

ISLANDS OF THE BAHAMAS

TOUR OPERATOR & MEDIA SURVEY



RESEARCH AND STATISTICS DEPARTMENT

MINISTRY OF TOURISM

2015

1. Why Did Visitors Come to The Bahamas?

- Approximately three in every four (74%) stopover visitors came to The Bahamas on a vacation;
- 6% of them came on a honeymoon;
- 5% came to visit friends & relatives and 4% of them came on a business trip;

2. What Influenced their Decision to Visit The Bahamas?

TOP INFLUENCES FOR DECIDING TO VISIT THE BAHAMAS ISLANDS OF THE BAHAMAS 2015

	Bahamas	Nassau/P.I.	Grand Bahama	Out Islands
Beaches	69%	69%	69%	69%
Climate	53%	56%	53%	46%
Rest and Relaxation	45%	45%	46%	44%
Friendly People	28%	28%	28%	30%
Hotel Facilities	24%	30%	16%	14%
Never Been Here Before	24%	24%	31%	17%
Easy to Get to	22%	23%	22%	17%
Safety of Islands	19%	17%	21%	21%
Good Package Deals	18%	17%	39%	7%
Exotic Islands	14%	13%	12%	19%
Best Value for Money	11%	9%	24%	5%
Friend recommended Bah.	11%	11%	9%	12%
Heard a lot about Bahamas	10%	11%	10%	8%
Sports	9%	6%	10%	18%
Casinos	9%	13%	5%	1%
Had Friends in Bah.	8%	8%	8%	10%
Wanted to Experience Culture	6%	6%	6%	5%
Travel Agent/TO	5%	5%	6%	5%
Shopping	4%	4%	5%	3%
Nightlife	4%	5%	3%	2%
Saw Ad on TV	3%	4%	1%	1%
Bahamas Website	2%	2%	3%	5%
Junkanoo/Other Bah. Festival	1%	1%	1%	1%
Saw Ad in Magazine	0%	1%	0%	0%
Other	10%	9%	7%	12%
Non Response	5%	4%	7%	4%

Source: Tour Operator and Media Exit Survey 2015, Research and Statistics Dept., Bahamas Ministry of Tourism

- Approximately seven in ten (69%) stopover visitors to the Bahamas were influenced to visit the Bahamas because of the beaches;
- More than half (53%) of them were influenced to visit by the climate;
- 45% of them were influenced to visit by the rest and relaxation that they expected to enjoy in the destination;
- Approximately three in ten (28%) stopovers were influenced to visit because of the friendly people in the Bahamas;
- Approximately one in every four stopovers, were influenced to visit because of the hotel facilities (24%) in the destination or the fact that they had never been to the Bahamas before (24%).

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 2015

	Bahamas	Nassau/P.I.	Grand Bahama	Out Islands
Enjoy Beaches	84%	83%	89%	84%
Rest and Relax	71%	73%	76%	63%
Go Snorkeling	36%	32%	34%	49%
Shop	28%	29%	39%	16%
Go on Island Tour	16%	13%	23%	22%
Go to Casinos	16%	20%	19%	2%
Go Diving	9%	7%	8%	16%
Go Sailing	7%	6%	7%	12%
Go Golfing	6%	5%	6%	10%
Go Deep Sea Fishing	5%	4%	5%	11%
Go Bonefishing	4%	2%	3%	12%
Go to Junkanoo/Oth. Festival	4%	4%	4%	3%
Go Birdwatching	3%	3%	3%	4%
Other Activities	7%	7%	7%	5%
Non Response	5%	4%	7%	4%

Source: Tour Operator and Media Exit Survey 2015, Research and Statistics Dept., Bahamas Ministry of Tourism

- Most of the stopover visitors to The Bahamas intended to enjoy the beaches (84%) and rest and relax (71%);
- Roughly one in three (36%) of them wanted to go snorkeling;
- Approximately three in ten (28%) stopovers intended to go shopping;
- Approximately one in every six stopovers wanted to go on an island tour (16%) or go to the casinos (16%);
- Sporting activities like diving, sailing, bone-fishing, deep sea fishing and golfing were especially of interest to some of the visitors to the Out Islands.

