

ISLANDS OF THE BAHAMAS

TOUR OPERATOR & MEDIA SURVEY

SUMMARY



RESEARCH AND STATISTICS DEPARTMENT
MINISTRY OF TOURISM
2019

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1. Why Did Visitors Come to The Bahamas?

- Roughly three in every four (75%) stopover visitors came to The Bahamas on a vacation;
- Approximately one in every twenty stopovers came on a honeymoon (5%) or on a business trip (5%), and roughly one in every twenty-five came to visit friends & relatives (3%).

2. What Influenced their Decision to Visit The Bahamas?

TOP INFLUENCES FOR DECIDING TO VISIT THE BAHAMAS ISLANDS OF THE BAHAMAS 2019

| | Bahamas | Nassau/P.I. | Grand Bahama | Out Islands |
|----------------------------------|---------|-------------|--------------|-------------|
| Beaches | 69% | 68% | 72% | 71% |
| Climate | 56% | 57% | 53% | 52% |
| Rest and Relaxation | 47% | 47% | 49% | 49% |
| Friendly People | 28% | 26% | 30% | 36% |
| Hotel Facilities | 28% | 32% | 11% | 15% |
| Easy to Get to | 24% | 26% | 18% | 21% |
| Never Been Here Before | 23% | 23% | 28% | 22% |
| Safety of the Islands | 21% | 20% | 20% | 26% |
| Exotic Islands | 16% | 14% | 11% | 23% |
| Good Package Deals | 12% | 14% | 15% | 5% |
| Friend Recommendation | 11% | 11% | 10% | 15% |
| Heard a Lot about The Bahamas | 10% | 10% | 9% | 9% |
| Casinos | 9% | 11% | 1% | 1% |
| Sports | 8% | 6% | 12% | 16% |
| Best Value for Money | 8% | 8% | 12% | 5% |
| Other | 8% | 8% | 6% | 7% |
| Wanted to Experience the Culture | 7% | 6% | 9% | 8% |
| Had Friends in The Bahamas | 6% | 5% | 7% | 9% |
| Travel Agent/TO | 4% | 4% | 5% | 3% |
| Shopping | 3% | 4% | 4% | 2% |
| Nightlife | 3% | 3% | 1% | 1% |
| Bahamas Website | 1% | 1% | 2% | 1% |
| Junkanoo/Other Festivals | 1% | 1% | 2% | 2% |
| Saw an AD on TV | 2% | 2% | 1% | 1% |
| Saw an AD in a Magazine | 0% | 0% | 0% | 0% |
| Non Response | 6% | 6% | 5% | 7% |

Source: Tour Operator & Media Exit Survey 2019, Research & Statistics Dept. Bahamas Ministry of Tourism

All numbers subject to revision.

- Stopover visitors were primarily influenced to visit The Bahamas by the beaches, the climate and the rest and relaxation that they expected to enjoy in the destination. Approximately seven in ten (69%) stopover visitors to the Bahamas

were influenced to visit because of the beaches and more than half of them were influenced to visit because of the climate (56%) and the rest and relaxation (47%).

- Stopovers were also influenced to visit because of a myriad of other things including the friendly people that they expected to meet (or had already met during past trips to the Bahamas) and the hotel facilities in the destination. Approximately three in ten stopovers were influenced to visit because of the friendly people (28%) and the hotel facilities (28%) in the destination.
- The casino was of particular interest to approximately one in ten (11%) stopovers to Nassau/Paradise Island.
- In the past good package deals and best value for money were of particular interest for stopovers to Grand Bahama, an island that tended to attract a more budget oriented consumer than Nassau/Paradise Island and the Out Islands. In 2019, fifteen percent (15%) of the stopovers to Grand Bahama were influenced to visit the Bahamas because of the good package deals, and 12% because of the perception that they would receive the best vacation value for the money.
- The Exotic mystique of the Out Islands and the sporting attractions like sailing, diving, and fishing were of particular interest to stopover visitors to those islands.

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

ACTIVITIES VISITORS INTENDED TO DO ON THIS VISIT TO THE BAHAMAS ISLANDS OF THE BAHAMAS 2019

| | Bahamas | Nassau/P.I. | Grand Bahama | Out Islands |
|--------------------------------|---------|-------------|--------------|-------------|
| Enjoy Beaches | 86% | 86% | 89% | 86% |
| Rest and Relax | 74% | 75% | 75% | 71% |
| Go Snorkeling | 31% | 26% | 39% | 47% |
| Shop | 26% | 27% | 36% | 19% |
| Go to Casinos | 20% | 26% | 3% | 2% |
| Go on Island Tour | 19% | 17% | 19% | 24% |
| Go Diving | 7% | 6% | 10% | 10% |
| Go Sailing | 7% | 5% | 7% | 13% |
| Go Deep Sea Fishing | 5% | 4% | 6% | 9% |
| Go Golfing | 4% | 4% | 4% | 7% |
| Go Bonefishing | 3% | 2% | 5% | 9% |
| Go to Junkanoo/Other Festivals | 2% | 2% | 7% | 4% |
| Go Birdwatching | 2% | 2% | 4% | 3% |
| Other Activities | 5% | 5% | 4% | 5% |
| No Response | 6% | 6% | 5% | 6% |

Source: Tour Operator & Media Exit Survey 2019, Research & Statistics Dept. Bahamas Ministry of Tourism

All numbers subject to revision.

