

**ISLANDS OF THE BAHAMAS**  
**TOUR OPERATOR & MEDIA SURVEY**  
**SUMMARY**



**RESEARCH AND STATISTICS DEPARTMENT**  
**MINISTRY OF TOURISM**  
**2017**

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

- Roughly three in every four (77%) stopover visitors came to The Bahamas on a vacation;
- One in every twenty (5%) stopovers came on a honeymoon, and one in every twenty-five came to visit friends & relatives (4%) or on a business trip (3%).

## 2. What Influenced their Decision to Visit The Bahamas?

### TOP INFLUENCES FOR DECIDING TO VISIT THE BAHAMAS ISLANDS OF THE BAHAMAS 2017

	Bahamas	Nassau/P.I.	Grand Bahama	Out Islands
Beaches	67%	67%	69%	67%
Climate	54%	56%	54%	51%
Rest and Relaxation	46%	46%	48%	46%
Friendly People	30%	28%	34%	33%
Hotel Facilities	26%	31%	14%	16%
Never Been Here Before	24%	25%	26%	20%
Easy to Get to	22%	23%	19%	19%
Safety of Islands	20%	20%	19%	21%
Exotic Islands	18%	17%	13%	23%
Good Package Deals	14%	17%	11%	7%
Friend recommended Bah.	11%	10%	12%	13%
Sports	11%	7%	12%	19%
Heard a lot about Bahamas	10%	10%	9%	9%
Best Value for Money	9%	10%	10%	5%
Had Friends in Bah.	8%	6%	11%	11%
Casinos	8%	11%	3%	1%
Wanted to Experience The Culture	7%	7%	9%	7%
Travel Agent/TO	4%	4%	3%	5%
Shopping	4%	4%	5%	2%
Nightlife	3%	3%	3%	1%
Saw Ad on TV	2%	3%	1%	1%
Bahamas Website	2%	2%	1%	1%
Junkanoo/Other Bahamas Festivals	2%	2%	2%	1%
Saw Ad in Magazine	0%	0%	0%	0%
Other	8%	7%	8%	10%
Non Response	5%	5%	6%	5%

Source: Tour Operator & Media Survey 2017, Research & Statistics Dept. Ministry of Tourism

All numbers subject to revision.

- Stopover visitors to the Bahamas were primarily influenced to visit the Bahamas by the beaches, the climate and the rest and relaxation that they expected to enjoy in the destination. Approximately two in three (67%) stopover visitors to the Bahamas were influenced to visit because of the beaches and roughly half of them were influenced to visit because of the climate (54%) and the rest and relaxation (46%) that they expected to enjoy in the destination;

- Stopovers were also influenced to visit because of a myriad of other things including the friendly people that they expected to meet (or had already met during past trips to the Bahamas) and the hotel facilities in the destination. Three in every ten (30%) stopovers were influenced to visit because of the friendly people in the Bahamas and approximately one in every four (26%) were influenced to visit because of the hotel facilities in the destination;
- The casino was of particular interest to approximately one in ten (11%) stopovers to Nassau/Paradise Island;
- In the past good package deals and best value for money were of particular interest to stopovers to Grand Bahama, an island that tended to attract a more budget oriented consumer than Nassau/Paradise Island and the Out Islands. In 2017 however, good package deals and best value for money were far less important than they had been in 2016 or other past years;
- The Exotic mystique of the Out Islands and the sporting attractions like sailing, diving, and fishing were of particular interest to stopover visitors to those islands.

### 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 2017

	Bahamas	Nassau/P.I.	Grand Bahama	Out Islands
Enjoy Beaches	85%	86%	85%	84%
Rest and Relax	73%	75%	77%	68%
Go Snorkeling	36%	32%	39%	49%
Shop	28%	31%	39%	16%
Go on Island Tour	19%	17%	18%	24%
Go to Casinos	18%	25%	7%	3%
Go Diving	9%	7%	12%	13%
Go Sailing	7%	5%	10%	12%
Go Deep Sea Fishing	5%	3%	5%	9%
Go Golfing	4%	3%	4%	8%
Go Bonefishing	4%	2%	6%	10%
Go to Junkanoo/Other Festival	4%	3%	6%	3%
Go Birdwatching	2%	1%	3%	4%
Other Activities	6%	6%	4%	5%
No Response	5%	5%	6%	4%

Source: Tour Operator and Media Exit Survey 2017, Research and Statistics Dept., Bahamas Ministry of Tourism

- Most of the stopover visitors to The Bahamas intended to enjoy the beaches (85%) and rest and relax (73%);
- Roughly one in three (36%) of them wanted to go snorkeling and approximately three in ten (28%) intended to go shopping;
- Approximately two in ten stopovers wanted to go on an island tour (19%) or go to the casinos (18%);
- Sporting activities like snorkeling, diving, sailing, bone-fishing, and deep-sea fishing 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 2017