4. When Did the Stopover Visitors Make Their Reservations?

WHEN DID YOU MAKE YOUR RESERVATIONS STOPOVER VISITORS 2015

	All Bah.	Nassau/P.I.	Grand Bah.	Out Isl.
Same Week of Travel	5%	5%	4%	6%
Same Month of Travel	15%	16%	14%	13%
1 to 3 Months Before Travel	44%	47%	47%	36%
4 to 7 Months Before Travel	26%	24%	28%	29%
8 to 12 Months Before Travel	6%	6%	5%	10%
More than 12 months Before Travel	1%	1%	1%	3%
Non-Response	2%	2%	1%	5%

Source: Tour Operator and Media Exit Survey 2015, 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. Roughly four in ten (44%) stopovers, booked their reservations one to three months before travel.

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

DID YOU USE AN ONLINE SERVICE TO BOOK ANY OF YOUR RESERVATIONS ISLANDS OF THE BAHAMAS 2015

	All Bahamas		Nassau/P.I.		Grand Bahama		Out Islands	
	2015	2014	2015	2014	2015	2014	2015	2014
Used Online Service	67%	64%	66%	62%	74%	72%	65%	64%
Did Not Use Online Service	32%	36%	34%	38%	25%	26%	33%	35%
	USA		Canada		Europe		Other Countries	
Used Online Service	68%	65%	60%	61%	63%	61%	68%	58%
Did Not Use Online Service	31%	35%	40%	38%	36%	39%	31%	41%

Source: Tour Operator and Media Exit Survey 2015, Research and Statistics Dept., Bahamas Ministry of Tourism

- Approximately two in every three stopover visitors to the Bahamas Overall (67%), Nassau/Paradise Island (66%), and the Out Islands (65%) used an online service to book some or all of their reservations to the Bahamas. Stopover visitors to Grand Bahama appeared to be more inclined to use an online service to book their reservations than stopovers from Nassau/Paradise Island and the Out Islands. Approximately three in four (74%) stopover visitors to Grand Bahama used an online service to book some or all of their reservations.

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

MOST POPULAR ONLINE BOOKING SERVICES USED STOPOVERS TO THE ISLANDS OF THE BAHAMAS 2015

Expedia.com	Itravel2000.com	Adelmanvacations.com	Marriott.com
Atlantis.com	Carlsonwagonlit.com	Aeroplan.com	Melia.com
Vacationexpress.com	Southwest.com	Airbnb.com	Moorings.com
Jetblue.com	Cheapoair.com	Americanexpress.com	Navtours.com
Sunwing.ca/sunwing.com	Redtag.ca	Bahamasvacations.com	Onetravel.com
Orbitz.com	Selloffvacations.com	Bcdtravel.com	Pleasantolidays.com
Sandals.com	Rwbimini.com	Breezes.com	Rbctravelmanagement.com
Aa.com	Usairwaysvacations.com	Britishairways.com	RCI.com
Travelocity.com	VRBO.com	Caribbean-airlines.com	RIU.com
Cheapcaribbean.com	Signature.ca	Cheapflights.com	Searstravel.ca
Delta.com/deltavacations.com	Hotels.com	Cheaptickets.com	Silverairways.com
Priceline.com	Kayak.com	Classicvacations.com	Starwoodvacationownership.com
Bookit.com	Cheaptickets.com	Cruiseplanners.com	Totaltravelmarine.com
Aircanada.com	Bahamas.com	Dertour.de	Trailfinders.com
Bahamasair.com	Gradcity.com	Egencia.com	Travelonly.com
Westjet.com	Tripcentral.ca	Gradweek.com	Tripadvisor.com
United.com	Doraltravelint.com	Hilton.com	Tui.com
Booking.com	Maritimetravel.ca	Homeaway.com	Vacationstogo.com
Watermakersair.com	Copaair.com	Interturnet.com.br	Vanzile.com
Ba.com	Hotwire.com	Intervalworld.com	Worldtvl.com

This list is not all-inclusive of every online service used. The 1st two columns in yellow contain the top 40 online services; the next two columns are top services listed in alphabetical order. (Source: Immigration Cards and Tour Media Exit Survey, 2015)

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

- Three in ten (30%) stopovers used a travel agent to book some or all of their reservations in 2015.

