

ISLANDS OF THE BAHAMAS

TOUR OPERATOR & MEDIA SURVEY



**RESEARCH AND STATISTICS DEPARTMENT
MINISTRY OF TOURISM**

2014

1. Why Did Visitors Come to The Bahamas?

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

2. What Influenced Stopover Visitors to Visit The Bahamas?

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

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

Source: Tour Operator and Media Exit Survey 2014

- Approximately two in three (66%) stopover visitors to the Bahamas were influenced to visit the Bahamas because of the beaches and roughly six in ten (57%) were influenced to visit because of the climate;
- Approximately four in ten (43%) stopovers were influenced to visit by the rest and relaxation that they expected to enjoy in the destination and roughly three in every ten (27%) were influenced to visit because of the friendly people in The Bahamas;
- One in four (25%) stopover visitors were influenced to visit by the hotel facilities in the destination and two in ten (20%) were influenced to visit because of the perceived safety of the Bahamas.

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

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

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

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

- Roughly eight in ten (83%) stopovers to The Bahamas intended to enjoy the beaches and roughly seven in ten (73%) intended to rest and relax;
- Approximately one in three (34%) stopovers wanted to go snorkeling, three in ten (30%) intended to go shopping and two in ten (20%) stopovers wanted to go to the casinos;
- Approximately one in six (16%) stopovers wanted to go on an island tour;
- Sporting activities like sailing, diving, bone fishing, deep sea fishing and golfing were especially of interest to some of the visitors to the Out Islands.

4. When Did the Stopover Visitors Make Their Reservations?

**WHEN DID YOU MAKE YOUR RESERVATIONS
STOPOVER VISITORS
2014**

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

Source: Tour Operator and Media Exit Survey 2014

- 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 (45%) of them booked their reservations one to three months before travel and approximately one in every seven (15%) 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 2014

	All Bahamas		Nassau/P.I.		Grand Bahama		Out Islands	
	2014	2013	2014	2013	2014	2013	2014	2013
Used Online Service	64%	66%	62%	65%	72%	77%	64%	62%
Did Not Use Online Service	36%	34%	38%	35%	26%	23%	35%	36%
	USA		Canada		Europe		Other Countries	
Used Online Service	65%	67%	61%	62%	61%	58%	58%	66%
Did Not Use Online Service	35%	33%	38%	37%	39%	41%	41%	33%

Source: Tour Operator and Media Exit Survey 2014 & 2013, Research and Statistics Dept. Bahamas Ministry of Tourism

- Roughly six in every ten stopover visitors to The Bahamas Overall (64%), Nassau/Paradise Island (62%) and the Out Islands (64%) used an online service to book some or all of their reservations in 2014 compared to approximately seven in ten (72%) stopovers to Grand Bahama.

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 2014

expedia.com	regtag.ca	aaa.com	intervalinternational.com
atlantis.com	Ba.com/Britishairways.com	aeroplan.com	intervalworld.com
cheapcaribbean.com	booking.com	airtran.com	istours.com
orbitz.com	cheapair.com	applevacations.com	libertytravel.com
jetblue.com	selloffvacations.com	bahamasvacations.com	luxurylink.com
delta.com/deltavacations.com	signature.ca	bcdtravel.com	maritimetravel.ca
sandals.com	cheaptickets.com	bestwestern.com	melia.com
travelocity.com	breezes.com	caribbean-airlines.com	rbctravelmanagement.com
vacationexpress.com	gradcity.com	celebration-cruise-line.com	RCL.com
sunwing.ca	hotels.com	cheapair.com	searstravel.ca
aa.com	bahamas.com	cheapflights.com	silverairways.com
bookit.com	kayak.com	classicvacations.com	skyauction.com
priceline.com	copair.com	continental.com	southwest.com
aircanada.com	VRBO.com	costco.com	Spg.com
bahamasair.com	tripcentral.ca	flybahamasexpress.com	spiritair.com
westjet.com/westjet.ca	vacationstogo.com	funjet.com	traveladvisors.com
watermakersair.com	hotwire.com	gradweek.com	travelzoo.com
united.com	starwoodvacationownership.com	grandbahamavacations.com	tui.com
usairwaysvacations.com	americanexpress.com	hilton.com	vision2000.ca
carlsonwagonlit.com	onetravel.com	homeaway.com	worldtvl.com
itravel2000.com	RIU.com	interturnet.com.br	wyndham.com

(Source: Immigration Cards and Tour Media Exit Survey, 2014). 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 (31%) stopovers used a travel agent to book some or all of their reservations in 2014.

