

# **ISLANDS OF THE BAHAMAS**

## **TOUR OPERATOR & MEDIA SURVEY**



**RESEARCH AND STATISTICS DEPARTMENT  
MINISTRY OF TOURISM**

**2013**

## 1. Why Did Visitors Come to The Bahamas?

- Approximately seven in ten (73%) stopover visitors came to The Bahamas on a vacation;
- Approximately one in every twenty stopovers came on a business trip (6%) or to visit friends & relatives (5%).
- Approximately one in every twenty-five (4%) stopovers came on a honeymoon.

## 2. What Influenced Stopover Visitors to Visit The Bahamas?

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

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

Source: Tour Operator and Media Exit Survey 2013

- Approximately two in three (64%) stopover visitors to the Bahamas were influenced to visit the Bahamas because of the beaches;
- More than half (55%) of them were influenced to visit by the climate;
- Four in ten (40%) stopovers were influenced to visit by the rest and relaxation that they expected to enjoy in the destination;
- Approximately three in every ten (29%) stopover visitor was influenced to visit by the friendly people in The Bahamas;
- Approximately one in four (23%) stopover visitors were influenced to visit by the hotel facilities in the destination.
- Approximately one in every four (24%) stopover visitors to the Out Islands was influenced to visit because of the perceived safety of the islands.

### 3. What Activities Did They Intend to Do While in The Bahamas?

- Roughly eight in ten (84%) stopovers to The Bahamas intended to enjoy the beaches and approximately three in four (73%) intended to rest and relax;
- Approximately three in ten (31%) stopovers intended to go shopping and approximately one in three (34%) of them wanted to go snorkeling;
- Two in ten (19%) of them wanted to go to the casinos;
- Sporting activities like diving, sailing, deep sea fishing and bone fishing were especially of interest to some of the visitors to the Out Islands.

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

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

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

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

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

Source: Tour Operator and Media Exit Survey 2013

- Stopover visitors to The Bahamas primarily booked their reservations anywhere from the same month of travel to seven months in advance of travel. Roughly one half (47%) of them booked their reservations one to three months before travel and roughly two in ten (17%) stopovers booked their reservations the same month of travel.

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

### DID YOU USE AN ONLINE SERVICE TO BOOK ANY OF YOUR RESERVATIONS ISLANDS OF THE BAHAMAS 2013

	Bahamas		Nassau/P.I.		Grand Bahama		Out Islands	
	2013	2012	2013	2012	2013	2012	2013	2012
Yes	66%	68%	65%	68%	77%	72%	62%	64%
No	34%	31%	35%	31%	23%	27%	36%	35%
Non Response	1%	1%	1%	1%	1%	1%	1%	2%
Total	100%	100%	100%	100%	100%	100%	100%	100%

66.6% of Americans used online service, 62.3% of Canadians used online service, and 58.3% of Europeans used an online service.

Source: Tour Operator and Media Exit Survey 2013 & 2012, Research and Statistics Dept. Bahamas Ministry of Tourism

- Two in every three stopover visitors to The Bahamas (66%) and Nassau/Paradise Island (65%) used an online service to book some or all of their reservations in 2013 compared to 77% of stopovers to Grand Bahama and 62% of stopovers to the Out Islands.

