

EXUMA



**RESEARCH AND STATISTICS DEPARTMENT
MINISTRY OF TOURISM
2010**

The island of Exuma is not just one island. It is really a chain of over 360 islands and cays with sandbars, flats, pristine beaches, aquamarine water, and land and sea parks. The islands of Exuma are a 120 mile long chain of breath taking beauty. Exuma is also called the Exumas because of its many islands and cays. The Exumas boasts some of the most beautiful beaches in the world.

The beaches in Exuma are so renowned for their beauty that the filmmakers of the movie Pirates of the Caribbean chose the destination to film parts of the very popular movie sequels there. Some of the best beaches in the world are on Stocking Island. The Exumas are known for the shifting sandbars that have been featured in Ministry of Tourism Advertising as well as in movies.

Exuma is also home to the Thunderball Grotto which is a spectacular underwater cave system located on Staniel Cay that was featured in the James Bond Movies “Thunderball” and “Never Say Never” and Ron Howard’s movie “Splash.”¹

Exuma is home to the Exuma Cays Land and Sea Park. It is also home to the native iguanas which look like very big dragon lizards. On the main island, there are beautiful cliffs and vistas all along the pristine coastline. The Exumas are known to be great for snorkeling, boating/sailing and kayaking. Visitors to the island also have the opportunity to go golfing, bone-fishing, diving and deep sea fishing.

1. Why Did Stopover Visitors Come to Exuma?

- 64% of stopover visitors came to Exuma for a vacation;
- 22% of stopover visitors came to Exuma for a Honeymoon;
- 3% of them came on a business trip;
- 3% of them came to visit friends or relatives.

¹ Source: www.thewaterfrontlife.com/Staniel_Cay

2. What Influenced Stopover Visitors to Visit Exuma?

TOP INFLUENCES FOR DECIDING TO VISIT THE BAHAMAS ISLANDS OF THE BAHAMAS 2010

| | Bahamas | Nassau/P.I. | Grand Bahama | <i>Exuma</i> |
|-------------------------|---------|-------------|--------------|--------------|
| Beaches | 60.2% | 59.2% | 62.6% | 72.0% |
| Climate | 51.4% | 52.7% | 47.7% | 55.3% |
| Rest and Relaxation | 41.1% | 40.3% | 43.0% | 49.3% |
| Hotel Facilities | 25.5% | 30.2% | 12.7% | 39.0% |
| Never Been Here Before | 21.8% | 21.6% | 26.8% | 26.5% |
| Friendly People | 25.2% | 24.0% | 25.1% | 25.1% |
| Easy to Get to | 22.1% | 22.7% | 20.9% | 22.5% |
| Exotic Islands | 13.6% | 12.4% | 13.4% | 22.2% |
| Safety of Islands | 17.3% | 17.3% | 14.8% | 21.3% |
| Good Package Deals | 16.3% | 15.8% | 26.6% | 19.4% |
| Sports | 10.0% | 7.6% | 9.5% | 12.0% |
| Friend recommended Bah. | 10.7% | 10.6% | 9.5% | 10.3% |
| Best Value for Money | 9.9% | 8.9% | 18.4% | 7.9% |
| Had Friends in Bah. | 8.3% | 7.3% | 6.9% | 7.5% |
| Casinos | 9.4% | 12.5% | 6.3% | 0.1% |

Source: Tour Operator and Media Exit Survey 2010

- Approximately seven in ten (72%) stopover visitors to Exuma were influenced to visit The Bahamas because of the beaches;
- More than half (55%) of them were influenced to visit by the climate;
- Almost half (49%) of them were influenced to visit by the rest and relaxation they expected to enjoy there;
- Almost four in ten (39%) stopovers were influenced to visit by the hotel facilities in Exuma;
- Approximately three in ten (27%) stopovers to Exuma were influenced to visit by the fact that they had never been there before;
- One in four (25%) stopover visitors to Exuma were influenced to visit by the friendly people.

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

- Most of the stopover visitors to Exuma intended to enjoy the beaches (93%) and rest and relax (81%);
- Almost half (46%) of the stopovers to Exuma wanted to go snorkeling;
- Approximately one in four (26%) stopovers to Exuma intended to go on an island tour before they arrived;
- 16% of stopovers intended to go shopping;
- 15% of stopovers wanted to go sailing, 14% golfing, 12% diving, 7% bone-fishing and 7% deep sea fishing.