**ISLANDS OF THE BAHAMAS
USE OF TRAVEL AGENT
2014**

	All Bahamas		Nassau/P.I.		Grand Bahama		Out Islands		
	2014	2013	2014	2013	2014	2013	2014	2013	
Used Travel Agent	31%	29%	32%	31%	34%	22%	26%	26%	
Did Not Use Travel Agent	68%	70%	67%	68%	65%	76%	73%	72%	
		USA		Canada		Europe		Other Countries	
Used Travel Agent	26%	26%	48%	42%	46%	47%	43%	38%	
Did Not Use Travel Agent	72%	73%	51%	57%	53%	52%	54%	60%	

Source: Tour Operator and Media Exit Survey 2014 & 2013, Research and Statistics Dept. Bahamas Ministry of Tourism

- Some of the stopovers to The Bahamas who used tour operators/travel agents used the following top 42 TO/TA's: Liberty Travel, American Express Travel, AAA Travel, Club Med, Flight Centre, Sandals/Sandals Unique Vacations, Carlson Wagonlit, Student City, Costco Travel, Marlin Travel, Funjet Vacations, RCI Travel, Altour International, Unique Vacations, GOGO Tours, Apple Vacations, AirTran, Travel Impressions, Travel Leaders, Pro Travel, Uniglobe Travel, CAA Travel, Sears Travel, Thomas Cook, Viaggi Del Ventaglio, Global Travel, Majestic Tours, STA Travel, Appalachia Travel, Club Voyages, Travel Inc., Autec, Carnival Cruise Line, Maritz Travel, Kuoni, Pair a Dice Travel, Travel Impressions, Sunquest, Going Places, Sky Unlimited, Omega World Travel and Havana Tours, etc. All of these Tour Operators/Travel agents were the most popular in 2014.

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
2014**

	Bahamas	Nassau/P.I.	Grand Bahama	Out Islands
Internet	85%	85%	86%	84%
Network Television	10%	11%	10%	6%
Specialty Cable Channels	7%	8%	8%	4%
Specialty News Channels	6%	7%	6%	3%
Radio	3%	3%	2%	1%

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

- Roughly nine in ten (85%) stopover visitors used the Internet as the electronic media most frequently used when planning their vacation. One in ten (10%) stopovers used Network television the most when planning their vacation and approximately one in every thirty (3%) stopovers used the radio when planning their vacations.