	All Bah.	Nassau/P.I.	Grand Bah.	Out Isl.
Same Week of Travel	5%	5%	4%	4%
Same Month of Travel	12%	13%	10%	10%
1 to 3 Months Before Travel	44%	46%	40%	40%
4 to 7 Months Before Travel	26%	24%	35%	29%
8 to 12 Months Before Travel	10%	9%	8%	12%
More than 12 months Before Travel	2%	1%	1%	3%
Non-Response	2%	2%	2%	3%

Source: Tour Operator and Media Exit Survey 2017, Research and Statistics Dept., Bahamas Ministry of Tourism

- Stopover visitors to The Bahamas primarily booked their reservations anywhere from the same month of travel to seven months in advance of travel. Almost half (44%) the stopovers, booked their reservations one to three months before 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 2017

	All Bahamas		Nassau/P.I.		Grand Bahama		Out Islands	
	2017	2016	2017	2016	2017	2016	2017	2016
Used Online Service	74%	68%	74%	67%	75%	77%	71%	65%
Did Not Use Online Service	25%	30%	25%	32%	24%	21%	27%	32%
	USA		Canada		Europe		Other Countries	
Used Online Service	75%	69%	70%	62%	65%	61%	80%	67%
Did Not Use Online Service	24%	29%	28%	36%	33%	37%	19%	31%

Source: Tour Operator and Media Exit Survey 2017 and 2016, Research and Statistics Dept., Bahamas Ministry of Tourism

- Approximately three in every four stopover visitors to the Bahamas Overall (74%), Nassau/Paradise Island (74%), and Grand Bahama (75%), used an online service to book some or all their reservations to the Bahamas.
- Seven in ten (71%) stopovers to the Out Islands used an online service to book some or all their reservations to the Bahamas.
- The percentage of stopover visitors booking their reservations online increased significantly in Nassau/Paradise Island and the Out Islands in 2017 compared to 2016. There was also a significant increase in online booking by visitors from the USA, Canada and the Other Countries of the world. The percentage of visitors from Europe booking their reservations online increased between 2017 and 2016 too, however the increase was not as significant as for the other countries.

## 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 2017

Expedia.com	Copaair.com	Aaa.com	Tripadvisors.com
Delta.com/deltavacations.com	Bookit.com	Airjamaica.ca	Vacationstogo.com
Atlantis.com	Hilton.com	Airtran.com	Virtuallythere.com
United.com	VRBO.com	Applevacations.com	
Aa.com	Kayak.com	Ba.com	
RIU.com	Cheapcaribbean.com	Bahamasvacations.com	
Continental.com	Hotels.com	Britishairways.com	
Travelocity.com	Aircanada.com	Carlsonwagonlit.com	
Sandals.com	Breezes.com	Cheapair.com	
Jetblue.com	Bahamas.com	Clubmed.com/clubmed.ca	
Bahamasair.com	Wyndham.com	Grandbahamavacations.com	
Usairwaysvacations.com	Skyauction.com	Homeaway.com	
Orbitz.com	Intervalinternational.com	Hotwire.com	
Melia.com	Cheaptickets.com	Libertytravel.com	
Americanexpress.com	Bestwestern.com	Omegaworldtravel.com	
RCI.com	Westjet.com	Regtag.ca	
Cheapflights.com	Spg.com	Smallhope.com	
Priceline.com	Fourseasons.com	Southernair.com	
Bellchannelinn.com	Sunwing.ca/Sunwing.com	Southwest.com	
Aadvantage.com	Bahamar.com	Spiritair.com	

This list is not all-inclusive of every online service used. The 1st two columns in yellow contain the top 40 online services; the next two columns are top services listed in alphabetical order. (Source: Tour Media Exit Survey, 2017)

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

- Approximately three in ten (27%) stopovers used a travel agent to book some or all their reservations in 2017.

### ISLANDS OF THE BAHAMAS USE OF TRAVEL AGENT 2017

	All Bahamas		Nassau/P.I.		Grand Bahama		Out Islands	
	2017	2016	2017	2016	2017	2016	2017	2016
Used Travel Agent	27%	28%	28%	27%	26%	33%	25%	27%
Did Not Use Travel Agent	71%	70%	71%	72%	72%	64%	71%	69%
	USA		Canada		Europe		Other Countries	
Used Travel Agent	24%	24%	39%	43%	42%	46%	34%	32%
Did Not Use Travel Agent	74%	74%	59%	54%	58%	51%	63%	64%

Source: Tour Operator and Media Exit Survey 2017 and 2016, Research and Statistics Dept., Bahamas Ministry of Tourism