- Most of the stopover visitors to The Bahamas intended to enjoy the beaches (86%) and rest and relax (74%);
- Roughly one in three (31%) of them wanted to go snorkeling and approximately one in four (26%) intended to go shopping;
- Approximately two in ten stopovers wanted go to the casinos (20%) or go on an island tour (19%);

- Sporting activities like snorkeling, diving, sailing, bone-fishing, and deep-sea fishing were especially of interest to some of the visitors to the Out Islands.

4. When Did the Stopover Visitors Make Their Reservations?

WHEN DID YOU MAKE YOUR RESERVATIONS STOPOVER VISITORS 2019

| | All Bah. | Nassau/P.I. | Grand Bah. | Out Isl. |
|-----------------------------------|----------|-------------|------------|----------|
| Same Week of Travel | 6% | 6% | 5% | 5% |
| Same Month of Travel | 11% | 12% | 8% | 9% |
| 1 to 3 Months Before Travel | 44% | 47% | 39% | 34% |
| 4 to 7 Months Before Travel | 26% | 25% | 31% | 29% |
| 8 to 12 Months Before Travel | 9% | 8% | 11% | 15% |
| More than 12 months Before Travel | 2% | 1% | 4% | 5% |
| Non-Response | 2% | 2% | 3% | 4% |

Source: Tour Operator and Media Exit Survey 2019, Research and Statistics Dept., Bahamas Ministry of Tourism

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

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

DID YOU USE AN ONLINE SERVICE TO BOOK ANY OF YOUR RESERVATIONS ISLANDS OF THE BAHAMAS 2019

| | All Bahamas | | Nassau/P.I. | | Grand Bahama | | Out Islands | |
|----------------------------|-------------|------|-------------|------|--------------|------|-----------------|------|
| | 2019 | 2018 | 2019 | 2018 | 2019 | 2018 | 2019 | 2018 |
| Used Online Service | 78% | 80% | 78% | 79% | 81% | 87% | 79% | 81% |
| Did Not Use Online Service | 21% | 20% | 21% | 21% | 18% | 13% | 19% | 19% |
| | USA | | Canada | | Europe | | Other Countries | |
| Used Online Service | 79% | 81% | 75% | 75% | 75% | 78% | 78% | 78% |
| Did Not Use Online Service | 20% | 19% | 25% | 25% | 24% | 22% | 21% | 22% |

Source: Tour Operator and Media Exit Survey 2019 and 2018, Research and Statistics Dept., Bahamas Ministry of Tourism

- In 2019, approximately eight in ten stopover visitors to The Bahamas Overall (78%), Nassau/Paradise Island (78%), Grand Bahama (81%), and the Out Islands (79%) used an online service to book some or all their reservations to The Bahamas.
- There were no significant changes in online booking by visitors from the USA, Canada, Europe, and the Other Countries of the world between 2019 and 2018.
- In 2019, the most popular online services used by stopover visitors to book their reservations included sites like Expedia, Travelocity, usairwaysvacations.com, aaa.com, Atlantis.com, Bahamar.com, etc.

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

- Approximately three in ten (28%) stopovers used a travel agent to book some or all their reservations in 2019.

ISLANDS OF THE BAHAMAS USE OF TRAVEL AGENT 2019

| | All Bahamas | | Nassau/P.I. | | Grand Bahama | | Out Islands | |
|--------------------------|-------------|------|-------------|------|--------------|------|-----------------|------|
| | 2019 | 2018 | 2019 | 2018 | 2019 | 2018 | 2019 | 2018 |
| Used Travel Agent | 28% | 30% | 29% | 31% | 31% | 32% | 22% | 26% |
| Did Not Use Travel Agent | 70% | 68% | 69% | 68% | 66% | 67% | 74% | 71% |
| | USA | | Canada | | Europe | | Other Countries | |
| Used Travel Agent | 24% | 27% | 47% | 42% | 36% | 48% | 43% | 34% |
| Did Not Use Travel Agent | 73% | 72% | 51% | 57% | 60% | 51% | 52% | 58% |

Source: Tour Operator and Media Exit Survey 2019 and 2018, Research and Statistics Dept., Bahamas Ministry of Tourism. NR is not listed in above table

Some of the stopovers to the Bahamas that used tour operators/travel agents used the following top TO/TA's: AAA Travel/Triple A/Triple AAA, Majestic Tours, Flight Centre, Sandals, American Express Travel, Liberty Travel, Club Med, GOGO Worldwide Vacations/GOGO Tours, Travel Leaders, Air Canada Vacations, TUI Travel, Apple Vacations, Funjet Vacations, Atlantis Travel, Jet Blue, Trip Central, and CAA Travel.

