour | 16% | 13% | 22% | 20% | 10% |
| Go Deep Sea Fishing | 5% | 4% | 7% | 10% | 9% |
| Go Birdwatching | 3% | 2% | 4% | 5% | 9% |
| Shop | 30% | 30% | 45% | 18% | 7% |
| Other Activities | 7% | 6% | 9% | 6% | 3% |
| Go Sailing | 8% | 5% | 6% | 18% | 2% |
| Go Golfing | 5% | 3% | 5% | 10% | 1% |
| Go to Casinos | 20% | 26% | 21% | 1% | 1% |
| Go to Junkanoo/Other Festival | 1% | 1% | 1% | 1% | 0% |
| Non Response | 5% | 5% | 5% | 5% | 2% |

Source: Tour Operator and Media Exit Survey 2014, Research and Statistics Dept., Ministry of Tourism

- Roughly six in ten (57%) stopover visitors to Andros intended to enjoy the beaches and half (49%) of them wanted to enjoy the rest and relaxation;
- Sporting activities in Andros were of particular interest to visitors to the island and as such were among the top activities visitors intended to do while on the island. Four in ten stopover visitors intended to go bone-fishing (40%) and snorkeling (39%) while in Andros. Approximately three in ten (29%) stopovers to Andros wanted to go diving. Approximately one in ten (9%) stopovers intended to go deep sea fishing and 2% intended to go sailing;
- Andros has a large plethora of birds. The International community that enjoy bird watching have become more aware of that fact. Approximately one in ten (9%) stopovers intended to go bird-watching while they were in Andros.

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

WHEN DID YOU MAKE YOUR RESERVATIONS STOPOVER VISITORS 2014

| | All Bah. | Nassau/P.I. | Grand Bah. | Out Isl. | ANDROS |
|-----------------------------------|----------|-------------|------------|----------|--------|
| Same Week of Travel | 5% | 5% | 5% | 6% | 4% |
| Same Month of Travel | 15% | 17% | 15% | 11% | 11% |
| 1 to 3 Months Before Travel | 45% | 46% | 48% | 40% | 45% |
| 4 to 7 Months Before Travel | 24% | 23% | 23% | 28% | 30% |
| 8 to 12 Months Before Travel | 7% | 7% | 5% | 9% | 8% |
| More than 12 months Before Travel | 1% | 1% | 2% | 3% | 1% |
| Non-Response | 2% | 2% | 2% | 3% | 1% |

Source: Tour Operator and Media Exit Survey 2014, Research and Statistics, Dept Ministry of Tourism

- Stopover visitors to Andros primarily booked their reservations anywhere from the same month of travel to seven months in advance of travel. Approximately one in ten (11%) stopovers to Andros booked their reservations the same month of travel. Almost half (45%) of the stopovers booked their reservations one to three months before travel. Three in ten (30%) stopovers booked their reservations four to seven months in advance of travel to the island. Approximately one in ten (8%) stopovers to Andros booked their reservations eight to 12 months in advance of travel.

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

- The percentage of stopover visitors to Andros booking their reservations online increased from 52% in 2013 to 58% in 2014;
- In 2014, approximately six in ten (58%) stopover visitors to Andros used an online service to book some or all of their reservations.

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

MOST POPULAR ONLINE BOOKING SERVICES USED

ANDROS

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| | | |
|----------------------------|----------------------|-------------------------|
| Watermakersair.com | Aa.com | Homeaway.com |
| Expedia.com | Aircanada.com | Hotels.com |
| Sandals.com | Americanexpress.com | Hotwire.com |
| Delta.com | Atlantis.com | Hrgnordic.com |
| Frontierstravel.com | Ba.com | Luxurylink.com |
| Orbitz.com | Bahamas.com | Priceline.com |
| Jetblue.com | Bahamasvacations.com | Rbctravelmanagement.com |
| Usairwaysvacations.com | Booking.com | Redtag.ca |
| Angleradventures.com | Breezes.com | Smallhope.com |
| Aircanada.com | Britishairways.com | Tripadvisors.com |
| Paradisetravelservices.com | Carlsonwagonlit.com | United.com |
| Travelocity.com | Cheapair.com | Usairwaysvacations.com |
| Bahamasair.com | Cheapflights.com | Villagegetravel.net |
| Cheapoair.com | Cheaptickets.com | Vrbo.com |
| Kayak.com | Dertour.de | Vwti.com |

Some online services listed for Eleuthera were also used by visitors to book their reservations for Nassau because of the fact that some stopovers visited both destinations during their visit. Online services with yellow background were the top 15 and the other top online services are listed in alphabetical order.