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 2014

Bahamas		% Informants	Nassau/P.I.		% Informants
1	ESPN	21%	ESPN	21%	21%
2	ABC	19%	ABC	18%	18%
3	NBC	18%	NBC	18%	18%
4	HBO	14%	HBO	14%	14%
5	CNN	13%	CNN	14%	14%
6	CBS	13%	FOX	13%	13%
7	HGTV(Home & Garden Network)	13%	CBS	13%	13%
8	FOX	12%	HGTV(Home & Garden Network)	13%	13%
9	FOOD (Food Network)	7%	FOOD (Food Network)	7%	7%
10	TNT	6%	TNT	7%	7%
11	DISC (Discovery Channel)	6%	USA	6%	6%
12	FOXN	6%	DISC (Discovery Channel)	5%	5%
13	USA	5%	BRAVO	5%	5%
14	BRAVO	5%	TLC (The Learning Channel)	5%	5%
15	HIST (History Channel)	5%	FOXN	5%	5%
16	TLC (The Learning Channel)	4%	SHW (Showtime)	5%	5%
17	SHW (Showtime)	4%	HIST (History Channel)	5%	5%
18	TBS	4%	TBS	4%	4%
19	A & E (Arts & Entertainment Network)	3%	E! (E! Entertainment)	3%	3%
20	E! (E! Entertainment)	3%	A & E (Arts & Entertainment Network)	3%	3%
Grand Bahama		% Informants	Out Islands		% Informants
1	ABC	20%	ESPN	23%	23%
2	NBC	18%	ABC	18%	18%
3	HBO	17%	NBC	18%	18%
4	ESPN	17%	CNN	13%	13%
5	CBS	15%	HGTV(Home & Garden Network)	12%	12%
6	HGTV(Home & Garden Network)	14%	HBO	12%	12%
7	CNN	12%	CBS	11%	11%
8	FOX	12%	FOX	10%	10%
9	DISC (Discovery Channel)	7%	DISC (Discovery Channel)	8%	8%
10	FOOD (Food Network)	7%	FOXN	8%	8%
11	TNT	6%	FOOD (Food Network)	7%	7%
12	FOXN	6%	HIST (History Channel)	5%	5%
13	TLC (The Learning Channel)	5%	BRAVO	5%	5%
14	A & E (Arts & Entertainment Network)	5%	TWC (The Weather Channel)	5%	5%
15	CBC (Canada)	4%	TNT	4%	4%
16	USA	4%	SHW (Showtime)	4%	4%
17	BRAVO	4%	AMC (American Movie Classics)	4%	4%
18	LIFE (Lifetime)	4%	NGEO (National Geographic Channel)	4%	4%
19	HIST (History Channel)	4%	USA	4%	4%
20	TBS	4%	PBS (Public Broadcasting Station)	4%	4%

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

- Approximately eight in ten (79%) stopovers to the Bahamas watched television. Stopover visitors to the Out Islands tended to watch television less than stopovers to Nassau/Paradise Island, Grand Bahama and the Bahamas Overall. Approximately two in three (66%) stopovers to the Out Islands watched television compared to approximately eight in ten stopovers to Nassau/Paradise Island (82%) and Grand Bahama (82%).
- The favorite television station watched by stopover visitors to the Bahamas was ESPN. ESPN has been the top television station watched by stopover

visitors to the Bahamas since 2011. In 2010, NBC was the number one television station watched by stopover visitors to the Bahamas and ESPN was in the number three spot.

- Approximately two in every ten stopovers to the Bahamas who watched television watched ESPN (21%), ABC (19%) or NBC (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 four in ten (40%) 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?

- Approximately one in six (16%) stopover visitors to The Bahamas used print media when they were planning their vacations. The number of people who used print media when planning their vacations has declined over the years. In 2013, 20% of stopover visitors to the Bahamas used print media to plan their vacations.

PRINT MEDIA USED MOST FREQUENTLY WHEN PLANNING A VACATION ISLANDS OF THE BAHAMAS 2014

	Bahamas		Nassau/P.I.		Grand Bahama		Out Islands	
	2014	2013	2014	2013	2014	2013	2014	2013
Newspapers	38%	39%	40%	41%	39%	41%	30%	37%
Magazines	69%	72%	67%	71%	68%	71%	78%	75%
Other Print Media	11%	7%	12%	6%	10%	6%	8%	9%

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 2014

- Of these stopovers who used print media when planning their vacations approximately four in ten (38%) used newspapers and approximately seven in ten (69%) used magazines.

11. Use of Newspapers

Although only 16% of stopover visitors to the Bahamas used print media when planning their vacations, half (50%) of them in 2014 read newspapers for their personal enjoyment and edification compared to 55% in 2013 and 60% in 2012. Newspaper readership among stopover visitors has been declining over the years.