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

ELECTRONIC MEDIA MOST FREQUENTLY USED WHEN PLANNING YOUR VACATION ISLANDS OF THE BAHAMAS 2019

| | Bahamas | Nassau/P.I. | Grand Bahama | Out Islands |
|--------------------------|---------|-------------|--------------|-------------|
| Internet | 84% | 83% | 87% | 87% |
| Network Television | 8% | 8% | 8% | 5% |
| Specialty Cable Channels | 6% | 7% | 7% | 4% |
| Specialty News Channels | 5% | 5% | 4% | 3% |
| Radio | 1% | 1% | 2% | 1% |

Source: Tour Operator and Media Exit Survey 2019, Research and Statistics Dept. Ministry of Tourism

- The majority (84%) of stopover visitors used the Internet as the electronic media most frequently used when planning their vacation, and approximately one in ten (8%) used Network television the most. Approximately one in every fifteen (6%) stopovers used specialty cable channels and approximately one in every twenty (5%) used specialty news channels the most when planning their vacations.

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

TOP 20 FAVORITE TELEVISION NETWORKS/STATIONS ISLANDS OF THE BAHAMAS 2019

| Bahamas | | % Informants | Nassau/P.I. | % Informants |
|--------------|--------------------------------------|--------------|--------------------------------------|--------------|
| 1 | ESPN | 23% | ESPN | 23% |
| 2 | ABC | 18% | ABC | 18% |
| 3 | NBC | 16% | NBC | 17% |
| 4 | HGTV (Home & Garden Network) | 15% | HBO | 15% |
| 5 | HBO | 14% | HGTV (Home & Garden Network) | 15% |
| 6 | CBS | 13% | CBS | 13% |
| 7 | CNN | 12% | CNN | 12% |
| 8 | FOXN | 9% | FOX | 9% |
| 9 | FOX | 9% | FOXN | 9% |
| 10 | Other Movie Networks | 8% | BRAVO | 8% |
| 11 | BRAVO | 8% | Other Movie Networks | 8% |
| 12 | FOOD (Food Network) | 7% | FOOD (Food Network) | 7% |
| 13 | DISC (Discovery Channel) | 5% | DISC (Discovery Channel) | 5% |
| 14 | MSNBC | 4% | MSNBC | 4% |
| 15 | TNT | 4% | TNT | 4% |
| 16 | HIST(History Channel) | 4% | HIST(History Channel) | 4% |
| 17 | E! (E! Entertainment) | 3% | E! (E! Entertainment) | 4% |
| 18 | TLC (The Learning Channel) | 3% | TLC (The Learning Channel) | 3% |
| 19 | Other Sports Networks | 3% | A & E (Arts & Entertainment Network) | 3% |
| 20 | A & E (Arts & Entertainment Network) | 3% | TBS | 3% |
| Grand Bahama | | % Informants | Out Islands | % Informants |
| 1 | HBO | 17% | ESPN | 27% |
| 2 | HGTV (Home & Garden Network) | 17% | ABC | 17% |
| 3 | ABC | 16% | HGTV (Home & Garden Network) | 17% |
| 4 | ESPN | 16% | NBC | 16% |
| 5 | NBC | 16% | FOXN | 14% |
| 6 | CBS | 12% | CNN | 13% |
| 7 | CNN | 10% | Other Movie Networks | 12% |
| 8 | Other Movie Networks | 10% | CBS | 12% |
| 9 | FOXN | 9% | HBO | 10% |
| 10 | DISC (Discovery Channel) | 6% | FOX | 8% |
| 11 | FOX | 6% | FOOD (Food Network) | 7% |
| 12 | FOOD (Food Network) | 6% | BRAVO | 6% |
| 13 | TNT | 6% | DISC (Discovery Channel) | 5% |
| 14 | USA | 4% | MSNBC | 4% |
| 15 | BRAVO | 4% | HIST(History Channel) | 4% |
| 16 | MSNBC | 3% | TNT | 3% |
| 17 | MTV (Music Television) | 3% | MTV (Music Television) | 3% |
| 18 | Other News Stations | 3% | NGEO (National Geographic Channel) | 3% |
| 19 | SHW (Showtime) | 3% | Other Sports Networks | 3% |
| 20 | NGEO (National Geographic Channel) | 3% | PBS (Public Broadcasting Station) | 2% |

Source: Tour Operator and Media Exit Survey 2019, Research and Statistics Dept. Ministry of Tourism

- In 2019, approximately seven in every ten (72%) stopovers to The Bahamas watched television. Stopover visitors to the Out Islands tended to watch television less than stopovers to Nassau/Paradise Island, Grand Bahama, and The Bahamas Overall. Approximately two in every three (64%) stopovers to the Out Islands watched television compared to approximately seven in every ten (73%) to Nassau/Paradise Island and three in four (75%) to Grand Bahama.
- ESPN was the favorite television station watched by stopover visitors to The Bahamas Overall. ESPN has been the top television station watched by stopover visitors to The Bahamas since 2011. In 2010, NBC was the number one television station watched by stopovers to The Bahamas and ESPN was in 3rd place.
- In 2019, approximately two in every ten stopovers to the Bahamas who watched television watched ESPN (23%), and ABC (18%). Roughly one in every six stopovers watched NBC (16%), or HGTV (15%) and approximately one in every seven watched HBO (14%) or CBS (13%).
- In both 2019 and 2018, 12% of stopovers to The Bahamas watched CNN compared to 14% in 2017, and 17% in 2016. Other popular networks watched by stopover visitors to The Bahamas included FOXN, FOX, and BRAVO. Visitors to The Bahamas also watched other movie and entertainment channels like (A & E, E! Entertainment, Lifetime, Showtime, etc.), home and garden and food channels like (FOOD/Food Network), children's channels (DSNY/Disney Channel) and educational channels like (DISC Discovery Channel, TLC/The Learning Channel, HIST/The History Channel). Some of these channels may not have been in the top 20 favorites but they were in the top 30.