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

2010

| | Bahamas | Nassau/P.I. | Grand Bahama | <i>Exuma</i> |
|---------------------|----------------|--------------------|---------------------|---------------------|
| Enjoy Beaches | 83.0% | 82.9% | 84.3% | 93.0% |
| Rest and Relax | 73.5% | 74.8% | 72.6% | 80.8% |
| Go Snorkeling | 33.3% | 30.6% | 32.8% | 46.1% |
| Go on Island Tour | 16.3% | 14.9% | 21.1% | 26.4% |
| Shop | 36.2% | 38.3% | 47.4% | 16.2% |
| Go Sailing | 7.8% | 6.1% | 7.3% | 15.3% |
| Go Golfing | 4.6% | 4.3% | 4.1% | 13.5% |
| Go Diving | 8.5% | 6.7% | 8.4% | 12.1% |
| Go Bonefishing | 4.1% | 2.4% | 3.1% | 7.3% |
| Go Deep Sea Fishing | 5.9% | 4.7% | 6.1% | 6.9% |
| Other Activities | 4.4% | 4.2% | 4.7% | 3.4% |
| Go to Casinos | 21.9% | 27.4% | 20.9% | 1.6% |
| Go Birdwatching | 2.7% | 2.2% | 3.3% | 1.2% |
| Non Response | 5.2% | 5.2% | 6.5% | 2.1% |

Source: Tour Operator and Media Exit Survey 2010

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

**WHEN DID YOU MAKE YOUR RESERVATIONS
STOPOVER VISITORS
2010**

| | All Bah. | Nassau/P.I. | Grand Bah. | <i>Exuma</i> |
|-----------------------------------|-----------------|--------------------|-------------------|---------------------|
| Same Week of Travel | 7% | 7% | 9% | 5% |
| Same Month of Travel | 18% | 18% | 16% | 13% |
| 1 to 3 Months Before Travel | 46% | 46% | 45% | 45% |
| 4 to 7 Months Before Travel | 20% | 20% | 18% | 29% |
| 8 to 12 Months Before Travel | 5% | 5% | 6% | 5% |
| More than 12 months Before Travel | 1% | 0% | 3% | 0% |
| Non-Response | 4% | 4% | 4% | 2% |

Source: Tour Operator and Media Exit Survey 2010

- Stopover visitors to Exuma primarily booked their reservations anywhere from the same month of travel to seven months in advance of travel. Almost half (45%) of them booked their reservations one to three months before travel.

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

- Two in three (66%) stopover visitors to Exuma used an online service to book some or all of their reservations.

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

MOST POPULAR ONLINE BOOKING SERVICES USED

EXUMA

2010

| | |
|------------------------------|----------------------|
| Sandals.com | Grandisleresort.com |
| Aa.com | Homeaway.com |
| Aircanada.com | Interturnet.com.br |
| Airmiles.co.uk | Itravel2000.com |
| Ba.com | Jetblue.com |
| Bahamas.com | Maritimetravel.ca |
| Bahamasair.com | Orbitz.com |
| Barrett-carlysl.com | Priceline.com |
| Beachbumvacation.com | Redtag.ca |
| Carlsonwagonlit.com | Selloffvacations.com |
| Cheapoair.com | Tdtravelrewards.com |
| Cheaptickets.com | Travelocity.com |
| Classicvacations.com | Tripcentral.ca |
| Continental.com | Virgin-atlantic.com |
| Delta.com/deltavacations.com | Vision2000.ca |
| Dreammakersvaca.com | Watermakersair.com |
| Expedia.com | Westjet.com |
| Explorers.co.uk | Worldtvl.com |
| Google.com | Ytb.com |

Some online services listed for Exuma were also used by visitors to book their reservations for Nassau because of the fact that some stopovers visited both destinations during their visit. (Source: Immigration Cards and Tour Media Exit Survey, 2010)

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

ISLANDS OF THE BAHAMAS

USE OF TRAVEL AGENT

2010

| | All Bah. | Nassau/P.I. | Grand Bahama | <i>Exuma</i> |
|--------------------------|----------|-------------|--------------|--------------|
| Used Travel Agent | 33% | 34% | 34% | 49% |
| Did Not Use Travel Agent | 64% | 63% | 63% | 50% |

Source: Tour Operator and Media Exit Surveys 2010

- Nearly half (49%) of the stopover visitors used a travel agent to book some or all of their reservations to Exuma. Some stopovers to Exuma are obviously using a combination of online and travel agent booking services to make their reservations.

- Some stopovers to Exuma who used tour operators/travel agents used the following: Unique Vacations, Flight Centre, Liberty Travel, AAA Travel, Marlin Travel, American Express Travel, Travel Impressions, GoGo Tours, Travel Leaders, Sears Travel, Uniglobe Travel, Funjet Vacations and CAA Travel.