(Source: Immigration Cards and Tour Media Exit Survey, 2014)

- Andros has a limited amount of international flights into the island and for this reason many visitors who want to go to the island have to travel through Nassau/Paradise Island first where they often have to overnight before heading to Andros. For this reason there are many online services used by visitors to Andros that also make Nassau/Paradise Island bookings too, like Atlantis, Breezes, etc.

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

**ISLANDS OF THE BAHAMAS
USE OF TOUR OPERATOR/TRAVEL AGENT
2014**

| | All Bah. | Nassau/P.I. | Grand Bahama | Out Islands | ANDROS |
|--------------------------|-----------------|--------------------|---------------------|--------------------|---------------|
| Used Travel Agent | 31% | 32% | 34% | 26% | 18% |
| Did Not Use Travel Agent | 68% | 67% | 65% | 73% | 80% |

Source: Tour Operator and Media Exit Survey 2014, Research and Statistics, Dept Ministry of Tourism

- Approximately two in ten (18%) stopover visitors used a travel agent to book some or all of their reservations to Andros;
- Some stopovers to Andros who used tour operators/travel agents used the following: AUTECH (a Research facility), IFS (International Field Studies), Yellow Dog, AAA Travel, Angler Adventures, American Express Travel, Going Places, Gulliver’s Travel, Bon Voyage Travel, Travel Unlimited, Airtran, Majestic Tours, Small Hope Bay, Shawnee Travel, Valerie Wilson Travel, etc.

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

- The majority (85%) of stopover visitors used the Internet as the electronic media most frequently used when planning their vacation.

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

TOP 20 FAVORITE TELEVISION STATIONS BY VISITORS ISLANDS OF THE BAHAMAS 2014

| Bahamas | | %Informants | ANDROS | % Informants |
|-------------|--------------------------------------|-------------|--------------------------------------|--------------|
| 1 | ESPN | 21% | ESPN | 25% |
| 2 | ABC | 19% | NBC | 19% |
| 3 | NBC | 18% | CNN | 15% |
| 4 | HBO | 14% | ABC | 13% |
| 5 | CNN | 13% | CBS | 12% |
| 6 | CBS | 13% | HBO | 10% |
| 7 | HGTV(Home & Garden Network) | 13% | HGTV(Home & Garden Network) | 8% |
| 8 | FOX | 12% | FOXN | 7% |
| 9 | FOOD (Food Network) | 7% | DISC (Discovery Channel) | 6% |
| 10 | TNT | 6% | FOOD (Food Network) | 5% |
| 11 | DISC (Discovery Channel) | 6% | Travel Channel | 5% |
| 12 | FOXN | 6% | SHW (Showtime) | 4% |
| 13 | USA | 5% | HIST (History Channel) | 4% |
| 14 | BRAVO | 5% | NGEO (National Geographic Channel) | 4% |
| 15 | HIST (History Channel) | 5% | FOX | 4% |
| 16 | TLC (The Learning Channel) | 4% | TNT | 4% |
| 17 | SHW (Showtime) | 4% | TWC (The Weather Channel) | 4% |
| 18 | TBS | 4% | CNBC | 3% |
| 19 | A & E (Arts & Entertainment Network) | 3% | USA | 3% |
| 20 | E! (E! Entertainment) | 3% | LFMN (Lifetime Movie Network) | 3% |
| Nassau/P.I. | | %Informants | Grand Bahama | %Informants |
| 1 | ESPN | 21% | ABC | 20% |
| 2 | ABC | 18% | NBC | 18% |
| 3 | NBC | 18% | HBO | 17% |
| 4 | HBO | 14% | ESPN | 17% |
| 5 | CNN | 14% | CBS | 15% |
| 6 | FOX | 13% | HGTV(Home & Garden Network) | 14% |
| 7 | CBS | 13% | CNN | 12% |
| 8 | HGTV(Home & Garden Network) | 13% | FOX | 12% |
| 9 | FOOD (Food Network) | 7% | DISC (Discovery Channel) | 7% |
| 10 | TNT | 7% | FOOD (Food Network) | 7% |
| 11 | USA | 6% | TNT | 6% |
| 12 | DISC (Discovery Channel) | 5% | FOXN | 6% |
| 13 | BRAVO | 5% | TLC (The Learning Channel) | 5% |
| 14 | TLC (The Learning Channel) | 5% | A & E (Arts & Entertainment Network) | 5% |
| 15 | FOXN | 5% | CBC (Canada) | 4% |
| 16 | SHW (Showtime) | 5% | USA | 4% |
| 17 | HIST (History Channel) | 5% | BRAVO | 4% |
| 18 | TBS | 4% | LIFE (Lifetime) | 4% |
| 19 | E! (E! Entertainment) | 3% | HIST (History Channel) | 4% |
| 20 | A & E (Arts & Entertainment Network) | 3% | TBS | 4% |