**ISLANDS OF THE BAHAMAS
USE OF TRAVEL AGENT
2015**

	All Bahamas		Nassau/P.I.		Grand Bahama		Out Islands	
	2015	2014	2015	2014	2015	2014	2015	2014
Used Travel Agent	30%	31%	27%	32%	37%	34%	32%	26%
Did Not Use Travel Agent	69%	68%	72%	67%	62%	65%	65%	73%
	USA		Canada		Europe		Other Countries	
Used Travel Agent	27%	26%	44%	48%	47%	46%	29%	43%
Did Not Use Travel Agent	72%	72%	55%	51%	52%	53%	68%	54%

Source: Tour Operator and Media Exit Survey 2015, Research and Statistics Dept., Bahamas Ministry of Tourism

- Some of the stopovers to the Bahamas that used tour operators/travel agents used the following top 42 TO/TA's: Liberty Travel, American Express Travel, AAA Travel, Club Med, Costco Travel, Flight Centre, Marlin Travel, RCI Travel, Student City, Apple Vacations, Funjet Vacations, GOGO Tours, Travel Impressions, Travel Leaders, Unique Vacations, Sears Travel, Viaggi Del Ventaglio, Pro Travel, Uniglobe Travel, CAA, Thomas Cook, Club Voyages, Majestic Tours, Oracle Travel, Sky Unlimited, Maritz Travel, Carnival Cruise Lines, Altour International, Kuoni, Travel Professionals, Travel Inc, Going Places, VIP Travel, Corporate Travel, Blackbeards Charters, Classic Travel, Autec, STA Travel, Wynford Travel Services, Travel and Transport, Sunquest, Adventure Tours. All of these Tour Operators/Travel Agents were the most popular in 2015.

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
2015**

	Bahamas	Nassau/P.I.	Grand Bahama	Out Islands
Internet	84%	86%	86%	76%
Network Television	8%	9%	9%	6%
Specialty Cable Channels	7%	7%	7%	4%
Specialty News Channels	5%	5%	5%	4%
Radio	3%	4%	2%	2%

Source: Tour Operator and Media Exit Survey 2015, Research and Statistics Dept. Ministry of Tourism

- Roughly, eight in ten (84%) stopover visitors used the Internet as the electronic media most frequently used when planning their vacation. Approximately one in ten (8%) stopover visitors used Network television the most when planning their vacation and approximately one in every thirty (3%) of them used the radio when planning their vacations.