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

- Approximately eight in ten (84%) stopover visitors used the Internet as the electronic media most frequently used when planning their vacation.
- 11% of them used Network television, 10% of them used Specialty Cable Channels when planning their vacations and 7% used Specialty News Channels the most when planning their vacations.

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

**TOP 15 FAVORITE TELEVISION STATIONS BY VISITORS
ISLANDS OF THE BAHAMAS
2010**

| | Bahamas | <i>Exuma</i> |
|----------|------------------------------|----------------------------------|
| 1 | NBC | ESPN |
| 2 | ABC | NBC |
| 3 | ESPN | ABC |
| 4 | CNN | FOX |
| 5 | CBS | CBS |
| 6 | FOX | CNN |
| 7 | HBO | HBO |
| 8 | DISC (Discovery Channel) | HGTV (Home & Garden Network) |
| 9 | HGTV (Home & Garden Network) | FOOD (Food Network) |
| 10 | FOOD (Food Network) | DISC (Discovery Channel) |
| 11 | FOXN | FOXN |
| 12 | LIFE (Lifetime) | Travel Channel |
| 13 | TNT | TNT |
| 14 | USA | TWC (The Weather Channel) |
| 15 | HIST(History Channel) | HIST(History Channel) |

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

- Stopover visitors to the Bahamas were most likely to watch television between the hours of 7:00 am to 8:59 am and 6 pm to 11:59 pm at night. The hours of 8:00 pm to 8:59 pm were of course prime time and almost one-half (46%) of stopovers watched television during that time.

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

- Approximately two in ten (23%) stopover visitors to Exuma used print media when they were planning their vacations. Of the stopover visitors to Exuma who used print media to plan their vacations, approximately one in four (26%) used newspapers and approximately eight in ten (82%) used magazines.

11. Use of Newspapers

TOP 16 FAVORITE NEWSPAPERS READ BY VISITORS ISLANDS OF THE BAHAMAS 2010

| | Bahamas | <i>Exuma</i> |
|----|------------------------------|----------------------------|
| 1 | USA Today | USA Today |
| 2 | New York Times | New York Times |
| 3 | Wall Street Journal | Wall Street Journal |
| 4 | Daily News | Globe & Mail |
| 5 | Washington Post | Toronto Star |
| 6 | New York Post | Other |
| 7 | Other | Local |
| 8 | Toronto Star | Daily News |
| 9 | Globe & Mail | Miami Herald |
| 10 | Boston Globe | Chicago Tribune |
| 11 | Miami Herald | New York Post |
| 12 | Times | Dallas Morning News |
| 13 | Local | Washington Post |
| 14 | New York Daily News | Times |
| 15 | Newsday | Sun/The Sun News |
| 16 | Atlanta Journal Constitution | Sun Sentinel |

- Although only 23% of stopover visitors to Exuma used print media when planning their vacations, approximately six in ten (59%) stopovers read newspapers for their personal enjoyment and edification.

12. Use of Magazines

- Although only 23% of stopover visitors to Exuma used print media when planning their vacations nearly three in four (74%) stopovers read magazines for their enjoyment or personal edification.

**TOP 20 FAVORITE MAGAZINES READ BY VISITORS
ISLANDS OF THE BAHAMAS
2010**

| | Bahamas | <i>Exuma</i> |
|----|-----------------------------------|-----------------------------------|
| 1 | People | People |
| 2 | Better Homes & Gardens | In Style |
| 3 | In Style | Men's Health |
| 4 | Cosmopolitan (Cosmo) | Glamour |
| 5 | Glamour | Cosmopolitan (Cosmo) |
| 6 | Good Housekeeping | Better Homes & Gardens |
| 7 | Men's Health | Food and Wine |
| 8 | Food & Wine | Good Housekeeping |
| 9 | National Geographic (Explorer) | Conde Nast Travel |
| 10 | O (Oprah) | Sports Illustrated |
| 11 | Bon Appetit | Bon Appetit |
| 12 | Sports Illustrated | In Touch/In Touch Weekly |
| 13 | Conde Nast Travel | Golf Digest |
| 14 | Time Magazine | O (Oprah) |
| 15 | Reader's Digest | US/US Weekly |
| 16 | Business Week | Time Magazine |
| 17 | In Touch/In Touch Weekly | National Geographic (Explorer) |
| 18 | Architectural Digest | Golf |
| 19 | US/US Weekly | Southern Living |
| 20 | Newsweek | Maximum/Maxim |