- Some of the stopovers to the Bahamas that used tour operators/travel agents used the following top TO/TA's: 11th Hour Vacations, AAA Travel /Triple A/Triple AAA, Ambassador Travel, American Express Travel, Apple Vacations, Atlantis Travel, Air Canada Vacations, Black Beard Cruises/Charters, Carlson Wagonlit Travel, Costco Travel, CAA Travel, Club Med, Delta Airlines/Delta Vacations, Flight Centre, Four Tour Operator & Media Survey 2017 Research & Statistics Dept. Ministry of Tourism

Seasons Travel, Funjet Vacations, GOGO Worldwide Vacations/GOGO Tours, Liberty Travel, Omega World Travel, Omni Travel, Marlin Travel, Marriott, RCI/RCI Vacations/Travel, Leisure Travel/Tours, Majestic Tours, Sandals/Sandals Vacations, Sell off Vacations, Thomas Cook/Thomas Cook Travel, Travel Leaders, Unique Vacations, Vacations to Go, and Yellow Dog.

**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  
2017**

	<b>Bahamas</b>	<b>Nassau/P.I.</b>	<b>Grand Bahama</b>	<b>Out Islands</b>
<b>Internet</b>	85%	85%	86%	83%
Network Television	8%	9%	9%	6%
Specialty Cable Channels	6%	7%	5%	5%
Specialty News Channels	5%	6%	4%	4%
Radio	2%	2%	3%	2%

Source: Tour Operator and Media Exit Survey 2017, Research and Statistics Dept. Ministry of Tourism

- The majority (85%) of stopover visitors used the Internet as the electronic media most frequently used when planning their vacation, and approximately one in ten (8%) used Network television the most. Approximately one in every fifteen (6%) stopovers used specialty cable channels and approximately one in every twenty (5%) used specialty news channels the most when planning their vacations.

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

### TOP 20 FAVORITE TELEVISION NETWORKS/STATIONS ISLANDS OF THE BAHAMAS 2017

Bahamas		% Informants	Nassau/P.I.	% Informants
1	ESPN	20%	ESPN	20%
2	NBC	19%	NBC	20%
3	ABC	18%	ABC	19%
4	HGTV (Home & Garden Network)	17%	HGTV (Home & Garden Network)	17%
5	HBO	14%	HBO	14%
6	CNN	14%	CBS	14%
7	CBS	13%	FOX	13%
8	FOX	12%	CNN	12%
9	FOXN	9%	FOXN	9%
10	FOOD (Food Network)	7%	FOOD (Food Network)	7%
11	TNT	5%	TNT	6%
12	DISC (Discovery Channel)	5%	TBS	5%
13	BRAVO	5%	USA	5%
14	TBS	5%	DISC (Discovery Channel)	5%
15	USA	4%	BRAVO	5%
16	HIST(History Channel)	4%	HIST(History Channel)	4%
17	E! (E! Entertainment)	3%	DSNY (Disney Channel)	4%
18	MSNBC	3%	E! (E! Entertainment)	4%
19	DSNY (Disney Channel)	3%	TLC (The Learning Channel)	3%
20	LIFE (Lifetime)	3%	LIFE (Lifetime)	3%
Grand Bahama		% Informants	Out Islands	% Informants
1	NBC	18%	ESPN	23%
2	CNN	18%	HGTV (Home & Garden Network)	18%
3	HGTV (Home & Garden Network)	17%	NBC	17%
4	ABC	17%	ABC	16%
5	CBS	16%	CNN	15%
6	HBO	16%	HBO	12%
7	ESPN	13%	CBS	12%
8	FOXN	8%	FOX	12%
9	FOX	8%	FOXN	9%
10	MSNBC	6%	FOOD (Food Network)	7%
11	FOOD (Food Network)	5%	DISC (Discovery Channel)	6%
12	PBS (Public Broadcasting Station)	5%	BRAVO	6%
13	LIFE (Lifetime)	5%	TNT	5%
14	BRAVO	4%	HIST(History Channel)	4%
15	DISC (Discovery Channel)	4%	E! (E! Entertainment)	3%
16	NGEO (National Geographic Channel)	4%	Travel Channel	3%
17	TNT	3%	TBS	3%
18	BBCA (BBC America)	3%	MSNBC	2%
19	DSNY (Disney Channel)	3%	USA	2%
20	TBS	3%	TLC (The Learning Channel)	2%

Source: Tour Operator and Media Exit Survey 2017, Research and Statistics Dept. Ministry of Tourism