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

	Bahamas	% Informants	Nassau/P.I.	% Informants
1	New York Times	26%	New York Times	25%
2	USA Today	26%	USA Today	25%
3	Wall Street Journal	17%	Wall Street Journal	15%
4	New York Post	11%	New York Post	14%
5	Daily News	8%	Daily News	9%
6	Toronto Star	6%	Toronto Star	6%
7	Globe & Mail	5%	New York Daily News	5%
8	Washington Post	5%	Newsday	5%
9	New York Daily News	4%	Globe & Mail	5%
10	Newsday	4%	Times	4%
11	Times	4%	Washington Post	4%
12	Boston Globe	3%	Post	3%
13	Post	2%	Boston Globe	3%
14	Miami Herald	2%	Chicago Tribune	2%
15	Chicago Tribune	2%	Miami Herald	2%
16	Atlanta Journal Constitution	2%	Sun Sentinel	1%
17	Sun Sentinel	2%	Atlanta Journal Constitution	1%
18	Sun/The Sun News	1%	Sun/The Sun News	1%
19	Daily Mail	1%	Daily Mail	1%
20	Orlando Sentinel	1%	Star Ledger	1%
	Grand Bahama	% Informants	Out Islands	% Informants
1	USA Today	25%	New York Times	31%
2	New York Times	23%	USA Today	29%
3	Wall Street Journal	16%	Wall Street Journal	23%
4	Toronto Star	8%	Washington Post	7%
5	Daily News	7%	Globe & Mail	5%
6	Washington Post	7%	Boston Globe	4%
7	Globe & Mail	6%	Daily News	4%
8	New York Post	4%	New York Post	4%
9	Boston Globe	4%	Miami Herald	4%
10	Sun/The Sun News	3%	Toronto Star	4%
11	Times	2%	Atlanta Journal Constitution	3%
12	Chicago Tribune	2%	Chicago Tribune	3%
13	Atlanta Journal Constitution	2%	Sun Sentinel	3%
14	Miami Herald	2%	Palm Beach Post	3%
15	Richmond Times	2%	Times	2%
16	Sun Sentinel	2%	Orlando Sentinel	2%
17	New York Daily News	1%	Abaconian	2%
18	Newsday	1%	Newsday	1%
19	Edmonton Journal	1%	New York Daily News	1%
20	Freeport News	1%	Post	1%

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

- The most popular newspaper read by stopover visitors to the Bahamas was The New York Times. Approximately one in every four (26%) stopovers who read newspapers read The New York Times. USA Today and the Wall Street Journal were the next two popular newspapers read by stopover visitors.

12. Use of Magazines

Although only 16% of stopover visitors used print media when planning their vacations roughly six in ten (57%) stopovers in 2014 read magazines for their personal enjoyment compared to 63% in 2013 and 67% in 2012. Magazine readership among stopovers to the Bahamas has been declining over the years.

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

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

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

US/US Weekly, Ebony, Southern Living and Golf fell in the top 25 magazines for Nassau/P.I.

Woman's Day, Architectural Digest, Shape and Travel and Leisure fell in the top 25 magazines for Grand Bahama.

- The most popular magazine for stopover visitors to the Bahamas who read magazines was People Magazine read by approximately two in every ten

(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 2014

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	66%	65%	67%	71%	6%	7%	8%	3%
Beaches	66%	64%	70%	69%	3%	3%	3%	2%
Climate	58%	59%	58%	56%	6%	6%	6%	6%
Food in Restaurants	48%	47%	49%	49%	9%	9%	12%	7%
Restaurant Service	48%	49%	44%	46%	10%	9%	14%	8%
Hotel Service	45%	49%	40%	35%	9%	10%	15%	4%
Easy to Get to	45%	46%	47%	38%	5%	4%	6%	7%
Hotel Rooms	38%	40%	33%	33%	10%	11%	19%	4%
Food in Hotels	38%	41%	31%	33%	12%	12%	19%	6%
Overall Value for Money	34%	34%	38%	34%	14%	15%	13%	11%
Value for Money in Hotels	29%	30%	32%	23%	15%	18%	12%	7%
Bahamas Overall	64%	63%	63%	67%	3%	3%	5%	2%

