

**TOUR OPERATOR AND MEDIA
EXIT SURVEY
2008**



**THE ISLANDS OF THE BAHAMAS
RESEARCH & STATISTICS DEPARTMENT
BAHAMAS MINISTRY OF TOURISM**

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EXECUTIVE SUMMARY

Reason for Visit

- The main reason visitors to the Islands of the Bahamas came to the Islands of the Bahamas was to vacation.
- Visitors to The Islands of The Bahamas said that the following influenced their decision to visit: the beaches, the climate, rest and relaxation, the hotel facilities, the friendly people, ease of getting to the island, the fact that they had never been to the Bahamas before, and the perceived safety of the islands.
- The Islands of the Bahamas did differ somewhat on the influences that made the visitor choose each of the islands for their vacation experiences.
- Visitors to Nassau/Paradise Island were also influenced to visit the destination because of the casinos, and the good package deals offered to the destination.
- Visitors to Grand Bahama were also influenced to visit the destination by the perception that they would receive the best value for money.
- Visitors to the Out Islands were also influenced to visit these islands because of the sporting attractions available, the perception that the islands were exotic, a friend had recommended the destination or they had friends in the Bahamas.

Electronic Media Used

- The electronic media most frequently used when *planning a vacation* was the Internet, followed by Network Television, Specialty Cable Channels and Specialty New Channels.
- The favorite television networks & television stations of visitors to the Islands of the Bahamas in general were: CNN (Specialty News Station), NBC (Network Station), ESPN (Specialty Cable Channel), ABC (Network Station), FOX (Network Station), CBS (Network Station), and HBO (Specialty Cable Channel).
- Visitors to the Islands of the Bahamas watched television primarily between 6:00 p.m. and 10:59 p.m. at night. The most popular time of the day for watching television was between 8:00 p.m. to 8:59 p.m.

Print Media Used

- The most popular print media used by visitors to the Islands of the Bahamas when planning their vacations included magazines and newspapers. Magazines were the more popular of the two.
- Some of the most popular magazines for visitors to the Bahamas were: People, Time Magazine, Cosmopolitan/Cosmo, US/US Weekly, Newsweek, Sports Illustrated, Glamour, O (Oprah), Vogue/Vogue Living, National Geographic Explorer, Men’s Health, In Style, Vanity Fair, The Economist, Good Housekeeping, Better Homes and Gardens, the New Yorker, GQ, Fitness, Essence, Readers Digest, Ebony, Conde Nast Travel, Elle Décor, Travel and Leisure, Southern Living, OK!Magazine, Self, Real Simple, Maximum/Maxim, Golf, Travel, Star, Woman’s Day, and Jet.
- Some of the top newspapers read by visitors to the Bahamas were: USA Today, The New York Times, Wall Street Journal, Washington Post, New York Post, Newsday, Globe and Mail, Boston Globe, Miami Herald, the Daily News, Sun Sentinel, Atlanta Journal-Constitution, Los Angeles Times (L.A. Times), Toronto Star, and the Chicago Tribune.

Internet Usage

- 84% of the stopover visitors to the Islands of the Bahamas said that they had e-mail addresses.
- 90% of them said that they “surfed” the Internet.
- Some of the top Internet search engines/content providers for visitors to the Bahamas were: Google, Yahoo, AOL, and MSN. In 2008, there were more visitors to the Bahamas using Google than in 2007, i.e. their market share increased by 7 percentage points.

Tour Operators & Travel Agents

- 30% of the stopover visitors to the Bahamas used a tour operator or travel agent to book their reservations.
- Some stopover visitors used a combination of methods to make their reservations, i.e., tour operator/travel agent, direct bookings and/or online on the Internet. The stopover visitors who *did not use* a tour

operator or travel agent to book their reservations either booked their reservations directly or via the Internet.

- Some of the visitors to the Islands of the Bahamas who booked their reservations online used: expedia.com, atlantis.com, orbitz.com, travelocity.com, aa.com, jetblue.com, Usairwaysvacations.com, continental.com, sandals.com, spiritair.com, carlsonwagonlit.com, delta.com/deltavacations.com, cheaptickets.com, bahamasair.com, Bahamas.com, aircanada.com, ba.com, firstchoice.co.uk, gradcity.com, nwa.com, airfrance.com, americanexpress.com, aol.com, Bahamasvacations.com, bookit.com, clubmed.com/clubmed.ca, colpittsworldtravel.com, comfortsuites.com, cosco.com, fourseasons.com, funjet.com, grandbahamavacations.com hotels.com, hotwire.com, intervalinternational.com, kayak.com, macystravel.com, Paradiseislandvacations.com, priceline.com, rci.com, Riu.com, Sheraton.com, skyauction.com, smallhope.com, spg.com, spiritair.com, starwood.com/westin.com, superclubs.com, travelzoo.com, united.com, Usairwaystravel.com, vacationstogo.com, virgin-atlantic.com, virtuallythere.com, Westjet.com, wyndham.com, and yahoo.com.
- Some of the popular tour operators/travel agents for the *Bahamas Overall* were: Liberty Travel, American Express Travel, Discovery Cruise Line, AAA Travel/Triple AAA, Club Med, RCI Travel, Security Travel, GOGO Tours, Apple Vacations, Student City, Thomas Cook Travel, Uniglobe Travel, Travel Impressions, Maritz Travel, and Bel Air Travel.

Likelihood of Return & Recommend

- 87% of the stopover visitors said that they were likely to return to the Bahamas in 1-5 years. (i.e., 59.5% of them were very likely and 27.1% of them were somewhat likely to return to The Bahamas).
- 93% of the stopover visitors said that they were likely to recommend the Bahamas to friends and relatives. (i.e., 69.6% of them indicated that they were very likely and 22.9% were somewhat likely to recommend The Bahamas to friends and relatives).

- Visitors to the Bahamas who were not likely to return or recommend the Bahamas to friends and relatives gave these reasons: high prices (too expensive), they wanted to visit other places, hotel dissatisfaction (e.g., poor accommodations, rude staff, poor hotel service), poor service, poor attitudes of the people, food (too expensive or poor quality), litter/cleanliness (country was too dirty), and crime.

How and When Did Visitors book their Reservations?

- Visitors to the Bahamas seemed to prefer short lead times when booking their reservations. They appeared to prefer to book their reservations the same month of travel or 1-3 months in advance of travel.

Demographics

- Visitors to the Bahamas were primarily white, between the ages of 25-54, college educated, with annual household incomes over \$75,000.
- 81% of the stopover visitors were from the United States and 8% were from Canada.
- 59% of the visitors to the Islands of the Bahamas were repeat visitors.
- The average length of stay of stopovers to the Bahamas was 6.6nts.

INTRODUCTION

The Ministry of Tourism has undertaken a survey of tourists leaving the Islands of The Bahamas since the early 1970's. The information contained in this Exit Survey report was especially designed to capture information on important visitor trip characteristics such as the reason for visit, what influenced a visitor's decision to visit, what they wanted to do when they got to the destination and reservation booking patterns. It was also designed to capture various media used by visitors to the Islands of The Bahamas when planning vacations. This report also contains information from the Immigration cards.

RESEARCH OBJECTIVES

1. Obtain information on trip characteristics (reasons for visit, etc.)
2. Obtain information on what influenced visitors to visit The Bahamas
3. Obtain information on the activities visitors intended to do on this visit
4. Obtain information on reservation bookings
5. Obtain information on Online Services/Tour Operators &/or Travel Agents
6. Obtain information on electronic media used for planning a vacation
7. Obtain information on favorite television networks
8. Obtain information on the time visitors to the Bahamas were most likely to watch television
9. Obtain information on print media choices (e.g., newspapers & magazines read)
10. Obtain information on the number of people who had e-mail addresses
11. Obtain information on favorite internet search engines & or content providers
12. Measure intention to return and recommend
13. Obtain demographic information on the stopover visitors (age, sex, education, household size, income).

METHODOLOGY

This Exit Study sample consists of stopover visitors to The Islands of The Bahamas. Stopover Visitors consists of non-residents travelling to the islands to stay in land-based accommodations and/or pleasure crafts/yachts other than cruise ships for 24 hours or more. In 2008, The Islands of The Bahamas received an estimated 1,463,006 stopover visitors compared to 1,527,727 in 2007, a decline of 4.2%. The majority of stopover visitors 1,177,271 (80.5%) were from the U.S.A. The other stopovers to The Islands of The Bahamas were from Canada, 114,960 (7.9%), Europe, 93,803 (6.4%), and Other Countries 76,972 (5.3%).

The method used in the selection of the sample for this Exit Study can be described as a two-staged Systematic Probability Sampling. With this method every kth element (mainly every 5th person) in the sampling frame is selected. Interviews of exiting stopover visitors were conducted at major airports throughout the country. The islands surveyed in this Exit Study include Nassau/Paradise Island, Grand Bahama, Abaco, Andros, Eleuthera, Exuma, Bimini and San Salvador. Interviews during the sampling process were conducted in the mornings, afternoons and evenings.

A total of 5,279 questionnaires were collected from stopover visitors and analyzed. The results were weighted to reflect the place of stay during the visit and the country of residence of the visitor. The published results, therefore, are weighted data and more accurately reflect the real situation.

As with any survey dependent upon random sampling, the percentages and averages in this report are subject to sampling error. The sample is used to estimate the population and differences exist between the result of the sample and the true underlying population value that is unknown. Sampling tolerances (error) for the percentages in this report are shown on the next page.

**SAMPLING TOLERANCES
FOR PERCENTAGES AT OR NEAR THESE LEVELS*
2008**

Place of Stay	Base	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
Total	5,279	± 0.8%	± 1.1%	± 1.2%	± 1.3%	± 1.4%
Nassau/P.I.	1,565	± 1.5%	± 2.0%	± 2.3%	± 2.4%	± 2.5%
Grand Bahama	2,160	± 1.3%	± 1.7%	± 1.9%	± 2.1%	± 2.1%
Out Islands	1,554	± 1.5%	± 2.0%	± 2.3%	± 2.4%	± 2.5%

Country of Residence	Base	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
U.S.A.	4,248	± 0.9%	± 1.2%	± 1.4%	± 1.5%	± 1.5%
Canada	415	± 2.9%	± 3.9%	± 4.4%	± 4.7%	± 4.8%
Europe	338	± 3.2%	± 4.3%	± 4.9%	± 5.2%	± 5.3%
Other	278	± 3.5%	± 4.7%	± 5.4%	± 5.8%	± 5.9%

* 95% Confidence level

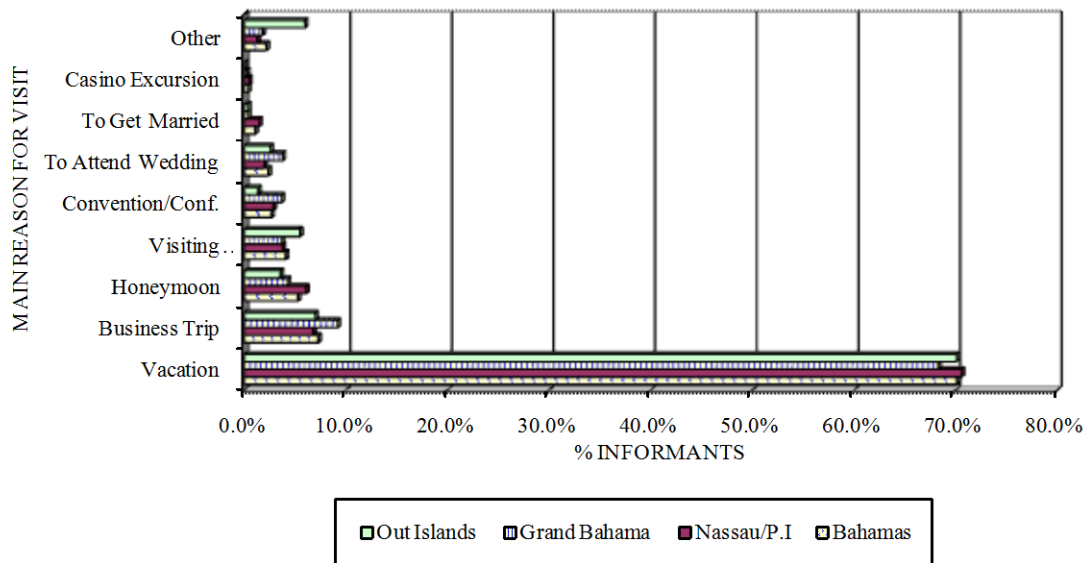
For example, if 50% of the stopover visitors to Nassau/Paradise Island gave a particular response, 95 times out of 100 times, the answer would be no higher than 52.5% and no lower than 47.5% (a margin of plus or minus 2.5%).

TOUR OPERATOR AND MEDIA EXIT SURVEY
MAIN FINDINGS
2008

MAIN REASON FOR THIS VISIT TO THE BAHAMAS
STOPOVER VISITORS
2008

	Bahamas	Nassau/P.I	Grand Bahama	Out Islands
Vacation	70%	71%	68%	70%
Business Trip	7%	7%	9%	7%
Honeymoon	5%	6%	4%	4%
Visiting Friends/Rel.	4%	4%	4%	6%
Convention/Conf.	3%	3%	4%	1%
To Attend Wedding	2%	2%	4%	3%
To Get Married	1%	2%	0%	0%
Casino Excursion	0%	1%	0%	0%
Other	2%	1%	2%	6%

No Response not listed in the table above.



- 70% of all stopover visitors to The Bahamas were on *vacation*.
- 7% of them were on *business*.

- 5% of the stopovers to The Bahamas were on *honeymoon*. 6% of the stopovers to Nassau were on honeymoon compared to 11% in 2001.
- 4% of them were visiting *friends/relatives*.
- 3% of them came for a *Convention and Conference*.
- 2% of them came to the Bahamas to attend a wedding and 1% came to get married.
- 3% of the stopover visitors came on a *Casino excursion* or for some other reason.

**WHAT INFLUENCED VISITORS TO DECIDE TO VISIT THE
BAHAMAS?**

**TOP INFLUENCES FOR DECIDING TO VISIT THE BAHAMAS
ISLANDS OF THE BAHAMAS
2008**

	Bahamas	Nassau/P.I.	Grand Bahama	Out Islands
Beaches	60%	60%	60%	64%
Climate	51%	51%	50%	53%
Rest and Relaxation	43%	43%	43%	42%
Hotel Facilities	28%	34%	15%	19%
Friendly People	26%	24%	24%	36%
Easy to Get to	21%	21%	21%	20%
Never Been Here Before	21%	21%	23%	17%
Safety of Islands	15%	14%	14%	20%
Exotic Islands	13%	12%	11%	17%
Casinos	12%	16%	8%	2%
Good Package Deals	11%	13%	13%	5%
Friend recommended Bah.	11%	11%	10%	13%
Other	11%	9%	13%	12%
Sports	11%	6%	12%	25%
Heard a lot about Bahamas	9%	11%	8%	7%
Best Value for Money	8%	7%	14%	7%
Had Friends in Bah.	8%	7%	8%	12%
Shopping	6%	7%	6%	2%
Nightlife	4%	5%	4%	3%
Travel Agent/Tour Operator	4%	5%	3%	3%
Bahamas Website	4%	4%	3%	3%
Saw Ad on TV	2%	2%	1%	0%
Saw Ad in Magazine	1%	1%	1%	1%
No Response	5%	5%	6%	4%

Visitors to the Islands of the Bahamas indicated that their decision to visit was influenced by:

- The beaches
- Climate
- The need for rest & relaxation
- Hotel facilities

- Friendly people
- The ease of getting to the Bahamas
- The fact that they had never been here before
- The safety of the islands (they perceived the islands to be safe)
- The perception that The Bahamas was exotic
- The Casinos
- Good package deals offered to the destination
- Friends had recommended the destination
- They had friends in the Bahamas
- They had heard a lot about the Bahamas
- Sporting attractions available in the destination (e.g. snorkeling, diving, sailing, deep sea fishing, golfing, and bonefishing)
 - For the Out Islands, sporting attractions really stood out as a major influence for visiting. In addition to the sport of snorkeling which was important to visitors to all of the Out Islands in the Bahamas there were some sporting activities that stood out by island.
 - For the island chain known as The Abacos (Abaco), **sailing** was a major sporting activity that visitors wanted to enjoy.
 - For the island of Andros, **bonefishing and diving** really stood out as activities that visitors to the island intended to enjoy while there.
 - For Bimini, **deep sea fishing and diving** really stood out.
 - For the Exumas **golfing and sailing** stood out.
 - For Eleuthera, **snorkeling** was the most important sporting activity that visitors intended to do there. Eleuthera had other “enchantments” that made visitors love that chain of islands.
 - For San Salvador, **snorkeling** was the most important sporting activity that visitors intended to do there. Visitors to this island also intended to go **sailing and diving**.

WHAT ACTIVITIES DID VISITORS INTEND TO DO ON THIS VISIT TO THE BAHAMAS?

**ACTIVITIES VISITORS INTENDED TO DO ON THIS VISIT TO THE BAHAMAS ISLANDS OF THE BAHAMAS
2008**

	Bahamas	Nassau/P.I.	Grand Bahama	Out Islands
Enjoy Beaches	83%	84%	84%	79%
Rest and Relax	74%	75%	75%	68%
Shop	37%	41%	45%	15%
Go Snorkeling	32%	27%	34%	48%
Go to Casinos	28%	36%	25%	5%
Go on Island Tour	16%	15%	19%	17%
Go Diving	10%	7%	10%	19%
Go Sailing	7%	5%	7%	12%
Go Deep Sea Fishing	6%	4%	7%	9%
Go Golfing	5%	4%	8%	7%
Go Bonefishing	5%	2%	3%	17%
Go Birdwatching	3%	2%	3%	5%
Other Activities	8%	8%	10%	7%
No Response	5%	5%	5%	4%

- Visitors to The Bahamas wanted to enjoy a number of things while on the islands.
- They primarily wanted to enjoy the beaches (83% of them), rest and relax (74%), go shopping (37%), go snorkeling (32%), play in the casinos (28%) and go on an island tour (16%)
- *Visitors to Nassau/P.I., Grand Bahama and the Out Islands differed on the following:*
 - Before arriving in Grand Bahama a higher percentage of visitors to that island had intended to enjoy *the beaches* than visitors to the Out Islands.

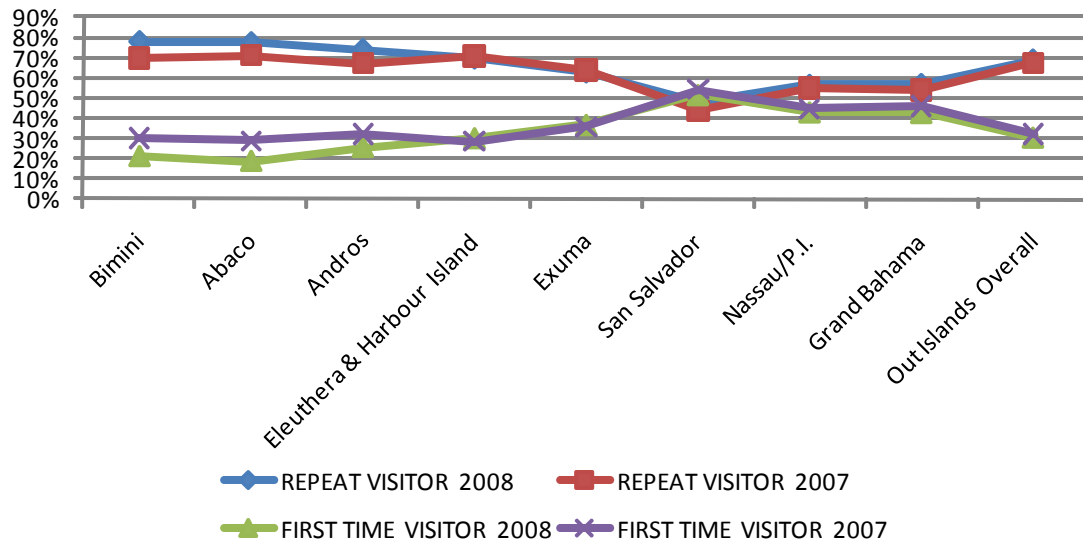
- Before their arrival, a higher percentage of visitors to Nassau/P.I. and Grand Bahama had intended to go *shopping and play in the casinos* than visitors to the Out Islands.
- Before their arrival in the Out Islands, a higher percentage of visitors to these islands had intended to enjoy the sporting attractions available like snorkeling, bonefishing, diving, deep sea fishing and sailing than the visitors to Nassau/P.I. and Grand Bahama.
- Many of the visitors to the Out Islands had a well defined idea of what they wanted to do when they arrived in the islands. Many of them wanted to participate in the sporting attractions available on the islands. Many of them were repeat visitors who came habitually to the islands for their “enchantments”.
- Many visitors to Andros “the Bonefishing Capital of the World” wanted to go **bonefishing**, snorkeling and diving. Andros is well known for its blue holes and the ocean surrounding the island is the home of the third largest barrier reef in the world and the Tongue of the Ocean.
- Many of the visitors to Bimini “the Sport Fishing Capital of the World” wanted to go **deep sea fishing**, and diving. The waters off Bimini are teeming with fish like blue marlins, white marlins, tuna, Wahoo, sailfish, dolphin fish, barracuda and swordfish and because of this are well known to sports fisherman from all over the world. For Abaco “the Sailing Capital of the World”, many of the visitors wanted to enjoy the **sailing**, the diving and deep sea fishing available on the island. For the Exumas, many of the visitors wanted to go **snorkeling** in the most beautiful crystal clear waters in the world and enjoy some **golfing** on the Emerald Bay Four Seasons World Class golf course (closed in 2009). For Eleuthera, many of the visitors wanted to go **snorkeling** in the beautiful waters off the island destination. For San Salvador **snorkeling** was important.

REPEAT VISITORS VS. FIRST TIME VISITORS
ISLANDS OF THE BAHAMAS
REPEAT VS. FIRST TIME VISITOR
STOPOVER VISITORS
2008

	REPEAT VISITOR		FIRST TIME VISITOR	
	2008	2007	2008	2007
Bimini	78%	70%	21%	30%
Abaco	77%	71%	19%	29%
Andros	74%	67%	26%	32%
Eleuthera & Harbour Island	70%	71%	30%	29%
Exuma	63%	64%	37%	36%
San Salvador	48%	44%	52%	54%
Nassau/P.I.	57%	55%	43%	45%
Grand Bahama	57%	54%	43%	46%
Out Islands Overall	69%	67%	30%	32%
All Bahamas	59%	58%	41%	42%

Source: Tour Media Exit Survey 2008 and Exit Survey 2007

REPEAT VS. FIRST TIME VISITOR
2008



Some of The Islands of The Bahamas had a high repeat visitor rate. The Out Islands as usual had the highest number of repeat visitors. Many of the

islands with this high repeat visitor rate offer sporting attractions that normally have very loyal enthusiasts that would do almost anything to enjoy their sport of choice. The islands with the highest number of return visitors (i.e., repeat visitors) were:

- Bimini (78% repeat visitors)
- Abaco (77%)
- Andros (74%)
- Eleuthera including Harbour Island (70%)
- Exuma (63%)

The islands of the Bahamas with the lowest number of repeat visitors were:

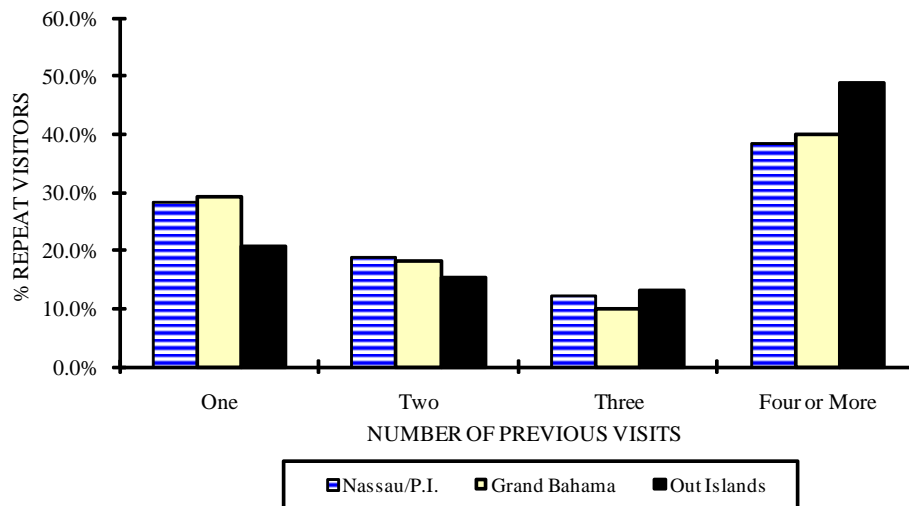
- San Salvador (Many of the visitors to this island are first time visitors)
48% of the stopover visitors to this island were repeat visitors.
- Nassau/Paradise Island (57%)
- Grand Bahama (57%)

NUMBER OF PREVIOUS VISITS EVER MADE
NUMBER OF PREVIOUS VISITS EVER MADE
TO THE BAHAMAS
REPEAT VISITORS
2008

	Number of Times			
	One	Two	Three	Four or More
Nassau/P.I.	28.4%	18.7%	12.3%	38.4%
Grand Bahama	29.2%	18.2%	10.0%	40.1%
Out Islands	20.6%	15.3%	13.1%	48.7%
All Bahamas	26.9%	17.9%	12.1%	40.9%

Source: Tour Operator and Media Exit Survey 2008

NUMBER OF PREVIOUS VISITS EVER MADE
TO THE BAHAMAS
REPEAT VISITORS
2008

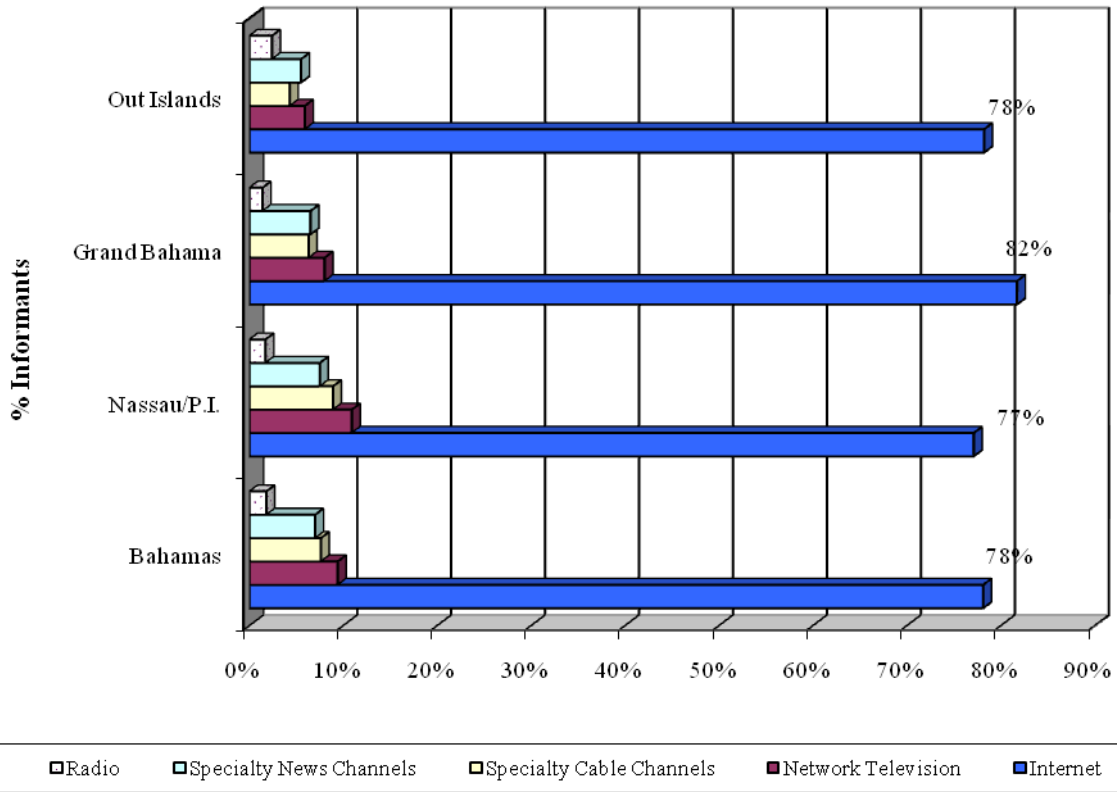


- 27% of the stopover visitors to the Bahamas had been here once before. 28% to Nassau/P.I., 29% to Grand Bahama and 21% to the Out Islands had visited once before.
- 18% of them had been here twice before.
- 12% of them had been here three times before
- 41% of them had visited 4 or more times. 38% to Nassau/P.I., 40% to Grand Bahama and 49% to the Out Islands had visited The Bahamas 4 or more times.