- Approximately seven in every ten (72%) 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; however, the differences between these islands became less significant over the years. Approximately two in every three (67%) stopovers to the Out Islands watched television compared to approximately three in every four (75%) to Nassau/Paradise Island and seven in every ten (71%) to Grand Bahama.
- ESPN was the favorite television station watched by stopover visitors to the Bahamas Overall. 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 stopovers to the Bahamas and ESPN was in 3<sup>rd</sup> place.
- In 2017, approximately two in every ten stopovers to the Bahamas who watched television watched ESPN (20%), NBC (19%), ABC (18%), and HGTV (17%). In 2016, CNN was in the top four television networks watched by stopovers to the Bahamas but in 2017 it fell into 5<sup>th</sup> place. In 2017, one in every seven (14%) stopovers to the Bahamas watched CNN compared to 17% in 2016. In 2017, HBO was tied with CNN for the 5<sup>th</sup> place as 14% of the stopovers to the Bahamas watched this channel. Other popular networks watched by stopover visitors to the Bahamas included CBS, FOX, and FOXN. Visitors to the Bahamas also watched other movie and entertainment channels like (A & E, E! Entertainment, Lifetime, Showtime, etc.), home and garden and food channels like (FOOD/Food Network), children's channels (DSNY/Disney Channel) and educational channels like (DISC Discovery Channel, TLC/The Learning Channel, HIST/The 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 6 pm to 10:59 pm at night. The hours of 8:00 pm to 8:59 pm were of course prime time and approximately four in ten (39%) stopovers watched television during that time.

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

### PRINT MEDIA USED MOST FREQUENTLY WHEN PLANNING A VACATION ISLANDS OF THE BAHAMAS 2017

	Bahamas		Nassau/P.I.		Grand Bahama		Out Islands	
	2017	2016	2017	2016	2017	2016	2017	2016
Newspapers	33%	33%	33%	34%	28%	29%	37%	32%
Magazines	72%	73%	72%	73%	73%	72%	72%	74%
Other Print Media	7%	7%	7%	8%	9%	10%	6%	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 2017

In 2017, approximately one in six (16%) stopover visitors to the Bahamas used print media when they were planning their vacations. The number of stopover visitors who used print media when planning their vacations declined over the years but stabilized in 2014 at 16%.

In 2010, 25% of stopover visitors to the Bahamas used print media to plan their vacations compared to 21% in 2011, 20% in 2012, 20% in 2013, 16% in 2014, and 16% in 2015. One of the reasons for this decline in print media usage is tied to the fact that the Internet became so very easy to access and use with the advent of smartphones and wireless tablets. These devices placed the Internet and by extension social media/photo/video sharing platforms into the hands of a plethora of users who were now able to push a few buttons to search for the vacation destinations of choice.

Of these stopover visitors who used print media to plan their vacations, one in three (33%) used newspapers and approximately seven in ten (72%) used magazines.

### **11. Use of Newspapers**

In 2017, although only 16% of stopover visitors used print media when planning their vacations, approximately four in ten (38%) of them read newspapers for their personal enjoyment and edification. The percentage of stopover visitors to the Bahamas using newspapers for their personal enjoyment and edification has declined over the years. In 2010, 64% of stopovers to the Bahamas read newspapers for their reading enjoyment compared to 63% in 2011, 60% in 2012, 55% in 2013, 50% in 2014, 45% in 2015 and 42% in 2016.

**TOP 20 FAVORITE NEWSPAPERS READ BY VISITORS  
ISLANDS OF THE BAHAMAS  
2017**

<b>Bahamas</b>		<b>% Informants</b>	<b>Nassau/P.I.</b>		<b>% Informants</b>
1	<b>New York Times</b>	31%	<b>New York Times</b>		29%
2	<b>USA Today</b>	23%	<b>USA Today</b>		24%
3	<b>Wall Street Journal</b>	21%	<b>Wall Street Journal</b>		20%
4	<b>Washington Post</b>	11%	<b>New York Post</b>		11%
5	<b>New York Post</b>	9%	<b>Washington Post</b>		10%
6	<b>Daily News</b>	7%	<b>Daily News</b>		8%
7	Globe & Mail	5%	Globe & Mail		6%
8	Toronto Star	5%	Toronto Star		6%
9	Boston Globe	4%	Boston Globe		5%
10	Newsday	3%	Newsday		4%
11	Miami Herald	3%	New York Daily News		3%
12	New York Daily News	3%	Miami Herald		2%
13	Times	2%	Chicago Tribune		2%
14	Chicago Tribune	2%	Times		2%
15	Palm Beach Post	2%	Atlanta Journal Constitution		1%
16	Atlanta Journal Constitution	2%	Palm Beach Post		1%
17	Orlando Sentinel	1%	Sun/The Sun News		1%
18	Sun/The Sun News	1%	Orlando Sentinel		1%
19	Dallas Morning News	1%	Dallas Morning News		1%
20	Denver Post	1%	Post		1%
<b>Grand Bahama</b>		<b>% Informants</b>	<b>Out Islands</b>		<b>% Informants</b>
1	<b>USA Today</b>	23%	<b>New York Times</b>		39%
2	<b>New York Times</b>	22%	<b>Wall Street Journal</b>		26%
3	<b>Wall Street Journal</b>	17%	<b>USA Today</b>		22%
4	<b>Washington Post</b>	14%	<b>Washington Post</b>		13%
5	<b>Daily News</b>	6%	<b>New York Post</b>		5%
6	<b>Boston Globe</b>	5%	<b>Daily News</b>		4%
7	New York Post	5%	Miami Herald		4%
8	Times	4%	Globe & Mail		3%
9	Toronto Star	2%	Boston Globe		3%
10	Globe & Mail	2%	Times		3%
11	Miami Herald	2%	Toronto Star		3%
12	Denver Post	2%	Palm Beach Post		2%
13	Newsday	2%	Atlanta Journal Constitution		2%
14	Sun Sentinel	1%	Chicago Tribune		2%
15	Daily Telegraph	1%	Denver Post		2%
16	BILD-Hamburg	1%	Orlando Sentinel		2%
17	Sun/The Sun News	1%	Sun Sentinel		1%
18	London Free Press	1%	New York Daily News		1%
19	Kitchener Waterloo Record/KW Record	1%	Dallas Morning News		1%
20	Royal Gazette	1%	Newsday		1%