### a) Which Online Services Were Used Most by Stopover Visitors to The Bahamas?

#### MOST POPULAR ONLINE BOOKING SERVICES USED STOPOVERS TO THE ISLANDS OF THE BAHAMAS 2013

expedia.com	hotels.com	aaa.com	lastminute.com
atlantis.com	bahamas.com	aadvantage.com	Libertytravel.com
aa.com	Wyndham.com	Bcdtravel.com	luxurylink.com
United.com	VRBO.com	Bestwestern.com	Nwa.com
Bahamasair.com	Britishairways.com	booking.com	oceanclub.com
Jetblue.com	Hilton.com	Carlsonwagonlit.com	onetravel.com
travelocity.com	hotwire.com	Celebration-Cruise-Line.com	regtag.ca
Sandals.com	Starwood.com/Starwoodhotels.com	cheapair.com	royalholiday.com
orbitz.com	Breezes.com	clubmed.com/clubmed.ca	selloffvacations.com
google.com	cheapflights.com	comfordsuites.com	signature.ca
Delta.com/deltavacations.com	bookit.com	copair.com	smallhope.com
Usairwaysvacations.com	Ba.com	Firstchoice.co.uk	southernair.com
cheapcaribbean.com	westjet.com/westjet.ca	flightcentre.com	Sunwing.ca
Aircanada.com	Spg.com	Fourseasons.com	travelzoo.com
priceline.com	Bahamasvacations.com	Gradcity.com	tripadvisors.com
Kayak.com	yahoo.com	grandbahamas.com	Tripcentral.ca
Sheraton.com	Intervalinternational.com	Grandbahamavacations.com	Tui.com
RCI.com	Continental.com	homeaway.com	worldtvl.com
cheaptickets.com	cheapair.com	intervalworld.com	vacationstogo.com
americanexpress.com	aol.com	itravel2000.com	Virtuallythere.com
RIU.com	Spiritair.com	kamalame.com	watermakersair.com

(Source: Immigration Cards and Tour Media Exit Survey, 2013). This is not an all inclusive list of every online service used, only the top 84.

The 1st two columns in yellow contain the top 42 online services; the next two columns are top services listed in alphabetical order.

## 6. Did Stopover Visitors to the Bahamas use a Tour Operator/Travel Agent to Book Any of Their Reservations?

- Approximately three in ten (29%) stopovers used a travel agent to book some or all of their reservations in 2013.

### ISLANDS OF THE BAHAMAS USE OF TRAVEL AGENT 2013

	All Bahamas		Nassau/P.I.		Grand Bahama		Out Islands		
	2013	2012	2013	2012	2013	2012	2013	2012	
Used Travel Agent	29%	34%	31%	36%	22%	28%	26%	30%	
Did Not Use Travel Agent	70%	64%	68%	62%	76%	68%	72%	68%	
		USA		Canada		Europe		Other Countries	
Used Travel Agent	26%	30%	42%	49%	47%	49%	38%	53%	
Did Not Use Travel Agent	73%	68%	57%	49%	52%	50%	60%	43%	

Source: Tour Operator and Media Exit Survey 2013 & 2012, Research and Statistics Dept. Bahamas Ministry of Tourism

- Some of the stopovers to The Bahamas who used tour operators/travel agents used the following: American Express Travel, Liberty Travel, AAA Travel, Club Med, Flight Centre, AirTran, Costco Travel, RCI Travel, Funjet Vacations, Unique Vacations, GOGO Tours, Marlin Travel, Pro Travel, Apple Vacations, Travel Leaders, Travel Impressions, Thomas Cook, Viaggi Del Ventaglio, Sears Travel, Student City, Uniglobe Travel, Majestic Tours, Sky Unlimited, Appalachia Travel, CAA, Maritz Travel, Autec, Pair a Dice Travel, Kuoni, Sunquest, Altour International, and Bel Air Travel, etc. All of these Tour Operators/Travel agents were the most popular in 2013.

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

### ELECTRONIC MEDIA MOST FREQUENTLY USED WHEN PLANNING YOUR VACATION ISLANDS OF THE BAHAMAS 2013

	Bahamas	Nassau/P.I.	Grand Bahama	Out Islands
Internet	83%	83%	85%	81%
Network Television	8%	9%	8%	6%
Specialty Cable Channels	6%	6%	6%	5%
Specialty News Channels	5%	5%	6%	4%
Radio	2%	2%	2%	2%

Source: Tour Operator and Media Exit Survey 2013

- Roughly eight in ten (83%) stopover visitors used the Internet as the electronic media most frequently used when planning their vacation. Approximately one in ten (8%) stopovers used Network television the most when planning their vacation.