ELECTRONIC MEDIA USED FOR PLANNING VACATIONS

**ELECTRONIC MEDIA MOST FREQUENTLY USED
WHEN PLANNING YOUR VACATION
ISLANDS OF THE BAHAMAS
2008**

	Bahamas	Nassau/P.I.	Grand Bahama	Out Islands
Internet	78%	77%	82%	78%
Network Television	9%	11%	8%	6%
Specialty Cable Channels	8%	9%	6%	4%
Specialty News Channels	7%	8%	7%	6%
Radio	2%	2%	1%	2%



Bahamas Overall

- 78% of the visitors to the Islands of the Bahamas indicated that the electronic media most frequently used when planning their vacations was the *Internet*.
- *Network Television* was the next most popular electronic media used by visitors to *The Islands of The Bahamas* to plan their vacations.
- 9% of the visitors to the Islands of the Bahamas used *Network Television* when planning their vacations
- 8% used *Specialty Cable Channels*.
- 7% used *Specialty News Channels*.
- Some used a combination of methods

Nassau/Paradise Island

- 77% of the visitors to *Nassau/Paradise Island* used the Internet to plan their vacations.
- 11% of the visitors to *Nassau/Paradise Island* used Network Television when planning their vacations
- 9% used Specialty Cable Channels
- 8% used Specialty News Channels.

Grand Bahama Island

- 82% of the visitors to *Grand Bahama* used the Internet to plan their vacations
- 8% of the visitors to *Grand Bahama* used Network Television when planning their vacations
- 7% used Specialty News Channels
- 6% used Specialty Cable Channels

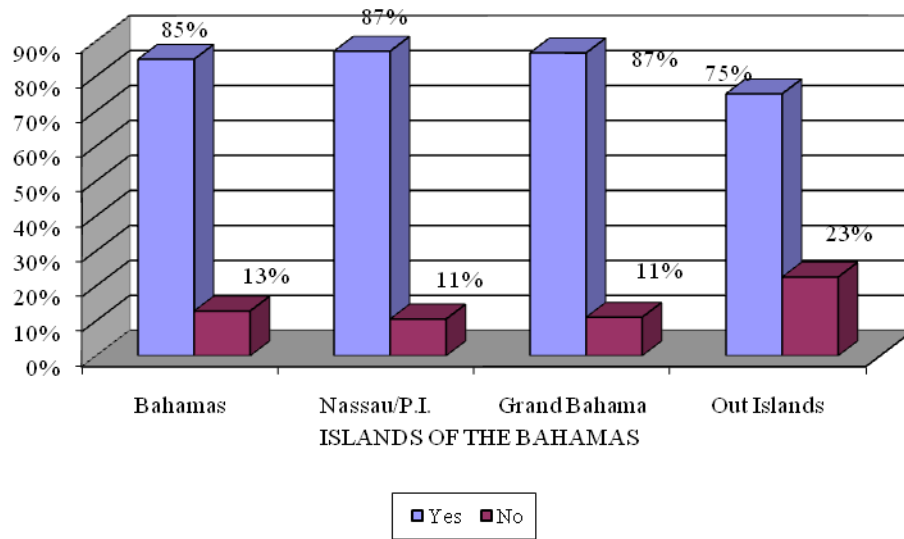
Out Islands

- 78% of the visitors from the *Out Islands* used the Internet to plan their vacations.
- 6% of the visitors to *The Out Islands* used Network Television when planning their vacations
- 6% used Specialty News Channels
- 4% used Specialty Cable Channels

**DO YOU WATCH TELEVISION
ISLANDS OF THE BAHAMAS
2008**

	Bahamas	Nassau/P.I.	Grand Bahama	Out Islands
Yes	85%	87%	87%	75%
No	13%	11%	11%	23%
No Response	2%	2%	2%	3%
Total	100%	100%	100%	100%

**DO YOU WATCH TELEVISION
ISLANDS OF THE BAHAMAS**



- 85% of the stopover visitors to The Islands of The Bahamas said that they watched television.
- Stopovers to the Out Islands were less likely to watch television than those to Nassau/Paradise Island and Grand Bahama. Only 75% of the stopovers to the Out Islands watched television compared to 87% of those to Nassau/Paradise Island and 87% to Grand Bahama.

**TOP 30 FAVORITE TELEVISION NETWORKS/STATIONS/CHANNELS
ISLANDS OF THE BAHAMAS
2008**

	Bahamas	Nassau/P.I.	Grand Bahama	Out Islands
1	CNN	CNN	CNN	CNN
2	NBC	ESPN	NBC	NBC
3	ESPN	NBC	ABC	ESPN
4	ABC	ABC	ESPN	ABC
5	FOX	FOX	FOX	FOX
6	CBS	CBS	CBS	DISC (Discovery Channel)
7	HBO	HBO	DISC (Discovery Channel)	CBS
8	DISC (Discovery Channel)	DISC (Discovery Channel)	HBO	HBO
9	HGTV (Home & Garden Network)	HGTV (Home & Garden Network)	HGTV (Home & Garden Network)	FOXN
10	FOOD (Food Network)	FOOD (Food Network)	FOXN	FOOD (Food Network)
11	FOXN	FOXN	MTV (Music Television)	HGTV (Home & Garden Network)
12	MTV (Music Television)	TNT	FOOD (Food Network)	HIST(History Channel)
13	TNT	MTV (Music Television)	TNT	MTV (Music Television)
14	MSNBC	USA	HIST(History Channel)	Travel Channel
15	USA	MSNBC	Other Local Channels	TBS
16	TBS	TBS	Travel Channel	MSNBC
17	Travel Channel	LIFE (Lifetime)	USA	TNT
18	Other Local Channels	Other Local Channels	TLC (The Learning Channel)	TWC (The Weather Channel)
19	LIFE (Lifetime)	Travel Channel	LIFE (Lifetime)	CNBC
20	HIST(History Channel)	E! (E! Entertainment)	NGEO (National Geographic Channel)	Other Specialty Cable Channels
21	TLC (The Learning Channel)	TLC (The Learning Channel)	MSNBC	CMDY (Comedy Central)
22	Other Specialty Cable Channels	DSNY (Disney Channel)	TBS	NGEO (National Geographic Channel)
23	E! (E! Entertainment)	HIST(History Channel)	A & E (Arts & Entertainment Network)	Other Local Channels
24	TWC (The Weather Channel)	Other Specialty Cable Channels	TWC (The Weather Channel)	PBS (Public Broadcasting Station)
25	A & E (Arts & Entertainment Network)	Other Sports Networks	VH1	TLC (The Learning Channel)
26	DSNY (Disney Channel)	A & E (Arts & Entertainment Network)	Other Specialty Cable Channels	E! (E! Entertainment)
27	CBC (Canada)	TWC (The Weather Channel)	CMDY (Comedy Central)	Other Movie Networks
28	CNBC	CBC (Canada)	BBCW (BBC World, London)	CBC (Canada)
29	Other Sports Networks	SHW (Showtime)	E! (E! Entertainment)	A & E (Arts & Entertainment Network)
30	NGEO (National Geographic Channel)	BBCW (BBC World, London)	LFMN (Lifetime Movie Network)	LIFE (Lifetime)

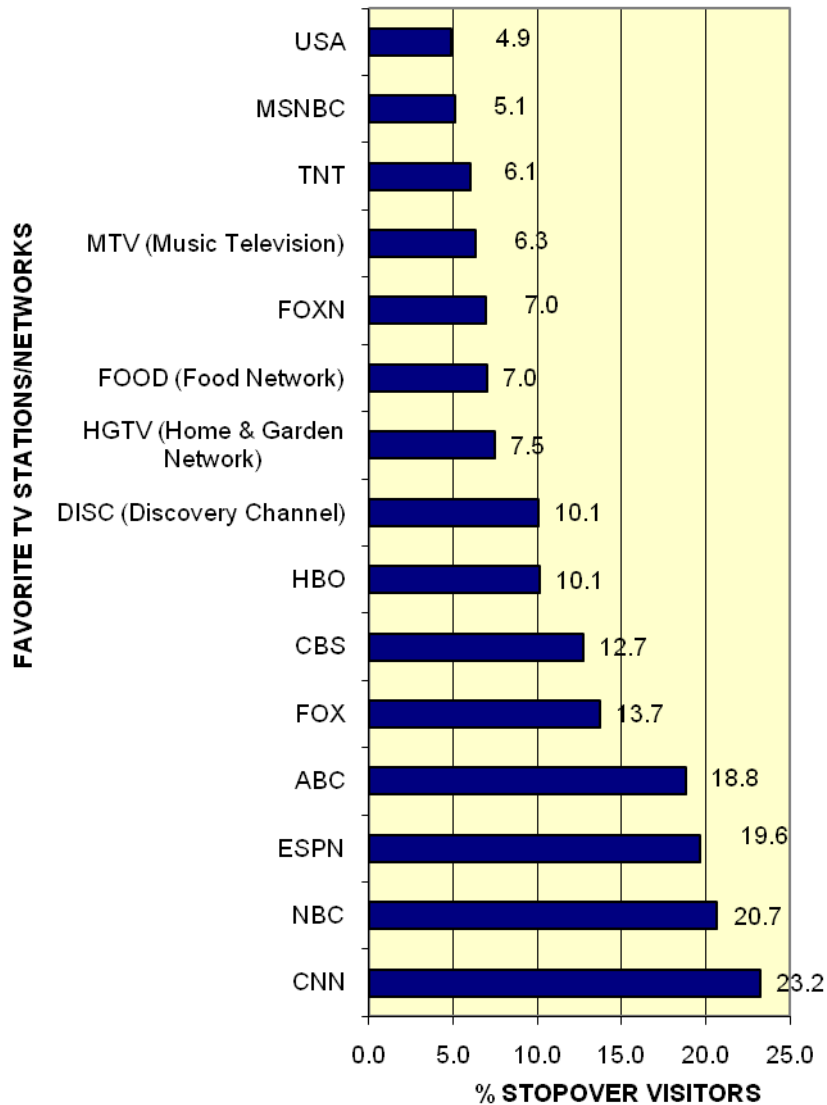
TOP 30 FAVORITE TELEVISION NETWORKS/STATIONS/CHANNELS
COUNTRY
2008

	USA	Canada	Europe	Other Countries
1	CNN	CBC (Canada)	BBCW (BBC World, London)	CNN
2	NBC	CNN	CNN	DISC (Discovery Channel)
3	ESPN	NBC	Other Sports Networks	HBO
4	ABC	ABC	Other Local Channels	ABC
5	FOX	CBS	ITV	MTV (Music Television)
6	CBS	DISC (Discovery Channel)	BBCA (BBC America)	Travel Channel
7	HBO	FOX	MTV (Music Television)	ESPN
8	DISC (Discovery Channel)	CTV (Canada)	HBO	NBC
9	HGTV (Home & Garden Network)	ESPN	ABC	USA
10	FOXN	A & E (Arts & Entertainment Network)	NBC	FOX
11	FOOD (Food Network)	HBO	NGEO (National Geographic Channel)	TNT
12	TNT	HGTV (Home & Garden Network)	Other Specialty Cable Channels	HIST(History Channel)
13	MTV (Music Television)	TSN (Sports Network)	DW (Deutsche Welle-German)	NGEO (National Geographic Channel)
14	MSNBC	FOOD (Food Network)	DISC (Discovery Channel)	Other News Stations
15	USA	Other Local Channels	Other News Stations	LIFE (Lifetime)
16	TBS	TLC (The Learning Channel)	FOX	TWC (The Weather Channel)
17	HIST(History Channel)	MTV (Music Television)	CBS	TBS
18	Travel Channel	Other Sports Networks	ESPN	BBCW (BBC World, London)
19	LIFE (Lifetime)	FOXN	FOOD (Food Network)	HGTV (Home & Garden Network)
20	Other Local Channels	TBS	TMC (The movie channel)	FOOD (Food Network)
21	TLC (The Learning Channel)	SHW (Showtime)	DSNY (Disney Channel)	Other Specialty Cable Channels
22	E! (E! Entertainment)	NGEO (National Geographic Channel)	E! (E! Entertainment)	VH1
23	Other Specialty Cable Channels	Travel Channel	TNT	LFMN (Lifetime Movie Network)
24	TWC (The Weather Channel)	TNT	TWC (The Weather Channel)	STARZ
25	DSNY (Disney Channel)	BBCA (BBC America)	TV5 (French)	ZNS
26	A & E (Arts & Entertainment Network)	BBCW (BBC World, London)	Other Foreign Language Networks	DSNY (Disney Channel)
27	CNBC	LIFE (Lifetime)	Other Movie Networks	BBCA (BBC America)
28	SHW (Showtime)	VH1	Travel Channel	BET (Black Entertainment Television)
29	CMDY (Comedy Central)	CNBC	LIFE (Lifetime)	CBS
30	VH1	NTV (Newfoundland)	A & E (Arts & Entertainment Network)	TOON (Cartoon Network)

- *Network Television* was the second most popular electronic media used by stopover visitors to *The Islands of The Bahamas* to plan their vacations. In addition, many visitors to the Bahamas used Network Television and other TV stations like *Specialty Cable Channels*, and *Specialty News Channels* for their viewing enjoyment.
- Although *Network Television* was the 2nd most popular electronic media (after the Internet) used by stopover visitors to *The Islands of The Bahamas* to plan their vacations they appeared to prefer Specialty News Network Stations in general when they were just watching television for their edification. CNN was the most popular television station of choice watched by stopover visitors to The Islands of The Bahamas.
- In 2007, ABC was the most popular television station viewed by visitors to the Bahamas. CNN was the 3rd most popular station. For the visitors to the Bahamas it appeared that CNN pulled ahead of the others during the electoral race for the Presidency of the United States in 2008 and the financial meltdown of September 2008.
- Visitors to the Bahamas tend to be very educated individuals so it is not surprising that they wanted to be in tune with what was going on in the United States which is the largest economy in the world based on GDP. In fact it appeared as if the world was also glued to CNN. In 2008, CNN was the 2nd most popular television station watched by visitors from both Canada and Europe and no. 1 for many other counties of the world.

Islands of The Bahamas

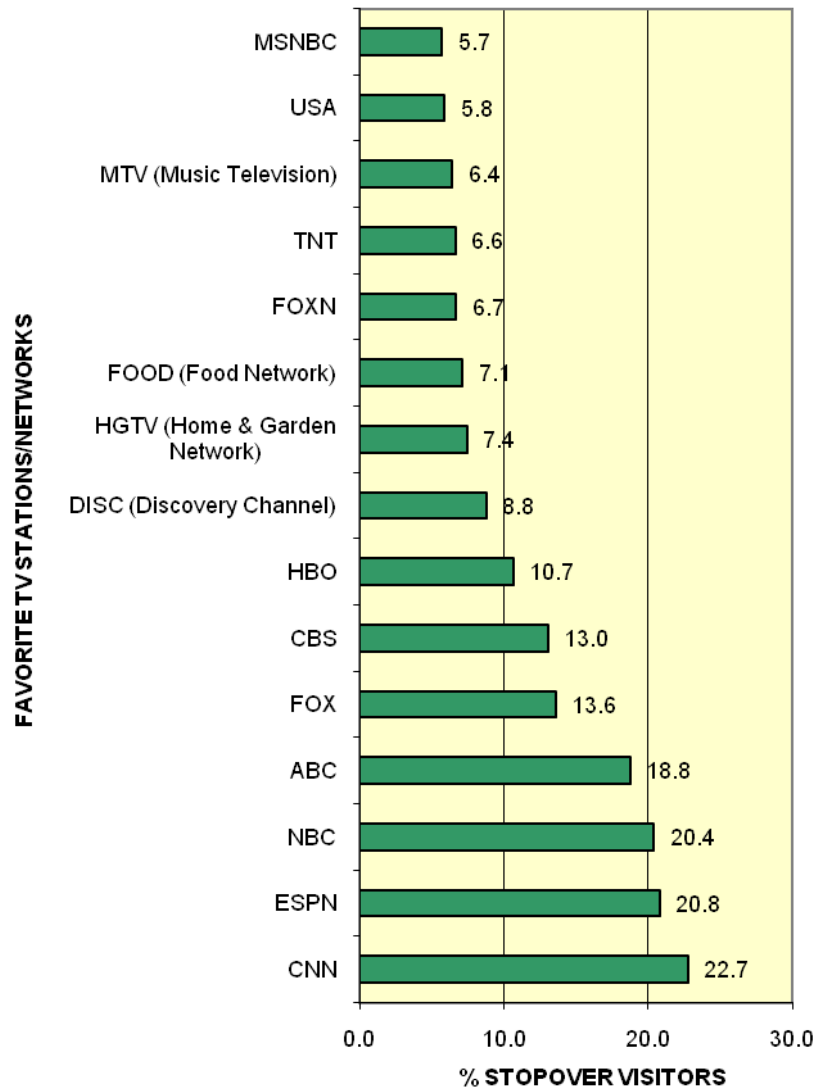
FAVORITE TELEVISION NETWORKS/STATIONS ISLANDS OF THE BAHAMAS



- CNN was the favorite television network/station viewed by visitors to the Bahamas. Twenty-three percent (23%) of the stopovers to the Bahamas said that CNN was one of their favorite stations.
- NBC (21%) was 2nd
- ESPN (20%) was 3rd
- ABC (19%) was 4th
- FOX (14%) was 5th CBS (13%) was 6th

Nassau/Paradise Island

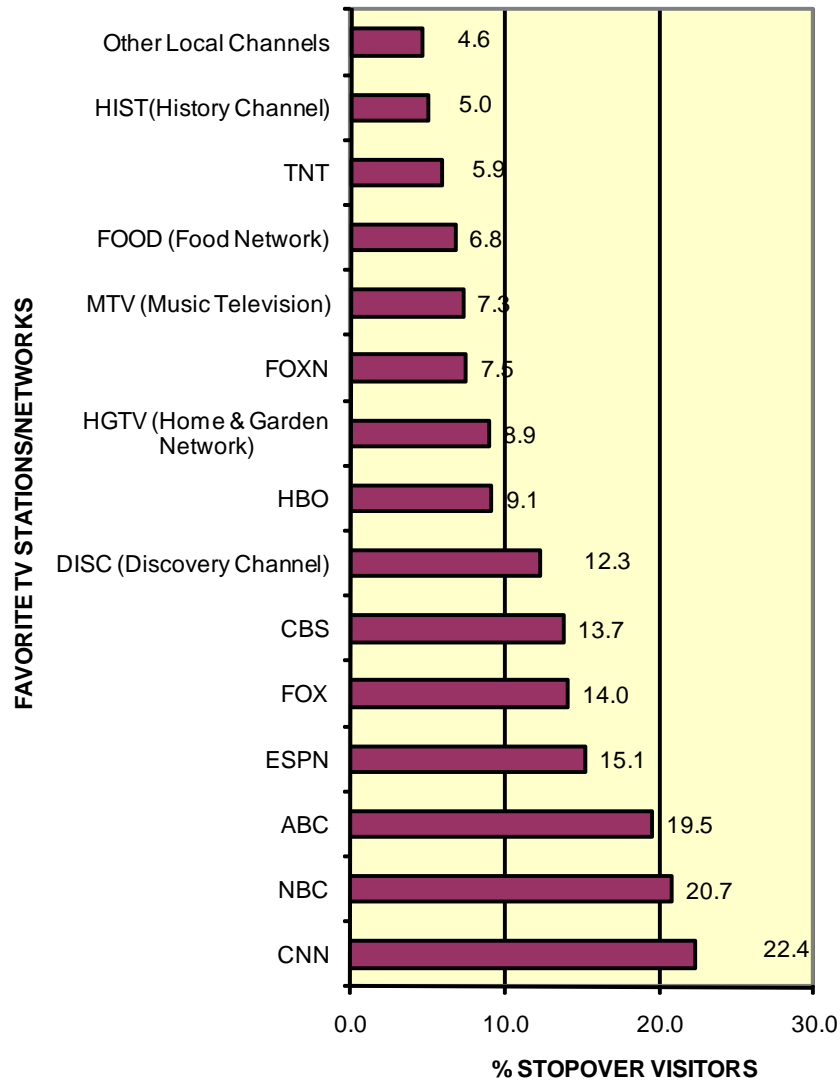
FAVORITE TELEVISION NETWORKS/STATIONS NASSAU & PARADISE ISLAND



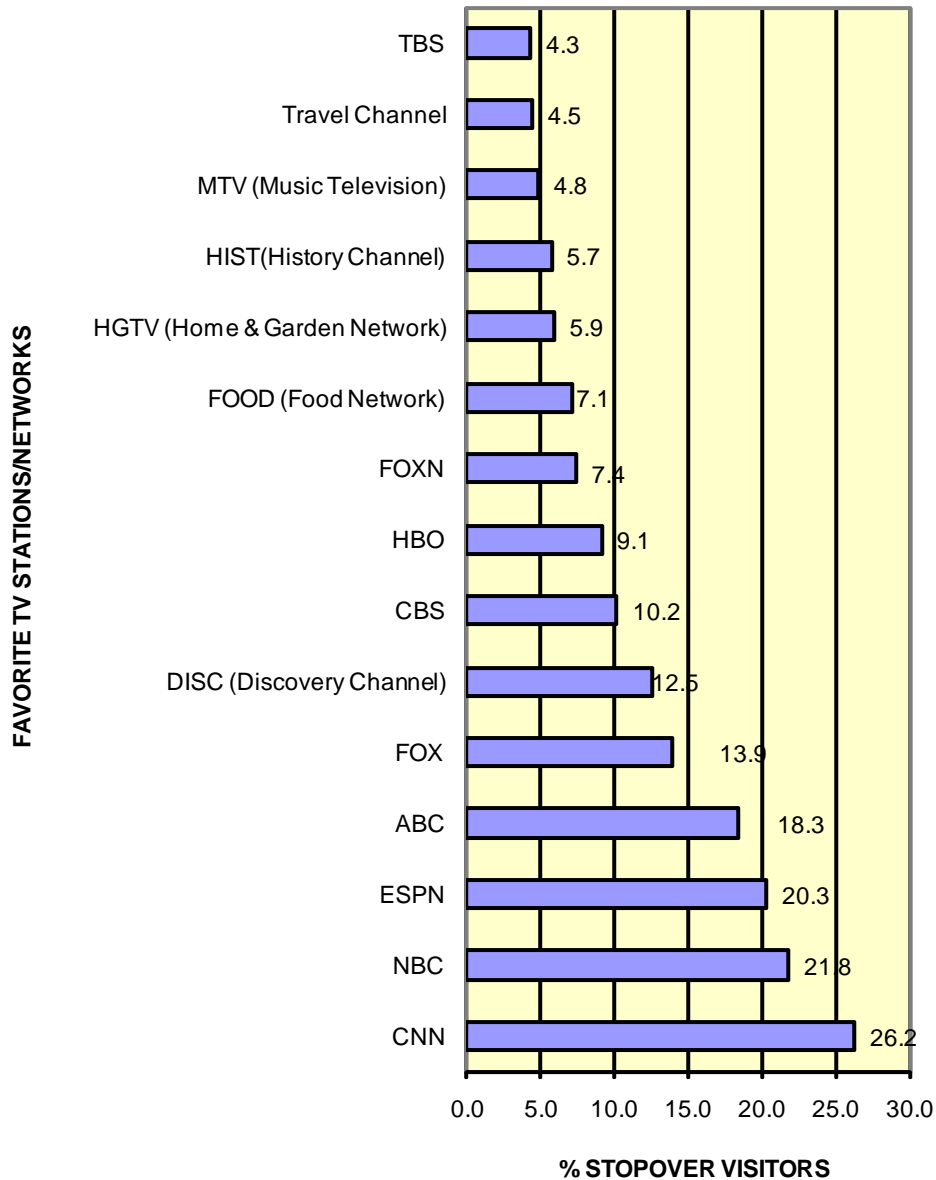
- CNN was the favorite television network/station viewed by visitors to Nassau/Paradise Island. Twenty-three percent (23%) of the stopovers to Nassau/Paradise Island said that CNN was one of their favorite stations.
- ESPN (21%) was 2nd
- NBC (20%) was 3rd
- ABC (19%) was 4th
- FOX (14%) was 5th and CBS (13%) was 6th

Grand Bahama

FAVORITE TELEVISION NETWORKS/STATIONS GRAND BAHAMA ISLAND



- CNN was the favorite television network/station viewed by visitors to Grand Bahama. Twenty-two percent (22%) of the stopovers to Grand Bahama said that CNN was one of their favorite stations.
- NBC (21%) was 2nd
- ABC (20%) was 3rd
- ESPN (15%) was 4th
- FOX (14%) was 5th
- CBS (13.7%) was 6th

Out Islands**FAVORITE TELEVISION NETWORKS/STATIONS
OUT ISLANDS**

- CNN was the favorite television network/station viewed by visitors to The Out Islands. Twenty-six (26%) of the stopovers to the Out Islands said that CNN was one of their favorite stations.
- NBC (22%) was 2nd
- ESPN (20%) was 3rd
- ABC (18%) was 4th
- FOX (14%) was 5th
- DISC (Discovery Channel 13%) was 6th

Time Visitors Most Likely to Watch Television

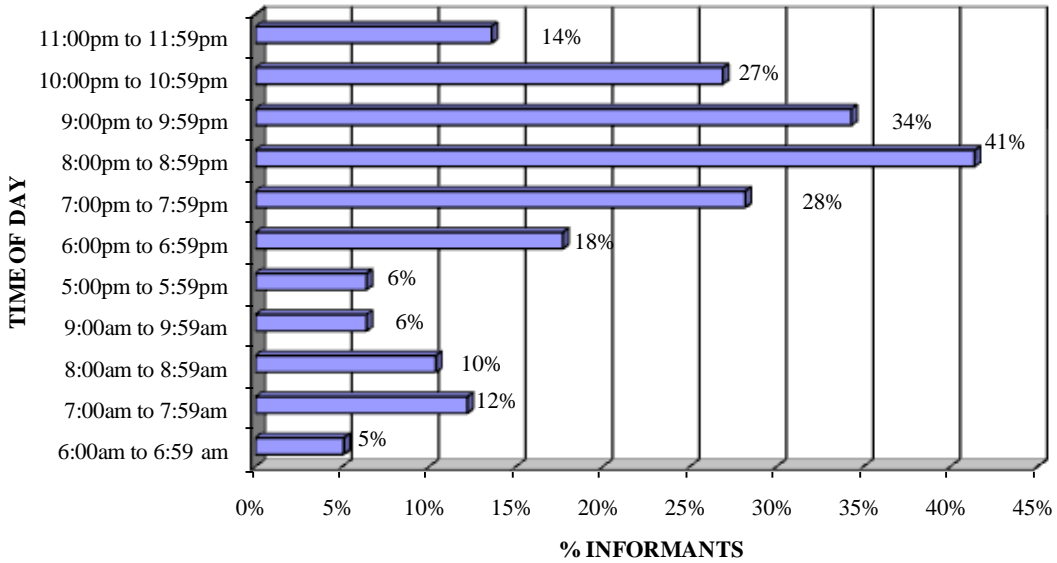
TIME MOST LIKELY TO WATCH TELEVISION ISLANDS OF THE BAHAMAS 2008

	Bahamas	Nassau/P.I.	Grand Bahama	Out Islands
6:00am to 6:59 am	5%	5%	4%	5%
7:00am to 7:59am	12%	13%	12%	12%
8:00am to 8:59am	10%	10%	11%	10%
9:00am to 9:59am	6%	7%	7%	5%
5:00pm to 5:59pm	6%	7%	6%	6%
6:00pm to 6:59pm	18%	18%	18%	18%
7:00pm to 7:59pm	28%	28%	29%	27%
8:00pm to 8:59pm	41%	40%	44%	43%
9:00pm to 9:59pm	34%	33%	37%	36%
10:00pm to 10:59pm	27%	27%	27%	27%
11:00pm to 11:59pm	14%	14%	13%	12%

Only the most popular times are shown in the above table.