Source: Tour Operator and Media Exit Survey 2017, Research and Statistics Dept. Ministry of Tourism

- The most popular newspaper read by stopover visitors to the Bahamas was the New York Times. Three in every ten (31%) 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 to the Bahamas.

## 12. Use of Magazines

Although only 16% of stopover visitors used print media when planning their vacations, in 2017, roughly half (46%) of them read magazines for their enjoyment. The percentage of stopover visitors to the Bahamas reading magazines for their personal enjoyment has declined over the years from 69% in 2010, 67% in 2012, 63% in 2013, 57% in 2014, 52% in 2015 and 48% in 2016.

### TOP 20 FAVORITE MAGAZINES READ BY VISITORS ISLANDS OF THE BAHAMAS 2016

Bahamas		% Informants	Nassau/P.I.		% Informants
1	<b>People</b>	23%	<b>People</b>	26%	
2	<b>Better Homes &amp; Gardens (BHG)</b>	17%	<b>Better Homes &amp; Gardens (BHG)</b>	18%	
3	<b>Good Housekeeping</b>	12%	<b>Good Housekeeping</b>	13%	
4	<b>Food &amp; Wine</b>	10%	<b>Food &amp; Wine</b>	10%	
5	<b>National Geographic (Explorer)</b>	10%	<b>Sports Illustrated</b>	10%	
6	<b>In Style</b>	10%	<b>National Geographic (Explorer)</b>	10%	
7	Cosmopolitan (Cosmo)	10%	<b>In Style</b>	10%	
8	Sports Illustrated	9%	<b>Cosmopolitan (Cosmo)</b>	9%	
9	Men's Health	9%	<b>Men's Health</b>	9%	
10	Glamour	8%	<b>Glamour</b>	9%	
11	Southern Living	8%	<b>Bon Appetit</b>	8%	
12	Bon Appetit	8%	<b>Southern Living</b>	8%	
13	Time Magazine	7%	Travel & Leisure	7%	
14	Architectural Digest	7%	Conde Nast Travel	7%	
15	Conde Nast Travel	7%	Architectural Digest	7%	
16	Travel & Leisure	7%	Time Magazine	7%	
17	In Touch/In Touch Weekly	6%	In Touch/In Touch Weekly	6%	
18	Economist	5%	Woman's Day	6%	
19	Other Magazines	5%	Other Magazines	6%	
20	Vanity Fair	5%	Economist	5%	
Grand Bahama		% Informants	Out Islands		% Informants
1	<b>Better Homes &amp; Gardens (BHG)</b>	21%	<b>People</b>	17%	
2	<b>People</b>	20%	<b>Better Homes &amp; Gardens (BHG)</b>	14%	
3	<b>Good Housekeeping</b>	13%	<b>Southern Living</b>	10%	
4	<b>Cosmopolitan (Cosmo)</b>	13%	<b>National Geographic (Explorer)</b>	10%	
5	<b>In Style</b>	11%	<b>Food &amp; Wine</b>	10%	
6	<b>National Geographic (Explorer)</b>	11%	<b>In Style</b>	10%	
7	<b>Food &amp; Wine</b>	10%	<b>Cosmopolitan (Cosmo)</b>	10%	
8	<b>Men's Health</b>	9%	<b>Architectural Digest</b>	9%	
9	<b>Glamour</b>	9%	<b>Good Housekeeping</b>	8%	
10	<b>Time Magazine</b>	8%	<b>Fly Fishing</b>	8%	
11	<b>Essence</b>	8%	<b>Glamour</b>	8%	
12	<b>Southern Living</b>	8%	<b>Conde Nast Travel</b>	8%	
13	Ebony	7%	Time Magazine	7%	
14	O (Oprah)	7%	Bon Appetit	7%	
15	Sports Illustrated	7%	Sports Illustrated	7%	
16	Bon Appetit	6%	Forbes	7%	
17	Shape	6%	Men's Health	7%	
18	In Touch/In Touch Weekly	6%	Travel & Leisure	7%	
19	Reader's Digest	5%	New Yorker	6%	
20	Real Simple	5%	Vanity Fair	6%	