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

- Stopover visitors to the Bahamas were most likely to watch television between the hours of 6 pm to 10:59 pm at night. The hours of 8:00 pm to 8:59 pm were of course prime time and approximately four in ten (38%) stopovers watched television during that time. Approximately three in ten (31%) watched television between 9:00 pm to 9:59 pm.

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

PRINT MEDIA USED MOST FREQUENTLY WHEN PLANNING A VACATION ISLANDS OF THE BAHAMAS 2019

| | Bahamas | | Nassau/P.L. | | Grand Bahama | | Out Islands | |
|-------------------|---------|------|-------------|------|--------------|------|-------------|------|
| | 2019 | 2018 | 2019 | 2018 | 2019 | 2018 | 2019 | 2018 |
| Newspapers | 33% | 30% | 33% | 29% | 35% | 28% | 31% | 33% |
| Magazines | 71% | 74% | 70% | 75% | 74% | 69% | 73% | 74% |
| Other Print Media | 6% | 8% | 7% | 8% | 6% | 15% | 5% | 9% |

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

Non Response has been factored out of the responses. Source: Tour Operator and Media Exit Survey 2019.

In 2019, fourteen percent (14%) of stopover visitors to The Bahamas used print media when they were planning their vacations. The number of stopover visitors who used print media when planning their vacations declined over the years but started to stabilize in 2014 and 2015 at 16%. In 2010, 25% of stopover visitors to The Bahamas used print media to plan their vacations compared to 21% in 2011, 20% in 2012, 20% in 2013, 16% in 2014, and 16% in 2015. One of the reasons for this decline in print media usage is tied to the fact that the Internet became so very easy to access and use with the advent of smartphones and wireless tablets. These devices placed the Internet and by extension social media/photo/video sharing platforms into the hands of a plethora of users who were now able to push a few buttons to search for the vacation destinations of choice.

Of the fourteen percent (14%) of stopover visitors who used print media to plan their vacations, one in three (33%) used newspapers and approximately seven in ten (71%) used magazines.

11. Use of Newspapers

In 2019, although only 14% of stopover visitors used print media when planning their vacations, approximately three in ten (31%) of them read newspapers for their personal enjoyment and edification. The percentage of stopover visitors to The Bahamas using newspapers for their personal enjoyment and edification has declined over the years. In 2010, 64% of stopovers to The Bahamas read newspapers for their reading enjoyment compared to 63% in 2011, 60% in 2012, 55% in 2013, 50% in 2014, 45% in 2015, 42% in 2016, 38% in 2017 and 34% in 2018.

**TOP 20 FAVORITE NEWSPAPERS READ BY VISITORS
ISLANDS OF THE BAHAMAS
2019**

| Bahamas | | % Informants | Nassau/P.I. | | % Informants |
|---------------------|------------------------------|---------------------|------------------------------|--|---------------------|
| 1 | New York Times | 37% | New York Times | | 36% |
| 2 | Wall Street Journal | 25% | Wall Street Journal | | 25% |
| 3 | USA Today | 23% | USA Today | | 24% |
| 4 | Washington Post | 14% | Washington Post | | 13% |
| 5 | New York Post | 9% | New York Post | | 10% |
| 6 | Boston Globe | 6% | Boston Globe | | 7% |
| 7 | Daily News | 6% | Daily News | | 6% |
| 8 | Toronto Star | 5% | Toronto Star | | 5% |
| 9 | Local | 4% | Local | | 4% |
| 10 | Globe & Mail | 4% | Globe & Mail | | 4% |
| 11 | Atlanta Journal Constitution | 3% | Atlanta Journal Constitution | | 3% |
| 12 | Times | 3% | Newsday | | 3% |
| 13 | Miami Herald | 2% | Times | | 3% |
| 14 | Newsday | 2% | Chicago Tribune | | 2% |
| 15 | Chicago Tribune | 2% | New York Daily News | | 2% |
| 16 | New York Daily News | 2% | Post | | 2% |
| 17 | Orlando Sentinel | 2% | Orlando Sentinel | | 2% |
| 18 | Dallas Morning News | 2% | Miami Herald | | 2% |
| 19 | Post | 2% | Sun/The Sun News | | 2% |
| 20 | Sun/The Sun News | 1% | Dallas Morning News | | 1% |
| Grand Bahama | | % Informants | Out Islands | | % Informants |
| 1 | New York Times | 29% | New York Times | | 44% |
| 2 | USA Today | 29% | Wall Street Journal | | 29% |
| 3 | Daily News | 13% | USA Today | | 20% |
| 4 | Wall Street Journal | 13% | Washington Post | | 17% |
| 5 | Washington Post | 12% | New York Post | | 7% |
| 6 | Local | 9% | Boston Globe | | 4% |
| 7 | Toronto Star | 5% | Miami Herald | | 4% |
| 8 | New York Post | 4% | Globe & Mail | | 4% |
| 9 | Globe & Mail | 4% | Local | | 3% |
| 10 | Times | 3% | Daily News | | 3% |
| 11 | Chicago Tribune | 3% | Dallas Morning News | | 3% |
| 12 | New York Daily News | 2% | Toronto Star | | 2% |
| 13 | Seattle Times | 2% | Palm Beach Post | | 2% |
| 14 | Boston Globe | 2% | Sun Sentinel | | 2% |
| 15 | Atlanta Journal Constitution | 2% | Chicago Tribune | | 2% |
| 16 | Newsday | 2% | Denver Post | | 1% |
| 17 | Post | 2% | Times | | 1% |
| 18 | UK Newspapers | 2% | La Press (Montreal, Quebec) | | 1% |
| 19 | Freeport News | 1% | Atlanta Journal Constitution | | 1% |
| 20 | Miami Herald | 1% | New York Daily News | | 1% |