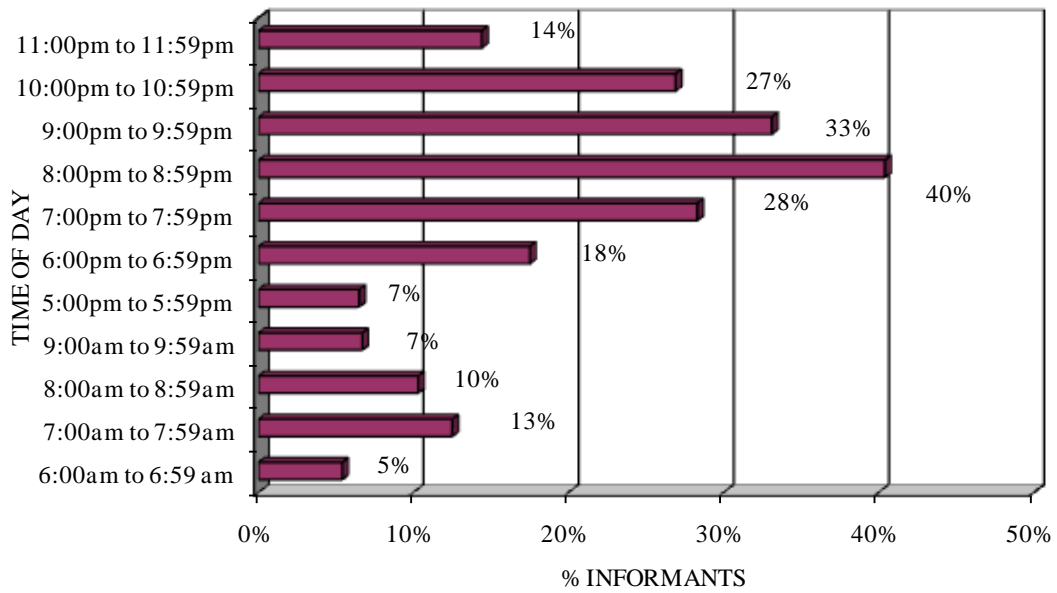
- Visitors to the Bahamas Overall, Nassau/Paradise Island, Grand Bahama and the Out Islands were most likely to watch television between the hours of **6:00 p.m. in the evening to 10:59 p.m.** at night.
- The **most popular time however** for watching television for visitors to the Islands of the Bahamas was between 8:00 p.m. to 8:59 p.m.
- 18% of the visitors to the Bahamas watched television between 6:00 p.m. to 6:59 p.m. in the evening.
- 28% of them watched television between 7:00 p.m. to 7:59 p.m.
- **41% of them watched television between 8:00 p.m. to 8:59 p.m.**
- 34% of them watched television between 9:00 p.m. to 9:59 p.m.
- 27% of them watched television between 10:00 p.m. to 10:59 p.m. at night.

Bahamas



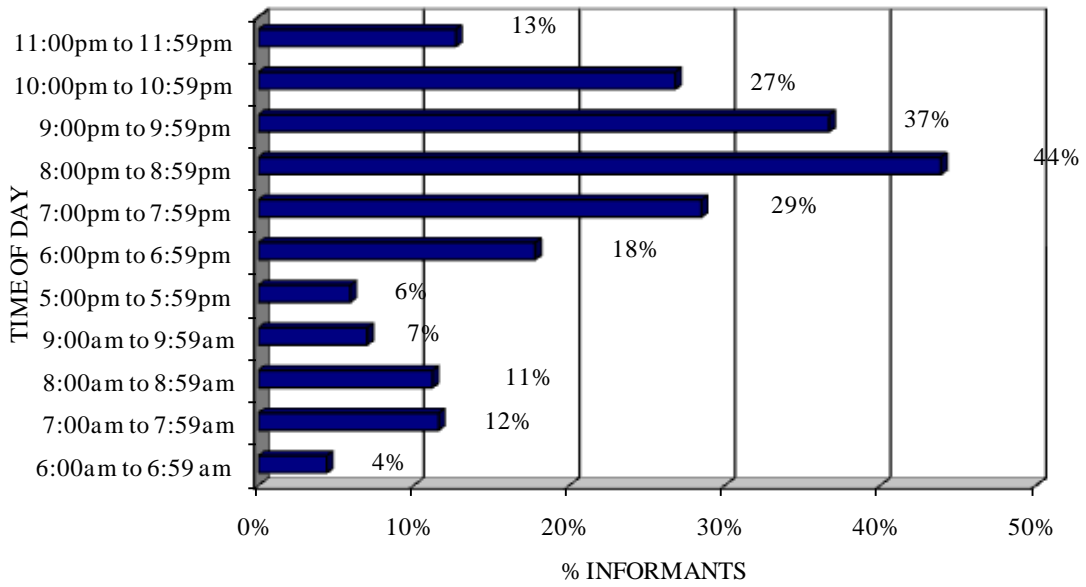
■ Bahamas

Nassau/P.I.



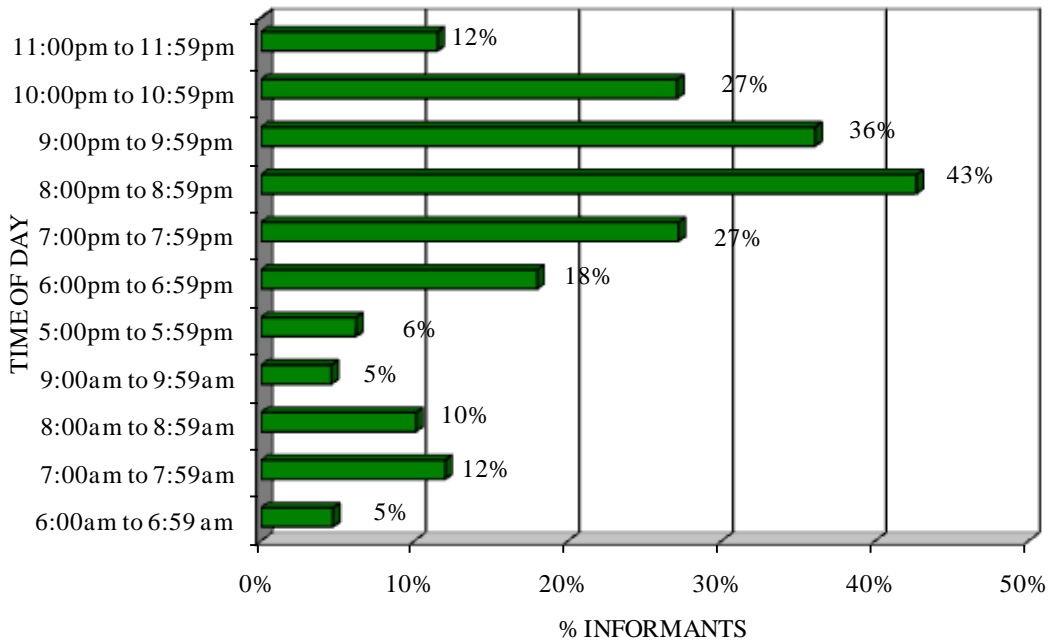
■ Nassau/P.I.

Grand Bahama



■ Grand Bahama

Out Islands



■ Out Islands

PRINT MEDIA CHOICES

DO YOU USE PRINT MEDIA TO PLAN YOUR VACATION?

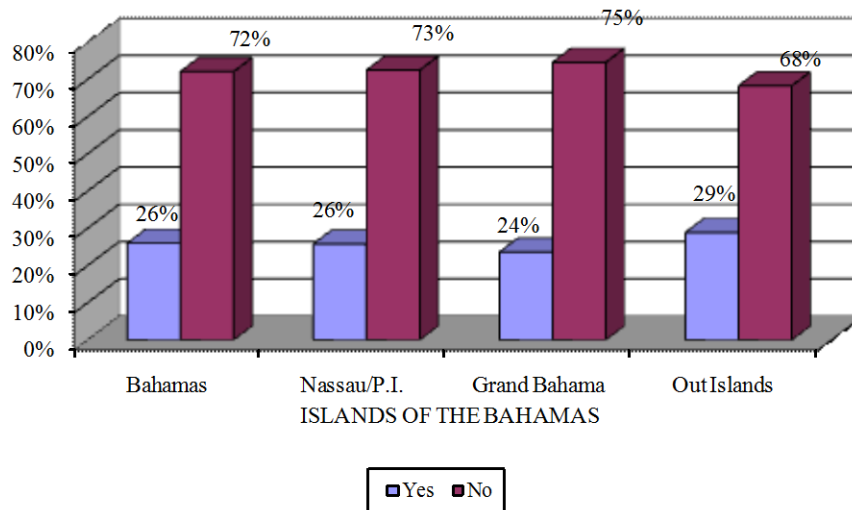
ISLANDS OF THE BAHAMAS

2008

	Bahamas	Nassau/P.I.	Grand Bahama	Out Islands
Yes	26%	26%	24%	29%
No	72%	73%	75%	68%
No Response	2%	2%	2%	3%
Total	100%	100%	100%	100%

DO YOU USE PRINT MEDIA TO PLAN YOUR VACATION?

ISLANDS OF THE BAHAMAS



- Over one quarter (26%) of the stopover visitors to The Bahamas used print media to plan their vacations and more than two thirds (72%) did not.
- Visitors to the Out Islands were more likely to use print media to plan their vacations than visitors to Nassau/Paradise Island and Grand Bahama. Twenty-nine percent (29%) of the stopover visitors to The Out Islands used print media to plan their vacations compared to 26% of those to Nassau/Paradise Island and 24% of those to Grand Bahama.

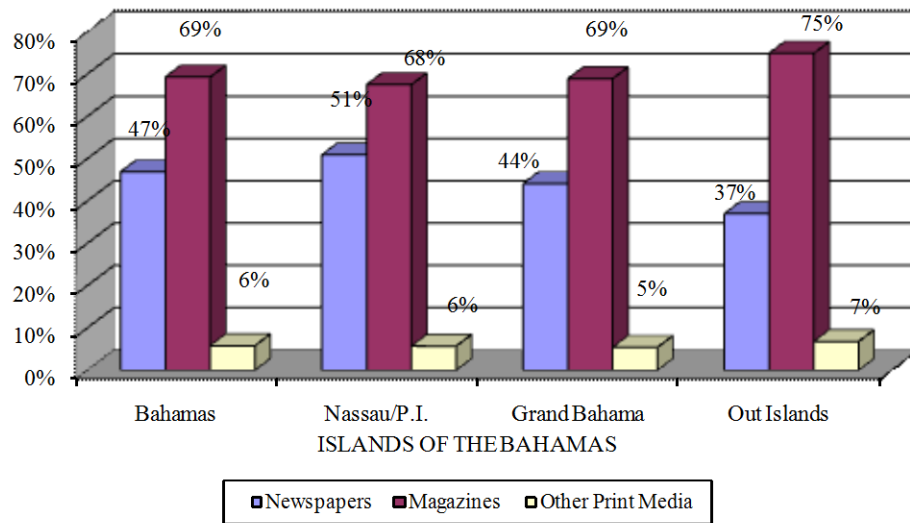
**PRINT MEDIA USED WHEN PLANNING YOUR VACATION
ISLANDS OF THE BAHAMAS
2008**

	Bahamas	Nassau/P.I.	Grand Bahama	Out Islands
Newspapers	47%	51%	44%	37%
Magazines	69%	68%	69%	75%
Other Print Media	6%	6%	5%	7%

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

No Response has been factored out of the responses.

PRINT MEDIA USED WHEN PLANNING YOUR VACATION



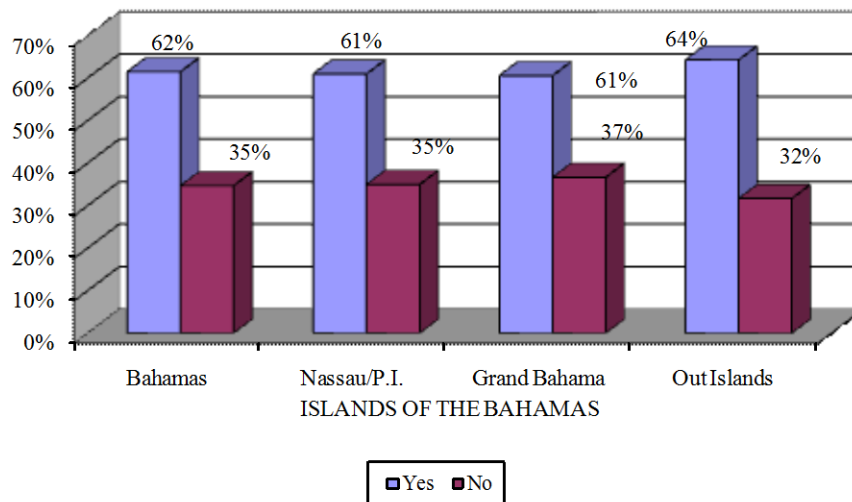
Twenty-six percent (26%) of the stopover visitors to the Bahamas used print media to plan their vacations. Stopovers to The Bahamas read both newspapers and magazines when they were planning their vacations. Magazines were the most popular print media used.

- Of the 26% of stopover visitors who used print media to plan their vacations, 47% of them read newspapers and 69% of them read magazines when they were planning their vacations.
- 51% of the visitors to Nassau/Paradise Island read newspapers when they were planning their vacations and 68% of them read magazines.
- 44% of the visitors to Grand Bahama Island read newspapers when they were planning their vacations and 69% of them read magazines.
- 37% of the visitors to the Out Islands read newspapers when they were planning their vacations and 75% of them read magazines.

**DO YOU READ MAGAZINES
ISLANDS OF THE BAHAMAS
2008**

	Bahamas	Nassau/P.I.	Grand Bahama	Out Islands
Yes	62%	61%	61%	64%
No	35%	35%	37%	32%
No Response	4%	4%	3%	4%
Total	100%	100%	100%	100%

**DO YOU READ MAGAZINES
ISLANDS OF THE BAHAMAS**



- In 2008, 62% of the stopover visitors to the Bahamas read magazines compared to 59% in 2007 for their reading enjoyment regardless of planning a vacation, and 35% did not.
- 61% of the stopovers to Nassau/Paradise Island in 2008 read magazines for their enjoyment compared to 56% in 2007.
- 61% of them to Grand Bahama in 2008 said that they read magazines.
- 64% of the stopovers to the Out Islands read magazines for their enjoyment.

MAGAZINES THAT VISITORS WERE READING

Visitors to the Islands of the Bahamas read a very wide selection of magazines and listed over 530 magazines on the questionnaires. They read magazines that dealt with sporting activities like golf, fly fishing, boating, yachting, flying, diving, weightlifting, running, tennis, surfing, horseback riding, skiing, yoga, etc. They read magazines on motor bikes, cycling, aviation, automobile racing and automobiles. They read magazines that dealt with the latest fashions, fitness/health, muscle and fitness, beauty and makeup. They read magazines on business issues, financial matters, current events, architecture, home and garden, and home improvements. They read magazines on family, parenting, nursing, bridal matters, sewing, woodworking, cooking, gourmet cooking, food & wine, and cigars. They read magazines on nature, outdoor life, travel, computers, religion, and simply life. Visitors to the Islands of the Bahamas read such a large selection of magazines that only the top ones are listed in this report.

The top 35 magazines read by visitors to the Islands of the Bahamas, Nassau/Paradise Island, Grand Bahama and The Out Islands are shown on the following pages.

It is interesting to note that there were 3 very prominent African American magazines among the top read magazines for Grand Bahama in 2008. Ebony, Essence and Jet all appeared in the top 30 magazines read by visitors to Grand Bahama. These African American magazines were not among the top 35 magazines read by visitors to The Out Islands. Grand Bahama is known to receive a higher percentage of African American Visitors than most of the other islands in The Bahamas. Therefore it is not surprising to see more African-American magazines in the top 30 magazines.

**TOP 35 FAVORITE MAGAZINES READ BY VISITORS
ISLANDS OF THE BAHAMAS
2008**

	Bahamas	Nassau/P.I.	Grand Bahama	Out Islands
1	People	People	People	People
2	Time Magazine	Cosmopolitan (Cosmo)	Time Magazine	Time Magazine
3	Cosmopolitan (Cosmo)	Time Magazine	Cosmopolitan (Cosmo)	Newsweek
4	US/US Weekly	US/US Weekly	US/US Weekly	Travel & Leisure
5	Newsweek	Glamour	Newsweek	National Geographic (Explorer)
6	Sports Illustrated	Sports Illustrated	O (Oprah)	Vogue/Vogue Living
7	Glamour	Newsweek	Sports Illustrated	Economist (The)
8	O (Oprah)	Men's Health	National Geographic (Explorer)	New Yorker
9	Vogue/Vogue Living	In Style	Glamour	Sports Illustrated
10	National Geographic (Explorer)	O (Oprah)	Good Housekeeping	US/US Weekly
11	Men's Health	Good Housekeeping	Vogue/Vogue Living	Vanity Fair
12	In Style	Vogue/Vogue Living	Better Homes & Gardens (BHG)	Cosmopolitan (Cosmo)
13	Vanity Fair	Vanity Fair	Southern Living	In Style
14	Economist (The)	Better Homes & Gardens (BHG)	Ebony	Conde Nast Travel
15	Good Housekeeping	GQ	Men's Health	O (Oprah)
16	Better Homes & Gardens (BHG)	National Geographic (Explorer)	In Style	Men's Health
17	New Yorker	Essence	Essence	Scuba
18	GQ	Fitness	Reader's Digest	Elle Decor
19	Fitness	Economist (The)	Conde Nast Travel	Travel
20	Essence	OK! Magazine	Fitness	Reader's Digest
21	Reader's Digest	Ebony	Real Simple	Real Simple
22	Ebony	Self	Economist (The)	Islands
23	Conde Nast Travel	Reader's Digest	Travel	Caribbean Travel
24	Elle Decor	New Yorker	Woman's Day	Fly Fishing
25	Travel & Leisure	Elle Decor	New Yorker	Forbes
26	Southern Living	Star	Vanity Fair	Golf Digest
27	OK! Magazine	Conde Nast Travel	Bon Appetit	Maximum/Maxim
28	Self	Jet	Health	Golf
29	Real Simple	Southern Living	Jet	GQ
30	Maximum/Maxim	Maximum/Maxim	Travel & Leisure	Out
31	Golf	Woman's Day	Maximum/Maxim	Southern Living
32	Travel	Golf	Self	Gourmet
33	Star	Shape	Elle Decor	Fishing
34	Woman's Day	Real Simple	Golf	Business Week
35	Jet	In Touch/In Touch Weekly	Golf Digest	Smithsonian

2 islands

Only in this island (s)

In All Bah. Nassau/P.I., GBI & OI

- Stopover Visitors to the Islands of the Bahamas were primarily between the ages of 25 to 54, well educated individuals with College degrees, and with household incomes over \$75,000. Most of them were also Americans. The demographics of the stopover visitors to the Bahamas were reflected in their magazine selections. The magazines enjoyed by the stopover target audience of the Bahamas were primarily very upscale.
- The magazine selections further reflect that there were some differences in interests between the stopover visitors who visit Nassau, Grand Bahama and the Out Islands.

Nassau/Paradise Island Only (In Top 35 magazines)

- In Touch/In Touch Weekly
- Shape
- Star
- Ok!Magazine

Grand Bahama Only (In Top 35 magazines)

- Bon Appetit
- Health

The Out Islands Only

The following magazines were in the top 35 magazine selections for The Out Islands but not in the top 35 for Nassau/P.I. or Grand Bahama.

- Scuba
- Islands
- Caribbean Travel
- Fly Fishing
- Forbes
- Out
- Gourmet
- Fishing (magazines)
- Business Week
- Smithsonian

One of the primary reasons stopover visitors selected the Out Islands to visit was because of the sporting attractions that were available, for example, snorkeling, fishing, scuba diving, etc. The stopover visitors to The Out Islands were primarily white, between the ages of 25-54 years of age, with more than half (51%) of the stopovers earning household incomes over \$100,000. Many of the magazine selections were specialty magazines that emanated their tastes.

Nassau/Paradise Island and Grand Bahama

The following magazines were in the top 35 magazine selections for Nassau/P.I. and Grand Bah. but not in the top 35 for the Out Islands.

- Glamour
- Good Housekeeping
- Better Homes and Gardens
- Ebony
- Jet
- Essence
- Fitness
- Self
- Women's Day

The Out Islands do not receive a large amount of African American stopover visitors compared to Nassau/Paradise Island and Grand Bahama. Most of the African American stopover visitors to the Bahamas go to Nassau/Paradise Island and Grand Bahama. A higher percentage of African Americans go to Grand Bahama than any other island in The Bahamas. Therefore magazines such as Essence, Ebony and Jet were not listed in the top 35 magazines of choice for the target audience for The Out Islands. Nine percent (8.6%) of the visitors to Grand Bahama were black, compared to 8.0% of the visitors to Nassau/Paradise Island, 3.9% of those to San Salvador, 2.1% of those to Abaco, 2.1% of those to Exuma, 1.1% of those to Bimini, 0.9% of those to Eleuthera and 0.8% of those to Andros.

Nassau/Paradise Island and The Out Islands

The following magazine was in the top 35 magazine selections for Nassau/P.I. and The Out Islands but not in the top 35 for Grand Bahama.

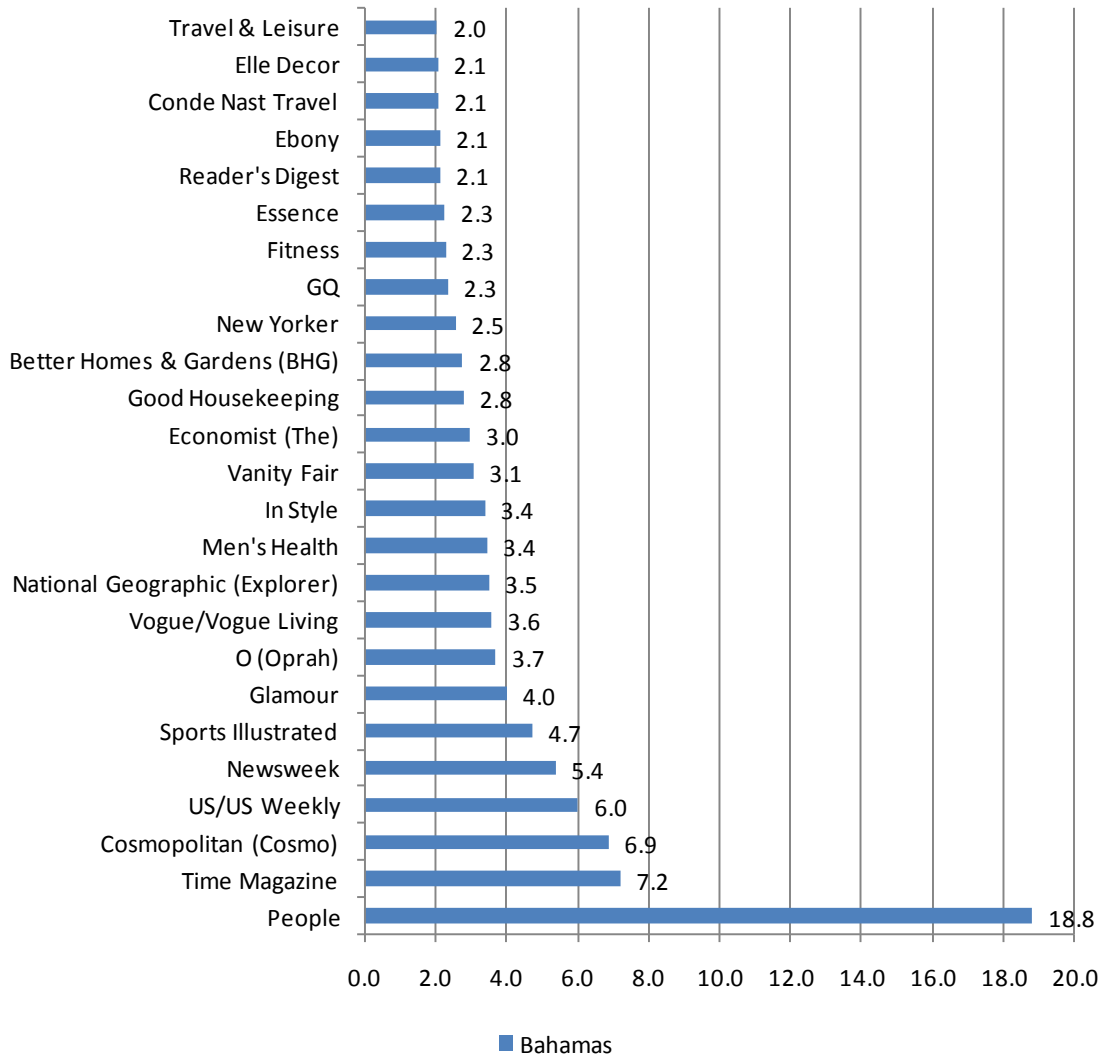
- GQ

Grand Bahama and The Out Islands (In Top 35 magazines)

The following magazines were in the top 35 magazine selections for Grand Bahama and The Out Islands but not in the top 35 for Nassau/P.I.

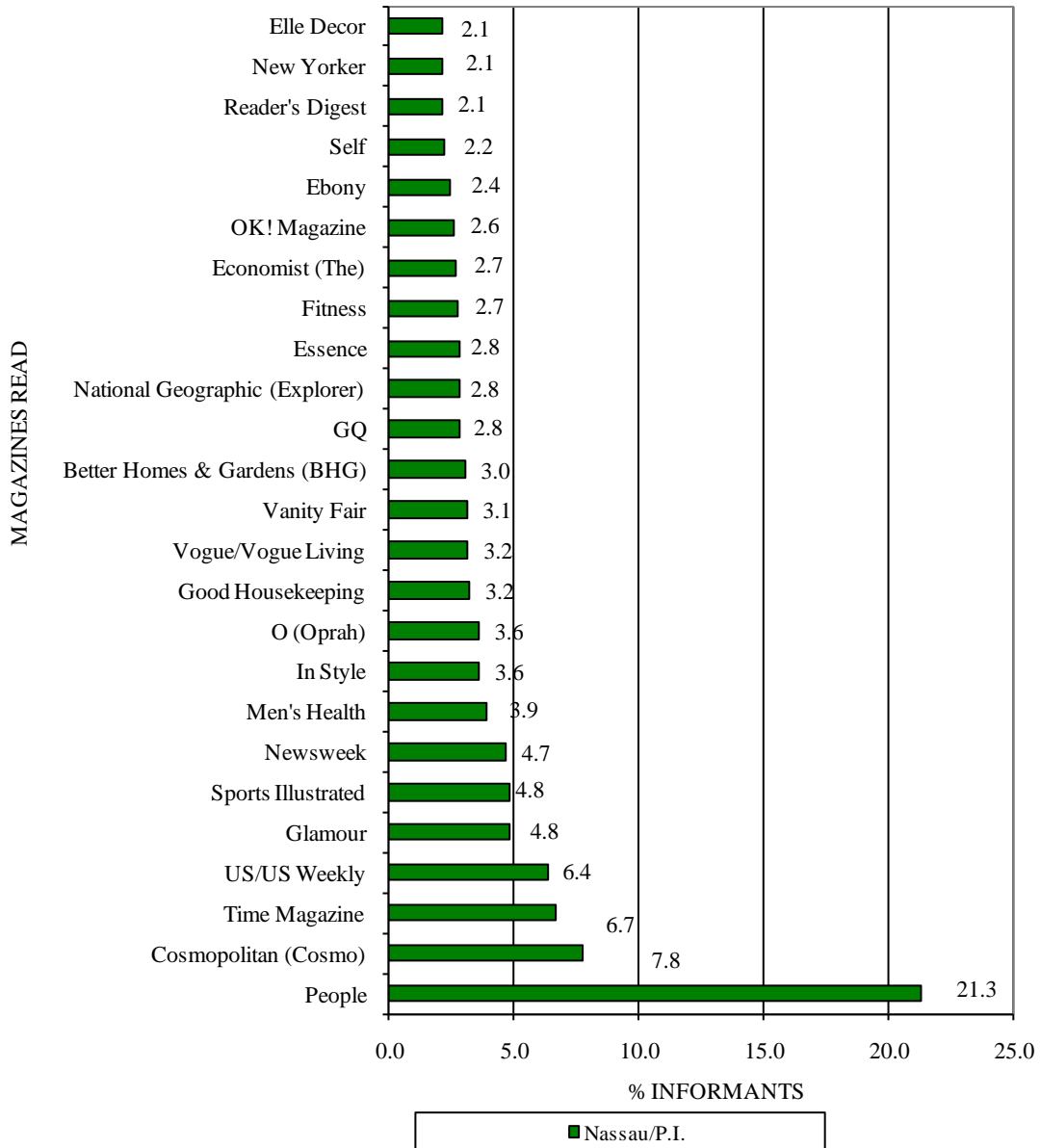
- Travel
- Travel and Leisure
- Golf Digest

Bahamas



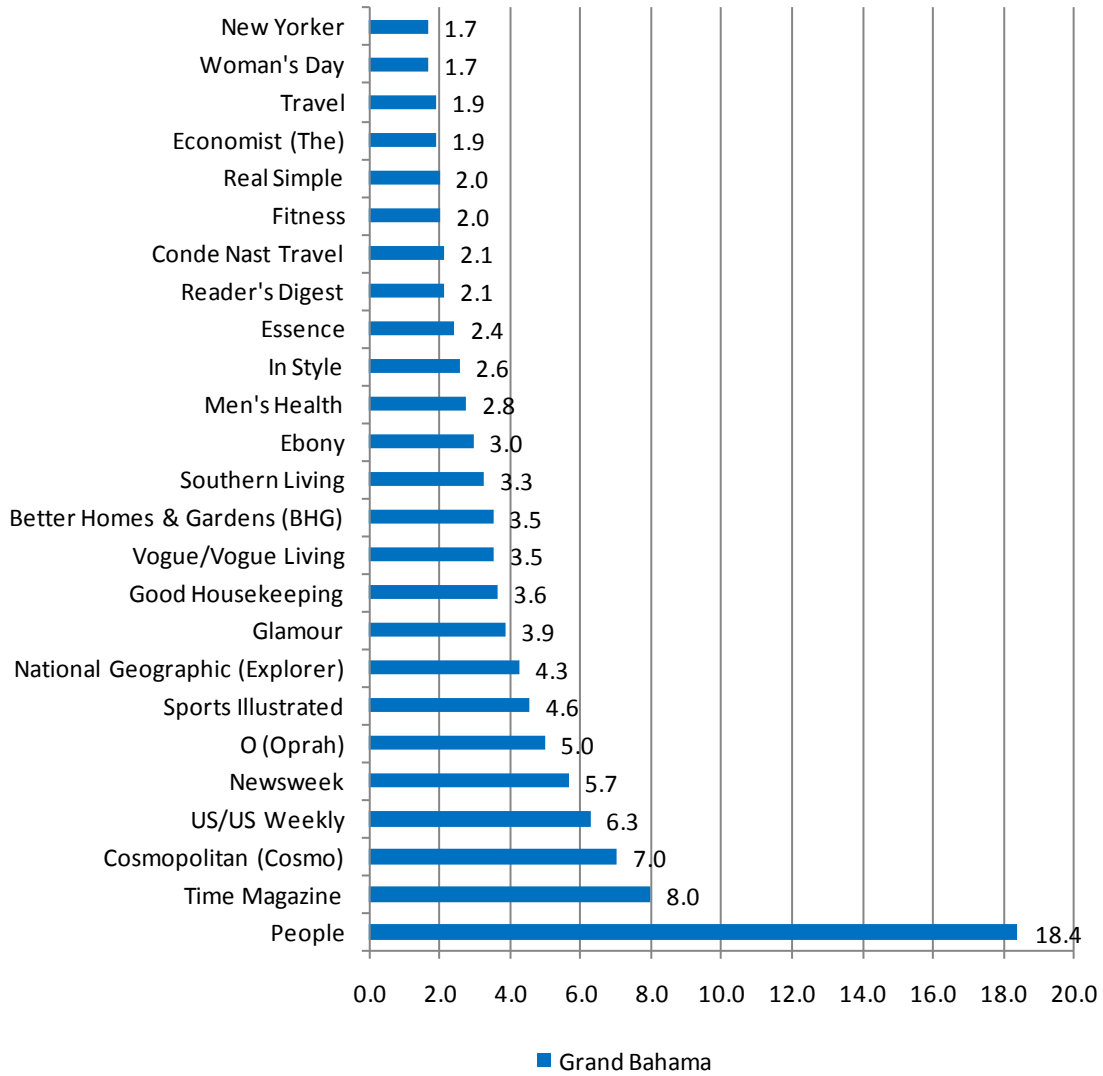
The above table shows the top 25 magazines read by stopovers to the Bahamas (in percentages).