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

TOP 20 FAVORITE TELEVISION NETWORKS/STATIONS ISLANDS OF THE BAHAMAS 2015

Bahamas		% Informants	Nassau/P.I.	% Informants
1	ESPN	21%	ESPN	22%
2	ABC	20%	ABC	21%
3	NBC	19%	NBC	20%
4	CNN	16%	CNN	17%
5	HBO	14%	HBO	14%
6	CBS	14%	CBS	14%
7	HGTV (Home & Garden Network)	13%	HGTV (Home & Garden Network)	12%
8	FOX	10%	FOX	10%
9	TNT	7%	TNT	7%
10	FOOD (Food Network)	7%	FOOD (Food Network)	7%
11	DISC (Discovery Channel)	7%	DISC (Discovery Channel)	6%
12	FOXN	6%	FOXN	6%
13	BRAVO	5%	BRAVO	6%
14	USA	5%	TLC (The Learning Channel)	5%
15	TLC (The Learning Channel)	5%	USA	5%
16	E! (E! Entertainment)	4%	E! (E! Entertainment)	4%
17	HIST(History Channel)	4%	SHW (Showtime)	4%
18	SHW (Showtime)	4%	LIFE (Lifetime)	4%
19	LIFE (Lifetime)	3%	HIST(History Channel)	4%
20	TBS	3%	DSNY (Disney Channel)	3%
Grand Bahama		% Informants	Out Islands	% Informants
1	HBO	19%	ESPN	24%
2	NBC	18%	ABC	19%
3	ABC	17%	NBC	16%
4	HGTV (Home & Garden Network)	16%	CNN	15%
5	ESPN	15%	CBS	14%
6	CBS	15%	HGTV (Home & Garden Network)	13%
7	CNN	13%	FOX	12%
8	FOOD (Food Network)	8%	HBO	9%
9	FOX	7%	FOXN	8%
10	DISC (Discovery Channel)	6%	DISC (Discovery Channel)	8%
11	TNT	6%	TNT	8%
12	USA	5%	FOOD (Food Network)	6%
13	CBC (Canada)	4%	Other Sports Networks	5%
14	BRAVO	4%	BRAVO	4%
15	FOXN	4%	TLC (The Learning Channel)	4%
16	TLC (The Learning Channel)	4%	TBS	4%
17	Other Sports Networks	4%	Other Movie Networks	4%
18	SHW (Showtime)	4%	Other News Stations	4%
19	A & E (Arts & Entertainment Network)	4%	HIST(History Channel)	4%
20	LFMN (Lifetime Movie Network)	3%	USA	3%

Source: Tour Operator and Media Exit Survey 2015, Research and Statistics Dept. Ministry of Tourism

- Approximately three in every four (76%) 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 seven in every ten (72%) stopovers to the Out islands watched television compared to approximately eight in ten stopovers to Nassau/Paradise Island (77%) and Grand Bahama (80%).

- The favorite television station watched by stopover visitors to the Bahamas Overall was ESPN. ESPN has been the top television station watched by stopover visitors to the Bahamas since 2011. In 2010, NBC was the number one television station watched by stopover visitors to the Bahamas and ESPN was in the number three spot.
- In 2015, approximately two in every ten stopovers to the Bahamas who watched television watched ESPN (21%), ABC (20%) or NBC (19%), virtually unchanged from 2014. Other popular networks watched by stopover visitors to the Bahamas included CNN, HBO and CBS. Visitors to the Bahamas also watched other movie and entertainment channels like (Showtime, A & E, E!Entertainment, Lifetime, etc.), home and garden and food channels like (HGTV, Food Network) and educational channels like (DISC Discovery Channel, TLC, HIST).

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

Stopover visitors to the Bahamas were most likely to watch television between the hours of 6 pm to 10:59 pm at night. The hours of 8:00 pm to 8:59 pm were of course prime time and approximately four in ten (39%) stopovers watched television during that time.

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

PRINT MEDIA USED MOST FREQUENTLY WHEN PLANNING A VACATION

ISLANDS OF THE BAHAMAS

2015

	Bahamas		Nassau/P.I.		Grand Bahama		Out Islands	
	2015	2014	2015	2014	2015	2014	2015	2014
Newspapers	36%	38%	37%	40%	36%	39%	34%	30%
Magazines	69%	69%	68%	67%	65%	68%	75%	78%
Other Print Media	8%	11%	8%	12%	8%	10%	7%	8%

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 2015

Approximately one in six (16%) stopover visitors to the Bahamas used print media when they were planning their vacations. The number of people who used print media when planning their vacations has declined over the years. In 2010, 25% of stopover visitors to the Bahamas used print media to plan their vacations.

Of these stopover visitors to The Bahamas who used print media to plan their vacations, roughly four in ten (36%) used newspapers and approximately seven in ten (69%) used magazines.

11. Use of Newspapers

Although only 16% of stopover visitors used print media when planning their vacations, 45% 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 from 64% in 2010, 60% in 2012, 55% in 2013, and 50% in 2014.