Source: Tour Operator and Media Exit Survey 2019, Research and Statistics Dept. Ministry of Tourism

- The most popular newspaper read by stopover visitors to The Bahamas was the New York Times. Roughly four in every ten (37%) stopovers who read newspapers read the New York Times. The Wall Street Journal and USA Today were the next two popular newspapers read by stopover visitors to The Bahamas.

12. Use of Magazines

Although only 14% of stopover visitors used print media when planning their vacations, in 2019, roughly four in ten (37%) of them read magazines for their enjoyment. The percentage of stopover visitors to The Bahamas reading magazines for their personal enjoyment has declined over the years from 69% in 2010, 67% in 2012, 63% in 2013, 57% in 2014, 52% in 2015, 48% in 2016, 46% in 2017 and 41% in 2018.

TOP 20 FAVORITE MAGAZINES READ BY VISITORS ISLANDS OF THE BAHAMAS 2019

| Bahamas | | % Informants | Nassau/P.I. | | % Informants |
|--------------|---|--------------|---|-----|--------------|
| 1 | People | 22% | People | 24% | |
| 2 | Better Homes & Gardens (BHG) | 18% | Better Homes & Gardens (BHG) | 19% | |
| 3 | Food & Wine | 11% | Good Housekeeping | 12% | |
| 4 | Southern Living | 11% | In Style | 11% | |
| 5 | Good Housekeeping | 11% | Southern Living | 11% | |
| 6 | In Style | 10% | Food & Wine | 11% | |
| 7 | National Geographic (Explorer) | 10% | Travel & Leisure | 10% | |
| 8 | Travel & Leisure | 9% | Men's Health | 9% | |
| 9 | Architectural Digest | 9% | National Geographic (Explorer) | 9% | |
| 10 | Bon Appetit | 9% | Architectural Digest | 9% | |
| 11 | Men's Health | 9% | Cosmopolitan (Cosmo) | 8% | |
| 12 | Conde Nast Travel | 8% | Conde Nast Travel | 8% | |
| 13 | Cosmopolitan (Cosmo) | 7% | Bon Appetit | 8% | |
| 14 | Time Magazine | 7% | Time Magazine | 7% | |
| 15 | Sports Illustrated | 7% | Glamour | 7% | |
| 16 | Glamour | 6% | Sports Illustrated | 7% | |
| 17 | Reader's Digest | 6% | Reader's Digest | 6% | |
| 18 | Forbes | 6% | Forbes | 5% | |
| 19 | Golf Digest | 5% | O (Oprah) | 5% | |
| 20 | Vanity Fair | 5% | Golf Digest | 5% | |
| Grand Bahama | | % Informants | Out Islands | | % Informants |
| 1 | Better Homes & Gardens (BHG) | 25% | People | 17% | |
| 2 | People | 20% | Better Homes & Gardens (BHG) | 14% | |
| 3 | Good Housekeeping | 14% | Food & Wine | 12% | |
| 4 | Food & Wine | 11% | Bon Appetit | 12% | |
| 5 | National Geographic (Explorer) | 11% | Architectural Digest | 12% | |
| 6 | Southern Living | 8% | Southern Living | 12% | |
| 7 | Conde Nast Travel | 7% | National Geographic (Explorer) | 11% | |
| 8 | Bon Appetit | 7% | Conde Nast Travel | 10% | |
| 9 | O (Oprah) | 7% | Travel & Leisure | 8% | |
| 10 | Cosmopolitan (Cosmo) | 7% | New Yorker | 8% | |
| 11 | Travel & Leisure | 6% | Economist | 8% | |
| 12 | Architectural Digest | 6% | In Style | 8% | |
| 13 | Men's Health | 6% | Forbes | 8% | |
| 14 | Sports Illustrated | 6% | Vanity Fair | 8% | |
| 15 | Glamour | 6% | Men's Health | 7% | |
| 16 | Vanity Fair | 6% | Coastal | 7% | |
| 17 | Reader's Digest | 5% | Good Housekeeping | 6% | |
| 18 | Woman's Day | 5% | Golf Digest | 6% | |
| 19 | Economist | 5% | Time Magazine | 6% | |
| 20 | Golf | 5% | Sports Illustrated | 6% | |