Nassau/P.I.



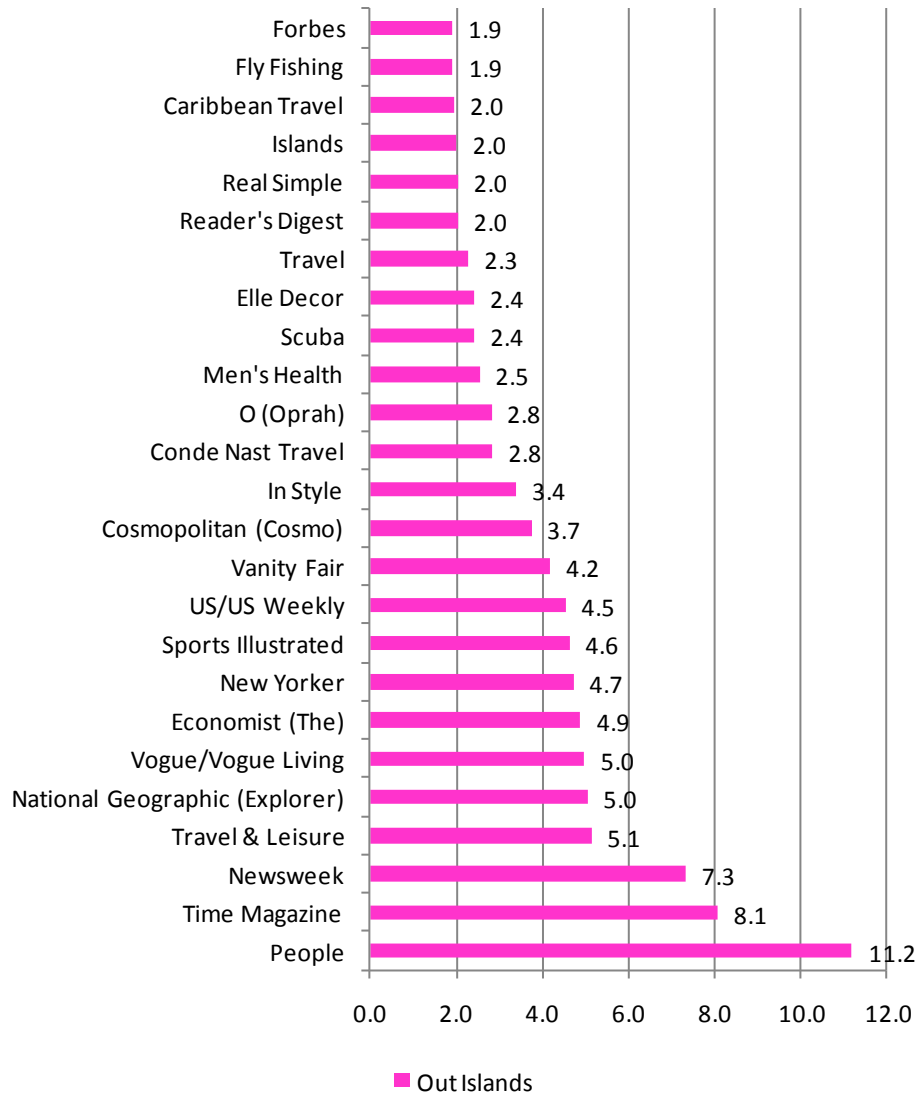
The above table shows the top 25 magazines read by stopovers to Nassau/P.I. in percentages.

Grand Bahama



The above table shows the top 25 magazines read by stopovers to Grand Bahama in percentages.

Out Islands

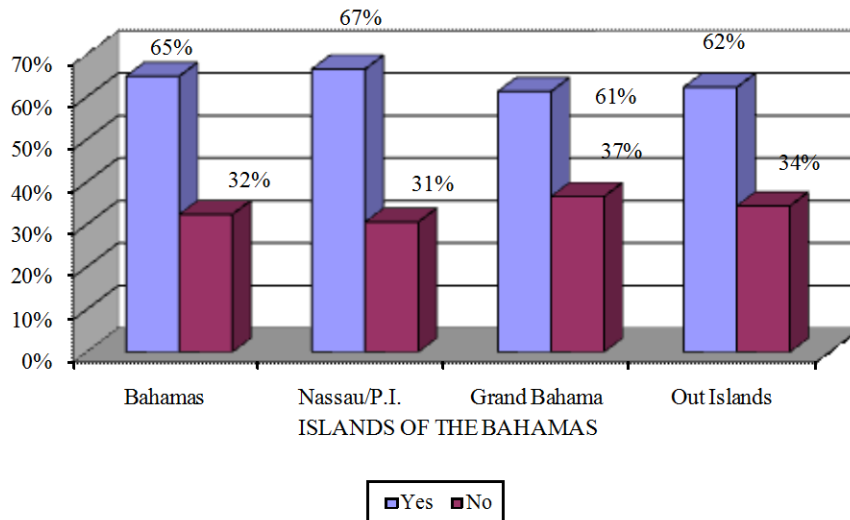


The above table shows the top 25 magazines read by stopovers to the Out Islands in percentages.

**DO YOU READ NEWSPAPERS
ISLANDS OF THE BAHAMAS
2008**

	Bahamas	Nassau/P.I.	Grand Bahama	Out Islands
Yes	65%	67%	61%	62%
No	32%	31%	37%	34%
No Response	3%	3%	2%	3%
Total	100%	100%	100%	100%

**DO YOU READ NEWSPAPERS
ISLANDS OF THE BAHAMAS**



- 65% of the stopover visitors to The Bahamas said that they read newspapers but only 47% of the visitors indicated that they used newspapers when they were planning their vacations.
- 67% of the stopovers to Nassau/P.I. read newspapers but only 51% of the visitors to Nassau/P.I. indicated that they used newspapers when they were planning their vacations.
- 61% of the stopovers to Grand Bahama read newspapers but only 44% of the visitors to Grand Bahama indicated that they used newspapers when planning their vacations.
- 62% of the stopovers to the Out Islands read newspapers but only 37% of the visitors to the Out Islands indicated that they used newspapers when planning their vacations.

NEWSPAPERS THAT VISITORS WERE READING
TOP 35 FAVORITE NEWSPAPERS READ BY VISITORS
ISLANDS OF THE BAHAMAS
2008

	Bahamas	Nassau/P.I.	Grand Bahama	Out Islands
1	USA Today	USA Today	New York Times	New York Times
2	New York Times	New York Times	USA Today	Wall Street Journal
3	Wall Street Journal	Local	Local	USA Today
4	Local	Wall Street Journal	Wall Street Journal	Local
5	Washington Post	Washington Post	Washington Post	Miami Herald
6	New York Post	New York Post	Atlanta Journal Constitution	Washington Post
7	Newsday	Newsday	Boston Globe	Chicago Tribune
8	Globe & Mail	Globe & Mail	Miami Herald	Los Angeles Times (L.A. Times)
9	Boston Globe	Daily News	Freeport News	Palm Beach Post
10	Miami Herald	Toronto Star	Chicago Tribune	New York Post
11	Daily News	Boston Globe	Sun Sentinel	Sun Sentinel
12	Sun Sentinel	Houston Chronicle	New York Post	Boston Globe
13	Atlanta Journal Constitution	Sun Sentinel	Los Angeles Times (L.A. Times)	Financial Times
14	Los Angeles Times (L.A. Times)	Atlanta Journal Constitution	Philadelphia Inquirer	Globe & Mail
15	Toronto Star	Philadelphia Inquirer	Newsday	Times
16	Chicago Tribune	New York Daily News	New York Daily News	Dallas Morning News
17	Philadelphia Inquirer	Daily Mail	Palm Beach Post	Newsday
18	Houston Chronicle	Sun/The Sun News	Sun/The Sun News	Houston Chronicle
19	New York Daily News	Miami Herald	Daily News	Denver Post
20	Times	Times	Houston Chronicle	Philadelphia Inquirer
21	Daily Mail	Los Angeles Times (L.A. Times)	Star Ledger	St. Petersburg Times
22	Star Ledger	Star Ledger	Richmond Times Dispatch	Atlanta Journal Constitution
23	Sun/The Sun News	Asbury Park Press	Baltimore Sun	Tampa Tribune
24	Palm Beach Post	National Post	Daily Mail	Times Union
25	Financial Times	Cayman Compass	Toronto Star	S.F. Chronicle
26	Asbury Park Press	Tribune	Globe & Mail	News Press (Ft. Myers)
27	National Post	Chicago Tribune	Dallas Morning News	Toronto Star
28	Herald	Herald	Orlando Sentinel	La Presse Montreal
29	Tribune	Post	St. Louis Post Dispatch/Post Dispatch	Vancouver Sun
30	Dallas Morning News	Pittsburgh Post Gazette	Times	Corriere Della Sera Europe
31	Cayman Compass	Guardian	Herald	Daily News
32	Post	Ottawa Citizen	S.F. Chronicle	Star Ledger
33	Guardian	Financial Times	Financial Times	Baltimore Sun
34	Freeport News	Dallas Morning News	Washington Times	Orlando Sentinel
35	Pittsburgh Post Gazette	Hartford Courant	Boston Herald	Columbus "Ohio" Dispatch

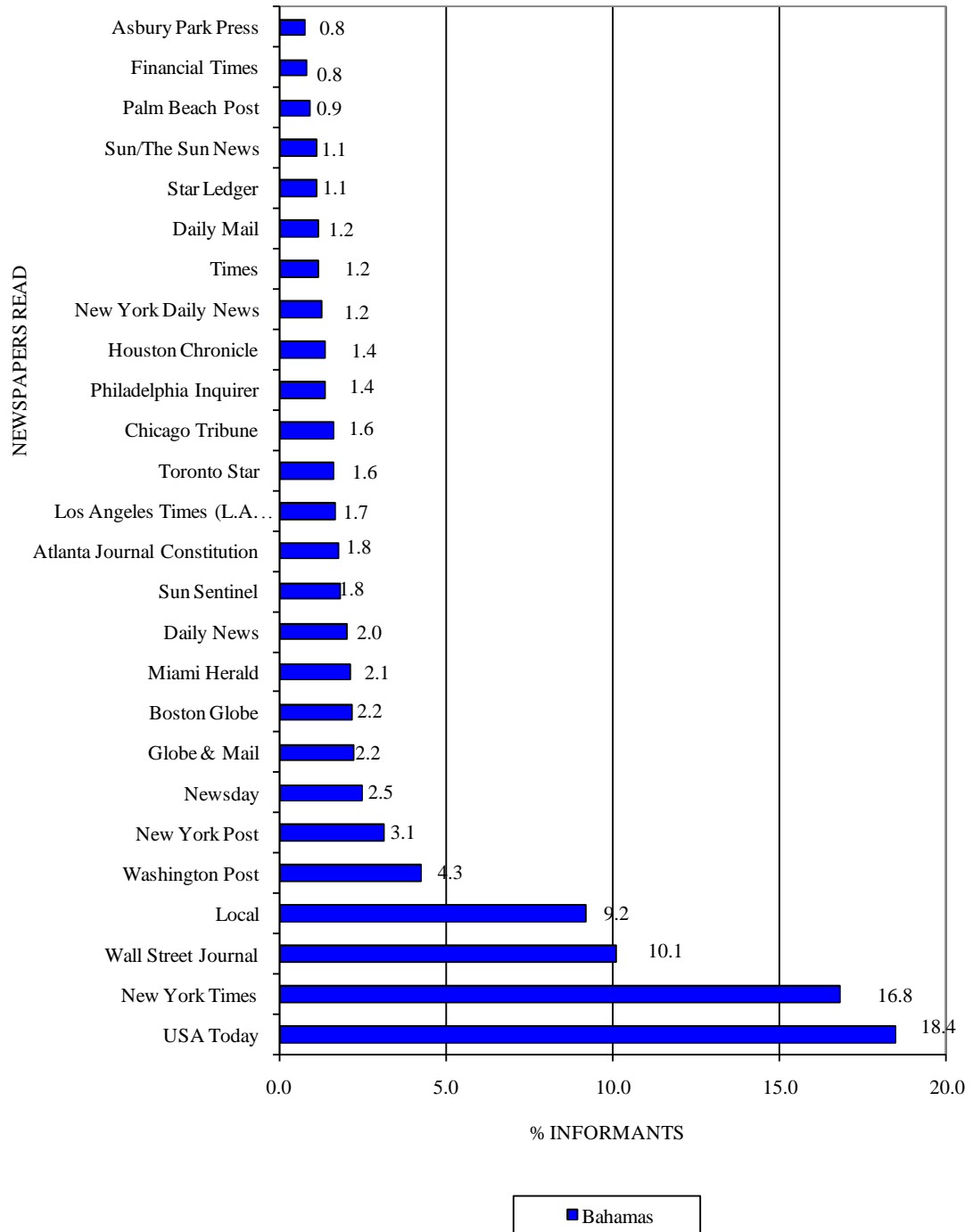
**TOP 35 FAVORITE NEWSPAPERS READ BY VISITORS
BY COUNTRY
2008**

	USA	Canada	Europe	Other Countries
1	USA Today	Globe & Mail	Daily Mail	Cayman Compass
2	New York Times	Toronto Star	Sun/The Sun News	USA Today
3	Wall Street Journal	National Post	Times	Wall Street Journal
4	Local	Local	New York Times	New York Times
5	Washington Post	USA Today	Sunday Times	Local
6	New York Post	Ottawa Citizen	Daily Telegraph	Tribune
7	Newsday	New York Times	USA Today	Guardian (The)
8	Boston Globe	Toronto Sun	The Times (U.K.)	Miami Herald
9	Daily News	La Presse Montreal	Mail (The)	Observer Report
10	Miami Herald	Calgary Herald	Local	Punch
11	Atlanta Journal Constitution	Vancouver Sun	Guardian (The)	Gleaner
12	Sun Sentinel	Tribune	Corriere Della Sera (Italy)	Newsweek
13	Los Angeles Times (L.A. Times)	Hamilton Spectator	Financial Times	Sun/The Sun News
14	Chicago Tribune	Gazette	Telegraph	The Times (U.K.)
15	Philadelphia Inquirer	Journal De Montreal	Daily Mirror	Star
16	Houston Chronicle	Toronto Globe	Mirror (The)	Herald
17	New York Daily News	Freeport News	Daily Express	Sun-Sentinel
18	Star Ledger	Post	Freeport News	Washington Post
19	Palm Beach Post	Punch	Herald	Houston Chronicle
20	Asbury Park Press	Wall Street Journal	Express News	El Diario de Yucatan (Mexico)
21	Dallas Morning News	Winnipeg Free Press	French Newspaper	Times Colonist
22	Times	Provinence	Italian Republican	Yomiuri (Japan)
23	Financial Times	Le Devoir	Florida Times	Jamaican Gleaner
24	Pittsburgh Post Gazette	Chronicle	Tribune	San Antonio Times
25	Herald	Edmonton Journal	Daily Star	Jamaican Local Paper
26	Hartford Courant	Toronto Mail	Daily Record	El Mercurio
27	Boston Herald	Sun Sentinel	Goteborgs-Posten (GP)	San Juan Star
28	Post	Financial Times	The Mail on Sunday	El Nuevo Dia
29	S.F. Chronicle	Times	The Sun	Brazil Newspaper
30	Detroit News	Guardian	Suddeutsche Zeitung (German Newspaper)	Freeport News
31	Denver Post	Abaconian	Wall Street Journal	Telegraph
32	Baltimore Sun	Star	Bloomington Pantagraph	Daily Star
33	Columbus "Ohio" Dispatch	Sun/The Sun News	Republican (The)	Sun Sentinel
34	Charlotte Observer	The Gazette	Frankfurter Allgemeine Zeitung	
35	Richmond Times Dispatch	Le Monde	Evening Standard	

**WHAT NEWSPAPERS DO YOU READ?
ISLANDS OF THE BAHAMAS
2008**

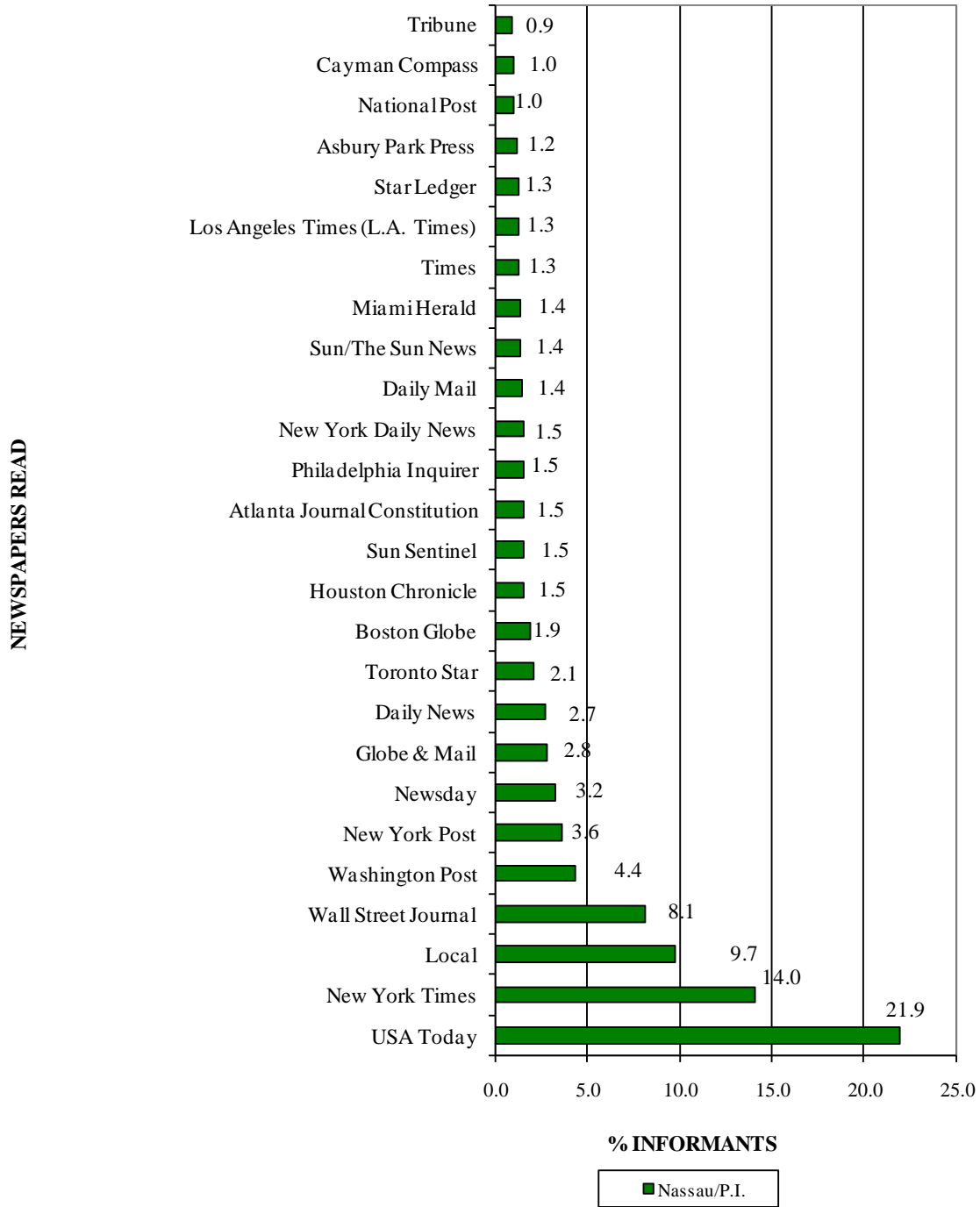
		% of Persons Who Read Those Newspapers			
		Bahamas	Nassau/P.I.	Grand Bah.	Out Islands
1	USA Today	18.4	21.9	12.8	11.3
2	New York Times	16.8	14.0	15.6	27.8
3	Wall Street Journal	10.1	8.1	9.1	18.3
4	Local	9.2	9.7	10.7	6.0
5	Washington Post	4.3	4.4	4.8	3.4
6	New York Post	3.1	3.6	2.0	2.4
7	Newsday	2.5	3.2	1.2	1.0
8	Globe & Mail	2.2	2.8	0.8	1.6
9	Boston Globe	2.2	1.9	3.2	2.2
10	Miami Herald	2.1	1.4	3.1	3.9
11	Daily News	2.0	2.7	1.1	0.6
12	Sun Sentinel	1.8	1.5	2.3	2.3
13	Atlanta Journal Constitution	1.8	1.5	3.7	0.8
14	Los Angeles Times (L.A. Times)	1.7	1.3	2.0	2.7
15	Toronto Star	1.6	2.1	0.9	0.6
16	Chicago Tribune	1.6	0.9	2.5	3.3
17	Philadelphia Inquirer	1.4	1.5	1.4	0.9
18	Houston Chronicle	1.4	1.5	1.1	1.0
19	New York Daily News	1.2	1.5	1.2	0.3
20	Times	1.2	1.3	0.7	1.2
21	Daily Mail	1.2	1.4	0.9	0.5
22	Star Ledger	1.1	1.3	1.1	0.6
23	Sun/The Sun News	1.1	1.4	1.2	0.0
24	Palm Beach Post	0.9	0.5	1.2	2.4
25	Financial Times	0.8	0.7	0.6	1.7
26	Asbury Park Press	0.8	1.2	0.1	0.1
27	National Post	0.8	1.0	0.2	0.5
28	Herald	0.8	0.9	0.7	0.3
29	Tribune	0.7	0.9	0.5	0.2
30	Dallas Morning News	0.7	0.6	0.8	1.1
31	Cayman Compass	0.6	1.0	0.0	0.0
32	Post	0.6	0.8	0.1	0.4
33	Guardian	0.6	0.7	0.1	0.5
34	Freeport News	0.5	0.1	2.8	0.0
35	Pittsburgh Post Gazette	0.5	0.7	0.4	0.0
36	Hartford Courant	0.5	0.6	0.2	0.6
37	Boston Herald	0.5	0.6	0.5	0.1
38	Ottawa Citizen	0.5	0.7	0.0	0.2

Bahamas



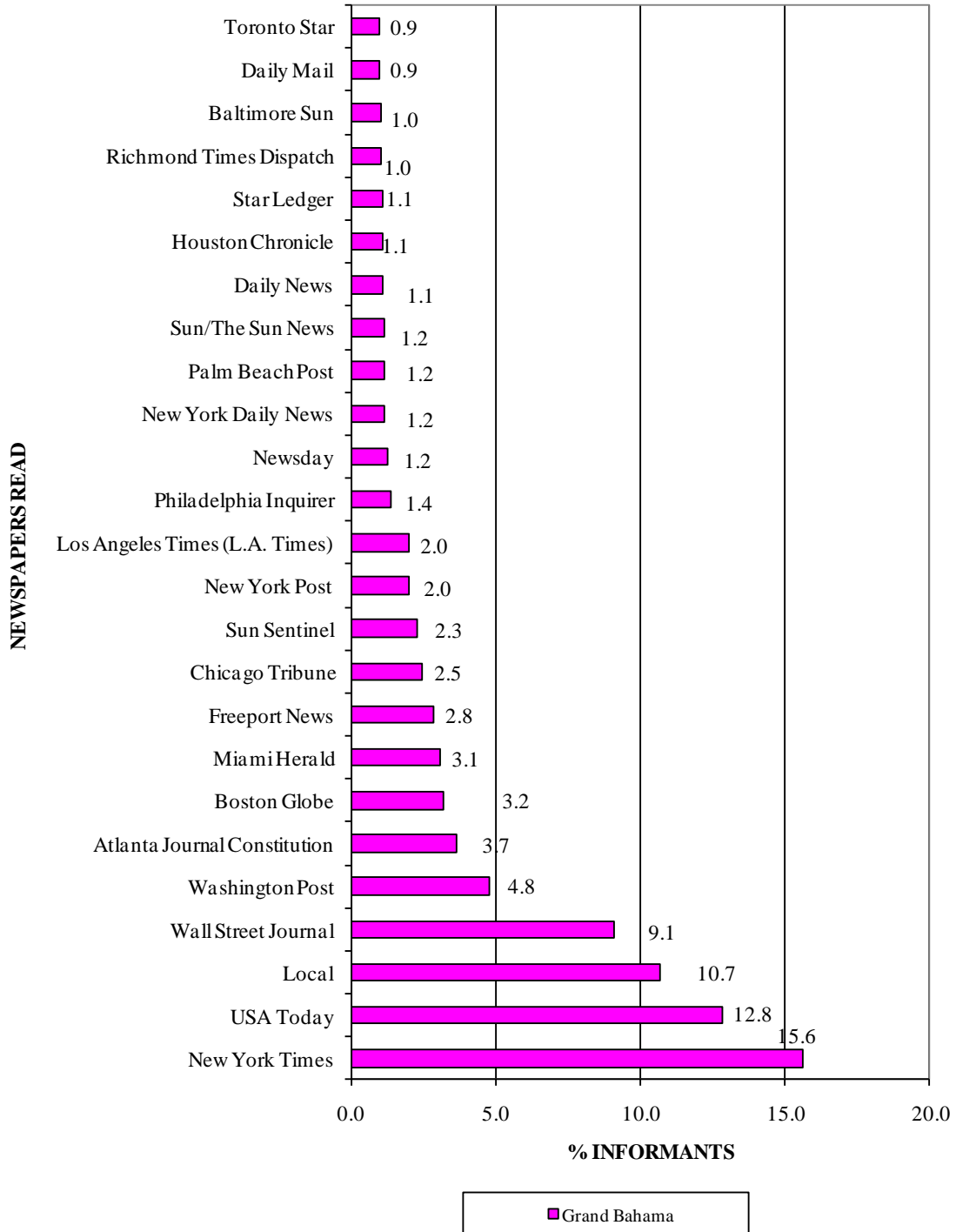
The above graph shows the top 26 newspapers stopover visitors to the Islands of the Bahamas indicated that they read.