Source: Tour Operator and Media Exit Survey 2016, Research and Statistics Dept. Ministry of Tourism

### 13. How Did Stopover Visitors Rate Their Product Experiences?

**PRODUCT SATISFACTION RATINGS  
ISLANDS OF THE BAHAMAS  
2017**

All Bahamas	Excellent	Good	OK	Not So Good	Awful	DK/NR	Categories Combined	
							Excellent or Good	Not So Good or Awful
Beaches	66%	22%	4%	1%	0%	6%	89%	1%
Climate	60%	28%	6%	2%	0%	5%	88%	2%
Attitude of People	60%	27%	7%	2%	1%	4%	87%	3%
Food in Restaurants	32%	38%	13%	3%	1%	13%	71%	3%
Easy to Get to	34%	36%	15%	3%	1%	11%	70%	4%
Restaurant Service	34%	33%	15%	3%	1%	13%	68%	4%
Hotel Rooms	33%	32%	13%	2%	1%	19%	65%	3%
Hotel Service	37%	28%	11%	3%	1%	21%	65%	4%
Overall Value for Money	22%	37%	25%	7%	2%	8%	59%	9%
Food in Hotels	26%	30%	17%	3%	1%	23%	56%	4%
Value for Money in Hotels	18%	30%	22%	6%	2%	22%	48%	9%
<b>Bahamas Overall</b>	<b>49%</b>	<b>39%</b>	<b>7%</b>	<b>1%</b>	<b>0%</b>	<b>5%</b>	<b>88%</b>	<b>1%</b>

Includes cruise stopover visitors e.g. in GBI

Source: Tour Operator and Media Exit Survey 2017, Research and Statistics Dept., Bahamas Ministry of Tourism

- In 2017, 88% of stopovers thought that the Bahamas Overall was excellent or good.
- The beaches, the climate, and the attitude of the people received the highest product satisfaction ratings of the 12 ratings asked of stopover visitors to the Bahamas.
- The majority of stopover visitors thought that the beaches (89%), and the climate (88%) were excellent or good.
- The majority (87%) of stopovers thought that the attitudes of the people were excellent or good.
- Roughly seven in ten stopovers thought that the food in restaurants (71%), the ease of getting to the destination (70%), and the restaurant service (68%) were excellent or good.
- Approximately two in every three stopovers thought that the hotel rooms (65%), and the hotel service (65%) were excellent or good.
- Approximately six in ten (59%) thought that the overall value for money was excellent or good.
- It is important to note however that although six in ten stopovers thought that the overall value for money was excellent or good, approximately one in every ten (9%) thought that it was not so good or awful.
- More than half (56%) the stopovers thought that the food in the hotels was excellent or good.
- Approximately half (48%) the stopovers thought that the value for money in the hotels was excellent or good but approximately one in every ten (9%) thought that it was not so good or awful.

## 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		
	2017	2016		2017	2016
General	36%	33%	Prices (neg)	21%	16%
People	29%	28%	People (neg)	14%	10%
Beaches	7%	5%	Litter (neg)	8%	8%
Scenery/Sightseeing	6%	9%	Hotel (neg)	6%	11%
Can't Wait to Come Back	3%	3%	Service (neg)	5%	6%
Service	2%	1%	Local Transp. (neg)	3%	3%
<b>No. of Comments</b>	<b>1,562</b>	<b>2,136</b>	<b>No. of Comments</b>	<b>680</b>	<b>967</b>

In 2015, 5% of the complaints received were about VAT/Taxes. In 2016, the complaints received about VAT/Taxes fell back down to 2% as it had been in 2014 but in 2017 it went back up to 2.8%. In 2017, 5% of the complaints were general negative comments compared to 3% in 2016.

\*Source: Tour Operator & Media Exit Study 2017, 2016, 2015, Research and Statistics Dept. Bahamas Ministry of Tourism