Source: Tour Operator and Media Exit Survey 2014. Percentages based on informants who watched TV.

- One in four (25%) stopovers to Andros indicated that ESPN was their favorite television station and approximately two in ten (19%) indicated that NBC was their favorite television station.
- Approximately one in seven (15%) stopovers indicated that CNN was their favorite television station.
- Roughly one in ten stopovers indicated that ABC (13%), CBS (12%) and HBO (10%) were their favorite television station.

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

- Stopover visitors to Andros were most likely to watch television between the hours of 7 am to 7:59 am and 6 pm to 10:59 pm at night. The hour of 8:00 pm to 8:59 pm was of course the most popular time; approximately half (52%) the stopovers to Andros watched television during that time.

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

- Approximately two in ten (18%) stopover visitors to Andros used print media when they were planning their vacations. Of the stopover visitors to Andros who used print media to plan their vacations, approximately three in ten (28%) used newspapers and approximately eight in ten (82%) used magazines.

11. Use of Newspapers

- Although only 18% of stopover visitors to Andros used print media when planning their vacations, roughly six in ten (56%) stopovers read newspapers for their personal enjoyment and edification. Some of these newspapers would have been online newspapers.

TOP 20 FAVORITE NEWSPAPERS READ BY VISITORS ISLANDS OF THE BAHAMAS 2014

| | Bahamas | % Informants | ANDROS | % Informants |
|----|------------------------------|---------------------|------------------------------|---------------------|
| 1 | New York Times | 26% | New York Times | 46% |
| 2 | USA Today | 26% | Wall Street Journal | 30% |
| 3 | Wall Street Journal | 17% | USA Today | 27% |
| 4 | New York Post | 11% | Washington Post | 5% |
| 5 | Daily News | 8% | New York Post | 4% |
| 6 | Toronto Star | 6% | Boston Globe | 3% |
| 7 | Globe & Mail | 5% | Orlando Sentinel | 3% |
| 8 | Washington Post | 5% | Miami Herald | 3% |
| 9 | New York Daily News | 4% | Atlanta Journal Constitution | 3% |
| 10 | Newsday | 4% | Globe & Mail | 2% |
| 11 | Times | 4% | Chicago Tribune | 2% |
| 12 | Boston Globe | 3% | Daily News | 2% |
| 13 | Post | 2% | Toronto Star | 2% |
| 14 | Miami Herald | 2% | Times | 2% |
| 15 | Chicago Tribune | 2% | Portland Press Herald | 2% |
| 16 | Atlanta Journal Constitution | 2% | Columbus "Ohio" Dispatch | 1% |
| 17 | Sun Sentinel | 2% | Democrat | 1% |
| 18 | Sun/The Sun News | 1% | Philadelphia Inquirer | 1% |
| 19 | Daily Mail | 1% | Sun/The Sun News | 1% |
| 20 | Orlando Sentinel | 1% | Newsday | 1% |
| | Nassau/P.I. | % Informants | Grand Bahama | % Informants |
| 1 | New York Times | 25% | USA Today | 25% |
| 2 | USA Today | 25% | New York Times | 23% |
| 3 | Wall Street Journal | 15% | Wall Street Journal | 16% |
| 4 | New York Post | 14% | Toronto Star | 8% |
| 5 | Daily News | 9% | Daily News | 7% |
| 6 | Toronto Star | 6% | Washington Post | 7% |
| 7 | New York Daily News | 5% | Globe & Mail | 6% |
| 8 | Newsday | 5% | New York Post | 4% |
| 9 | Globe & Mail | 5% | Boston Globe | 4% |
| 10 | Times | 4% | Sun/The Sun News | 3% |
| 11 | Washington Post | 4% | Times | 2% |