Nassau/P.I.



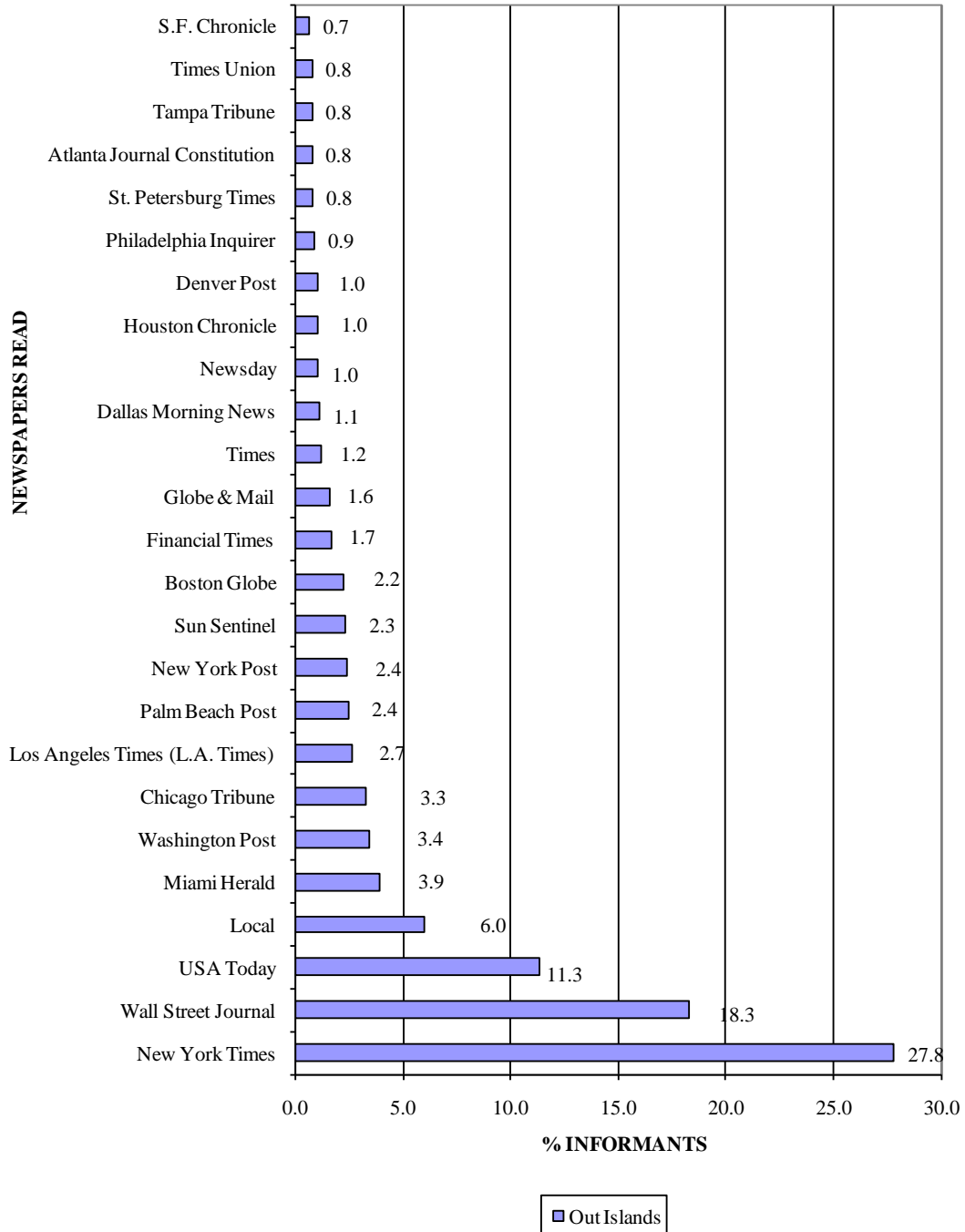
The above graph shows the top 26 newspapers stopover visitors to the Nassau/Paradise Island indicated that they read.

Grand Bahama



The above graph shows the top 25 newspapers stopover visitors to Grand Bahama Island indicated that they read.

Out Islands



The above graph shows the top 25 newspapers stopover visitors to The Out Islands indicated that they read.

**NEWSPAPERS AND SOME OF THE TOP PRODUCING MARKETS
ISLANDS OF THE BAHAMAS
2008**

	Top Newspapers Read By Visitors All Bahamas	Some of the Top Producing Markets for All Bahamas	Top Newspapers Read By Visitors To Nassau/P.I.	Some of the Top Producing Markets for Nassau/P.I.
1	USA Today	<i>Read Worldwide</i>	USA Today	<i>Read Worldwide</i>
2	New York Times	<i>New York/Read Worldwide</i>	New York Times	<i>New York/Read Worldwide</i>
3	Wall Street Journal	<i>New York/Read Worldwide</i>	Local	Various States
4	Local	Various States	Wall Street Journal	<i>New York/Read Worldwide</i>
5	Washington Post	Washington, DC	Washington Post	Washington, DC
6	New York Post	<i>New York</i>	New York Post	<i>New York</i>
7	Newsday	<i>New York</i>	Newsday	<i>New York</i>
8	Globe & Mail	Toronto & Rest of Canada	Globe & Mail	Toronto & Rest of Canada
9	Boston Globe	Boston, MA	Daily News	Various States
10	Miami Herald	<i>Miami, FL/Read Worldwide</i>	Toronto Star	Toronto, Canada
11	Daily News	Various States	Boston Globe	Boston, MA
12	Sun Sentinel	<i>South Florida</i>	Houston Chronicle	Texas
13	Atlanta Journal Constitution	Atlanta, Georgia	Sun Sentinel	<i>South Florida</i>
14	Los Angeles Times (L.A. Times)	Los Angeles, California	Atlanta Journal Constitution	Atlanta, Georgia
15	Toronto Star	Toronto, Canada	Philadelphia Inquirer	Philadelphia, PA
16	Chicago Tribune	Chicago, Illinois	New York Daily News	<i>New York</i>
17	Philadelphia Inquirer	Philadelphia, PA	Daily Mail	<i>United Kingdom</i>
18	Houston Chronicle	Texas	Sun/The Sun News	United Kingdom & Various Countries

The New York Times and the Miami Herald are also read in many countries other than the United States.

The above table shows some of the Top Producing Markets for the Islands of The Bahamas and Nassau/Paradise Island. It also shows the most popular newspapers read by stopover visitors to Nassau/Paradise Island and The Bahamas from those top markets.

**NEWSPAPERS AND SOME OF THE TOP PRODUCING MARKETS
GRAND BAHAMA ISLAND AND THE OUT ISLANDS
2008**

	Top Newspapers Read By Visitors To Grand Bahama	Some of the Top Producing Markets for Grand Bahama	Top Newspapers Read By Visitors To Out Islands	Some of the Top Producing Markets To Out Islands
1	New York Times	<i>New York/Read Worldwide</i>	New York Times	<i>New York/Read Worldwide</i>
2	USA Today	<i>Read Worldwide</i>	Wall Street Journal	<i>New York/Read Worldwide</i>
3	Local	Various States	USA Today	Read Worldwide
4	Wall Street Journal	<i>New York/Read Worldwide</i>	Local	Various States
5	Washington Post	Washington, DC	Miami Herald	<i>Miami, FL/Read Worldwide</i>
6	Atlanta Journal Constitution	Atlanta, Georgia	Washington Post	Washington, DC
7	Boston Globe	Boston, MA	Chicago Tribune	Chicago, Illinois
8	Miami Herald	<i>Miami, FL/Read Worldwide</i>	Los Angeles Times (L.A. Times)	Los Angeles, California
9	Freeport News	N/A	Palm Beach Post	<i>West Palm Beach, Florida</i>
10	Chicago Tribune	Chicago, Illinois	New York Post	<i>New York</i>
11	Sun Sentinel	<i>South Florida</i>	Sun Sentinel	<i>South Florida</i>
12	New York Post	<i>New York</i>	Boston Globe	Boston, MA
13	Los Angeles Times (L.A. Times)	Los Angeles, California	Financial Times	Read Worldwide
14	Philadelphia Inquirer	Philadelphia, PA	Globe & Mail	Toronto & Rest of Canada
15	Newsday	<i>New York</i>	Times	United Kingdom & Various Countries
16	New York Daily News	<i>New York</i>	Dallas Morning News	Dallas, Texas
17	Palm Beach Post	<i>West Palm Beach, Florida</i>	Newsday	<i>New York</i>
18	Sun/The Sun News	UK & Various Countries	Houston Chronicle	Texas

The New York Times and the Miami Herald are also read in many countries other than the United States.

The above table shows some of the Top Producing Markets for Grand Bahama and the Out Islands. It also shows the most popular newspapers read by stopover visitors to those islands from some of their top markets.

NUMBER OF PEOPLE WITH E-MAIL ADDRESSES

DO YOU HAVE E-MAIL ADDRESS?

ISLANDS OF THE BAHAMAS

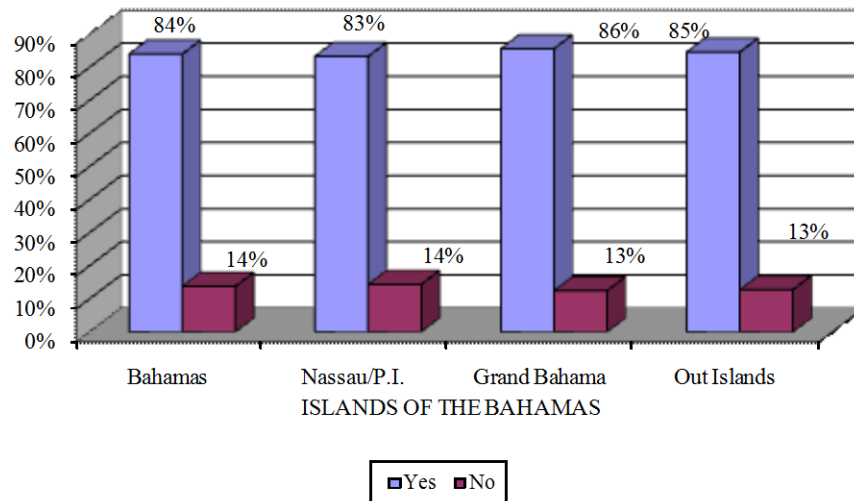
2008

	Bahamas	Nassau/P.I.	Grand Bahama	Out Islands
Yes	84%	83%	86%	85%
No	14%	14%	13%	13%
No Response	2%	2%	2%	3%
Total	100%	100%	100%	100%

*83% of American Visitors had e-mail addresses. 89% of the Canadian Visitors had e-mail addresses.

83% of the European Visitors had e-mail addresses.

DO YOU HAVE E-MAIL? ISLANDS OF THE BAHAMAS



- 84% of the stopover visitors to The Islands of the Bahamas indicated that they had an e-mail address.
- 83% of the visitors to Nassau/Paradise Island had e-mail addresses.
- 86% of the visitors to Grand Bahama had e-mail addresses
- 85% of those to the Out Islands had e-mail addresses.

NUMBER OF PEOPLE WHO SURF THE INTERNET

DO YOU SURF THE INTERNET?

ISLANDS OF THE BAHAMAS

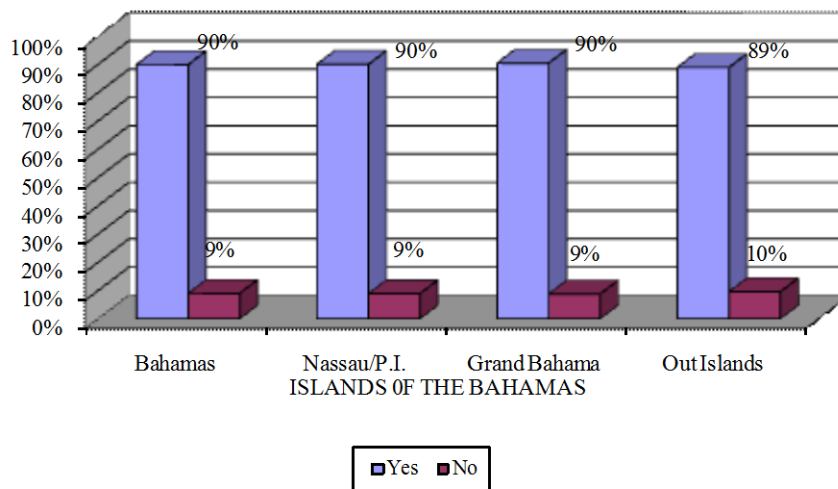
2008

	Bahamas	Nassau/P.I.	Grand Bahama	Out Islands
Yes	90%	90%	90%	89%
No	9%	9%	9%	10%
No Response	1%	1%	1%	2%
Total	100%	100%	100%	100%

*88% of American Visitors indicated that they surfed the Internet. 86% of the Canadian Visitors indicated that they surfed the Internet. 83% of the Europeans indicated that they surfed the Internet.

DO YOU SURF THE INTERNET?

ISLANDS OF THE BAHAMAS



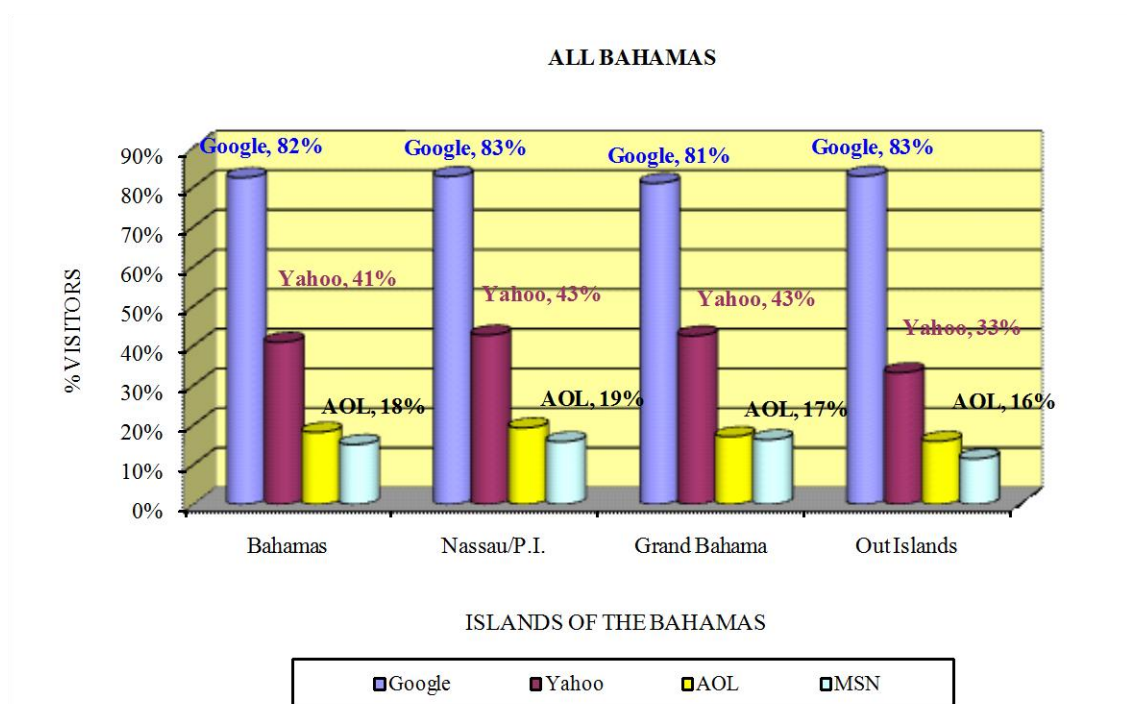
- 90% of the stopover visitors to the Islands of the Bahamas indicated that they “surfed” the Internet.
- 90% of the stopover visitors to Nassau/Paradise Island indicated that they "surfed" the Internet.
- 90% of the stopover visitors to Grand Bahama surfed the Internet
- 89% of the stopovers to the Out Islands "surfed" the Internet.

N.B. A key point to remember is that the Internet was the most popular electronic media used by visitors to The Islands of The Bahamas to plan their vacations. This was the case for visitors to Nassau/Paradise Island, Grand Bahama and the Out Islands.

FAVOURITE INTERNET SEARCH ENGINES &/OR CONTENT PROVIDERS

INTERNET SEARCH ENGINES &/OR CONTENT PROVIDERS ISLANDS OF THE BAHAMAS 2008

		Bahamas	Nassau/P.I.	Grand Bahama	Out Islands
1	Google	82%	83%	81%	83%
2	Yahoo	41%	43%	43%	33%
3	AOL	18%	19%	17%	16%
4	MSN	15%	16%	16%	12%



The top 4 Internet Search Engines/content providers for the Islands of the Bahamas were:

- Google (82%)
- Yahoo (41%)
- AOL (18%) –A higher % of Americans use AOL than Canadians
- MSN (15%)

LIKELIHOOD TO RETURN TO BAHAMAS
ISLANDS OF THE BAHAMAS
LIKELIHOOD TO RETURN
STOPOVER VISITORS
2008

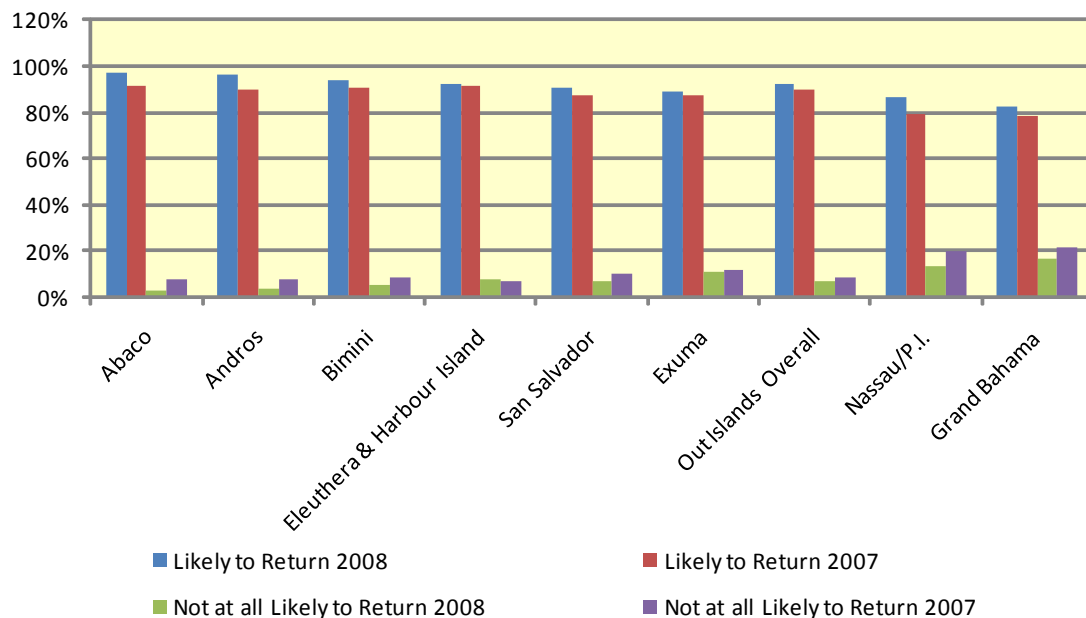
	Likely to Return		Not at all Likely to Return	
	2008	2007	2008	2007
Abaco	97%	91%	3%	8%
Andros	96%	90%	4%	8%
Bimini	94%	90%	5%	9%
Eleuthera & Harbour Island	92%	92%	7%	7%
San Salvador	91%	87%	7%	10%
Exuma	89%	87%	11%	12%
Out Islands Overall	92%	90%	7%	9%
Nassau/P.I.	86%	79%	13%	20%
Grand Bahama	82%	78%	17%	21%
All Bahamas	87%	81%	13%	18%

Likely Return percentages include those persons who said they were **very likely or somewhat likely** to return.

Not Likely Return percentages include those persons who said they were **somewhat unlikely or Not at all likely** to return

Source: Tour Media Exit Survey 2008 & Exit 2007

LIKELY RETURN
2008



- 87% of the stopovers were likely to return to the Bahamas in 1-5 yrs (i.e., 59.5% were very likely and 27.1% were somewhat likely to return). 7.8% said somewhat unlikely, 4.8% said that they were not at all likely to return.
- 86% of the stopovers to Nassau/P.I. said that they were likely to return (i.e., 57.6% were very likely and 28.5% were somewhat likely to return). 8.1% said that they were somewhat unlikely, and 5.1% said that they were not at all likely to return.
- 82% of the stopovers to Grand Bahama said that they were likely to return (i.e., 53.8% were very likely and 28.6% were somewhat likely). 9.6% said somewhat unlikely and 7.0% said that they were not at all likely to return.
- 92% of the stopovers to the Out Islands said that they were likely to return (i.e., 71.6% were very likely and 20.6% were somewhat likely to return). 5.2% said that they were somewhat unlikely, and 1.9% said that they were not at all likely to return.

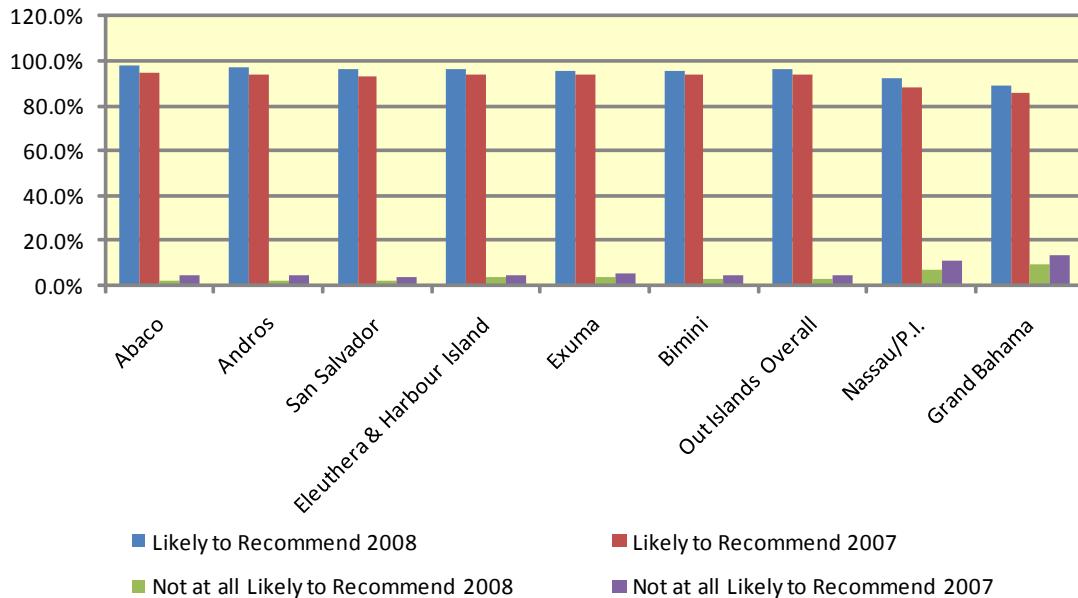
LIKELIHOOD OF RECOMMENDING THE BAHAMAS

ISLANDS OF THE BAHAMAS LIKELIHOOD TO RECOMMEND STOPOVER VISITORS 2008

	Likely to Recommend		Not at all Likely to Recommend	
	2008	2007	2008	2007
Abaco	98.0%	94.5%	2.0%	4.5%
Andros	97.3%	93.8%	2.5%	4.5%
San Salvador	96.2%	93.1%	2.1%	4.0%
Eleuthera & Harbour Island	96.0%	93.8%	4.0%	4.2%
Exuma	95.8%	93.4%	3.8%	5.3%
Bimini	95.6%	94.0%	3.3%	4.3%
Out Islands Overall	96.6%	94.0%	2.8%	4.5%
Nassau/P.I.	92.3%	87.9%	6.9%	11.2%
Grand Bahama	88.8%	85.9%	9.8%	13.3%
All Bahamas	92.5%	88.7%	6.6%	10.3%

Likely Recommend percentages include those persons who said they were **very likely** or **somewhat likely** to recommend. Not Likely to Recommend percentages include those persons who said they were **somewhat unlikely** or **Not at all likely** to recommend. **Source: Tour Media Exit Survey 2008 & Exit 2007**

LIKELIHOOD OF RECOMMENDING 2008



- 93% of the stopovers were likely to recommend the Bahamas to friends and relatives (i.e., 69.6% were very likely and 22.9% were somewhat likely to recommend). 4.2% were somewhat unlikely and 2.4% were not at all likely to recommend the Bahamas.
- 92% of the stopovers to Nassau/P.I. said that they were likely to recommend (i.e., 68.5% were very likely and 23.8% were somewhat likely to recommend). 4.4% said that they were somewhat unlikely, and 2.5% were not at all likely to recommend the Bahamas.
- 89% of the stopovers to Grand Bahama said that they were likely to recommend (i.e., 62.9% were very likely and 25.9% were somewhat likely to recommend). 6.0% said that they were somewhat unlikely, and 3.8% were not at all likely to recommend the Bahamas.
- 97% of the stopovers to the Out Islands were likely to recommend (i.e., 79.9% were very likely and 16.7% were somewhat likely to recommend). 1.9% of the stopovers said that they were somewhat unlikely, and 0.9% of them were not at all likely to recommend the Bahamas.

VISITORS WHO WERE NOT LIKELY TO RETURN TO THE BAHAMAS

The stopover visitors who were not likely to return indicated the following reasons:

Bahamas Overall

**REASONS VISITORS SAID THEY WOULD NOT RETURN
ISLANDS OF THE BAHAMAS
STOPOVER VISITORS
2008**

1	Prices (neg)	20.8%
2	Want to Go Somewhere Else	14.4%
3	Hotel (neg)	10.8%
4	Service (neg)	7.8%
5	People (neg)	6.6%
6	Other (neg)	6.0%
7	General Comm. (neg.)	4.5%
8	Food (neg.)	3.7%
9	Litter (neg)	2.7%
10	Crime (neg)	2.1%

Source: Tour Operator and Media Exit Survey 2008

There was an improvement in the percentage of visitors who said that they were not likely to return to the Bahamas between 2008 and 2007. In 2008, 13% of the stopovers to the Bahamas Overall indicated that they were unlikely to return to the Bahamas in 1-5 years compared to 18% in 2007. The visitors who said that they would not return gave the following reasons:

- High prices
- They wanted to go somewhere else
- They were dissatisfied with their hotel (i.e., service, quality & prices)
- Poor Service
- Poor attitudes of the people
- Food (i.e. poor quality, high prices)
- Litter
- Crime (Visitors are concerned about the increase in crime, e.g. stuff stolen from their rooms, or the beach, or other robberies).

Nassau/Paradise Island

There was an improvement in the percentage of visitors who said that they were not likely to return to the Nassau/P.I. between 2008 and 2007. In 2008, 13% of the stopover visitors to Nassau/Paradise Island said that they would not return compared to 20% in 2007. The visitors who said that they would not return gave the following reasons:

**REASONS VISITORS SAID THEY WOULD NOT RETURN
NASSAU/PARADISE ISLAND
STOPOVER VISITORS
2008**

1	Prices (neg)	26.3%
2	Want to Go Somewhere Else	12.5%
3	Hotel (neg)	10.9%
4	Service (neg)	7.1%
5	Other (neg)	5.2%
6	People (neg)	5.1%
7	Food (neg.)	4.3%
8	General Comm. (neg.)	3.9%
9	Litter (neg)	2.6%
10	Crime (neg)	2.2%

Source: Tour Operator and Media Exit Survey 2008

- High Prices
- They wanted to go somewhere else
- Didn't like the hotel where they stayed because of one or more of the following: poor facilities, poor service, hotel too expensive, poor food in hotel, unfriendly people in hotel
- Poor service
- The poor attitudes of the people
- Food (i.e. poor quality, high prices)
- Litter
- Crime

Grand Bahama Island

There was an improvement in the percentage of visitors who said that they were not likely to return to Grand Bahama between 2008 and 2007. In 2008, 17% of the stopover visitors to Grand Bahama Island indicated that they were unlikely to return to the Bahamas in 1-5 years compared to 21% in 2007. The visitors who said that they would not return gave the following reasons:

**REASONS VISITORS SAID THEY WOULD NOT RETURN
GRAND BAHAMA
STOPOVER VISITORS
2008**

1	Want to Go Somewhere Else	18.7%
2	Hotel (neg)	11.1%
3	People (neg)	10.4%
4	Service (neg)	9.7%
5	Prices (neg)	9.0%
6	Other (neg)	6.0%
7	General Comm. (neg.)	5.8%
8	Activities (neg.)	5.2%
9	Food (neg.)	3.0%
10	Beaches (neg)	2.7%

Source: Tour Operator and Media Exit Survey 2008

- They wanted to go somewhere else
- Hotel dissatisfaction
- The poor attitudes of the people
- Poor service
- High Prices
- Lack of Activities
- Food (poor quality, too expensive)
- Beaches (Litter on them, etc.)