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

**TOURIST COMMENTS
POSITIVE VS. NEGATIVE COMMENTS
EXUMA**

| TOP 6 COMPLIMENTS | | TOP 6 COMPLAINTS | |
|--------------------------|-------------|-------------------------|-------------|
| | 2010 | | 2010 |
| General | 35% | Hotel (neg) | 13% |
| People | 27% | Prices (neg) | 10% |
| Scenery/Sightseeing | 12% | Litter (neg) | 10% |
| Beaches | 7% | Food (neg) | 6% |
| Sea/Water | 5% | Service (neg) | 6% |
| Hotel | 4% | People (neg) | 5% |
| No. of Comments | 415 | No. of Comments | 154 |

Source: Tour Operator and Media Exit Survey 2010

- 13% of the complaints received about Exuma were about the hotel. The fact that hotel was in the top 6 compliments and the top 6 complaints means that some of the visitors were highly satisfied with their hotel experience and

others had some not as satisfying experiences with their hotel e.g. poor hotel food, poor hotel service;

- 10% of the complaints received about Exuma were about the high prices in the island destination;
- 10% of the complaints received were about the litter in Exuma;
- 6% of the complaints received were about food in Exuma i.e. food was expensive, food wasn't good, limited food available, no vegetarian dishes;
- 6% of the complaints received were about poor service in Exuma i.e. slow service, poor service in hotel (employees did not smile).

14. How Did Stopover Visitors Rate Their Product Experiences?

PRODUCT SATISFACTION RATINGS 2010

| Rating Area | Much Better or Better | | Not as Good or Worse | |
|---------------------------|-----------------------|-------|----------------------|-------|
| | The Bah. | Exuma | The Bah. | Exuma |
| Hotel Rooms | 38% | 53% | 10% | 4% |
| Food in Hotels | 37% | 42% | 13% | 18% |
| Hotel Service | 44% | 52% | 11% | 12% |
| Value for Money in Hotels | 26% | 32% | 15% | 12% |
| Easy to Get to | 41% | 45% | 6% | 9% |
| Beaches | 62% | 79% | 4% | 2% |
| Climate | 49% | 58% | 11% | 7% |
| Attitude of People | 64% | 79% | 7% | 2% |
| Food in Restaurants | 44% | 44% | 10% | 12% |
| Restaurant Service | 43% | 45% | 12% | 11% |
| Overall Value for Money | 32% | 38% | 19% | 13% |
| Bahamas Overall | 59% | 69% | 5% | 4% |

Source: Research & Statistics Dept., Ministry of Tourism

- The beaches and the people were the two most highly rated product experiences in Exuma. Nearly eight in ten stopovers thought that the attitude of the people (79%) and the beaches (79%) were much better or better than they had expected them to be.
- Exuma Overall as a destination was also highly rated. Approximately seven in ten (69%) stopover visitors thought that Exuma overall was much better or better than they had expected it to be and only 4% thought that it was not as good or worse than they had expected.
- Stopovers to Exuma rated the hotel rooms more highly than stopovers to the Bahamas Overall. More than half (53%) of the stopovers to Exuma thought that the hotel rooms were much better or better than expected. Only 4% thought that they were not as good or worse than expected.
- More than half (52%) of the stopovers to Exuma thought that the hotel service was much better or better than expected. However, 12% thought that it was not as good or worse than expected.
- Nearly two in ten (18%) stopovers to Exuma thought that the food in the hotels was not as good or worse than they had expected it to be.

Approximately one in ten (12%) thought that the food in the restaurants was not as good or worse than expected.

- Exuma like many islands in The Bahamas did have problems with providing value for money to some stopover visitors. Approximately one in ten stopover visitors to Exuma thought that the hotel value for money (12%) and overall value for money (13%) in the island were not as good or worse than they had expected them to be.

15. How Did Stopover Visitors to Exuma Get There?

- The majority (85%) of stopover visitors to Exuma travelled to Exuma via a commercial airline.
- One in ten (10%) stopovers travelled to the island destination via a private plane and 3% by a yacht/private boat.

16. Where Did Visitors to Exuma Stay While There?

- Approximately six in ten (60%) stopovers to Exuma stayed in a hotel, 14% in an apt/villa, 15% on a private boat/yacht, 3% in their own property, and 4% with friends or relatives.

17. Which Stopover Visitors to Exuma Tended to Stay the Longest (2010)?

- On average, stopovers from the region known as Australasia stayed the longest 20.7 nights followed by those from Africa 20.0 nights;
- Stopover visitors from Europe stayed 12.0 nights and those from the Caribbean 11.6 nights ;
- Stopovers from Canada stayed an average of 8.5 nights;
- Stopovers from United States (8.1 nights), Latin America (6.2 nights).