| 12 | Post | 3% | Chicago Tribune | 2% |
| 13 | Boston Globe | 3% | Atlanta Journal Constitution | 2% |
| 14 | Chicago Tribune | 2% | Miami Herald | 2% |
| 15 | Miami Herald | 2% | Richmond Times | 2% |
| 16 | Sun Sentinel | 1% | Sun Sentinel | 2% |
| 17 | Atlanta Journal Constitution | 1% | New York Daily News | 1% |
| 18 | Sun/The Sun News | 1% | Newsday | 1% |
| 19 | Daily Mail | 1% | Edmonton Journal | 1% |
| 20 | Star Ledger | 1% | Freeport News | 1% |

Source: Tour Operator and Media Exit Survey 2014. Percentages based on informants who read newspapers.

- Roughly half (46%) the stopovers read the New York Times and approximately three in ten read the Wall Street Journal (30%), or USA Today (27%) for their reading enjoyment and edification.

12. Use of Magazines

- Although only 18% of stopover visitors to Andros used print media when planning their vacations approximately six in ten (60%) stopovers read magazines for their enjoyment or personal edification.

TOP 20 FAVORITE MAGAZINES READ BY VISITORS ISLANDS OF THE BAHAMAS 2014

| | Bahamas | % Informants | ANDROS | % Informants |
|----|---|---------------------|---|---------------------|
| 1 | People | 22% | Fly Fishing | 22% |
| 2 | Better Homes & Gardens (BHG) | 16% | Economist | 13% |
| 3 | Good Housekeeping | 12% | National Geographic (Explorer) | 13% |
| 4 | In Style | 12% | People | 13% |
| 5 | Food & Wine | 10% | New Yorker | 13% |
| 6 | Men's Health | 9% | Architectural Digest | 12% |
| 7 | Sports Illustrated | 9% | Better Homes & Gardens (BHG) | 10% |
| 8 | Cosmopolitan (Cosmo) | 9% | Food & Wine | 9% |
| 9 | National Geographic (Explorer) | 9% | Sports Illustrated | 8% |
| 10 | Time Magazine | 9% | Southern Living | 8% |
| 11 | Glamour | 8% | Conde Nast Travel | 8% |
| 12 | Architectural Digest | 8% | Time Magazine | 8% |
| 13 | O (Oprah) | 7% | Golf Digest | 8% |
| 14 | Bon Appetit | 7% | Bon Appetit | 8% |
| 15 | Reader's Digest | 7% | Vanity Fair | 8% |
| 16 | Travel & Leisure | 6% | Salt Water Fisherman | 8% |
| 17 | Conde Nast Travel | 6% | Forbes | 7% |
| 18 | Southern Living | 6% | Golf | 6% |
| 19 | Woman's Day | 5% | Coastal | 6% |
| 20 | Real Simple | 5% | Travel & Leisure | 5% |
| | Nassau/P.I. | % Informants | Grand Bahama | % Informants |
| 1 | People | 22% | People | 23% |
| 2 | Better Homes & Gardens (BHG) | 15% | Better Homes & Gardens (BHG) | 20% |
| 3 | Good Housekeeping | 13% | Good Housekeeping | 15% |
| 4 | In Style | 13% | Cosmopolitan (Cosmo) | 11% |
| 5 | Sports Illustrated | 11% | Glamour | 11% |
| 6 | Men's Health | 10% | In Style | 11% |
| 7 | Food & Wine | 9% | O (Oprah) | 11% |
| 8 | Cosmopolitan (Cosmo) | 9% | National Geographic (Explorer) | 11% |
| 9 | Time Magazine | 9% | Food & Wine | 10% |
| 10 | National Geographic (Explorer) | 8% | Men's Health | 8% |
| 11 | Architectural Digest | 8% | Time Magazine | 8% |
| 12 | O (Oprah) | 8% | Reader's Digest | 8% |
| 13 | Glamour | 8% | Sports Illustrated | 7% |
| 14 | Reader's Digest | 7% | Southern Living | 7% |
| 15 | Woman's Day | 7% | Economist | 6% |
| 16 | Travel & Leisure | 6% | Golf Digest | 5% |
| 17 | Bon Appetit | 6% | Bon Appetit | 5% |
| 18 | Real Simple | 6% | In Touch/In Touch Weekly | 5% |
| 19 | In Touch/In Touch Weekly | 5% | Ebony | 5% |
| 20 | Shape | 5% | Conde Nast Travel | 5% |