TOP 20 FAVORITE NEWSPAPERS READ BY VISITORS ISLANDS OF THE BAHAMAS 2015

Bahamas		% Informants	Nassau/P.I.		% Informants
1	New York Times	25%	New York Times	26%	
2	USA Today	25%	USA Today	25%	
3	Wall Street Journal	16%	Wall Street Journal	16%	
4	Other	9%	Other	9%	
5	Washington Post	8%	Washington Post	9%	
6	New York Post	7%	New York Post	8%	
7	Daily News	6%	Daily News	7%	
8	Toronto Star	6%	Toronto Star	6%	
9	Globe & Mail	5%	Globe & Mail	5%	
10	Boston Globe	4%	Boston Globe	5%	
11	Times	4%	Post	5%	
12	Post	3%	Times	3%	
13	Miami Herald	2%	Newsday	3%	
14	Atlanta Journal Constitution	2%	New York Daily News	3%	
15	Newsday	2%	Chicago Tribune	2%	
16	Chicago Tribune	2%	Atlanta Journal Constitution	2%	
17	New York Daily News	2%	Dallas Morning News	2%	
18	Dallas Morning News	2%	Miami Herald	2%	
19	Sun/The Sun News	1%	Sun/The Sun News	1%	
20	Orlando Sentinel	1%	Orlando Sentinel	1%	
Grand Bahama		% Informants	Out Islands		% Informants
1	USA Today	22%	New York Times	29%	
2	New York Times	18%	USA Today	26%	
3	Wall Street Journal	13%	Wall Street Journal	21%	
4	Other	12%	Other	9%	
5	Daily News	8%	Washington Post	7%	
6	Washington Post	7%	Miami Herald	5%	
7	Toronto Star	6%	Toronto Star	4%	
8	Times	5%	Boston Globe	4%	
9	New York Post	5%	Globe & Mail	4%	
10	Globe & Mail	4%	New York Post	4%	
11	Sun/The Sun News	3%	Times	3%	
12	Miami Herald	3%	Atlanta Journal Constitution	3%	
13	Winnipeg Free Press	2%	Daily News	3%	
14	Boston Globe	2%	Dallas Morning News	3%	
15	La Press (Montreal, Quebec)	2%	Post	2%	
16	Calgary Herald	1%	Chicago Tribune	2%	
17	Atlanta Journal Constitution	1%	Sun Sentinel	2%	
18	Dallas Morning News	1%	Palm Beach Post	2%	
19	National Post	1%	Denver Post	2%	
20	Ottawa Citizen	1%	New York Daily News	1%	

Source: Tour Operator and Media Exit Survey 2015, Research and Statistics Dept. Ministry of Tourism

- The most popular newspaper read by stopover visitors to the Bahamas was the New York Times. One in every four (25%) stopovers who read newspapers read the New

York Times. USA Today and the Wall Street Journal were the next two popular newspapers read by stopover visitors.

12. Use of Magazines

Although only 16% of stopover visitors used print media when planning their vacations approximately half (52%) 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, and 57% in 2014.