Out Islands

The Out Islands always enjoyed the highest visitor return and recommend rate of The Islands of the Bahamas but there was still an even a greater improvement in the percentage of visitors who said that they were not likely to return to The Out Islands between 2008 and 2007. In 2008, 7% of the stopover visitors to The Out Islands indicated that they were unlikely to return to the Bahamas in 1-5 years compared to 9% in 2007. The visitors who said that they would not return gave the following reasons:

**REASONS VISITORS SAID THEY WOULD NOT RETURN
OUT ISLANDS
STOPOVER VISITORS
2008**

1	Want to Go Somewhere Else	19.3%
2	Other (neg)	14.7%
3	People (neg)	8.2%
4	Hotel (neg)	7.5%
5	Service (neg)	7.5%
6	General Comm. (neg.)	7.3%
7	Environment (neg)	7.0%
8	Weather/Climate (neg.)	5.0%
9	Prices (neg)	4.7%
10	Litter (neg)	4.7%

Source: Tour Operator and Media Exit Survey 2008

- They wanted to go somewhere else
- The poor attitudes of the people
- Hotel dissatisfaction
- Poor service
- Environment (need to protect it, etc.)
- Bad weather (too hot, too cold, etc.)
- High Prices
- Litter

VISITORS NOT LIKELY TO RECOMMEND THE BAHAMAS

Bahamas Overall

There was an improvement in the percentage of visitors who said that they were not likely to recommend the Bahamas between 2008 and 2007. In 2008, 7% of the stopovers said that they were not likely to recommend the Bahamas to friends and relatives compared to 10% in 2007. Visitors who were not likely to recommend the Bahamas to their friends and relatives gave some of the following reasons:

- High Prices
- Hotel dissatisfaction (Didn't like the hotel where they stayed)
- Poor service
- The poor attitudes of the people
- Lack of activities
- Litter
- Restaurants (poor service, too expensive, not enough of them)
- Poor Value for money
- Food (poor quality, too expensive)

Nassau/Paradise Island

There was an improvement in the percentage of visitors who said that they were not likely to recommend the Bahamas between 2008 and 2007. In 2008, 7% of the stopovers to the Nassau/Paradise Island said that they would not recommend the Bahamas to their friends and relatives compared to 11% in 2007. Visitors who were not likely to recommend the Bahamas to their friends and relatives gave some of the following reasons:

- High Prices
- The poor attitudes of the people
- Didn't like the hotel where they stayed because of one or more of the following: poor facilities, poor service, hotel too expensive, unfriendly people in hotel
- Poor service
- Poor Value for money
- Litter

Grand Bahama Island

There was an improvement in the percentage of visitors who said that they were not likely to recommend the Bahamas between 2008 and 2007. In 2008, 10% of the stopover visitors to Grand Bahama Island indicated that they were unlikely to recommend the Bahamas to friends and relatives compared to 13% for 2007. Visitors who were not likely to recommend the Bahamas to their friends and relatives gave the following reasons:

- The poor attitude of the people
- High Prices
- Hotel dissatisfaction (Didn't like the hotel where they stayed)
- Poor service
- Food (poor quality, too expensive)
- Litter
- Lack of Activities

Out Islands

There was an improvement in the percentage of visitors who said that they were not likely to recommend the Bahamas between 2008 and 2007. In 2008, 3% of the stopover visitors to the Out Islands indicated that they were unlikely to recommend the Bahamas to friends and relatives compared to 5% for 2007. Visitors who were not likely to recommend the Bahamas to their friends and relatives gave some of the following reasons:

- Litter
- High Prices
- Airlines
- Environmental issues (bugs, destruction of mangroves, etc.)

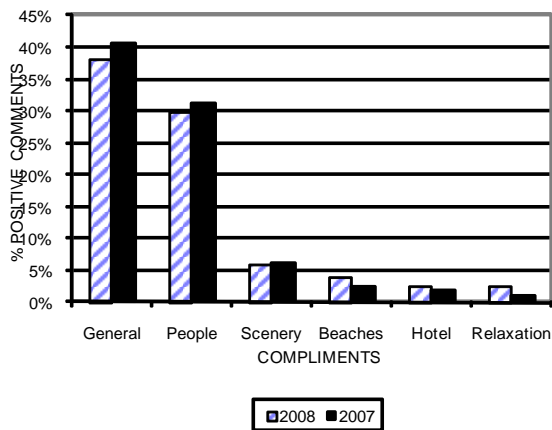
TOURIST COMMENTS POSITIVE VS. NEGATIVE COMMENTS

ALL BAHAMAS

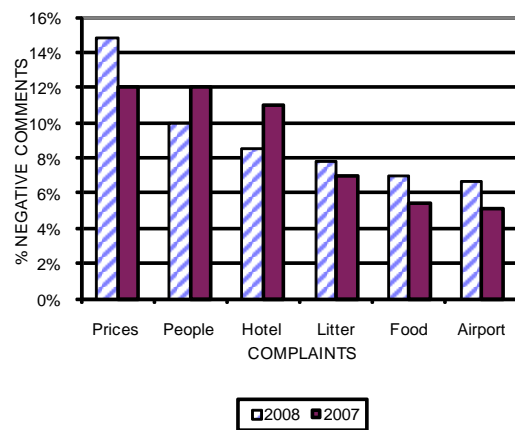
TOP 6 COMPLIMENTS			TOP 6 COMPLAINTS		
	2008	2007		2008	2007
General Comments	38%	40%	Prices	15%	12%
People	30%	31%	People	10%	12%
Scenery/Sightseeing	6%	6%	Hotel	9%	11%
Beaches	4%	3%	Litter	8%	7%
Hotel	3%	2%	Food	7%	5%
Relaxation	2%	1%	Airport	7%	5%
No. of Comments	2,009	1,685	No. of Comments	1,494	1,221

Poor Service (6.2%) was the 7th top complaint

TOURIST COMMENTS ALL BAHAMAS COMPLIMENTS



TOURIST COMMENTS ALL BAHAMAS COMPLAINTS



Top Compliments

- General (38% of the comments received, e.g. “loved it”)
- The people (30% of the comments received)
- Scenery (6% of the comments received)
- Beaches (4% of the comments received)
- Hotel (3% of the comments received)
- Relaxation (3% of the comments received)

Top Complaints

- High prices (15% of the comments received)
- Poor attitudes of the people (10% of the comments received)
- Hotel not as expected (9% of the comments received. e.g. too expensive, rude hotel staff, poor facilities, poor service)
- Litter (8% of the comments received)
- Food (7% of the comments received. e.g. high prices and poor quality)
- Airport (7% of the comments received. e.g. not up to standards, need fixing up/upgrade, overcharging at airport, rude people at airport, food at airport not good, more food options at airport, better signage, A/C not working properly)

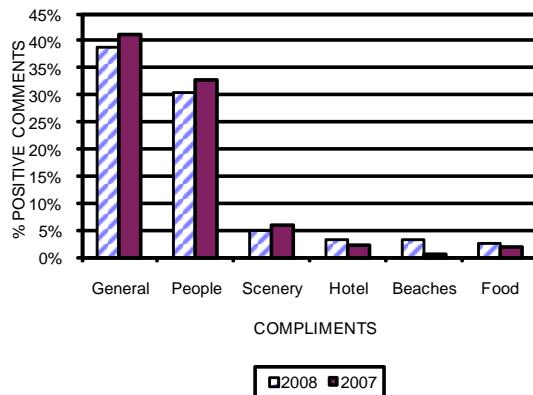
TOURIST COMMENTS POSITIVE VS. NEGATIVE COMMENTS

NASSAU/PARADISE ISLAND

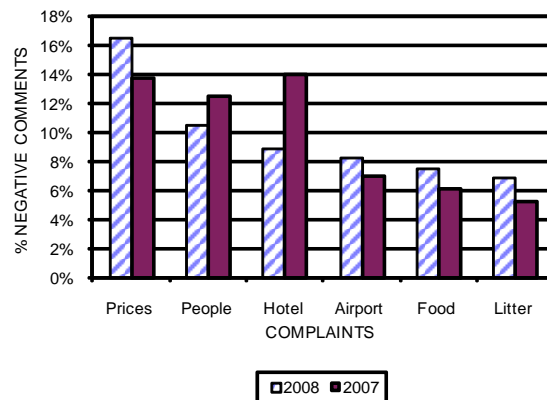
TOP 6 COMPLIMENTS			TOP 6 COMPLAINTS		
	2008	2007		2008	2007
General	39%	41%	Prices (neg)	17%	14%
People	30%	33%	People (neg)	11%	12%
Scenery/Sightseeing	5%	6%	Hotel (neg)	9%	14%
Hotel	3%	2%	Airport (neg)	8%	7%
Beaches	3%	1%	Food (neg.)	8%	6%
Food	2%	2%	Litter (neg)	7%	5%
No. of Comments	535	879	No. of Comments	519	855

The 7th top complaint for Nassau/Paradise Island was poor service (6.4%) of complaints received.

TOURIST COMMENTS NASSAU/PARADISE ISLAND COMPLIMENTS



TOURIST COMMENTS NASSAU/PARADISE ISLAND COMPLAINTS



Top Compliments

- General (39% of the comments received, e.g. “loved it, very nice”)
- The people (30% of the comments received)
- Scenery (5% of the comments received)
- Hotel (3% of the comments received)
- Beaches (3% of the comments received)
- Food (2% of the comments received)

Top Complaints

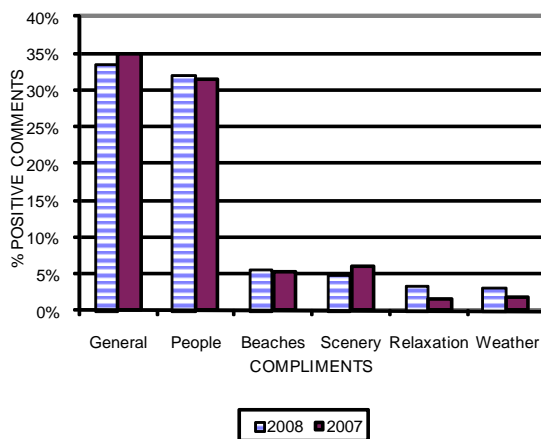
- High prices(17% of the comments received)
- Poor attitudes of the people(11% of the comments received)
- Hotel not as expected (9% of the comments received, i.e., too expensive, poor facilities, poor service, rude hotel staff)
- Airport not up to standards (8% of the comments received. e.g. not up to standards, need fixing up/upgrade, overcharging at airport, rude people at airport, food at airport not good, more food options at airport, better signage, A/C not working properly)
- Food (8% of the comments received. e.g. high prices and poor quality)
- Too much litter(7% of the comments received)
- Poor Service(6% of the comments received)

TOURIST COMMENTS POSITIVE VS. NEGATIVE COMMENTS

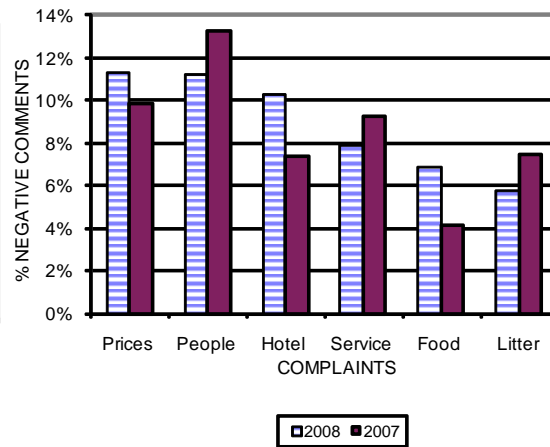
GRAND BAHAMA ISLAND

TOP 6 COMPLIMENTS			TOP 6 COMPLAINTS		
	2008	2007		2008	2007
General	34%	35%	Prices (neg)	11%	10%
People	32%	32%	People (neg)	11%	13%
Beaches	6%	5%	Hotel (neg)	10%	7%
Scenery/Sightseeing	5%	6%	Service (neg)	8%	9%
Relaxation	3%	2%	Food (neg.)	7%	4%
Weather/Climate	3%	2%	Litter (neg)	6%	8%
No. of Comments	960	389	No. of Comments	541	223

TOURIST COMMENTS GRAND BAHAMA ISLAND COMPLIMENTS



TOURIST COMMENTS GRAND BAHAMA ISLAND COMPLAINTS



Top Compliments

- General (34% of the comments received, e.g. “enjoyed the visit”)
- The people (32% of the comments received)
- Beaches (6% of the comments received)
- Scenery (5% of the comments received)
- Relaxation (3% of the comments received)
- Climate/Weather (3% of the comments received)

Top Complaints

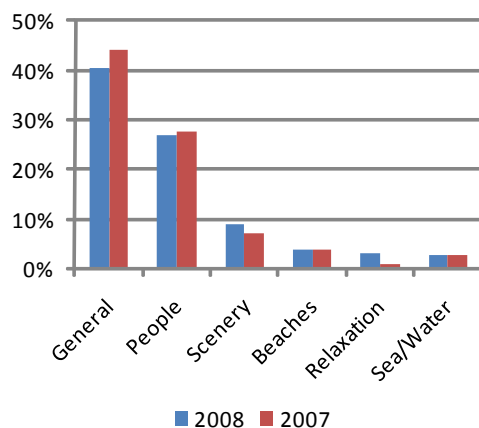
- High prices (11% of the comments received)
- Poor attitude of the people (11% of the comments received)
- Hotel dissatisfaction (10% of the comments received e.g. too expensive, poor facilities, poor service, rude hotel staff)
- Poor Service (8% of the comments received)
- Food (7% of the comments received. e.g. high prices and poor quality)
- Litter (6% of the comments received)

TOURIST COMMENTS POSITIVE VS. NEGATIVE COMMENTS

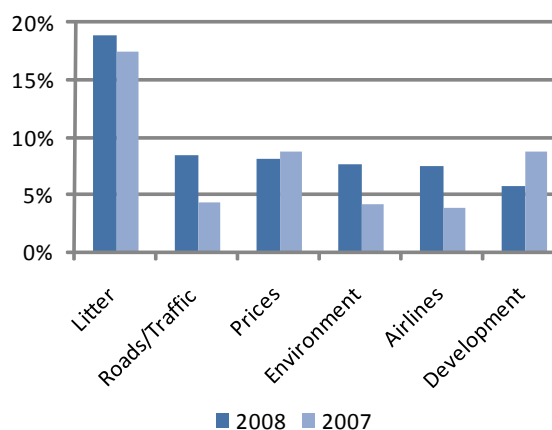
OUT ISLANDS

TOP 6 COMPLIMENTS			TOP 6 COMPLAINTS		
	2008	2007		2008	2007
General	41%	44%	Litter (neg)	19%	17%
People	27%	28%	Roads/Traffic (neg.)	8%	4%
Scenery/Sightseeing	9%	7%	Prices (neg)	8%	9%
Beaches	4%	4%	Environment (neg)	8%	4%
Relaxation	3%	1%	Airlines (neg)	8%	4%
Sea/Water	3%	3%	Development (neg)	6%	9%
No. of Comments	701	418	No. of Comments	229	143

TOURIST COMMENTS OUT ISLANDS COMPLIMENTS



TOURIST COMMENTS OUT ISLANDS COMPLAINTS



Top Compliments

- General (41% of the comments received. e.g. “It was wonderful”)
- The People (27% of the comments received)
- Scenery (9% of the comments received)
- Beaches (4% of the comments received)
- Relaxation (3% of the comments received)
- Sea/Water (3% of the comments received)

Top Complaints

- Litter (19% of the comments received)
- Roads/Traffic (8% of the comments received)
- High prices (8% of the comments received)
- Environment (8% of the comments received. e.g. “hate the sand flies”, destruction of the eco-system)
- Airlines (8% of the comments received)
- Development (6% of the comments received)

RESERVATION BOOKINGS

- The use of travel agents has been declining steadily over the years as visitors began to use other ways (e.g. Internet) of booking their reservations.
- In 1997, 72% of the stopover visitors used a travel agent to book their reservations compared to only 30% in 2008. Thirty-three percent (33%) of stopovers to Nassau/Paradise Island in 2008 indicated that they had used a travel agent to book their reservations compared to 54% in 2003, 61% in 2002, 68% of them in 2001 and 76% in 1997.
- Twenty-four percent (24%) of the stopovers in 2008 to Grand Bahama had used a travel agent compared to 52% in 2002, 60% in 2001 and 72% in 1997.
- Twenty-four percent (24%) of the stopover visitors in 2008 to the Out Islands had used a travel agent compared to 34% in 2002 and 40% in 2001.
- In 2007, a higher percentage of Canadians used tour operators and travel agents than their American and European counterparts. By 2008 however, they appeared to greatly relinquish their stronghold on tour operator/travel agents.
 - In 2008, 33% of the stopover visitors from Canada used a tour operator/travel agent to book their travel experience compared to 52% in 2007. They began to do as many Americans had been doing for years they began to use the online services more.
 - There was a significant increase in the percentage of Canadians booking online in 2008 compared to 2007. In 2008, 57% of Canadians used online services to book a part of or all of their reservations compared to 49% of them in 2007, an increase of 8 percentage points. One possible reason for this change was the global recession which began in December 2007 and really began to show itself in September 2008 with the financial

meltdown that occurred in that month. After this meltdown more and more persons began to look for bargains and hence, the Internet for Canadians became a very viable option.

AMOUNT OF TIME BETWEEN RESERVATION & VISITOR'S ARRIVAL

In 2008, stopover visitors to The Islands of The Bahamas booked their reservations anywhere from *7 months* in advance to the very same month of travel. *Short lead times* seemed to be preferred as the highest percentage of visitors booked *1-3 months* in advance or the very *same month* of travel. There was a very small amount of stopover visitors who booked their reservations *7 months to a year* in advance of traveling to the Bahamas.

TOUR OPERATORS AND TRAVEL AGENTS

ISLANDS OF THE BAHAMAS

USE OF TRAVEL AGENT

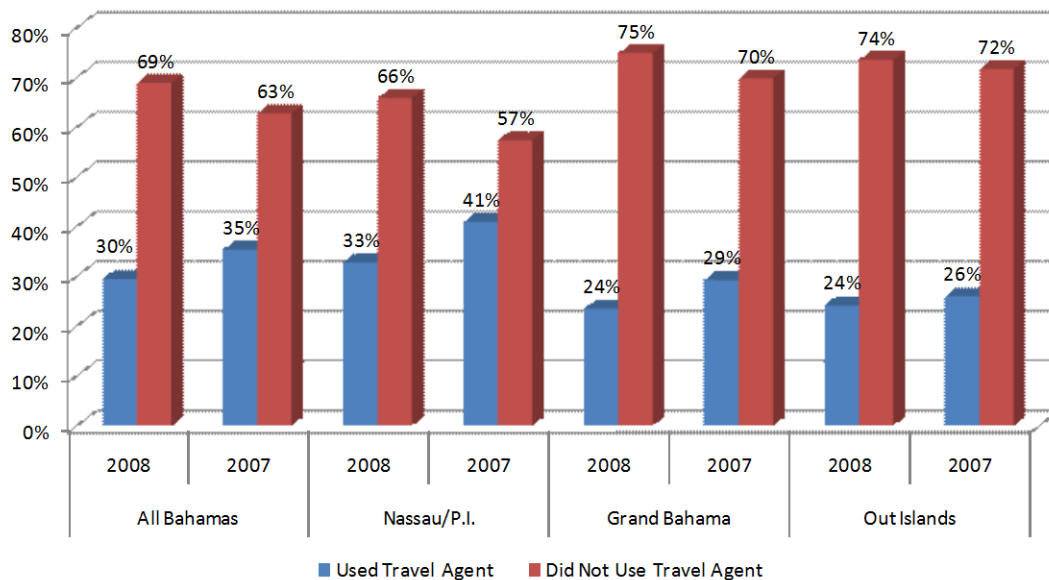
2008

	All Bahamas		Nassau/P.I.		Grand Bahama		Out Islands	
	2008	2007	2008	2007	2008	2007	2008	2007
Used Travel Agent	30%	35%	33%	41%	24%	29%	24%	26%
Did Not Use Travel Agent	69%	63%	66%	57%	75%	70%	74%	72%
	USA		Canada		Europe		Other Countries	
Used Travel Agent	27%	33%	33%	52%	54%	47%	41%	43%
Did Not Use Travel Agent	72%	65%	66%	47%	45%	52%	53%	53%

Source: Tour Operator and Media Exit Survey 2008 & Exit Survey 2007

USE OF TRAVEL AGENT

2008



- 30% of the visitors to the Islands of the Bahamas used a tour operator or travel agent. 54% said that they used an online Internet service to book their reservations.
- A higher percentage of stopovers to Nassau/P.I. (33%) used a Tour Operator/ Travel Agent than those to Grand Bahama (24%) and the Out Islands (24%).
- Some visitors to the Bahamas used tour operators and travel agents to book their reservations.
- Some booked their reservations directly with the hotel or airline via phone, etc. Some booked their reservations directly on the Internet and others used a combination of methods.

**WHAT ITEMS DID YOU BOOK WITH TOUR OPERATOR/TRAVEL AGENT
ISLANDS OF THE BAHAMAS
2008**

	Bahamas	Nassau/P.I.	Grand Bahama	Out Islands
Airline	74%	75%	69%	73%
Hotel	71%	76%	60%	59%
Transfers from Airport	39%	46%	25%	25%
On-island Activities	12%	11%	8%	17%
Rental Car	5%	5%	6%	4%
No Response	11%	9%	14%	16%

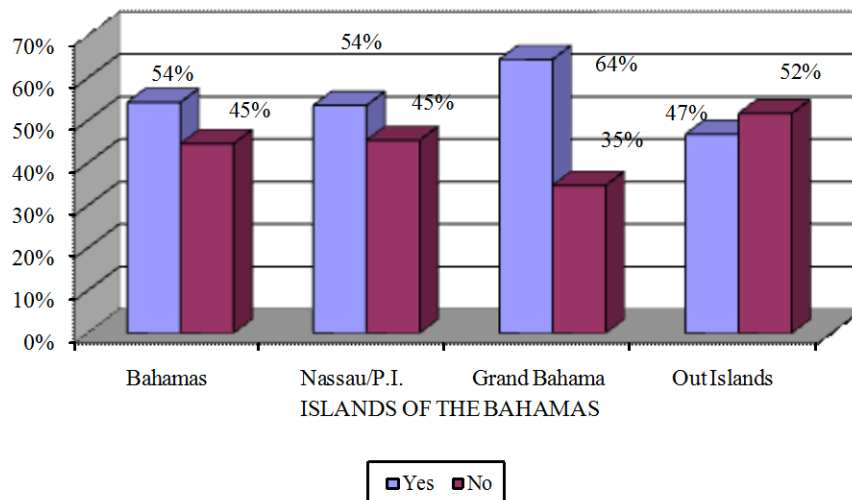
- ***Of the 30% of the stopover visitors that used the tour operator/travel agent to book their reservations in 2008:***
 - 74% of them booked their airline with the TO/TA
 - 71% of them booked their hotel with the TO/TA
 - 39% of them booked their transfers from the airport with the TO/TA
 - 12% of them booked their on-island activities with the TO/TA
 - 5% of them booked their rental car with the TO/TA

**DID YOU USE AN ONLINE SERVICE TO BOOK ANY OF YOUR RESERVATIONS
ISLANDS OF THE BAHAMAS
2008**

	Bahamas	Nassau/P.I.	Grand Bahama	Out Islands
Yes	54%	54%	64%	47%
No	45%	45%	35%	52%
No Response	1%	1%	1%	1%
Total	100%	100%	100%	100%

56% of Americans used online service, 57% of Canadians used online service, and 44% of Europeans used an online service.

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



- A higher percentage of stopover visitors to Grand Bahama used online services to book their reservations than those to Nassau/P.I. and the Out Islands. Visitors to The Out Islands used online services less than those to Nassau/P.I. and Grand Bahama.
- 54% of the stopovers said that they had used an online service to book some or all of their reservations to the Bahamas.
- 54% of them to Nassau/Paradise Island used an online service to book their reservations.
- 64% of them to Grand Bahama used an online
- 47% of the stopovers to the Out Islands used an online service to book their reservations. Some of them booked their reservations directly with the hotels, etc.

**WHAT ITEMS DID YOU BOOK ONLINE
ISLANDS OF THE BAHAMAS
2008**

	Bahamas	Nassau/P.I.	Grand Bahama	Out Islands
Airline	86%	86%	87%	83%
Hotel	51%	56%	50%	35%
Transfers from Airport	12%	15%	10%	4%
On-island Activities	6%	7%	4%	5%
Rental Car	4%	3%	7%	5%
No Response	10%	10%	9%	11%

- ***Of the 54% of the stopover visitors that used the Internet to book their reservations in 2008:***
 - 86% of them booked their airline online
 - 51% of them booked their hotel online
 - 12% of them booked their transfers from the airport online
 - 6% of them booked their on-island activities online
 - 4% of them booked their rental car online

- It is clear that many stopover visitors are using a combination of methods to book their reservations to the Bahamas. Some of them are booking their airline online and then booking their hotel directly by phone or with a tour operator/travel agent.
- A higher percentage of stopovers used a tour operator/travel agent (39%) to book their airport transfers than those who used an online service (12%). It is clear that many stopovers are still waiting until they arrive in the destination to book their airport transfers, for example with the taxi drivers at the airport directly.
- A higher percentage of stopovers used a tour operator/travel agent (12%) to book their on-island activities than those who used an online service (6%).
- Rental cars that were booked by visitors were primarily booked directly with the rental car company either before or after the visitor arrived in The Bahamas. Tour Operators/Travel Agents and Online services were not used heavily to book this service.

**MOST POPULAR ONLINE BOOKING SERVICES USED
STOPOVERS TO THE ISLANDS OF THE BAHAMAS
2008**

Expedia.com	Airfrance.com	RIU.com
Atlantis.com	Americanexpress.com	Sheraton.com
Orbitz.com	Aol.com	Skyauction.com
Travelocity.com	Bahamasvacations.com	Smallhope.com
AA.com	Bookit.com	Spg.com
Jetblue.com	Clubmed.com/clubmed.ca	Starwood/westin.com
Usairwaysvacations.com	Colpittsworldtravel.com	Superclubs.com
Continental.com	Comfortsuites.com	Travelzoo.com
Sandals.com	Cosco.com	United.com
Spiritair.com	Fourseasons.com	Usairwaystravel.com
Carlsonwagonlit.com	Funjet.com	Vacationstogo.com
Delta.com/deltavacations.com	Grandbahamavacations.com	Virgin-atlantic.com
Cheaptickets.com	Hotels.com	Virtuallythere.com
Bahamasair.com	Hotwire.com	Westjet.com
Bahamas.com	Intervalinternational.com	Wyndham.com
Aircanada.com	Kayak.com	Yahoo.com
Ba.com	Macystravel.com	
Firstchoice.co.uk	Paradiseislandvacations.com	
Gradcity.com	Priceline.com	
Nwa.com	RCI.com	

This list is not all-inclusive of every online service used.

(Source: Immigration Cards and Tour Media Exit Survey, 2008)

- *Some stopover visitors to the Bahamas stay on more than one island in the Bahamas and use one tour operator/travel agency to book their reservations in all of these islands.*
- *In the following pages with the tour operators/travel agencies you will see that this happened with some of the islands.*

**MOST POPULAR ONLINE BOOKING SERVICES USED
STOPOVERS TO NASSAU/PARADISE ISLAND
2008**

Expedia.com	Nwa.com	Sheraton.com
Atlantis.com	Virgin-atlantic.com	Skyauction.com
Orbitz.com	Yahoo.com	Starwood/westin.com
Travelocity.com	Americanexpress.com	Superclubs.com
Jetblue.com	Bookit.com	Travelzoo.com
AA.com	Comfortsuites.com	Usairwaystravel.com
Sandals.com	Continental.com	Vacationstogo.com
Usairwaysvacations.com	Coralsands.com	Westjet.com
Carlsonwagonlit.com	Cosco.com	Wyndham.com
Delta.com/deltavacations.com	Fourseasons.com	
Spiritair.com	Funjet.com	
Bahamasair.com	Hotels.com	
Continental.com	Hotwire.com	
Cheaptickets.com	Intervalinternational.com	
Aircanada.com	Itravel2000.com	
Bahamas.com	Kayak.com	
Ba.com	Priceline.com	
Firstchoice.co.uk	RCI.com	
Gradcity.com	RIU.com	

This list is not all-inclusive of every online service used.
(Source: Immigration Cards and Tour Media Exit Survey, 2008)

**MOST POPULAR ONLINE BOOKING SERVICES USED
STOPOVERS TO GRAND BAHAMA ISLAND
2008**

Expedia.com	Grandbahamavacations.com	Kayak.com
Orbitz.com	Wyndham.com	Pelicanbay.com
Travelocity.com	Aircanada.com	Priceline.com
Spiritair.com	Virgin-atlantic.com	RCI.com
AA.com	Yahoo.com	Sheraton.com
Cheaptickets.com	Ba.com	Skyauction.com
Continental.com	Americanexpress.com	Spg.com
Delta.com/deltavacations.com	Aol.com	Starwood/westin.com
Bahamas.com	Cheapair.com	Travelzoo.com
Carlsonwagonlit.com	Hotels.com	Usairwaystravel.com
Jetblue.com	Hotwire.com	Usairwaysvacations.com
Bahamasair.com	Intervalinternational.com	Vacationstogo.com

This list is not all-inclusive of every online service used.