Source: Tour Operator and Media Exit Survey 2019, Research and Statistics Dept. Ministry of Tourism

13. How Did Stopover Visitors Rate Their Product Experiences?

**PRODUCT SATISFACTION RATINGS
ISLANDS OF THE BAHAMAS
2019**

| All Bahamas | Excellent | Good | OK | Not So Good | Awful | DK/NR | Categories Combined | |
|---------------------------|------------|------------|-----------|-------------|-----------|-----------|---------------------|----------------------|
| | | | | | | | Excellent or Good | Not So Good or Awful |
| Beaches | 69% | 21% | 4% | 0% | 0% | 5% | 90% | 1% |
| Climate | 66% | 25% | 4% | 1% | 0% | 4% | 91% | 1% |
| Attitude of People | 60% | 26% | 8% | 2% | 1% | 4% | 86% | 3% |
| Food in Restaurants | 33% | 37% | 14% | 3% | 1% | 11% | 71% | 4% |
| Easy to Get to | 39% | 34% | 14% | 3% | 0% | 10% | 74% | 3% |
| Restaurant Service | 36% | 34% | 14% | 4% | 1% | 11% | 69% | 5% |
| Hotel Rooms | 38% | 32% | 12% | 2% | 1% | 16% | 70% | 3% |
| Hotel Service | 41% | 28% | 11% | 3% | 1% | 17% | 68% | 4% |
| Overall Value for Money | 21% | 36% | 24% | 9% | 3% | 8% | 56% | 12% |
| Food in Hotels | 28% | 30% | 18% | 5% | 1% | 19% | 58% | 6% |
| Value for Money in Hotels | 18% | 29% | 23% | 9% | 3% | 19% | 47% | 11% |
| Bahamas Overall | 51% | 37% | 7% | 1% | 0% | 4% | 88% | 1% |

Includes cruise stopover visitors e.g. in GBI

Source: Tour Operator and Media Exit Survey 2019, Research and Statistics Dept., Bahamas Ministry of Tourism

- In 2019, 88% of stopovers thought that the Bahamas Overall was excellent or good.
- The beaches, the climate, and the attitude of the people received the highest product satisfaction ratings of the 12 ratings asked of stopover visitors to The Bahamas.
- The majority of stopover visitors thought that the beaches (90%), and the climate (91%) were excellent or good.
- The majority (86%) of stopovers thought that the attitudes of the people were excellent or good.
- Roughly seven in ten stopovers thought that the food in restaurants (71%), the ease of getting to the destination (74%), and the restaurant service (69%) were excellent or good.
- Approximately seven in every ten stopovers thought that the hotel rooms (70%), and the hotel service (68%) were excellent or good.
- More than half (56%) thought that the overall value for money was excellent or good. But approximately one in every ten (12%) thought that it was not so good or awful.
- Approximately six in ten (58%) stopovers thought that the food in the hotels was excellent or good.
- Roughly half (47%) the stopovers thought that the value for money in the hotels was excellent or good but approximately one in every ten (11%) thought that it was not so good or awful.

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

TOURIST COMMENTS POSITIVE VS. NEGATIVE COMMENTS ALL BAHAMAS

| TOP 6 COMPLIMENTS | | | TOP 6 COMPLAINTS | | |
|-------------------------|--------------|--------------|------------------------|------------|------------|
| | 2019 | 2018 | | 2019 | 2018 |
| General | 35% | 35% | Prices (neg.) | 28% | 26% |
| People | 29% | 28% | People (neg.) | 13% | 11% |
| Scenery/Sightseeing | 11% | 8% | Hotel (neg.) | 8% | 6% |
| Beaches | 5% | 6% | Taxes (neg.) | 8% | 6% |
| Can't Wait to Come Back | 3% | 3% | Service (neg.) | 6% | 5% |
| Weather/Climate | 2% | 2% | Litter (neg.) | 6% | 7% |
| No. of Comments | 1,768 | 1,938 | No. of Comments | 718 | 740 |

*Source: Tour Operator & Media Exit Study 2019 and 2018, Research and Statistics Dept. Bahamas Ministry of Tourism