- Of the 1,562 positive comments received in 2017 from the survey, the top six compliments made by visitors included: General Comments, people, beaches, scenery/sightseeing, can't wait to come back, and service.
- **General:** Roughly one in every three (36%) compliments received from visitors were general comments like: "I love Eleuthera and 1st visited in 1974. Loved it, everything was amazing. Awesome in every aspect of my trip, Thank you! Really enjoyed the outer islands. Enjoyed visiting in the off season. Loved the quick easy trip to get here. Very much enjoyed our visit and it's an awesome place; thanks for letting us come. Bahamas was fantastic. Loved Exuma. Overall, I truly enjoyed my stay. We love it here, wonderful beautiful country. Time here in the Bahamas, it was a blast. Sailed to Hope Town 13yrs ago, purchased a home last year. It gets better every visit, bravo. We loved staying at the Marina House. Loved walking the downtown area. Andros always feels like home. I am extremely pleased visiting this island, definitely became a better swimmer. Would like to keep this gem of an island a secret longer. Say hi to Philip from the girl who he assisted in 2015 when I had a scooter accident. We loved our visit, every person we met was friendly, helpful and knowledgeable about the Bahamian culture. Great Family Vacation to celebrate 3 Birthdays, 2 Retirements so we shall return, thanks! Loved outdoor dining, snorkeling, soft sand. We loved Eleuthera. Best place on Earth - Please do not allow Foreign Countries \$ to change it too much; no gambling please! Great Guana Cay was amazing. Freeport Lucaya was amazing; Grand Bahama is by far my favorite Island. My 25th year. Home away from home. Staniel Cay was amazing. Beautiful stay in Elbow Cay. Had a great trip, made great memories."
- **People:** Approximately three in every ten (29%) compliments received from stopovers were about the positive attitudes of the people like "After travelling to 9+

Countries, the Bahamian People are my Favorite! Loved the people. The nicest people I've met on a vacation. Locals were so friendly and helpful to us. Very friendly and helpful people everywhere we went! Love the people and the ocean flats! Loved the people; the nicest people I've met on a vacation. The people are warm and friendly; always happy to return. People very friendly from taxis to hotels. Your spirit, kindness and outlook on life and people is second to none, and I wish we could sprinkle it on people all over the world. The people in Eleuthera were wonderful. People are very friendly in Exumas. As always your major asset is your people. The main reasons for our return visit: the friendly attitude of the people. The Exuma residents are the friendliest people I have ever met. I left my phone on a bus and the driver went out of his way to return it bus#10 thanks so much. The staff at Lighthouse Pointe were terrific; we had a great time. People very pleasant and welcoming; Julian taxi driver nice guy. The bus drivers are very friendly and helpful. Beautiful people, well spoken, excellent manners. So grateful for Kelly the concierge at the Melia and Keith Burs taxi driver they are blessing! Everyone was very nice and hospitable; everyone we came in contact with at Melia: Jason - Entertainment, Alan - Security, Robert Kelly -Bartender, CeCe - Security.”

- **Beaches:** Roughly one in every ten (7%) compliments received from stopover visitors were positive comments about the beaches like: “The beaches here on Freeport are absolutely beautiful we recommend advertising them more. Happy to see undeveloped beaches! Love, love the white sand beaches. Love the pig beach. Beautiful beach @Atlantis. Beaches are spectacular. Beaches were amazing. Pretty beaches, the water is beautiful we enjoyed the breeze. We come here for the shallow waters and beautiful beaches. We enjoyed the beaches and sunshine. Eleuthera was very pretty with great beaches. Amazing beach at Emerald Bay.”
- **Scenery/Sightseeing:** Approximately one in every twenty (6%) compliments received from visitors were about the scenery/sightseeing like: “Lovely island always enjoy trip here. Cable beach, beautiful. It is beautiful and amazing! Keep these beautiful islands as is. The Abacos are lovely islands. Very friendly, beautiful and happy environment that made the departure difficult.”
- **Can't Wait to Come Back:** Approximately one in every thirty (3%) compliments received from stopover visitors about returning were like: “Will return for many years. Can't wait to bring my family back with friends. I truly enjoyed my visit and will come again. I absolutely love Exuma; I will be back as many times as possible; we vacationed over the Caribbean and Exuma was our favorite. Great first-time experience; will come back again. We love it here and will continue to come back. I enjoyed it thoroughly and will return. So sad when it's time to leave, but so good to know we'll be back. It was Amazing; absolutely coming back!
- **Service:** Approximately one in every fifty (2%) compliments received from stopovers were about the service like: “Service in Nassau was great. Excellent server staff at all restaurants. Stayed at Kamalame Cay and had amazing service, the people, staff are amazing. Enjoyed the amazing level of service provide by the staff. Paradise Cove was amazing with great service. The hospitality was unmatched to anywhere else, thank you. The service was great. Great quality service.

- Of the 680 negative comments received in 2017, the top six complaints made by visitors included: high prices, attitudes of the people, litter, complaints about their hotel, poor service, and grievances about local transportation.