TOP 20 FAVORITE MAGAZINES READ BY VISITORS ISLANDS OF THE BAHAMAS 2015

Bahamas		% Informants	Nassau/P.I.		% Informants
1	People	24%	People		25%
2	Better Homes & Gardens (BHG)	16%	Better Homes & Gardens (BHG)		16%
3	In Style	11%	In Style		12%
4	Good Housekeeping	11%	Good Housekeeping		11%
5	National Geographic (Explorer)	10%	Men's Health		11%
6	Men's Health	10%	Sports Illustrated		10%
7	Cosmopolitan (Cosmo)	9%	National Geographic (Explorer)		10%
8	Food & Wine	9%	Cosmopolitan (Cosmo)		9%
9	Sports Illustrated	9%	Food & Wine		9%
10	Glamour	8%	Time Magazine		8%
11	Time Magazine	8%	Glamour		8%
12	Bon Appetit	8%	Bon Appetit		8%
13	Southern Living	8%	O (Oprah)		7%
14	Reader's Digest	7%	Southern Living		7%
15	Architectural Digest	7%	Architectural Digest		7%
16	O (Oprah)	6%	Reader's Digest		7%
17	Conde Nast Travel	6%	Travel & Leisure		6%
18	Travel & Leisure	6%	Other Magazines		6%
19	Other Magazines	6%	Conde Nast Travel		6%
20	Woman's Day	5%	US/US Weekly		6%
Grand Bahama		% Informants	Out Islands		% Informants
1	People	26%	People		22%
2	Better Homes & Gardens (BHG)	22%	Better Homes & Gardens (BHG)		14%
3	Good Housekeeping	14%	In Style		10%
4	Cosmopolitan (Cosmo)	12%	Food & Wine		10%
5	National Geographic (Explorer)	11%	National Geographic (Explorer)		10%
6	Food & Wine	9%	Southern Living		9%
7	Reader's Digest	9%	Coastal		8%
8	Glamour	9%	Bon Appetit		8%
9	In Style	9%	Men's Health		8%
10	Men's Health	8%	Sports Illustrated		8%
11	Woman's Day	8%	Cosmopolitan (Cosmo)		8%
12	Southern Living	8%	Conde Nast Travel		8%
13	O (Oprah)	7%	Architectural Digest		8%
14	Other Magazines	7%	Good Housekeeping		7%
15	Time Magazine	7%	Glamour		7%
16	Shape	6%	Time Magazine		7%
17	Bon Appetit	6%	Travel & Leisure		6%
18	Travel & Leisure	6%	Reader's Digest		6%
19	Economist	5%	Fly Fishing		6%
20	Conde Nast Travel	5%	Forbes		6%

Source: Tour Operator and Media Exit Survey 2015, Research and Statistics Dept. Ministry of Tourism

13. How Did Stopover Visitors Rate Their Product Experiences?

**PRODUCT SATISFACTION RATINGS
ISLANDS OF THE BAHAMAS
2015**

All Bahamas	Excellent	Good	OK	Not So Good	Awful	DK	Categories Combined	
							Excellent or Good	Not So Good or Awful
Beaches	52%	25%	14%	2%	1%	7%	77%	2%
Attitude of People	49%	27%	14%	3%	2%	5%	76%	5%
Climate	46%	28%	18%	3%	1%	5%	73%	4%
Food in Restaurants	26%	33%	23%	4%	1%	12%	59%	6%
Easy to Get to	28%	31%	25%	4%	1%	11%	60%	5%
Restaurant Service	28%	30%	22%	6%	2%	13%	58%	8%
Hotel Service	29%	26%	18%	5%	2%	20%	56%	7%
Hotel Rooms	24%	28%	23%	5%	7%	19%	52%	12%
Food in Hotels	22%	27%	22%	6%	2%	22%	49%	8%
Overall Value for Money	19%	29%	33%	9%	3%	8%	48%	12%
Value for Money in Hotels	16%	23%	29%	8%	3%	20%	39%	11%
Bahamas Overall	40%	36%	17%	2%	1%	5%	76%	3%

Includes cruise stopover visitors e.g. in GBI

Source: Tour Operator and Media Exit Survey 2015, Research and Statistics Dept., Bahamas Ministry of Tourism

- In 2015, three in every four (76%) stopovers thought that the Bahamas Overall was Excellent or Good.
- The beaches, attitude of the people and the climate received among the highest product satisfaction ratings of the 12 ratings asked of stopover visitors to the Bahamas.
- Approximately eight in every ten (77%) stopovers thought that the beaches were Excellent or Good and approximately seven in ten (73%) thought that the climate was Excellent or Good.
- Three in every four (76%) stopovers thought that the attitudes of the people were excellent or good.
- Roughly six in ten stopovers thought that the ease of getting to the destination (60%), the food in restaurants (59%), restaurant service (58%) and the hotel service (56%) were excellent or good.
- Roughly half the stopovers thought that the hotel rooms (52%) and the food in the hotels (49%) were excellent or good.
- Roughly half (48%) of the stopovers thought that the overall value for money was excellent or good but approximately one in every ten (12%) stopovers thought that it was not so good or awful.
- Approximately four in ten (39%) 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		
	2015	2014		2015	2014
General	36%	33%	Prices (neg)	15%	14%
People	24%	25%	Hotel (neg)	13%	14%
Scenery/Sightseeing	8%	8%	People (neg)	11%	10%
Beaches	5%	5%	Litter (neg)	7%	5%
Will Return	4%	4%	Food (neg)	7%	6%
Hotel	3%	3%	Service (neg)	7%	6%
No. of Comments	2,733	3,019	No. of Comments	1,113	1,148

In 2014, 2% of the complaints received were about taxes but in 2015, 5% of the complaints received were about Taxes/VAT.