(Source: Immigration Cards and Tour Media Exit Survey, 2008)

**MOST POPULAR ONLINE BOOKING SERVICES USED
STOPOVERS TO THE OUT ISLANDS
2008**

Expedia.com	Ba.com	Americanexpress.com
Continental.com	spiritair.com	Clubmed.com/clubmed.ca
Orbitz.com	Aircanada.com	Fourseasons.com
AA.com	Nwa.com	Hotels.com
Travelocity.com	Colpittsworldtravel.com	Hotwire.com
Cheaptickets.com	Virgin-atlantic.com	Intervalinternational.com
Bahamasair.com	Firstchoice.co.uk	Kamalame.com
Carlsonwagonlit.com	Bahamasvacations.com	Kayak.com
Delta.com/deltavacations.com	Yahoo.com	Priceline.com
Bahamas.com	United.com	Smallhope.com
Usairwaysvacations.com	Virtuallythere.com	Tripadvisors.com
Jetblue.com		Lynxair.com

This list is not all-inclusive of every online service used. All of the airline sites do not necessarily fly into the Out Islands

(Source: Immigration Cards and Tour Media Exit Survey, 2008)

**TOP 35 TOUR OPERATORS/TRAVEL AGENTS/ONLINE SERVICES USED BY VISITORS
ISLANDS OF THE BAHAMAS
2008**

	Bahamas	Nassau/P.I.	Grand Bahama	Out Islands
1	EXPEDIA.COM	EXPEDIA.COM	DISCOVERY CRUISE LINE	CLUB MED
2	ATLANTIS.COM	ATLANTIS.COM	EXPEDIA.COM	EXPEDIA.COM
3	ORBITZ.COM	LIBERTY TRAVEL	ORBITZ.COM	CONTINENTAL.COM
4	LIBERTY TRAVEL	ORBITZ.COM	TRAVELOCITY.COM	ORBITZ.COM
5	TRAVELOCITY.COM	AMERICAN EXPRESS TRAVEL	SECURITY TRAVEL	AA.COM
6	AMERICAN EXPRESS TRAVEL	TRAVELOCITY.COM	USAIRWAYS VACATIONS.COM	TRAVELOCITY.COM
7	DISCOVERY CRUISE LINE	JETBLUE.COM	SPIRITAIR.COM	AMERICAN EXPRESS TRAVEL
8	AA.COM	AAA TRAVEL	AA.COM	CHEAPTICKETS.COM
9	JETBLUE.COM	AA.COM	RCI TRAVEL	BAHAMASAIR.COM
10	AAA TRAVEL	SANDALS.COM	CHEAPTICKETS.COM	CARLSONWAGONLIT.COM
11	USAIRWAYS VACATIONS.COM	USAIRWAYS VACATIONS.COM	LIBERTY TRAVEL	DELTA.COM
12	CLUB MED	CARLSONWAGONLIT.COM	STUDENT CITY	AAA TRAVEL
13	CONTINENTAL.COM	DELTA.COM	CONTINENTAL.COM	BAHAMAS.COM
14	SANDALS.COM	SPIRITAIR.COM	DELTA.COM	THOMAS COOK
15	SPIRITAIR.COM	BAHAMASAIR.COM	AMERICAN EXPRESS TRAVEL	USAIRWAYS VACATIONS.COM
16	CARLSONWAGONLIT.COM	CONTINENTAL.COM	AAA TRAVEL	FOUR SEASONS TRAVEL
17	DELTA.COM	CHEAPTICKETS.COM	BAHAMAS.COM	JETBLUE.COM
18	CHEAPTICKETS.COM	AIRCANADA.COM	SPECIAL T TRAVEL	LIBERTY TRAVEL
19	BAHAMASAIR.COM	BAHAMAS.COM	CARLSONWAGONLIT.COM	BA.COM
20	BAHAMAS.COM	GOGO TOURS	MARITZ TRAVEL	SPIRITAIR.COM
21	AIRCANADA.COM	BA.COM	JETBLUE.COM	AIRCANADA.COM
22	RCI TRAVEL	FIRSTCHOICE.CO.UK	BAHAMASAIR.COM	RCI TRAVEL
23	SECURITY TRAVEL	APPLE VACATIONS	GARBER TRAVEL	NWA.COM
24	GOGO TOURS	GRADCITY.COM	GRANDBAHAMA VACATIONS.COM	UNIGLOBE TRAVEL
25	BA.COM	RCI TRAVEL	WYNDHAM.COM	COLPITTSWORLDTRAVEL.COM
26	APPLE VACATIONS	THOMAS COOK	GOGO TOURS	VIRGIN-ATLANTIC.COM
27	FIRSTCHOICE.CO.UK	UNIGLOBE TRAVEL	APPLE VACATIONS	FIRSTCHOICE.CO.UK
28	STUDENT CITY	TRAVEL IMPRESSIONS	AIRCANADA.COM	BAHAMAS VACATIONS.COM
29	GRADCITY.COM	NWA.COM	THOMAS COOK	YAHOO.COM
30	THOMAS COOK	BEL AIR TRAVEL	VIP TRAVEL	DESTINATIONS TRAVEL
31	UNIGLOBE TRAVEL	SEARS TRAVEL	VIRGIN-ATLANTIC.COM	VIP TRAVEL
32	TRAVEL IMPRESSIONS	FUNJET VACATIONS	UNIGLOBE TRAVEL	UNITED.COM
33	NWA.COM	VIRGIN-ATLANTIC.COM	BLACKBEARDS CHARTERS	VIRTUALLYTHERE.COM
34	MARITZ TRAVEL	MARITZ TRAVEL	YAHOO.COM	GOGO TOURS
35	BEL AIR TRAVEL	YAHOO.COM	BA.COM	MARITZ TRAVEL

**TOP 35 TOUR OPERATORS/TRAVEL AGENTS/ONLINE SERVICES USED BY VISITORS
ISLANDS OF THE BAHAMAS
2008**

	Abaco	Andros	Bimini	Total Eleuthera
1	ORBITZ.COM	EXPEDIA.COM	CONTINENTAL.COM	CONTINENTAL.COM
2	EXPEDIA.COM	CONTINENTAL.COM	EXPEDIA.COM	ORBITZ.COM
3	CONTINENTAL.COM	ORBITZ.COM	TRAVELOCITY.COM	EXPEDIA.COM
4	TRAVELOCITY.COM	TRAVELOCITY.COM	ORBITZ.COM	TRAVELOCITY.COM
5	AA.COM	USAIRWAYS VACATIONS.COM	USAIRWAYS VACATIONS.COM	DELTA.COM
6	BAHAMAS AIR.COM	JETBLUE.COM	RCI TRAVEL	AMERICAN EXPRESS TRAVEL
7	CHEAPTICKETS.COM	AMERICAN EXPRESS TRAVEL	CHEAPTICKETS.COM	CHEAPTICKETS.COM
8	AMERICAN EXPRESS TRAVEL	CHEAPTICKETS.COM	AA.COM	JETBLUE.COM
9	AAA TRAVEL	DELTA.COM	SPIRITAIR.COM	BAHAMAS.COM
10	CARLSONWAGONLIT.COM	AIRCANADA.COM	AIRCANADA.COM	CARLSONWAGONLIT.COM
11	BAHAMAS.COM	BA.COM	JETBLUE.COM	BA.COM
12	LIBERTY TRAVEL	AAA TRAVEL	DELTA.COM	AA.COM
13	USAIRWAYS VACATIONS.COM	BAHAMASAIR.COM	AMERICAN EXPRESS TRAVEL	AAA TRAVEL
14	DELTA.COM	CARLSONWAGONLIT.COM	BAHAMAS.COM	USAIRWAYS VACATIONS.COM
15	RCI TRAVEL	AA.COM	CARLSONWAGONLIT.COM	BAHAMASAIR.COM
16	NWA.COM	BAHAMAS.COM	AAA TRAVEL	BAHAMAS VACATIONS.COM
17	BA.COM	SPIRITAIR.COM	BAHAMASAIR.COM	LIBERTY TRAVEL
18	AIRCANADA.COM	GARBER TRAVEL	BA.COM	NWA.COM
19	FIRSTCHOICE.CO.UK	UNITED.COM	LIBERTY TRAVEL	VIRGIN-ATLANTIC.COM
20	SPIRITAIR.COM	FIRSTCHOICE.CO.UK	YAHOO.COM	AIRCANADA.COM
21	JETBLUE.COM	THOMAS COOK	STA TRAVEL	VIP TRAVEL
22	UNIGLOBE TRAVEL	VIP TRAVEL	THOMAS COOK	THOMAS COOK
23	YAHOO.COM	UNIGLOBE TRAVEL	AOL.COM	UNITED.COM
24	THOMAS COOK	DISCOVERY CRUISE LINE	TRAVEL IMPRESSIONS	LINDEN TRAVEL
25	VIRGIN-ATLANTIC.COM	LIBERTY TRAVEL	VIRTUALLYTHERE.COM	DESTINATIONS TRAVEL
26	VIRTUALLYTHERE.COM	YAHOO.COM	UNIGLOBE TRAVEL	UNIGLOBE TRAVEL
27	UNITED.COM	MACYSTRAVEL.COM	ATLANTIS.COM	GOGO TOURS
28	VIP TRAVEL	AOL.COM	DESTINATIONS TRAVEL	SPIRITAIR.COM
29	BAHAMAS VACATIONS.COM	n/a	NWA.COM	ATLANTIS.COM
30	AOL.COM	n/a	PARADISEISLAND VACATIONS.COM	GARBER TRAVEL
31	DESTINATIONS TRAVEL	n/a	DISCOVERY CRUISE LINE	RCI TRAVEL
32	CI TRAVEL	n/a	GOGO TOURS	FOUR SEASONS TRAVEL
33	STA TRAVEL	n/a	FIRSTCHOICE.CO.UK	NAVIGANT
34	GOGO TOURS	n/a	FOUR SEASONS TRAVEL	WYNDHAM.COM
35	SEARS TRAVEL	n/a	n/a	SPRING BREAK TRAVEL

**TOP 34 TOUR OPERATORS/TRAVEL AGENTS/ONLINE SERVICES USED BY VISITORS
ISLANDS OF THE BAHAMAS
2008**

	Exuma	Harbour Island	San Salvador
1	AA.COM	EXPEDIA.COM	CLUB MED
2	EXPEDIA.COM	CONTINENTAL.COM	THOMAS COOK
3	AMERICAN EXPRESS TRAVEL	ORBITZ.COM	CARLSONWAGONLIT.COM
4	CONTINENTAL.COM	AMERICAN EXPRESS TRAVEL	BAHAMAS AIR.COM
5	ORBITZ.COM	TRAVELOCITY.COM	LIBERTY TRAVEL
6	FOUR SEASONS TRAVEL	DELTA.COM	UNIGLOBE TRAVEL
7	TRAVELOCITY.COM	JETBLUE.COM	AMERICAN EXPRESS TRAVEL
8	CARLSONWAGONLIT.COM	CARLSONWAGONLIT.COM	BAHAMAS.COM
9	DELTA.COM	CHEAPTICKETS.COM	EXPEDIA.COM
10	COLPITTSWORLDTRAVEL.COM	BA.COM	ORBITZ.COM
11	BAHAMASAIR.COM	USAIRWAYSVCATIONS.COM	SPIRITAIR.COM
12	BAHAMAS.COM	BAHAMAS.COM	AAA TRAVEL
13	CHEAPTICKETS.COM	AA.COM	SEARS TRAVEL
14	AAA TRAVEL	AAA TRAVEL	AIRFRANCE.COM
15	LIBERTY TRAVEL	LIBERTY TRAVEL	TRAVELOCITY.COM
16	JETBLUE.COM	VIRGIN-ATLANTIC.COM	AA.COM
17	BA.COM	BAHAMASAIR.COM	CONTINENTAL.COM
18	USAIRWAYSVCATIONS.COM	THOMAS COOK	ATLANTIS.COM
19	MARITZ TRAVEL	AIRCANADA.COM	USAIRWAYSVCATIONS.COM
20	UNIGLOBE TRAVEL	GOGO TOURS	STA TRAVEL
21	DESTINATIONS TRAVEL	VIP TRAVEL	BA.COM
22	AIRCANADA.COM	RCI TRAVEL	JETBLUE.COM
23	YAHOO.COM	ATLANTIS.COM	PARADISEISLANDVACATIONS.COM
24	GOGO TOURS	NAVIGANT	CHEAPTICKETS.COM
25	VIRGIN-ATLANTIC.COM	LINDEN TRAVEL	VIRTUALLYTHERE.COM
26	SPIRITAIR.COM	UNIGLOBE TRAVEL	CI TRAVEL
27	AA VACATIONS	UNITED.COM	BEST TRAVEL
28	GARBER TRAVEL	COLPITTSWORLDTRAVEL.COM	VIP TRAVEL
29	NAVIGANT	NWA.COM	DELTA.COM
30	BLACKBEARDS CHARTERS	AIRFRANCE.COM	n/a
31	FIRSTCHOICE.CO.UK	FOUR SEASONS TRAVEL	n/a
32	ATLAS TRAVEL	STA TRAVEL	n/a
33	CREATIVE TRAVEL	ATLAS TRAVEL	n/a
34	SANDALS.COM	OMEGA TRAVEL	n/a

Source:Immigration Cards

**DEMOGRAPHIC PROFILE
ISLANDS OF THE BAHAMAS**

	2008	2007
MAIN PURPOSE OF VISIT		
Vacation	70%	68%
Business	7%	8%
Honeymoon	5%	6%
DECISION TO VISIT INFLUENCED BY:		
Beaches	60%	55%
Climate	51%	51%
Rest and Relaxation	43%	42%
LIKELY RETURN IN 1-5 YEARS	87%	81%
LIKELY RECOMMEND TO FRIENDS/REL	93%	89%
USED TRAVEL AGENT	30%	35%
AGE*		
25 - 54 years old	56%	56%
55 years old or older	19%	20%
SEX*		
Male	49%	49%
Female	48%	48%
RACE		
White	82%	82%
Black	7%	7%
Hispanic	4%	3%
Mixed Race/Mixed Heritage	3%	3%
Asian/Pacific Islander	3%	3%
American Indian/Alaska Native	0%	0%
Other	0%	1%
EDUCATION		
College Graduate or Above	67%	65%
ANNUAL HOUSEHOLD INCOME		
\$25,001 to \$50,000	7%	10%
\$50,001 to \$75,000	10%	11%
\$75,001 or more	62%	58%
PREVIOUS VISITS		
First Time Visitor	41%	42%
Repeat Visitor	59%	58%
TRAVELLING PARTY SIZE		
One	16%	17%
Two	44%	48%
Three or more	37%	32%
HOUSEHOLD SIZE		
One	12%	12%
Two	38%	39%
Three-Four	38%	34%
COUNTRY OF ORIGIN		
USA	81%	83%
Canada	8%	7%
Europe	6%	6%
Other Countries	5%	5%
AVERAGE LENGTH OF STAY	6.6 nts.	6.6 nts.

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

*Source: Tour Operator & Media Exit Study.

In 2008, Likelihood to return: Very Likely=59.5% and Somewhat Likely=27.1%, Likelihood to Recommend: VL= 69.6% and SL=22.9%. All numbers are subject to revision.

**DEMOGRAPHIC PROFILE
NASSAU/PARADISE ISLAND
2008**

	Nassau/Paradise Island	All Bahamas
MAIN PURPOSE OF VISIT		
Vacation	71%	70%
Business	7%	7%
Honeymoon	6%	5%
DECISION TO VISIT INFLUENCED BY:		
Beaches	60%	60%
Climate	51%	51%
Rest and Relaxation	43%	43%
Hotel Facilities	34%	28%
Friendly People	24%	26%
Easy to get to	21%	21%
Never Been Here Before	21%	21%
Casinos	16%	12%
Safety of Islands	14%	15%
Good Package Deals Offered	13%	11%
ACTIVITIES VISITORS INTENDED TO DO		
Enjoy Beaches	84%	83%
Rest and Relax	75%	74%
Shop	41%	37%
Go Snorkeling	27%	32%
Go To Casinos	36%	28%
Go on Island Tour	15%	16%
LIKELY RETURN IN 1-5 YEARS		
	86%	87%
LIKELY RECOMMEND TO FRIENDS/REL		
	92%	93%
USED TRAVEL AGENT		
	33%	30%
AGE*		
25 - 54 years old	57%	56%
55 years old or older	17%	19%
SEX*		
Male	47%	49%
Female	50%	48%
RACE		
White	80%	82%
Black	8%	7%
Hispanic	4%	4%
Mixed Race/Mixed Heritage	4%	3%
Asian/Pacific Islander	4%	3%
American Indian/Alaska Native	0%	0%
Other	1%	0%
EDUCATION		
College Graduate or Above	66%	65%
ANNUAL HOUSEHOLD INCOME		
\$25,001 to \$50,000	7%	10%
\$50,001 to \$75,000	10%	11%
\$75,001 or more	64%	58%

**DEMOGRAPHIC PROFILE
NASSAU/PARADISE ISLAND
2008**

PREVIOUS VISITS		
First Time Visitor	43%	41%
Repeat Visitor	57%	59%
TRAVELLING PARTY SIZE		
One	15%	16%
Two	45%	44%
Three or more	38%	37%
HOUSEHOLD SIZE		
One	10%	12%
Two	36%	39%
Three-Four	40%	34%
COUNTRY OF ORIGIN		
USA	78%	81%
Canada	10%	8%
Europe	6%	6%
Other Countries	6%	5%
AVERAGE LENGTH OF STAY		
	6.0 nts.	6.6 nts.

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

*Source: Tour Operator & Media Exit Study.

In 2008, Likelihood to return: Very Likely=57.6% and Somewhat Likely=28.5%, Likelihood to Recommend: VL= 68.5% and SL=23.8%. All numbers are subject to revision.

**DEMOGRAPHIC PROFILE
GRAND BAHAMA ISLAND
2008**

	Grand Bahama	All Bahamas
MAIN PURPOSE OF VISIT		
Vacation	68%	70%
Business	9%	7%
Honeymoon	4%	5%
Attend Wedding	4%	2%
DECISION TO VISIT INFLUENCED BY:		
Beaches	60%	60%
Climate	50%	51%
Rest and Relaxation	43%	43%
Friendly People	24%	26%
Never Been Here Before	23%	21%
Easy to Get to	21%	21%
Hotel Facilities	15%	28%
Safety of Islands	14%	15%
Best Value for Money	14%	8%
Good Package Deals	13%	11%
ACTIVITIES VISITORS INTENDED TO DO		
Enjoy Beaches	84%	83%
Rest and Relax	75%	74%
Shop	45%	37%
Go Snorkeling	34%	32%
Go To Casinos	25%	28%
Go on Island Tour	19%	16%
LIKELY RETURN IN 1-5 YEARS	82%	87%
LIKELY RECOMMEND TO FRIENDS/REL	89%	93%
USED TRAVEL AGENT	24%	30%
AGE*		
25 - 54 years old	56%	56%
55 years old or older	21%	19%
SEX*		
Male	49%	49%
Female	48%	48%
RACE		
White	82%	82%
Black	9%	7%
Hispanic	4%	4%
Mixed Race/Mixed Heritage	2%	3%
Asian/Pacific Islander	3%	3%
American Indian/Alaska Native	0%	0%
Other	0%	0%
EDUCATION		
College Graduate or Above	66%	65%

**DEMOGRAPHIC PROFILE
GRAND BAHAMA ISLAND
2008**

ANNUAL HOUSEHOLD INCOME		
\$25,001 to \$50,000	9%	10%
\$50,001 to \$75,000	14%	11%
\$75,001 or more	60%	58%
PREVIOUS VISITS		
First Time Visitor	43%	41%
Repeat Visitor	57%	59%
TRAVELLING PARTY SIZE		
One	18%	16%
Two	45%	44%
Three or more	33%	37%
HOUSEHOLD SIZE		
One	13%	12%
Two	42%	39%
Three-Four	34%	34%
COUNTRY OF ORIGIN		
USA	83%	81%
Canada	5%	8%
Europe	8%	6%
Other Countries	4%	5%
AVERAGE LENGTH OF STAY	6.2 nts.	6.6 nts.

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

*Source: Tour Operator & Media Exit Study.

In 2008, Likelihood to return: Very Likely=53.8% and Somewhat Likely=28.6%, Likelihood to Recommend: VL= 62.9% and SL=25.9%. All numbers are subject to revision.

**DEMOGRAPHIC PROFILE
OUT ISLANDS
2008**

	Out Islands	All Bahamas
MAIN PURPOSE OF VISIT		
Vacation	70%	70%
Other	6%	2%
Business	7%	7%
Visiting Friends and Relatives	6%	4%
Honeymoon	4%	5%
DECISION TO VISIT INFLUENCED BY:		
Beaches	64%	60%
Climate	53%	51%
Rest and Relaxation	42%	43%
Friendly People	36%	26%
Sports	25%	11%
Safety of Islands	20%	15%
Easy to get to	20%	21%
Hotel Facilities	19%	28%
Exotic Islands	17%	13%
Never Been Here Before	17%	21%
ACTIVITIES VISITORS INTENDED TO DO		
Enjoy Beaches	79%	83%
Rest and Relax	68%	74%
Go Snorkeling	48%	32%
Go Diving	19%	10%
Go on Island Tour	17%	16%
Go Bonefishing	17%	5%
Shop	15%	37%
Sailing	12%	7%
Deep Sea Fishing	9%	6%
LIKELY RETURN IN 1-5 YEARS		
	92%	87%
LIKELY RECOMMEND TO FRIENDS/REL		
	97%	93%
USED TRAVEL AGENT		
	24%	30%
AGE*		
25 - 54 years old	52%	56%
55 years old or older	25%	19%
SEX*		
Male	54%	49%
Female	43%	48%
RACE		
White	90%	82%
Black	2%	7%
Hispanic	3%	4%
Mixed Race/Mixed Heritage	3%	3%
Asian/Pacific Islander	2%	3%
American Indian/Alaska Native	0%	0%
Other	0%	0%

**DEMOGRAPHIC PROFILE
OUT ISLANDS
2008**

EDUCATION		
College Graduate or Above	71%	65%
ANNUAL HOUSEHOLD INCOME		
\$25,001 to \$50,000	6%	10%
\$50,001 to \$75,000	8%	11%
\$75,001 or more	61%	58%
PREVIOUS VISITS		
First Time Visitor	3%	41%
Repeat Visitor	0%	59%
TRAVELLING PARTY SIZE		
One	17%	16%
Two	38%	44%
Three or more	40%	37%
HOUSEHOLD SIZE		
One	15%	12%
Two	43%	39%
Three-Four	31%	34%
COUNTRY OF ORIGIN		
USA	85%	81%
Canada	5%	8%
Europe	7%	6%
Other Countries	3%	5%
AVERAGE LENGTH OF STAY		
	9.2 nts.	6.6 nts.

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

*Source: Tour Operator & Media Exit Study. All numbers are subject to revision.

In 2008, Likelihood to return: Very Likely=71.6% and Somewhat Likely=20.6%, Likelihood to Recommend: VL= 79.9% and SL=16.7%.

**DEMOGRAPHIC PROFILE
ABACO ISLAND
2008**

	Abaco	All Bahamas
MAIN PURPOSE OF VISIT		
Vacation	65%	70%
Business	6%	7%
Honeymoon	4%	5%
Other	3%	2%
To Attend Wedding	3%	5%
DECISION TO VISIT INFLUENCED BY:		
Beaches	65%	60%
Climate	52%	51%
Rest and Relaxation	44%	43%
Friendly People	42%	26%
Safety of Islands	28%	15%
Exotic Islands	25%	13%
Sporting Attractions	25%	11%
Easy to Get to	22%	21%
Had Friends in the Bahamas	20%	8%
ACTIVITIES VISITORS INTENDED TO DO		
Enjoy Beaches	82%	83%
Rest and Relax	72%	74%
Go Snorkeling	60%	32%
Shop	24%	37%
Sailing	22%	7%
LIKELY RETURN IN 1-5 YEARS		
	97%	87%
LIKELY RECOMMEND TO FRIENDS/REL		
	98%	93%
USED TRAVEL AGENT		
	46%	30%
AGE*		
25 - 54 years old	48%	56%
55 years old or older	29%	19%
SEX*		
Male	54%	49%
Female	43%	48%
RACE		
White	91%	82%
Black	2%	7%
Hispanic	1%	4%
Mixed Race/Mixed Heritage	4%	3%
Asian/Pacific Islander	1%	3%
American Indian/Alaska Native	1%	0%
EDUCATION		
College Graduate or Above	54%	65%
ANNUAL HOUSEHOLD INCOME		
\$25,001 to \$50,000	8%	10%
\$50,001 to \$75,000	8%	11%
\$75,001 or more	51%	58%

**DEMOGRAPHIC PROFILE
ABACO ISLAND
2008**

PREVIOUS VISITS		
First Time Visitor	19%	41%
Repeat Visitor	77%	59%
TRAVELLING PARTY SIZE		
One	13%	16%
Two	31%	44%
Three or more	47%	37%
HOUSEHOLD SIZE		
One	16%	12%
Two	33%	38%
Three-Four	33%	38%
COUNTRY OF ORIGIN		
USA	92%	81%
Canada	3%	8%
Europe	4%	6%
Other Countries	2%	5%
AVERAGE LENGTH OF STAY	9.8 nts.	6.6 nts.

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

*Source: Tour Operator & Media Exit Study.

In 2008, Likelihood to return: Very Likely=82.7% and Somewhat Likely=14.1%, Likelihood to Recommend: VL= 85.1% and SL=12.9%. All numbers are subject to revision.

**DEMOGRAPHIC PROFILE
ANDROS ISLAND
2008**

	Andros	All Bahamas
MAIN PURPOSE OF VISIT		
Vacation	75%	70%
Other	10%	2%
Business	4%	7%
Honeymoon	4%	5%
DECISION TO VISIT INFLUENCED BY:		
Sporting Attractions	48%	11%
Beaches	40%	60%
Climate	41%	51%
Rest and Relaxation	34%	43%
Friendly People	34%	26%
ACTIVITIES VISITORS INTENDED TO DO		
Go Bonefishing	48%	5%
Enjoy Beaches	48%	83%
Rest and Relax	43%	74%
Go Diving	35%	10%
Go Snorkeling	32%	32%
LIKELY RETURN IN 1-5 YEARS		
	96%	87%
LIKELY RECOMMEND TO FRIENDS/REL		
	97%	93%
USED TRAVEL AGENT		
	22%	30%
AGE*		
25 - 54 years old	52%	56%
55 years old or older	31%	19%
SEX*		
Male	60%	49%
Female	37%	48%
RACE*		
White	93%	82%
Black	1%	7%
Hispanic	1%	4%
Mixed Race/Mixed Heritage	2%	3%
Asian/Pacific Islander	2%	3%
American Indian/Alaska Native	0%	0%
Other	0%	0%
EDUCATION		
College Graduate or Above	81%	65%
ANNUAL HOUSEHOLD INCOME		
\$25,001 to \$50,000	5%	10%
\$50,001 to \$75,000	8%	11%
\$75,001 or more	69%	58%
PREVIOUS VISITS		
First Time Visitor	26%	41%
Repeat Visitor	74%	59%

**DEMOGRAPHIC PROFILE
ANDROS ISLAND
2008**

TRAVELLING PARTY SIZE		
One	12%	16%
Two	39%	44%
Three or more	46%	37%
HOUSEHOLD SIZE		
One	16%	12%
Two	47%	38%
Three-Four	28%	38%
COUNTRY OF ORIGIN		
USA	90%	81%
Canada	3%	8%
Europe	5%	6%
Other Countries	2%	5%
AVERAGE LENGTH OF STAY		
	8.7 nts.	6.6 nts.

Source: Tour Operator and Media Exit Survey 2008. Information on age, sex and avg. length of stay were obtained from immigration card data.

In 2008, Likelihood to return: Very Likely=76.5% and Somewhat Likely=19.4%, Likelihood to Recommend: VL= 82.6%

and SL=14.7%.

All numbers are subject to revision.