Source: Tour Operator and Media Exit Survey 2014, Research and Statistics Dept. Ministry of Tourism

Percentages based on informants who read magazines.

- Approximately two in ten (22%) stopovers to Andros read Fly Fishing. Roughly one in ten stopovers read Economist (13%), National Geographic Explorer (13%), People Magazine (13%), New Yorker (13%), Architectural Digest (12%), Better Homes & Gardens (10%) and Food & Wine (9%).

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

TOURIST COMMENTS POSITIVE VS. NEGATIVE COMMENTS ANDROS

| | TOP 6 COMPLIMENTS | | TOP 6 COMPLAINTS | | |
|----------------------------------|-------------------|-----------|------------------------|-----------|-----------|
| | 2014 | 2013 | | 2014 | 2013 |
| General | 44% | 34% | Roads/Traffic (neg.) | 17% | 32% |
| People | 25% | 21% | Litter (neg) | 13% | 14% |
| Scenery/Sightseeing | 7% | 3% | Environment (neg) | 9% | 9% |
| Sports | 7% | 6% | People (neg) | 9% | 4% |
| Hotel | 5% | 8% | Prices (neg) | 9% | 9% |
| Will Return/Can't wait to return | 3% | 3% | Weather/Climate (neg.) | 9% | 0% |
| No. of Comments | 152 | 95 | No. of Comments | 23 | 24 |

Source: Tour Operator and Media Exit Survey 2014, Research and Statistics Dept.

- Approximately four in ten (44%) compliments received about the island were general positive things. One in four (25%) compliments received about Andros were about the people on the island.
- The top complaints about Andros included the roads/traffic, litter, environment, poor attitudes of some of the people, high prices, and poor weather. Approximately two in ten (17%) complaints received about Andros from stopover visitors were about the roads. Roughly one in ten complaints received was about litter (13%), the environment (9%), poor attitudes of the people (9%), high prices (9%) and poor weather (9%).

14. How Did Stopover Visitors Rate Their Product Experiences?

PRODUCT SATISFACTION RATINGS 2014

| Rating Area | Much Better or Better | | | | Not as Good or Worse | | | |
|---------------------------|-----------------------|--------------|--------------|------------|----------------------|--------------|--------------|-----------|
| | The Bah. | Nassau/ P.I. | Grand Bahama | Andros | The Bah. | Nassau/ P.I. | Grand Bahama | Andros |
| Attitude of People | 66% | 65% | 67% | 73% | 6% | 7% | 8% | 0% |
| Hotel Service | 45% | 49% | 40% | 56% | 9% | 10% | 15% | 3% |
| Food in Hotels | 38% | 41% | 31% | 54% | 12% | 12% | 19% | 3% |
| Climate | 58% | 59% | 58% | 49% | 6% | 6% | 6% | 5% |
| Beaches | 66% | 64% | 70% | 49% | 3% | 3% | 3% | 3% |
| Overall Value for Money | 34% | 34% | 38% | 41% | 14% | 15% | 13% | 4% |
| Hotel Rooms | 38% | 40% | 33% | 40% | 10% | 11% | 19% | 9% |
| Easy to Get to | 45% | 46% | 47% | 37% | 5% | 4% | 6% | 10% |
| Restaurant Service | 48% | 49% | 44% | 36% | 10% | 9% | 14% | 1% |
| Value for Money in Hotels | 29% | 30% | 32% | 36% | 15% | 18% | 12% | 5% |
| Food in Restaurants | 48% | 47% | 49% | 34% | 9% | 9% | 12% | 2% |
| Bahamas Overall | 64% | 63% | 63% | 63% | 3% | 3% | 5% | 1% |