## 8. What Were the Favorite Television Stations Watched by Stopover Visitors to The Bahamas?

### TOP 20 FAVORITE TELEVISION STATIONS BY VISITORS ISLANDS OF THE BAHAMAS 2013

Bahamas		% Informants	Nassau/P.I.		% Informants
1	ESPN	20%	NBC		19%
2	NBC	19%	ESPN		19%
3	ABC	18%	ABC		18%
4	CNN	16%	CNN		16%
5	CBS	15%	CBS		15%
6	FOX	14%	FOX		15%
7	HBO	12%	HBO		12%
8	HGTV(Home & Garden Network)	10%	HGTV(Home & Garden Network)		10%
9	DISC (Discovery Channel)	8%	TNT		9%
10	TNT	8%	DISC (Discovery Channel)		7%
11	FOXN	7%	FOXN		6%
12	FOOD (Food Network)	6%	HIST (History Channel)		6%
13	USA	6%	FOOD (Food Network)		6%
14	HIST (History Channel)	6%	TLC (The Learning Channel)		6%
15	BRAVO	5%	USA		5%
16	TLC (The Learning Channel)	5%	BRAVO		5%
17	A & E (Arts & Entertainment Network)	4%	A & E (Arts & Entertainment Network)		4%
18	TBS	4%	TBS		4%
19	SHW (Showtime)	3%	BBCA (BBC America)		3%
20	E! (E! Entertainment)	3%	E! (E! Entertainment)		3%
Grand Bahama		% Informants	Out Islands		% Informants
1	ABC	20%	ESPN		24%
2	NBC	19%	NBC		18%
3	ESPN	18%	ABC		18%
4	CNN	16%	CNN		16%
5	CBS	14%	FOX		13%
6	HBO	13%	CBS		13%
7	HGTV (Home & Garden Network)	11%	HBO		11%
8	FOX	11%	HGTV (Home & Garden Network)		11%
9	USA	8%	FOXN		9%
10	DISC (Discovery Channel)	8%	DISC (Discovery Channel)		8%
11	FOXN	7%	FOOD (Food Network)		7%
12	TWC (The Weather Channel)	6%	BRAVO		5%
13	TNT	6%	TNT		5%
14	A & E (Arts & Entertainment Network)	6%	HIST(History Channel)		4%
15	LIFE (Lifetime)	5%	USA		4%
16	FOOD (Food Network)	5%	SHW (Showtime)		3%
17	HIST(History Channel)	4%	MTV (Music Television)		3%
18	MSNBC	4%	MSNBC		3%
19	TLC (The Learning Channel)	4%	TWC (The Weather Channel)		3%
20	TBS	4%	NGEO (National Geographic Channel)		3%

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

- The favorite television station watched by stopover visitors to the Bahamas was ESPN. Two in every ten stopovers to the Bahamas who watched television watched ESPN (20%), NBC (19%) or ABC (18%). Other popular networks watched by stopover visitors to the Bahamas included CNN, CBS and FOX. Visitors to the Bahamas also watched movie and entertainment channels like (HBO, Showtime, A & E, E!Entertainment), home & garden and food channels like (HGTV, FOOD) and educational channels like (DISC Discovery Channel, HIST, TLC).

## 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 6 pm to 10:59 pm at night. The hour of 8:00 pm to 8:59 pm was of course the key prime time hour and approximately four in ten (42%) stopovers to the Bahamas watched television during that time.

## 10. Did Stopover Visitors Use Print Media Such as Newspapers and Magazines When They Were Planning Their Vacations?

Two in ten (20%) stopover visitors to The Bahamas used print media when they were planning their vacations.

### PRINT MEDIA USED MOST FREQUENTLY WHEN PLANNING A VACATION ISLANDS OF THE BAHAMAS 2013

	Bahamas		Nassau/P.I.		Grand Bahama		Out Islands	
	2013	2012	2013	2012	2013	2012	2013	2012
Newspapers	39%	43%	41%	48%	30%	34%	37%	32%
Magazines	72%	68%	71%	64%	74%	74%	75%	79%
Other Print Media	7%	5%	6%	4%	14%	7%	9%	6%

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

Non Response has been factored out of the responses. Source: Tour Operator and Media Exit Survey 2013

Of these stopovers who used print media when planning their vacations approximately four in ten (39%) used newspapers and approximately seven in ten (72%) used magazines.