**DEMOGRAPHIC PROFILE
BIMINI
2008**

	Bimini	All Bahamas
MAIN PURPOSE OF VISIT		
Vacation	63.2%	70.1%
Business	11.0%	7%
Visting Friends & Relatives	6.6%	4.1%
Other	5.5%	2%
Honeymoon	5.5%	5%
To Attend Wedding	4.4%	2%
DECISION TO VISIT INFLUENCED BY:		
Beaches	54.9%	60%
Climate	44.9%	51%
Friendly People	38.2%	26%
Rest and Relaxation	35.8%	43%
Sporting Attractions	29.5%	11%
Easy to get to	25.4%	21%
Other	20.7%	10.5%
ACTIVITIES VISITORS INTENDED TO DO		
Enjoy Beaches	77%	83%
Rest and Relax	64%	74%
Go Snorkeling	47%	32%
Go Deep Sea Fishing	26%	28%
Go Diving	21%	10%
LIKELY RETURN IN 1-5 YEARS		
	93.5%	87%
LIKELY RECOMMEND TO FRIENDS/REL		
	95.6%	93%
USED TRAVEL AGENT		
	8.7%	30%
AGE*		
25 - 54 years old	55.4%	56%
55 years old or older	19.4%	19%
SEX*		
Male	58.3%	49%
Female	38.7%	48%
RACE*		
White	81.5%	82%
Black	1.1%	7%
Hispanic	13.0%	4%
Mixed Race/Mixed Heritage	3.3%	3%
Asian/Pacific Islander	0.0%	3%
American Indian/Alaska Native	0.0%	0%
Other	1.1%	0%
EDUCATION		
College Graduate or Above	65.5%	65%
ANNUAL HOUSEHOLD INCOME		
\$25,001 to \$50,000	9%	10%
\$50,001 to \$75,000	9%	11%
\$75,001 or more	59%	58%

**DEMOGRAPHIC PROFILE
BIMINI
2008**

PREVIOUS VISITS		
First Time Visitor	21.0%	41%
Repeat Visitor	77.9%	59%
TRAVELLING PARTY SIZE		
One	18.4%	16%
Two	31.8%	44%
Three or more	45.8%	37%
HOUSEHOLD SIZE		
One	15.9%	12%
Two	47.3%	38%
Three-Four	30.6%	38%
COUNTRY OF ORIGIN		
USA	91.9%	81%
Canada	2.0%	8%
Europe	2.3%	6%
Other Countries	3.7%	5%
AVERAGE LENGTH OF STAY	7.6 nts.	6.6 nts.

Source: Tour Operator and Media Exit Survey 2008. Information on age, sex and avg. length of stay were obtained from immigration card data. In 2008, Likelihood to return: Very Likely=80.6% and Somewhat Likely=12.9%, Likelihood to Recommend: VL= 81.7% and SL=13.9%.

**DEMOGRAPHIC PROFILE
ELEUTHERA (INCLUDING HARBOUR ISL.)
2008**

	Eleuthera	All Bahamas
MAIN PURPOSE OF VISIT		
Vacation	75%	70%
Friends and Relatives	9%	4%
Business	4%	7%
Other	3%	2%
Honeymoon	3%	5%
DECISION TO VISIT INFLUENCED BY:		
Beaches	77%	60%
Climate	61%	51%
Rest and Relaxation	48%	43%
Friendly People	42%	26%
Safety of Islands	27%	15%
ACTIVITIES VISITORS INTENDED TO DO		
Enjoy Beaches	88%	83%
Rest and Relax	76%	74%
Go Snorkeling	50%	32%
Shop	23%	37%
Go on Island Tour	16%	16%
LIKELY RETURN IN 1-5 YEARS	92%	87%
LIKELY RECOMMEND TO FRIENDS/REL	96%	93%
USED TRAVEL AGENT	15%	30%
AGE*		
25 - 54 years old	52%	56%
55 years old or older	26%	19%
SEX*		
Male	51%	49%
Female	45%	48%
RACE*		
White	91%	82%
Black	1%	7%
Hispanic	3%	4%
Mixed Race/Mixed Heritage	2%	3%
Asian/Pacific Islander	2%	3%
American Indian/Alaska Native	0%	0%
Other	0%	0%
EDUCATION		
College Graduate or Above	70%	65%
ANNUAL HOUSEHOLD INCOME		
\$25,001 to \$50,000	7%	10%
\$50,001 to \$75,000	10%	11%
\$75,001 or more	60%	58%
PREVIOUS VISITS		
First Time Visitor	30%	41%
Repeat Visitor	70%	59%

**DEMOGRAPHIC PROFILE
ELEUTHERA (INCLUDING HARBOUR ISL.)
2008**

TRAVELLING PARTY SIZE		
One	20%	16%
Two	34%	44%
Three or more	41%	37%
HOUSEHOLD SIZE		
One	17%	12%
Two	43%	38%
Three-Four	30%	38%
COUNTRY OF ORIGIN		
USA	87%	81%
Canada	3%	8%
Europe	7%	6%
Other Countries	3%	5%
AVERAGE LENGTH OF STAY	9.5 nts.	6.6 nts.

Source: Tour Operator and Media Exit Survey 2008. All numbers are subject to revision.

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

In 2008, Likelihood to return: Very Likely=77.7% and Somewhat Likely=14.3%, Likelihood to Recommend: VL= 82.2% and SL=13.8%

Avg. Stay of visitors to Harbour Island is 6.6 nts.

DEMOGRAPHIC PROFILE
EXUMA
2008

	Exuma	All Bahamas
MAIN PURPOSE OF VISIT		
Vacation	70%	70%
Business	11%	7%
Friends and Relatives	4%	4%
Attend Wedding	4%	5%
DECISION TO VISIT INFLUENCED BY:		
Beaches	64%	60%
Climate	54%	51%
Rest and Relaxation	46%	43%
Hotel Facilities	32%	28%
Friendly People	27%	26%
Exotic Islands	21%	13%
Easy to Get to	20%	21%
Sporting Attractions	15%	11%
Safety of the Islands	15%	15%
ACTIVITIES VISITORS INTENDED TO DO		
Enjoy Beaches	87%	83%
Rest and Relax	77%	74%
Go Snorkeling	46%	32%
Go on Island Tour	20%	16%
Go Golfing	19%	5%
Go To Casinos	16%	28%
Sailing	16%	7%
LIKELY RETURN IN 1-5 YEARS	89%	87%
LIKELY RECOMMEND TO FRIENDS/REL	96%	93%
USED TRAVEL AGENT	24%	30%
AGE*		
25 - 54 years old	58%	56%
55 years old or older	23%	19%
SEX*		
Male	52%	49%
Female	45%	48%
RACE*		
White	88%	82%
Black	2%	7%
Hispanic	4%	4%
Mixed Race/Mixed Heritage	2%	3%
Asian/Pacific Islander	3%	3%
American Indian/Alaska Native	0%	0%
Other	1%	0%
EDUCATION		
College Graduate or Above	76%	65%

**DEMOGRAPHIC PROFILE
EXUMA
2008**

ANNUAL HOUSEHOLD INCOME		
\$25,001 to \$50,000	3%	10%
\$50,001 to \$75,000	9%	11%
\$75,001 or more	67%	58%
PREVIOUS VISITS		
First Time Visitor	37%	41%
Repeat Visitor	63%	59%
TRAVELLING PARTY SIZE		
One	23%	16%
Two	46%	44%
Three or more	28%	37%
HOUSEHOLD SIZE		
One	17%	12%
Two	39%	38%
Three-Four	32%	38%
COUNTRY OF ORIGIN		
USA	82%	81%
Canada	6%	8%
Europe	8%	6%
Other Countries	4%	5%
AVERAGE LENGTH OF STAY		
	8.0 nts.	6.6 nts.

Source: Tour Operator and Media Exit Survey 2008. Information on age, sex and avg. length of stay were obtained from immigration card data. In 2008, Likelihood to return: Very Likely=61.5% and Somewhat Likely=27.4%, Likelihood to Recommend: VL= 73.2% and SL=22.6%.

**DEMOGRAPHIC PROFILE
SAN SALVADOR
2008**

	San Salvador	All Bahamas
MAIN PURPOSE OF VISIT		
Vacation	70%	70%
Business	2%	7%
Other	6%	2%
Honeymoon	19%	5%
DECISION TO VISIT INFLUENCED BY:		
Beaches	78%	60%
Climate	58%	51%
Friendly People	38%	26%
Exotic Islands	35%	13%
Rest and Relaxation	31%	43%
Sporting Attractions	30%	11%
Hotel Facilities	29%	28%
Safety of Islands	26%	15%
Never been Here Before	26%	21%
ACTIVITIES VISITORS INTENDED TO DO		
Enjoy Beaches	91%	83%
Rest and Relax	68%	74%
Go Snorkeling	61%	32%
Go on Island Tour	27%	16%
Go Sailing	26%	7%
Go Diving	23%	10%
LIKELY RETURN IN 1-5 YEARS	91%	87%
LIKELY RECOMMEND TO FRIENDS/REL	96%	93%
USED TRAVEL AGENT	73%	30%
AGE*		
25 - 54 years old	60%	56%
55 years old or older	18%	19%
SEX*		
Male	46%	49%
Female	50%	48%
RACE*		
White	89%	82%
Black	4%	7%
Hispanic	1%	4%
Mixed Race/Mixed Heritage	4%	3%
Asian/Pacific Islander	2%	3%
American Indian/Alaska Native	0%	0%
Other	0%	0%
EDUCATION		
College Graduate or Above	75%	65%

**DEMOGRAPHIC PROFILE
SAN SALVADOR
2008**

ANNUAL HOUSEHOLD INCOME		
\$25,001 to \$50,000	13%	10%
\$50,001 to \$75,000	5%	11%
\$75,001 or more	48%	58%
PREVIOUS VISITS		
First Time Visitor	52%	41%
Repeat Visitor	48%	59%
TRAVELLING PARTY SIZE		
One	9%	16%
Two	52%	44%
Three or more	33%	37%
HOUSEHOLD SIZE		
One	9%	12%
Two	49%	38%
Three-Four	27%	38%
COUNTRY OF ORIGIN		
USA	30%	81%
Canada	18%	8%
Europe	44%	6%
Other Countries	8%	5%
AVERAGE LENGTH OF STAY		
	8.7 nts.	6.6 nts.

Source: Tour Operator and Media Exit Survey 2008. Information on age, sex and avg. length of stay were obtained from immigration card data. In 2008, Likelihood to return: Very Likely=65.1% and Somewhat Likely=25.8%, Likelihood to Recommend: VL= 83.4% and SL=12.8%.

Conclusion

Stopover visitors came to the Islands of the Bahamas primarily for the purpose of vacationing. Their decision to visit The Bahamas was primarily influenced by the beaches, the climate, the need for rest and relaxation, the hotel facilities (this was especially true for Nassau/Paradise Island), the friendly people they expected to meet in the destination, the ease of getting to the destination, the fact that they had never been here before, the perceived safety of the islands, the exotic nature of the islands and the casinos. Visitors to Grand Bahama also mentioned the perceived best value for money that they expected to receive as a major influence for deciding to visit the destination. In addition to the other major influences already mentioned, visitors to the Out Islands were also influenced to visit the islands because of the sporting attractions offered in these islands (e.g. fishing, boating, diving, snorkeling, etc.), and the fact that they had friends there.

Stopover visitors to the Bahamas wanted to participate in a number of different activities when they came to the islands. Most of them wanted to enjoy the beaches. Many of them want to simply “kick back” and relax. Some of them wanted to do some shopping (e.g. Nassau/P.I. & Grand Bahama), go snorkeling, go to the casinos (e.g. Nassau/P.I. & Grand Bahama), or take an island tour. Some of them wanted to go diving (e.g. Andros, Bimini), go sailing (e.g. Abaco), go deep sea fishing (Bimini), go golfing (Exuma), and go bone-fishing (e.g. Andros). Some of them even wanted to go bird-watching.

Stopovers came for vacation and to enjoy various activities. The electronic media most frequently used by these visitors to the Islands of the Bahamas when they planned a vacation was the **Internet** (*Some of the top Internet search engines and content providers for visitors to the Bahamas were: Google, Yahoo, AOL, and MSN*). The second most popular electronic media was **Network Television**. The third most popular electronic media was **Specialty Cable Channels** and the fourth most popular was **Specialty News Channels**.

In addition to the Internet, stopover visitors used the television when planning their vacations. Most stopover visitors said that they watched television although they did not all use TV specifically to plan their vacations. The favorite television networks/stations of visitors to the Islands

of the Bahamas were: CNN (Specialty News Station), NBC (Network Station), ESPN (Specialty Cable Channel), ABC (Network Station), FOX (Network Station), CBS (Network Station), HBO (Specialty Cable Channel), Discovery Channel (Specialty Cable Channel), HGTV/Home and Garden Network (Specialty Cable Channel), the FOOD Network (Specialty Cable Channel), FOXN (Specialty News Station), MTV (Music Television), TNT and MSNBC (Specialty News Station).

Visitors to the Islands of the Bahamas primarily watched television between 6:00 p.m. and 10:59 p.m. at night. The most popular time of day for watching television was between 8:00 p.m. to 8:59 p.m.

In addition to watching television, some visitors to the Bahamas also read newspapers and magazines for their own personal enjoyment and some of them also read them when planning their vacations. Magazines were the most popular print media used by visitors to the Bahamas when planning their vacations. More than half of the stopover visitors to the Bahamas read magazines for their reading enjoyment. Visitors read a very wide selection of magazines. Some of the top magazines for visitors to the Islands of the Bahamas as a whole were: People, Time Magazine, Cosmopolitan/Cosmo, US/US Weekly, Newsweek, Sports Illustrated, Glamour, O (Oprah), Vogue/Vogue Living, National Geographic Explorer, Men's Health, In Style, Vanity Fair, Economist, Good Housekeeping, Better Homes and Gardens, the New Yorker, GQ, Fitness, Essence, Readers Digest, Ebony, Conde Nast Travel, Elle Décor, and Travel and Leisure.

Almost two thirds of the stopover visitors read newspapers regardless of planning a vacation but only one half read them when actually planning their vacations. Some of the top newspapers read by visitors to The Bahamas were: USA Today, The New York Times, Wall Street Journal, Washington Post, New York Post, Newsday, Globe and Mail, Boston Globe, Miami Herald, the Daily News, Sun Sentinel, Atlanta Journal-Constitution, Los Angeles Times, Toronto Star, the Chicago Tribune, Philadelphia Inquirer, Houston Chronicle and the New York Daily News.

Stopover visitors used the Internet, television, magazines and newspapers for their enjoyment as well as to plan their vacation experiences. When it came time to take the next step, some stopover visitors booked their reservations directly on the Internet (54%), some used tour operators and travel agents (30%) and some booked their reservations directly with the

hotel or airline, etc. Others used a combination of methods. Stopover visitors to the Bahamas were more likely to book their airport transfers with a Tour Operator/Travel Agent than online however, many of them still preferred to wait until they arrived in the destination and use the available transportation at the airports (e.g. taxis). In addition, stopover visitors to the Bahamas were more likely to book their on-island activities with a Tour Operator/Travel Agent than online however, many of them still preferred to wait until they arrived in the destination before they booked their on-island activities. Visitors who booked rental cars tended to do so directly with the rental car company either before or after their arrival in the Bahamas.

Some of the visitors to the Islands of the Bahamas who booked their reservations online used: expedia.com, atlantis.com, orbitz.com, travelocity.com, aa.com, jetblue.com, Usairwaysvacations.com, continental.com, sandals.com, spiritair.com, carlsonwagonlit.com, delta.com/deltavacations.com, cheaptickets.com, bahamasair.com, Bahamas.com, aircanada.com, ba.com, firstchoice.co.uk, gradcity.com, nwa.com, *(these online services that follow are listed in alphabetical order)* airfrance.com, americanexpress.com, aol.com, Bahamasvacations.com, bookit.com, Clubmed.com/clubmed.ca, Colpittsworldtravel.com, Comfortsuites.com, Cosco.com, Fourseasons.com, Funjet.com, Grandbahamavacations.com, hotels.com, hotwire.com, Intervalinternational.com, Kayak.com, Macystravel.com, Paradiseislandvacations.com, priceline.com, RCI.com, RIU.com, Sheraton.com, Skyauction.com, Smallhope.com, Spg.com, Starwood.com/Westin.com, Superclubs.com, Travelzoo.com, United .com, Usairwaystravel.com, Vacationstogo.com, Virtuallythere.com, Westjet.com, Wyndham.com, and Yahoo.com, etc.

Some of the most popular tour operators/travel agents used by the stopover visitors to the ***Bahamas Overall*** were: Liberty Travel, American Express Travel, Discovery Cruise Line, AAA Travel/Triple AAA, Club Med, RCI Travel, Security Travel, GOGO Worldwide Vacations/GOGO Tours, Apple Vacations, Student City, Thomas Cook Travel, Uniglobe Travel, Travel Impressions, Maritz Travel, and Bel Air Travel.

Moreover, visitors to the Bahamas seemed to prefer short lead times when booking their reservations. The highest percentage of visitors booked their reservations 1-3 months in advance or the very same month of travel.

More than half of the visitors to the Islands of the Bahamas were repeat visitors. Eighty-seven percent (87%) of the stopovers said that they would return to the Bahamas in 1-5 years. Ninety-three percent (93%) said that they would recommend the Bahamas to their friends or relatives.

Visitors to The Islands of The Bahamas who were not likely to return or recommend the Bahamas to friends and relatives gave the following reasons: high prices (too expensive), they wanted to visit other places, hotel dissatisfaction (e.g., poor accommodations, rude staff, poor hotel service), poor service, poor attitudes of the people, food (too expensive or poor quality), litter/cleanliness (country was too dirty), and crime.

Stopover visitors to the Bahamas were primarily white, between the ages of 25-54, college educated, with annual household incomes over \$75,000. In fact, almost half of them (49%) had household incomes of \$100,000 or more.

APPENDIX

TOUR OPERATOR AND MEDIA EXIT SURVEY



Dear Visitor,

The Government of the Bahamas would like to thank you for choosing the Islands of the Bahamas for this visit.

Tourism is our number one Industry and we would like to invite you to share your opinions and your media habits with us so that we would be able to serve you better.

We would be grateful if you would help us by filling out this questionnaire. It should only take a few moments of your time. All information will be treated confidentially.

Thank you for taking the time to help us. We greatly appreciate it.

1. WHAT WAS THE MAIN REASON FOR THIS VISIT TO THE BAHAMAS? (PLEASE "X" ONE BOX ONLY)

- Business Trip..... []1
- Convention/Conference..... []2
- To Get Married..... []3
- To Attend Wedding..... []4
- Honeymoon..... []5
- Vacation..... []6
- Visiting friends or relatives..... []7
- Casino excursion..... []8

Other (PLEASE WRITE IN)_____

2. WHAT INFLUENCED YOUR DECISION TO VISIT THE BAHAMAS? (PLEASE "X" AS MANY BOXES AS APPLY)

- Beaches..... []1
- Climate..... []2
- Safety of islands. []3
- Hotel Facilities... []4
- Casinos..... []5
- Nightlife..... []6
- Sports (eg.diving)[]7
- Exotic Islands.... []8
- Shopping..... []9
- Friendly people... []10
- Easy to get to..... []11
- Best value for money..... []12
- Good package deals..... []13
- Rest & Relaxation..... []14
- Heard a lot about the Bah. []15
- Friend recommended Bah []16
- Had friends in the Bah..... []17
- Never been here before.... []18
- Travel Agent/Tour Operat.[]19
- Bahamas website..... []20
- Saw Ad on TV..... []21
- Saw Ad in Magazine..... []22

Other_____

3. WHAT ACTIVITIES DID YOU INTEND TO DO ON THIS VISIT TO THE BAHAMAS? (PLEASE "X" AS MANY BOXES AS APPLY)

- Enjoy Beaches... []1
- Shop..... []2
- Go Birdwatching []3
- Rest & Relax []4
- Go to Casinos..... []5
- Go Sailing..... []6
- Go on an Island Tour []7
- Go Golfing..... []8
- Go Snorkeling..... []9
- Go Diving..... []10
- Go Bonefishing..... []11
- Go Deep Sea Fishing..... []12

Other_____

4. WHEN DID YOU MAKE YOUR RESERVATIONS? (PLEASE WRITE IN)

Month_____ Year_____

5. DID YOU USE AN ONLINE SERVICE (INTERNET) TO BOOK ANY OF YOUR RESERVATIONS?

1. Yes [] 2. No [] → Go to question 7

6. WHICH ONLINE BOOKING SERVICE DID YOU USE TO MAKE YOUR RESERVATIONS TO THE BAH.?

- Expedia.com..... []1 Hotwire.com..... []5
- Travelocity.com. []2 Yahoo.com.....[]6
- Orbitz.com..... []3 Hotels.com.....[]7
- Priceline.com..... []4 Cheaptickets.com[]8

Other Internet Service (Please Write In)_____

What Items Did You Book Online? (Please “X” As Many As Apply)

Used the Internet to book:

- Airline..... []1
- Hotel..... []2
- Rental Car..... []3
- Transfers from Airport..... []4
- On-island activities (e.g. tours)..... []5

7. DID YOU USE A TOUR OPERATOR/TRAVEL AGENT TO BOOK ANY OF YOUR RESERVATIONS?

1. Yes [] 2. No [] Go to question 8

(Please Write in Name of Tour Operator/Travel Agent)

Tour Operator &/or Travel Agent Used_____

Town/City where booked_____

WHAT ITEMS DID YOU PURCHASE FROM THE TOUR OPERATOR/TRAVEL AGENT? (Please “X” As Many As Apply)

Used a travel agent/tour operator to book:

- Airline..... []1
- Hotel..... []2
- Rental Car..... []3
- Transfers from Airport..... []4
- On-island activities (e.g. tours)..... []5

8. DID YOU BOOK ANY OF YOUR RESERVATIONS DIRECTLY WITH AIRLINE, HOTEL OR OTHER COMPANIES?

1. Yes [] 2. No [] Go to question 9

Booked reservations directly with:

- Airline..... []1
- Hotel..... []2
- Rental Car..... []3
- Transport companies (e.g. taxis)..... []4
- On-island activities (e.g. tours)..... []5

9. **WHEN PLANNING YOUR VACATION, WHAT IS THE ELECTRONIC MEDIA MOST FREQUENTLY USED?** (PLEASE "X AS MANY BOXES AS APPLY)

- Specialty Cable Channels (e.g. Lifetime)..... []1
- Specialty News Channels (e.g. CNN, MSNBC)..... []2
- Network Television, e.g. ABC, NBC,CBS..... []3
- Radio..... []4
- Internet..... []5

Other (PLEASE WRITE IN)_____

10. **DO YOU WATCH TELEVISION?**

- 1. Yes [] 2. No [] **→** Go to question 12

WHAT ARE YOUR FAVORITE TELEVISION STATIONS (CABLE OR SATELLITE)?

11. **AT WHAT TIME ARE YOU MOST LIKELY TO WATCH TELEVISION?** (PLEASE WRITE IN)

_____ a.m. _____ p.m.

12. **DO YOU USE PRINT MEDIA SUCH AS NEWSPAPERS AND MAGAZINES TO PLAN YOUR VACATION?**

- 1. Yes [] 2. No [] **→** Go to question 13

When Planning Your Vacation, What Is The Print Media Most Frequently Used? (Please "X As Many Boxes As Apply)

- Newspaper..... []1
- Magazine..... []2

Other (PLEASE WRITE IN)_____

13. **DO YOU READ ANY NEWSPAPERS?**

- 1. Yes [] 2. No [] **→** Go to question 14

What Newspapers Do You Read? (Please Write In)

14. DO YOU READ ANY MAGAZINES?

1. Yes 2. No → Go to question 15

What Magazines Do You Read? (Please Write In)

15. DO YOU HAVE AN E-MAIL ADDRESS? (PLEASE "X" ONE BOX ONLY)

Yes.....[]1 No.....[]2

16. DO YOU SURF THE INTERNET?(PLEASE "X" ONE BOX ONLY)

Yes.....[]1 No.....[]2 **If no, go to question 18**

17. WHAT INTERNET SEARCH ENGINE (S) &/OR CONTENT PROVIDER (S) DO YOU USE?

(PLEASE "X" AS MANY BOXES AS APPLY)

AOL.....[]1 Lycos.....[]5 Dogpile. []14
 Yahoo... []2 Alta Vista..... []6 Earthlink.. []15
 Excite... []3 Hotbot..... []7 MSN.... []24
 Google []4 Infoseek..... []8
 Other_____

18. HAVE YOU EVER VISITED THE BAHAMAS BEFORE BY AIR, BY PRIVATE BOAT, OR A CRUISE SHIP?

Yes.....[]1 No.....[]2 **If no, go to quest. 20**

19. NOT COUNTING THIS TRIP, HOW MANY TIMES HAVE YOU EVER VISITED THE BAHAMAS?

One..... []1 Three.....[]3 Ten to Nineteen... []5
 Two.....[]2 Four to Nine []4 Twenty or more.. []6

20. HOW LIKELY ARE YOU TO RETURN TO THE BAHAMAS FOR A VACATION IN THE NEXT 1-5 YRS? (PLEASE "X" ONE BOX ONLY)

Very Likely..... []1 Somewhat UnLikely..... []3
 Somewhat Likely []2 Not at all Likely..... []4

If not at all likely to return, Why not?_____

21. HOW LIKELY ARE YOU TO RECOMMEND THE BAHAMAS TO YOUR FRIENDS OR RELATIVES? (PLEASE "X" ONE BOX ONLY)

Very Likely..... []1 Somewhat UnLikely..... []3
Somewhat Likely []2 Not at all Likely..... []4

IF not at all likely to recommend, Why not? _____

22. IF YOU STAYED AT A HOTEL (S), GUEST HOUSE OR RENTED COTTAGE, PLEASE WRITE IN THE

NAME (S).

Did not stay in hotel, guest house or cottage..... []

FOR STATISTICAL PURPOSES ONLY.

23. INCLUDING YOURSELF, WRITE IN THE NUMBER OF PEOPLE TRAVELLING WITH YOU?

_____PEOPLE

24. WHERE DO YOU LIVE?

United States []1 State:_____ Zip Code:_____

Canada []2 Province:_____ PostalCode:_____

Other (PLEASE WRITE IN COUNTRY):_____
Zip/Postal Code_____

25. WHAT IS YOUR AGE? (PLEASE "X" ONE BOX ONLY)

12 to 17..... []1 45 to 54 years..... []5
18 to 24..... []2 55 to 64 years..... []6
25 to 34..... []3 65 years or over..... []7
35 to 44..... []4

26. ARE YOU.....(PLEASE "X" ONE BOX ONLY)

Male..... []1 Female..... []2

27. WHAT IS THE HIGHEST LEVEL OF EDUCATION THAT YOU HAVE COMPLETED?
(PLEASE "X" ONE BOX ONLY)

- High school or less.....[]1 College graduate.[]3
Some college.....[]2 Post graduate..... []4

28. INCLUDING YOURSELF AND ANY INFANTS, HOW MANY PEOPLE ARE THERE CURRENTLY LIVING IN YOUR HOUSEHOLD? (PLEASE "X" ONE BOX ONLY)

- One..... []1
Two..... []2
Three to Four..... []3
Five or more..... []4

29. WHAT IS YOUR TOTAL HOUSEHOLD INCOME BEFORE TAXES IN U.S. DOLLARS?
(PLEASE "X" ONE BOX ONLY)

- | | |
|------------------------------|-----------------------------|
| Under \$25,000.....[]1 | \$150,001 to \$200,000[]7 |
| \$25,001 to \$50,000... []2 | \$200,001 to \$250,000[]8 |
| \$50,001 to \$75,000... []3 | \$250,001 to \$325,000[]9 |
| \$75,001 to \$100,000...[]4 | \$325,001 to \$400,000[]10 |
| \$100,001 to \$125,000.[]5 | \$400,001 to \$500,000[]11 |
| \$125,001 to \$150,000.[]6 | Over \$500,000.....[]12 |

30. WHICH OF THE FOLLOWING BEST DESCRIBES YOUR ETHNIC ORIGIN? (PLEASE "X" ONE BOX ONLY)

- []1 White
[]2 Black
[]3 Hispanic
[]4 Mixed Race/Mixed Heritage
[]5 Asian/Pacific Islander
[]6 American Indian/Alaska Native

Other (Please Write In)_____

31. WHAT OTHER COMMENTS, IF ANY, WOULD YOU LIKE TO MAKE ABOUT YOUR VISIT TO THE BAHAMAS? (PLEASE WRITE IN)

FOR OFFICE USE ONLY

- | | |
|--------------------------|----------------|
| Place of Survey..... [] | Year..... [] |
| Enumerator..... [] | Col..... [] |
| Month..... [] | Coder..... [] |
-