- Of the 1,768 positive comments received in 2019 from the survey, the top six compliments made by visitors included: general comments, people, scenery/sightseeing, beaches, can't wait to come back, and the weather/climate.
- **General:** Approximately one in every three (35%) compliments received from visitors were general comments like: "We had the best vacation ever in the Bahamas. Enjoyed our anniversary vacation, greatly wished we would have stayed longer, should have brought along more cash. Love Eleuthera our 7th-8th time. We loved this island, we wanted to go to a less touristy locale with beaches that were not crowded. Believer Faith Outreach Ministries international is the best place to worship. We only came because of a wedding from California, but once we got here, we loved our time. We love Harbour Island. Fabulous trip, first time to Spanish Wells. Thank you for a wonderful vacation, I will always remember the Bahamas. First time to Exuma, loved it. After 9 years, we still love Grand Bahama Island; we definitely miss the Casino, Bahama Mama cruise and the business of Port Lucaya. The location is priceless, I loved that the local community works at the resort. Fantastic adventure. Worked local ministry, rewarding. We had an absolutely amazing vacation fun of incredible experiences. The Exumas are like paradise. Epic stay. Incredible time spent as always. Love your country. Thank you! Happy New Year! Always fun time in Bimini. Praying for all affected by Hurricane Dorian. God bless! Best week of my life. Thank you! Love the islands, culture and locals. The Abacos we visit often. We have a yacht and we island shop, its beautiful and peaceful. Love GBI, been coming here 24 yrs. condo owner for 10 years. I used Bahamas.com extensively for research. Times here enjoyed to the fullest. Paradise full of beautiful people, flowers and beaches. We absolutely love GB and enjoy every moment we are here. Exceptional as always, time went so quickly. Great birding on Eleuthera. Love the reef protection programs. Married in Bahamas, special place in my heart. This is my favorite place to visit in the winter, Tourists are treated very well here. Love the pigs. Life is better in the Bahamas, beautiful time in the Bahamas.

- **People:** Approximately three in every ten (29%) compliments received from stopovers were about the positive attitudes of the people like “The locals were amazing. The Bahamians make me feel like home, Thank You. We enjoyed visiting Nassau, downtown and the people. Super friendly and happy people. Everyone here was friendly and helpful, we will deficiently recommend to our friend /family. All the locals were extremely nice. Extremely friendly people. The people are so friendly, kind and helpful. The people here made the trip, so great Bahamians have a good energy. We were so impressed with the hospitality of the people. Every person that we came in contact with was so nice and kind. When we came across happy locals, it was a total delight; we really appreciated the courtesy and warmth; big selling points on holiday in The Bahamas. Everyone is friendly, relaxed and fun to chat with. Everyone here is very nice it makes you love the Bahamas. The people are very polite. Wonderful friendly people everywhere. The people are so friendly here, we always enjoy coming for years, its always fun. Everyone was so friendly on Eleuthera. Everyone is so friendly always smiling, helping. Taxi drivers are the best ever so friendly and information. The people here are incredibly friendly and accommodating, we were asked several times by complete strangers, how our trip was going. Very friendly people in Marsh Harbor. People are always very polite, courteous and sweet. People working in the airport from start to finish were awesome. Everyone in Nassau was very friendly, respectful and glad that we were here. We loved the hospitality. We love how friendly everyone we meet is towards us. Mike was great. Hotel staff was extremely pleasant and always greeted us and anything we wanted they got; everyone in Bahamas was nice and pleasant. Most of the people we encountered were wonderful, cab drivers, excursion team (Bahama Adventures) and most servers at Melia, the BEST. Thank you. Very friendly people more so than Jamaica or Mexico.”
- **Scenery/Sightseeing:** Approximately one in every ten (11%) compliments received from visitors were about the scenery/sightseeing like: “Beautiful scenery, Hope town is lovely. What a beautiful island. Natural beauty is breath taking. Lovely trip, so beautiful. Beautiful place, flora and fauna. It was so stunningly beautiful I couldn't believe it. Beautiful island, got lots a great shots here for my blog, the best.”
- **Beaches:** Roughly one in every twenty (5%) compliments received from stopover visitors were positive comments about the beaches like: “The sand is the softest that we have ever felt. The beaches are gorgeous. The beaches are gorgeous. Beautiful beaches and oceans. Best beaches I have ever been to. Treasure key beach is the best beach out of all the island beaches. Loved beaches (Treasure Cay). Loved it, Lighthouse Beach.”
- **Can't Wait to Come Back:** Approximately one in every thirty (3%) compliments received from stopover visitors were about returning like: “Looking forward to another visit in 2020. Can't wait to start planning to come back. I hate to leave; I will return as soon as I save up enough vacation time at work. Been too many countries and this was by far one of the best; can't wait to return. There was as much or as little to-do as one would want; look forward to coming back.
- **Weather/Climate:** Approximately one in every fifty (2%) compliments received from stopovers were about the weather/climate. “Love the climate. Weather was perfect. The weather was amazing. Happy to be in nicer weather at this time.”

- Of the 718 negative comments received in 2019, the top six complaints made by visitors included: high prices, attitude of the people, hotel facilities, taxes, customer service, and litter.