## 11. Use of Newspapers

Although only 20% of stopover visitors to the Bahamas used print media when planning their vacations, more than half (55%) of them in 2013 read newspapers for their personal enjoyment and edification compared to 60% in 2012, a decline in readership of 5%.

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

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

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

- The most popular newspaper read by stopover visitors to the Bahamas was USA Today. Three in every ten (30%) stopovers who read newspapers read USA Today. The New York Times and the Wall Street Journal were the next two popular newspapers read by stopover visitors to the Bahamas.



## 12. Use of Magazines

Although only 20% of stopover visitors used print media when planning their vacations approximately six in ten (63%) stopovers read magazines for their personal enjoyment.

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

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

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

Fly Fishing is number 25 on the Out Island list

- The most popular magazine read by stopover visitors to the Bahamas who read magazines was People Magazine read by approximately two in every twenty (22%) stopovers. Better Homes and Garden and Good Housekeeping were the next most popular magazines read by stopovers to the Bahamas.

### 13. How Did Stopover Visitors Rate Their Product Experiences Compared to What They Expected?

#### PRODUCT SATISFACTION RATINGS 2013

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

- Approximately six in ten (63%) stopover visitors thought that The Bahamas overall was much better or better than they had expected it to be.
- Stopovers to the Out Islands gave higher ratings than those to Nassau/Paradise Island and Grand Bahama on the overall Bahamas experience, the attitude of the people, the beaches, climate, restaurant food, and overall value for money.
- A higher percentage of stopover visitors to Grand Bahama rated the island worse than those to Nassau/Paradise Island and the Out Islands on hotel rooms (14% vs. 12% and 4%), hotel food (16% vs. 13% and 6%), hotel service (11% vs. 9% and 4%) and restaurant food (10% vs. 8% vs. 7%).
- The Bahamas overall did not receive very high ratings on hotel value for money (only 26% or approximately one in four stopovers thought it was MB or B than they had expected it to be), or overall value for money (only 33% or one in three stopovers thought it was MB or B) but Grand Bahama rated higher than Nassau/Paradise Island in these areas. The Out Islands rated better on overall value for money than both Nassau/P.I. and Grand Bahama. However, approximately one in ten (11%) stopover visitors to the Out Islands still thought that the overall value for money was not as good as or worse than it should have been.

## 14. What Were the Top Compliments and Complaints Given by Stopover Visitors to The Bahamas?

### TOURIST COMMENTS POSITIVE VS. NEGATIVE COMMENTS ALL BAHAMAS

TOP 6 COMPLIMENTS			TOP 6 COMPLAINTS		
	2013	2012		2013	2012
General	33%	38%	Prices (neg)	13%	14%
People	26%	27%	Hotel (neg)	12%	12%
Scenery/Sightseeing	7%	7%	People (neg)	9%	9%
Beaches	5%	5%	Litter (neg)	8%	6%
Will Return	5%	n/a	Food (neg.)	6%	7%
Hotel	3%	3%	Service (neg)	5%	7%
<b>No. of Comments</b>	<b>2,779</b>	<b>4,312</b>	<b>No. of Comments</b>	<b>1,176</b>	<b>1,712</b>

In 2013, comments that visitors made about returning to the Bahamas were separated out of General and placed by themselves.