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 2014

- Attitude of the people, hotel service and hotel food in Andros received the highest ratings of the 12 product experiences of stopover visitors to the island. Approximately seven in ten (73%) stopovers thought that the

attitude of the people was much better or better than they had expected it to be;

- Roughly six in ten (56%) stopovers rated the hotel service as much better or better than expected and 3% thought that the hotel service was not as good as or worse than expected;
- More than half (54%) of the stopovers rated the food in the hotels as much better or better than expected and three percent (3%) of them thought that the hotel food was not as good as or worse than expected;
- Approximately four in every ten (40%) stopover visitors rated the hotel rooms in Andros as much better or better than expected but approximately one in every ten (9%) thought that they were not as good as or worse than expected;
- Roughly four in every ten (36%) stopover visitors rated the hotel value for money in Andros as much better or better than expected but one in every twenty (5%) thought that it was not as good as or worse than expected;
- One in every ten (10%) stopover thought that the ease of getting to the island was not as good or worse than expected;
- One in every twenty (5%) stopovers thought that the value for money in hotels was not as good as or worse than expected and one in every twenty-five (4%) thought this of the overall value for money on the island.
- Approximately six in ten (63%) stopover visitors to Andros thought that the Bahamas Overall was much better or better than they had expected it to be but 1% thought that it was not as good as or worse than expected.

15. How Did Stopover Visitors to Andros Get There?

- Approximately six in ten (58%) stopover visitors to Andros traveled to Andros via a commercial airline;
- Approximately two in ten (23%) stopovers traveled to the island destination via a private plane and 3% by a yacht/private boat.

16. Where Did Visitors to Andros Stay While There?

- Approximately six in ten (58%) stopovers to Andros stayed in a hotel, one in every ten stayed on a private boat/yacht (10%) or with friends and relatives (10%). One in every twenty (5%) stopovers stayed in an apt/villa, 4% stayed in their own property and 4% in other accommodations.

17. Which Stopover Visitors to Andros Tended to Stay the Longest (2014)?

- On average, stopovers from Africa stayed 21.5 nights;
- On average, stopovers from Australasia stayed an average 16.5;
- Stopover visitors from Europe stayed an average of 11.8 nights;
- Stopovers from Canada stayed an average of 10.0 nights;
- Stopovers from the Caribbean stayed 6.7 nights;
- Stopover visitors from Latin America stayed an average of 6.3 nights;
- On average, stopovers from Asia stayed 5.9 nights;
- On average, stopovers from the United States stayed 9.2 nights.
- Stopovers to Andros on average stayed 9.4 nights.

18. What Were the Busiest Months for Stopover Visitors to Andros?

- Stopover visitors to Andros come all year round. The months of March to June are normally the busiest months for stopovers to visit the island but March is normally the busiest. In 2014 however, April was the busiest month of the year and February stopover performance was better than that of June's.

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

- The slowest months for stopover visitors to visit Andros were September and October.

20. How Many Stopover Visitors Did Andros Receive and Where Did They Come From (2014)?

- In total, Andros received 6,429 stopover visitors.

United States: 88% (5,683) of the stopover visitors came from the United States. Stopovers to Andros from the United States primarily came from the states of Florida (35%), New York (6%), California (6%), Texas (5%), Georgia (5%), Ohio (4%), Pennsylvania (3%), Virginia (3%), North Carolina (3%) and Massachusetts (3%).