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

- Roughly six in ten (64%) 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 and the attitude of the people;
- 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 (19% vs. 11% and 4%), hotel food (19% vs. 12% and 6%), hotel service (15% vs. 10% and 4%), restaurant service (14% vs. 9% vs. 8%) and restaurant food (12% vs. 9% vs. 7%).
- A higher percentage of stopover visitors to Nassau/Paradise Island rated the island worse than those to Grand Bahama and the Out islands on value for money in hotels (18% vs. 12% vs. 7%) and overall value for money (15% vs. 13% vs. 11%).
- The Bahamas overall did not receive very high ratings on hotel value for money (only 29% or approximately three in ten stopovers thought it was MB or B than they had expected it to be), or overall value for money (only 34% or approximately 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 also had an issue with providing overall value for money to the stopovers who visited the islands. 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 they had expected it to be.

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		
	2014	2013		2014	2013
General	33%	33%	Prices (neg)	14%	13%
People	25%	26%	Hotel (neg)	14%	12%
Scenery/Sightseeing	8%	7%	People (neg)	10%	9%
Beaches	5%	5%	Food (neg.)	6%	6%
Will Return	4%	5%	Service (neg)	6%	5%
Hotel	3%	3%	Litter (neg)	5%	8%
No. of Comments	3,019	2,779	No. of Comments	1,148	1,176

Source: Tour Operator Media Exit Survey 2014 and 2013

- Of the 3,019 **positive comments** received in 2014 from the survey, the top six compliments made by visitors included General comments, people, scenery/sightseeing, beaches, comments about returning and hotel.
- **General:** One in every three (33%) compliments received were general comments like: “We loved it, I was amazed, I enjoyed my stay, Love it, It is a great place, Fantastic, It’s my happy place, Had a wonderful time;”
- **People:** Approximately one in every four (25%) compliments received from stopover visitors were about the positive attitudes of the people like: “Love the people, Friendly people, Best people on the planet;”
- **Scenery/Sightseeing:** One in every twelve (8%) compliments received were about the scenery/sightseeing like: “Beautiful corner of the world, Beautiful nature, It’s extremely beautiful here, Absolutely beautiful islands;”
- **Beaches:** One in every twenty (5%) compliments received from stopover visitors were positive comments about the beaches like: “Beaches are beautiful, Amazing beaches, Best beaches in the world, I love the beaches;”
- **Will Return:** Approximately one in every twenty (4%) compliments received from stopover visitors were about the fact that they intended to return like: “We loved our vacation hope to return often, We had a pleasant overnight stop and would love to return some day, Visited 5 years in a row now and will continue to return for at least one week per year, We will return;”
- **Hotel:** Approximately one in every thirty (3%) compliments received from stopover visitors were about the hotel where they stayed like: “Atlantis was awesome, Housekeeping at Atlantis was great, Sandals is the best, RIU Paradise Island: room, food, service, staff comportsment exceeded expectations, Sivananda Yoga was great, Cat Island Fernandez Bay was amazing, Grand Lucayan was great, Memories was so much better than expected, Ocean Reef people are great, I loved Firefly Resort, the Abaco Club was great, the Lofty Fig (Marsh harbour) was outstanding, Highly recommend Sea Spray on Elbow Cay, Bluff House was excellent, Love Baker’s Bay, Small Hope Bay is amazing, Love Kamalame Resort;”
- Of the 1,148 negative comments received in 2014, the top six complaints made by visitors included: high prices, complaints about their hotel, poor attitudes of the people, food (i.e. prices & quality), poor service and litter.