Source: Tour Operator Media Exit Survey 2013 and 2012

- Of the 2,779 **positive comments** received in 2013 from the survey, the top six compliments made by visitors included General Comments, people, scenery/sightseeing, beaches, comments about the fact that they will return, and hotel.
- **General:** One in every three (33%) compliments received were general comments like: "Loved It, Bahamas is great, very enjoyable."
- **People:** Approximately one in every four (26%) compliments received from stopover visitors were about the positive attitudes of the people like: "people were very friendly, nice people, wonderful, warm."
- **Scenery/Sightseeing:** One in every fourteen (7%) compliments received in 2013 were about the scenery/sightseeing like: "beautiful, beautiful island, lovely part of the world, spectacular scenery."
- **Beaches:** One in every twenty (5%) compliments received from stopover visitors were positive comments about the beaches like: "beautiful beaches, great beaches, loved the beaches."
- **Will Return:** One in every twenty (5%) compliments received from stopover visitors were about the fact that they intended to return like: "will be back, will come back again, can't wait to return."
- **Hotel:** 3% of the compliments received from stopover visitors were about the hotel where they stayed like: "Atlantis was great, hotel service was fabulous, serving staff at RIU were fantastic, Small Hope Bay was amazing, adding new hotels are a good thing."
- Of the 1,176 negative comments received in 2013 on the survey, the top six complaints made by visitors included: high prices, complaints about their hotel, the poor attitudes of the people, litter/cleanliness, food and poor service.

## 15. Visitor Demographics

### DEMOGRAPHIC & PSYCHOGRAPHIC PROFILE ISLANDS OF THE BAHAMAS

	2013	2012
<b>MAIN PURPOSE OF VISIT</b>		
Vacation	73%	76%
Business	6%	5%
Honeymoon	4%	6%
Visiting friends and relatives	5%	4%
<b>DECISION TO VISIT INFLUENCED BY:</b>		
Beaches	64%	65%
Climate	55%	53%
Rest and Relaxation	40%	43%
<b>ACTIVITIES VISITORS INTENDED TO DO</b>		
Enjoy Beaches	84%	87%
Rest and Relax	73%	76%
Go Snorkeling	34%	35%
Shop	31%	35%
Go To Casinos	19%	21%
Go on Island Tour	16%	16%
<b>LIKELY RETURN IN 1-5 YEARS</b>	89%	85%
<b>LIKELY RECOMMEND TO FRIENDS/REL</b>	94%	93%
<b>USED ONLINE SERVICE TO BOOK</b>	66%	68%
<b>USED TRAVEL AGENT</b>	29%	34%
<b>AGE*</b>		
25 - 54 years old	53%	54%
55 years old or older	23%	21%
<b>SEX*</b>		
Male	49%	48%
Female	48%	49%
<b>RACE</b>		
White	82%	83%
Black	6%	4%
Hispanic	5%	5%
Mixed Race/Mixed Heritage	3%	3%
Asian/Pacific Islander	2%	4%
American Indian/Alaska Native	1%	0%
Other	1%	0%
<b>EDUCATION</b>		
College Graduate or Above	69%	69%
<b>ANNUAL HOUSEHOLD INCOME</b>		
\$25,001 to \$50,000	8%	8%
\$50,001 to \$75,000	9%	10%
\$75,001 or more	58%	60%
<b>PREVIOUS VISITS</b>		
First Time Visitor	41%	44%
Repeat Visitor	58%	55%
<b>TRAVELLING PARTY SIZE</b>		
One	17%	16%
Two	45%	45%
Three or more	34%	36%
<b>HOUSEHOLD SIZE</b>		
One	12%	12%
Two	43%	40%
Three-Four	33%	36%
<b>COUNTRY OF ORIGIN</b>		
USA	78%	79%
Canada	9%	9%
Europe	6%	6%
Other Countries	7%	6%
<b>AVERAGE LENGTH OF STAY</b>	6.8 nts.	6.8 nts.

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

\*Source: Tour Operator & Media Exit Study 2013 & 2012, Research and Statistics Dept. Bahamas Ministry of Tourism  
In 2013, Likelihood to return: Very Likely=60.9% and Somewhat Likely=27.8%, Likelihood to Recommend: VL= 71.5% and SL=22.9%. Likelihood of not returning: Somewhat Unlikely to return=7.1% and Not at all likely to return=3.1%  
Likelihood of not recommending: Somewhat Unlikely to recommend=3.5% and Not at all likely to recommend=1.2%

All numbers are subject to revision.

All information in this brochure is based on the Tour Operator & Media Exit Survey 2013 and the Immigration Card. Date of publication July 23, 2014.



Research and Statistics Department  
Bahamas Ministry of Tourism  
P.O. Box N-3701  
Nassau, Bahamas  
Tel: 242-302-2094

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