Canada: 5% (288) of the stopover visitors came from Canada. Stopovers to Andros from Canada primarily came from the Canadian Provinces of Ontario (50% of them), Quebec (12%), Alberta (9%) and British Columbia (6%).

Europe: 4% (278) of the stopover visitors came from Europe. Stopovers to Andros from Europe primarily came from the UK (40% of them), France (14%), Germany (11%), Italy (9%) and Switzerland (3%).

Latin America: 0.7 % (42) of the stopover visitors came from Latin America. Stopover Visitors to Andros from Latin America primarily came from Mexico (24%), Argentina (19%) and Brazil (17%).

DEMOGRAPHIC & PSYCHOGRAPHIC PROFILE
ISLANDS OF THE BAHAMAS
2014

| | Andros | All Bah. |
|---|---------------|-----------------|
| MAIN PURPOSE OF VISIT | | |
| Vacation | 72% | 73% |
| Visiting Friends/Rel. | 2% | 5% |
| To Attend Wedding | 4% | 3% |
| Business Trip | 3% | 5% |
| Honeymoon | 3% | 5% |
| DECISION TO VISIT INFLUENCED BY: | | |
| Beaches | 45% | 66% |
| Sports | 43% | 9% |
| Climate | 40% | 57% |
| Rest and Relaxation | 35% | 43% |
| Friendly People | 34% | 27% |
| ACTIVITIES VISITORS INTENDED TO DO | | |
| Enjoy Beaches | 57% | 83% |
| Rest and Relax | 49% | 73% |
| Go Bonefishing | 40% | 4% |
| Go Snorkeling | 39% | 34% |
| Go Diving | 29% | 8% |
| Go on Island Tour | 10% | 16% |
| Go Birdwatching | 9% | 3% |
| Go Deep Sea Fishing | 9% | 5% |
| LIKELY RETURN IN 1-5 YEARS | 93% | 88% |
| LIKELY RECOMMEND TO FRIENDS/REL | 96% | 95% |
| USED ONLINE SERVICE | 58% | 64% |
| USED TRAVEL AGENT | 18% | 31% |
| AGE* | | |
| 25 - 54 years old | 47% | 53% |
| 55 years old or older | 36% | 23% |
| SEX* | | |
| Male | 58% | 49% |
| Female | 39% | 48% |
| RACE | | |
| White | 90% | 81% |
| Black | 3% | 6% |
| Hispanic | 2% | 5% |
| Mixed Race/Mixed Heritage | 4% | 3% |
| Asian/Pacific Islander | 1% | 3% |
| American Indian/Alaska Native | 0% | 0% |
| Other | 0% | 1% |
| EDUCATION | | |
| College Graduate or Above | 75% | 67% |

**DEMOGRAPHIC & PSYCHOGRAPHIC PROFILE
ISLANDS OF THE BAHAMAS
2014**

| | Andros | All Bah. |
|--------------------------------|---------------|-----------------|
| ANNUAL HOUSEHOLD INCOME | | |
| \$25,001 to \$50,000 | 5% | 9% |
| \$50,001 to \$75,000 | 8% | 11% |
| \$75,001 or more | 58% | 57% |
| PREVIOUS VISITS | | |
| First Time Visitor | 28% | 40% |
| Repeat Visitor | 70% | 59% |
| TRAVELLING PARTY SIZE | | |
| One | 16% | 17% |
| Two | 37% | 44% |
| Three or more | 40% | 35% |
| HOUSEHOLD SIZE | | |
| One | 14% | 11% |
| Two | 48% | 44% |
| Three-Four | 26% | 32% |
| COUNTRY OF ORIGIN | | |
| USA | 88% | 78% |
| Canada | 5% | 10% |
| Europe | 4% | 6% |
| Other Countries | 3% | 7% |
| AVERAGE LENGTH OF STAY | 9.4 nts. | 6.7 nts. |

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

*Source: Tour Operator & Media Exit Study 2014. Some rounding may have occurred

Information in this brochure is based on the Tour Operator & Media Exit Survey 2014 and the Immigration Card. If you have any questions about this report you may call the number below.



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