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

INTERNET SEARCH ENGINES &/OR CONTENT PROVIDERS/ SOCIAL NETWORKS/PHOTO SHARING WEBSITES ISLANDS OF THE BAHAMAS 2019

| | | Bahamas | Nassau/P.I. | Grand Bahama | Out Islands |
|----|-------------|---------|-------------|--------------|-------------|
| 1 | Google | 85% | 85% | 85% | 85% |
| 2 | Facebook | 53% | 53% | 53% | 50% |
| 3 | Instagram | 41% | 41% | 33% | 41% |
| 4 | YouTube | 34% | 33% | 35% | 36% |
| 5 | Snapchat | 20% | 21% | 16% | 17% |
| 6 | Yahoo! | 19% | 20% | 20% | 15% |
| 7 | Pinterest | 17% | 18% | 17% | 17% |
| 8 | LinkedIn | 16% | 17% | 13% | 16% |
| 9 | Twitter | 14% | 14% | 8% | 16% |
| 10 | AOL | 7% | 7% | 6% | 6% |
| 11 | MSN/Hotmail | 5% | 5% | 5% | 6% |
| 12 | Reddit | 5% | 5% | 3% | 5% |

Source: Tour Operator and Media Exit Survey 2019, Research and Statistics Dept., Bahamas Ministry of Tourism

- The most popular Internet search engines, content providers, social media networks, or photo sharing websites used by stopovers that visited The Bahamas were Google (85%), Facebook (53%), Instagram (41%), YouTube (34%), Snapchat (20%), Yahoo! (19%), Pinterest (17%), LinkedIn (16%) and Twitter (14%).
- The percentage of stopover visitors using Google has increased over the years while the percentage using Yahoo has declined over the years. In 2003, approximately half (48%) the stopover visitors to The Bahamas used Yahoo and roughly half (47%) of them used Google but by 2019, approximately two in ten (19%) used Yahoo and eighty-five percent (85%) of stopovers used Google.
- The percentage of stopovers to The Bahamas using Instagram increased significantly over the years. In 2014, approximately one in ten (11%) stopover visitors to The Bahamas used Instagram but in 2019, that percentage increased to approximately four in ten (41%) stopovers.
- Like Yahoo!, the percentage of stopover visitors using AOL has declined over the years. In 2003, thirty-six percent (36%) of stopovers to The Bahamas used AOL, in 2019 however, only 7% of them used this service.

16. Visitor Demographics

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

| | 2019 | 2018 |
|---|-------------|-------------|
| MAIN PURPOSE OF VISIT | | |
| Vacation | 75% | 75% |
| Honeymoon | 5% | 6% |
| Business | 5% | 5% |
| Visiting Friends and Relatives | 3% | 3% |
| DECISION TO VISIT INFLUENCED BY: | | |
| Beaches | 69% | 68% |
| Climate | 56% | 53% |
| Rest and Relaxation | 47% | 46% |
| ACTIVITIES VISITORS INTENDED TO DO | | |
| Enjoy Beaches | 86% | 86% |
| Rest and Relax | 74% | 73% |
| Go Snorkeling | 31% | 34% |
| Shop | 26% | 26% |
| Go to Casinos | 20% | 20% |
| Go on Island Tour | 19% | 19% |
| LIKELY RETURN IN 1-5 YEARS | 86% | 86% |
| LIKELY RECOMMEND TO FRIENDS/REL | 94% | 94% |
| USED ONLINE SERVICE TO BOOK | 78% | 80% |
| USED TRAVEL AGENT | 28% | 30% |
| AGE* | | |
| 25 - 54 years old | 50% | 49% |
| 55 years old or older | 22% | 23% |
| SEX* | | |
| Male | 46% | 47% |
| Female | 47% | 47% |
| RACE | | |
| White | 83% | 85% |
| Black | 4% | 3% |
| Hispanic | 4% | 4% |
| Mixed Race/Mixed Heritage | 2% | 2% |
| Asian/Pacific Islander | 3% | 3% |
| American Indian/Alaska Native | 0% | 0% |
| Other | 0% | 0% |
| EDUCATION | | |
| College Graduate or Above | 72% | 71% |

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

| | 2019 | 2018 |
|--------------------------------|-------------|-------------|
| ANNUAL HOUSEHOLD INCOME | | |
| \$25,001 to \$50,000 | 5% | 5% |
| \$50,001 to \$75,000 | 8% | 9% |
| \$75,001 to \$100,000 | 10% | 11% |
| \$100,001 to \$125,000 | 9% | 9% |
| \$125,001 to \$150,000 | 10% | 8% |
| \$150,001 to \$250,000 | 13% | 12% |
| \$250,001 and over | 15% | 14% |
| PREVIOUS VISITS | | |
| First Time Visitor | 41% | 42% |
| Repeat Visitor | 58% | 56% |
| TRAVELLING PARTY SIZE | | |
| One | 16% | 18% |
| Two | 47% | 48% |
| Three or more | 36% | 33% |
| HOUSEHOLD SIZE | | |
| One | 10% | 12% |
| Two | 43% | 43% |
| Three-Four | 33% | 32% |
| COUNTRY OF ORIGIN | | |
| USA | 81% | 80% |
| Canada | 7% | 8% |
| Europe | 7% | 7% |
| Other Countries | 5% | 5% |
| AVERAGE LENGTH OF STAY | | |
| | 6.4 nts. | 6.7 nts. |

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

*Source: Tour Operator & Media Exit Study 2019 & 2018, Research and Statistics Dept. Bahamas Ministry of Tourism

All numbers are subject to revision.

All information in this brochure is based on the Tour Operator & Media Exit Survey 2019 and the Immigration Card.

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



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