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

#### INTERNET SEARCH ENGINES &/OR CONTENT PROVIDERS/ SOCIAL NETWORKS/PHOTO SHARING WEBSITES ISLANDS OF THE BAHAMAS 2017

		Bahamas	Nassau/P.I.	Grand Bahama	Out Islands
1	Google	83%	83%	85%	84%
2	Facebook	52%	52%	53%	50%
3	Youtube	30%	31%	30%	29%
4	Instagram	30%	29%	25%	34%
5	Yahoo	21%	22%	21%	20%
6	Pinterest	16%	15%	16%	17%
7	Linkedin	14%	14%	12%	14%
8	Twitter	12%	12%	10%	13%
9	Snapchat	9%	12%	0%	5%
10	AOL	7%	8%	6%	7%
12	MSN/Hotmail	6%	7%	6%	5%
11	Bing	5%	4%	7%	4%

Source: Tour Operator and Media Exit Survey 2017, Research and Statistics Dept., Bahamas Ministry of Tourism

- The most popular Internet search engines, content providers, social media networks, or photo sharing websites used by stopovers that visited the Bahamas were Google (83%), Facebook (52%), YouTube (30%), Instagram (30% vs. 21% in 2015), Yahoo (21% in 2017 compared to 24% in 2016 and 27% in 2015), Pinterest (16%), LinkedIn (14%) and Twitter (12%).
- The percentage of stopover visitors to the Bahamas using Google, Facebook, YouTube, and Instagram all increased in 2017 compared to 2016.
- The percentage of stopover visitors using Google has increased over the years while the percentage 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 2017, approximately two in ten (21%) used Yahoo and approximately eight in ten (83%) stopovers used Google.
- The percentage of stopovers to the Bahamas using Instagram increased significantly over the years. In 2014, approximately one in ten (11%) stopovers to the Bahamas used Instagram but in 2017, that percentage increased to three in ten (30%).
- Like Yahoo, the percentage of stopover visitors using AOL has declined over the years. In 2003, roughly one in three (36%) stopovers to the Bahamas used AOL, in 2017 however, only 7% of them used this service.



## 16. Visitor Demographics

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

	<b>2017</b>	<b>2016</b>
<b>MAIN PURPOSE OF VISIT</b>		
Vacation	77%	74%
Honeymoon	5%	5%
Visiting friends and relatives	4%	4%
Business	3%	4%
<b>DECISION TO VISIT INFLUENCED BY:</b>		
Beaches	67%	65%
Climate	54%	51%
Rest and Relaxation	46%	45%
<b>ACTIVITIES VISITORS INTENDED TO DO</b>		
Enjoy Beaches	85%	83%
Rest and Relax	73%	72%
Go Snorkeling	36%	34%
Shop	28%	30%
Go on Island Tour	19%	16%
Go To Casinos	18%	18%
<b>LIKELY RETURN IN 1-5 YEARS</b>		
	86%	86%
<b>LIKELY RECOMMEND TO FRIENDS/REL</b>		
	93%	93%
<b>USED ONLINE SERVICE TO BOOK</b>		
	74%	68%
<b>USED TRAVEL AGENT</b>		
	27%	28%
<b>AGE*</b>		
25 - 54 years old	49%	52%
55 years old or older	23%	23%
<b>SEX*</b>		
Male	48%	47%
Female	47%	47%
<b>RACE</b>		
White	83%	79%
Black	4%	7%
Hispanic	4%	5%
Mixed Race/Mixed Heritage	3%	4%
Asian/Pacific Islander	2%	3%
American Indian/Alaska Native	0%	0%
Other	1%	1%
<b>EDUCATION</b>		
College Graduate or Above	68%	67%

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

	<b>2017</b>	<b>2016</b>
<b>ANNUAL HOUSEHOLD INCOME</b>		
\$25,001 to \$50,000	7%	8%
\$50,001 to \$75,000	10%	10%
\$75,001 to \$100,000	11%	11%
\$100,001 to \$125,000	9%	9%
\$125,001 to \$150,000	9%	8%
\$150,001 to \$250,000	18%	16%
\$250,001 and over	13%	12%
<b>PREVIOUS VISITS</b>		
First Time Visitor	41%	43%
Repeat Visitor	58%	56%
<b>TRAVELLING PARTY SIZE</b>		
One	14%	17%
Two	45%	45%
Three or more	39%	36%
<b>HOUSEHOLD SIZE</b>		
One	10%	11%
Two	41%	41%
Three-Four	35%	34%
<b>COUNTRY OF ORIGIN</b>		
USA	78.6%	79%
Canada	7.7%	8%
Europe	8.0%	7%
Other Countries	5.4%	6%
<b>AVERAGE LENGTH OF STAY</b>		
	7.1 nts.	6.9 nts.

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

\*Source: Tour Operator & Media Exit Study 2017 & 2016, Research and Statistics Dept. Bahamas Ministry of Tourism

In 2017, Likelihood to return: Very Likely=58.5% and Somewhat Likely=27.5%, Likelihood to Recommend: VL= 73.6%

and SL=19.8%. Likelihood of not returning: Somewhat Unlikely to return=7.9% and Not at all likely to return=3.7%

Likelihood of not recommending: Somewhat Unlikely to recommend=3.1% and Not at all likely to recommend=1.3%

All numbers are subject to revision.

All information in this brochure is based on the Tour Operator & Media Exit Survey 2017 and the Immigration Card.

If you have any questions, please use the contact information below.



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