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

- Although stopover visitors visit Exuma all year round, March is normally the busiest month.

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

- The slowest months for stopover visitors to visit Exuma were normally September and October however in 2010 the slowest months were January and September. It is not unusual for some hotel properties to close during the months in September and October.

20. How Many Stopover Visitors Did Exuma Receive and Where Did They Come From (2010)?

- In total, Exuma received 28,007 stopover visitors.

United States: 76% (21,200) of the stopover visitors came from the United States. Stopovers to Exuma from the United States primarily came from the states of Florida (23%), Texas (8%), New York (6%), California (5%), Georgia (4%), Pennsylvania (4%), New Jersey (4%) and Massachusetts (4%).

Canada: 15% (4,089) of the stopover visitors came from Canada. Stopovers to Exuma from Canada primarily came from the Canadian Provinces of

Ontario (51% of them), Quebec (15%), Alberta (7%), and British Columbia (5%).

Europe: 6% (1,626) of the stopover visitors came from Europe. Stopovers to Exuma from Europe primarily came from the UK (38% of them), Italy (23%), France (10%), Germany (8%), Switzerland (6%) and Sweden (3%).

Latin America: 1% (198) of the stopover visitors came from Latin America. Stopover Visitors to Exuma from Latin America primarily came from Venezuela (36%), Mexico (17% of them), Brazil (15%), Argentina (11%), Chile (5%) and Colombia (5%).

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

| | Exuma | All Bah. |
|---|-----------------|-----------------|
| MAIN PURPOSE OF VISIT | | |
| Vacation | 64% | 73% |
| Honeymoon | 22% | 5% |
| Business | 3% | 5% |
| Visiting friends and relatives | 3% | 5% |
| DECISION TO VISIT INFLUENCED BY: | | |
| Beaches | 72% | 60% |
| Climate | 55% | 51% |
| Rest and Relaxation | 49% | 41% |
| Hotel Facilities | 39% | 26% |
| Never Been Here Before | 27% | 22% |
| ACTIVITIES VISITORS INTENDED TO DO | | |
| Enjoy Beaches | 93% | 83% |
| Rest and Relax | 81% | 74% |
| Go Snorkeling | 46% | 33% |
| Go on Island Tour | 26% | 16% |
| Shop | 16% | 36% |
| Go Sailing | 15% | 8% |
| Go Golfing | 14% | 5% |
| Go Diving | 12% | 9% |
| LIKELY RETURN IN 1-5 YEARS | 90% | 86% |
| LIKELY RECOMMEND TO FRIENDS/REL | 96% | 92% |
| USED ONLINE SERVICE | 66% | 74% |
| USED TRAVEL AGENT | 49% | 33% |
| AGE* | | |
| 25 - 54 years old | 61% | 54% |
| 55 years old or older | 25% | 20% |
| SEX* | | |
| Male | 50% | 48% |
| Female | 47% | 49% |
| RACE | | |
| White | 87% | 80% |
| Black | 4% | 7% |
| Hispanic | 2% | 4% |
| Mixed Race/Mixed Heritage | 3% | 3% |
| Asian/Pacific Islander | 2% | 3% |
| American Indian/Alaska Native | 0% | 0% |
| Other | 1% | 1% |
| EDUCATION | | |
| College Graduate or Above | 74% | 66% |
| ANNUAL HOUSEHOLD INCOME | | |
| \$25,001 to \$50,000 | 4% | 8% |
| \$50,001 to \$75,000 | 8% | 11% |
| \$75,001 or more | 64% | 56% |
| PREVIOUS VISITS | | |
| First Time Visitor | 45% | 40% |
| Repeat Visitor | 55% | 59% |
| TRAVELLING PARTY SIZE | | |
| One | 14% | 15% |
| Two | 68% | 41% |
| Three or more | 16% | 38% |
| HOUSEHOLD SIZE | | |
| One | 7% | 13% |
| Two | 58% | 38% |
| Three-Four | 25% | 34% |
| COUNTRY OF ORIGIN | | |
| USA | 76% | 80% |
| Canada | 15% | 9% |
| Europe | 6% | 6% |
| Other Countries | 4% | 6% |
| AVERAGE LENGTH OF STAY | 8.6 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 2010. Some rounding may have occurred

Information in this brochure is based on the Tour Operator & Media Exit Survey 2010, Immigration Card, The Bahamas Tourist Office Exuma, and myoutislands.com.

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www.Tourismtoday.com and www.bahamas.com