15. Visitor Demographics

DEMOGRAPHIC & PSYCHOGRAPHIC PROFILE ISLANDS OF THE BAHAMAS

	2014	2013
MAIN PURPOSE OF VISIT		
Vacation	73%	73%
Business	5%	6%
Honeymoon	5%	4%
Visiting friends and relatives	5%	5%
DECISION TO VISIT INFLUENCED BY:		
Beaches	66%	64%
Climate	57%	55%
Rest and Relaxation	43%	40%
ACTIVITIES VISITORS INTENDED TO DO		
Enjoy Beaches	83%	84%
Rest and Relax	73%	73%
Go Snorkeling	34%	34%
Shop	30%	31%
Go To Casinos	20%	19%
Go on Island Tour	16%	16%
LIKELY RETURN IN 1-5 YEARS	88%	89%
LIKELY RECOMMEND TO FRIENDS/REL	95%	94%
USED ONLINE SERVICE TO BOOK	64%	66%
USED TRAVEL AGENT	31%	29%
AGE*		
25 - 54 years old	53%	53%
55 years old or older	23%	23%
SEX*		
Male	49%	49%
Female	48%	48%
RACE		
White	81%	82%
Black	6%	6%
Hispanic	5%	5%
Mixed Race/Mixed Heritage	3%	3%
Asian/Pacific Islander	3%	2%
American Indian/Alaska Native	0%	1%
Other	1%	1%
EDUCATION		
College Graduate or Above	67%	69%
ANNUAL HOUSEHOLD INCOME		
\$25,001 to \$50,000	9%	8%
\$50,001 to \$75,000	11%	9%
\$75,001 or more	57%	58%
PREVIOUS VISITS		
First Time Visitor	40%	41%
Repeat Visitor	59%	58%
TRAVELLING PARTY SIZE		
One	17%	17%
Two	44%	45%
Three or more	35%	34%
HOUSEHOLD SIZE		
One	11%	12%
Two	44%	43%
Three-Four	32%	33%
COUNTRY OF ORIGIN		
USA	78%	78%
Canada	10%	9%
Europe	6%	6%
Other Countries	7%	7%
AVERAGE LENGTH OF STAY	6.7 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 2014 & 2013, Research and Statistics Dept. Bahamas Ministry of Tourism

In 2014, Likelihood to return: Very Likely=59.9% and Somewhat Likely=28.3%, Likelihood to Recommend: VL= 73.2% and SL=21.8%. Likelihood of not returning: Somewhat Unlikely to return=7.3% and Not at all likely to return=2.9% Likelihood of not recommending: Somewhat Unlikely to recommend=3.2% and Not at all likely to recommend=1.0%

All numbers are subject to revision.

16. What Internet Search Engines, Content Providers, Social Networks, or Photo Sharing Websites Did Stopover Visitors to the Bahamas Use?

INTERNET SEARCH ENGINES/CONTENT PROVIDERS/ SOCIAL NETWORKS/PHOTO SHARING WEBSITES ISLANDS OF THE BAHAMAS 2014

		Bahamas	Nassau/P.I.	Grand Bahama	Out Islands
1	Google	83%	80%	87%	87%
2	Facebook	44%	44%	45%	43%
3	Yahoo	29%	30%	29%	26%
4	YouTube	25%	25%	24%	26%
5	Instagram	11%	13%	5%	11%
6	Twitter	11%	10%	9%	14%
7	AOL	10%	11%	9%	9%
8	MSN/Hotmail	9%	10%	9%	8%
9	Pinterest	7%	9%	4%	6%
10	Linkedin	7%	8%	3%	5%

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

- ✚ The most popular Internet search engines, content providers, social networks, or photo sharing websites used by stopovers that visited the Bahamas were Google, Facebook, Yahoo, YouTube, Instagram and Twitter.
- ✚ The percentage of stopover visitors to the Bahamas using Google has increased over the years while the percentage of stopover visitors using Yahoo has declined over the years. In 2003, approximately half (48%) the stopover visitors to the Bahamas used Yahoo and roughly half (47%) of them used Google but by 2014, approximately eight in ten (83%) stopovers used Google and approximately three in ten (29%) used Yahoo.
- ✚ In 2014, roughly four in ten (44%) stopover visitors to the Bahamas used Facebook, one in every four (25%) used YouTube and approximately one in every ten stopovers used Instagram (11%), Twitter (11%) and/or AOL (10%). Like Yahoo, the percentage of stopover visitors using AOL has declined over the years. In 2003, roughly one in three (36%) stopover visitors to the Bahamas used AOL.

All information in this brochure is based on the Tour Operator & Media Exit Survey 2014 and the Immigration Card, date of publication July 9, 2015.



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