*Source: Tour Operator & Media Exit Study 2015 & 2014, Research and Statistics Dept. Bahamas Ministry of Tourism

- Of the 2,733 positive comments received in 2015 from the survey, the top six compliments made by visitors included General Comments, people, scenery/sightseeing, beaches, comments about returning and hotel.
- **General:** Roughly one in every three (36%) compliments received from visitors were general comments like: “Wonderful vacation. This is my third time, so I mostly know what to expect. I expect a lot and get it. We had an amazing vacation. Always welcoming, the Bahamas are wonderful. The whole vacation experience was amazing. Please do not change a thing. Thanks for an awesome vacation. I love the Bahamas, my favorite place in the world and I've been all over the Caribbean. I am a sister of charity and I worked in Nassau for 42 years, and when I come for a visit, it is like coming home. Well worth celebrating my 50th birthday here in the Bahamas. I enjoyed Grand Bahama. Impressed with health care system, school uniform, method for handling school. Don't want this trip to come to an end.”
- **People:** Approximately one in every four (24%) compliments received from stopover visitors were about the positive attitudes of the people like “The people are really what makes my trips the best cannot find nicer people anywhere else and I have travelled extensively. Car driver very polite. The people were warm and helpful and friendly. People extremely friendly and helpful knowledgeable. Everyone happy to talk to us and very friendly. Nice people none of the locals ever seemed irritated or tired of dealing with tourist. Very pleasant people. People are very friendly and polite, Bahama islands South Andros very welcoming. We had a perfect beautiful celebration of our 25th Anniversary. The folks we met were " Very " friendly and engaging!”
- **Scenery/Sightseeing:** One in every twelve (8%) compliments received from visitors were about the scenery/sightseeing like: “The Exumas are an exotic and stunning destination. It's like a secret no one knows about. Gorgeous. Amazing landscape. Bimini is really a beautiful island. Always wanted to visit, great. The beauty makes up for everything else. It's not a huge place but beautiful, like it.

Andros is beautiful. Beautiful views and unspoiled nature. I appreciate the natural, undeveloped beauty of the land on Andros. Lovely Island (Eleuthera). The islands are so beautiful.”

- **Beaches:** One in every twenty (5%) compliments received from stopover visitors were positive comments about the beaches like: “Amazing beaches. Great beaches. The beaches are the most beautiful in the world. Clean easily accessible public beaches. Magnificent beaches. The Gold Rock Beach was beautiful. Beautiful secluded beaches. Only pictures can describe Bahamas beaches.”
- **Will Return:** Approximately one in every twenty (4%) compliments received from stopover visitors were about the fact that they intended to return like: “Very nice vacation, will be back. Wonderful, lovely, be back soon. We enjoyed our time and want to return soon. We want to see the place/beach from the film Pirates of the Caribbean, we will return to the island. Had such an amazing trip. Looking forward to planning others. Nice relaxing little island, reminds me a little of our home. Weather is basically the same and few things similar. Muchas gracias. Tremendous, have so much to say but this says it all, we will be back in the summer. We love the island, looking to return many more times.”
- **Hotel:** Approximately one in every thirty (3%) compliments received from stopovers were about the hotel where they stayed like: “We loved everything about Sandals Emerald Bay. Resort world is nice, the town is where you get that island feel and taste. Terrific stay at the hotel, the resort was nice did not expect for it to look that great. On my honeymoon with my husband and I stayed at this beautiful resort. The hotel is very nice. We had a great trip and I look forward to staying at Small Hope again. We love Small Hope Lodge. Kamalame Cay is amazing. Our stay at South Andros Beach Club was wonderful. Our stay at the Conch Inn room was good. Memories is a lovely property. We had an amazing time at Memories. Very pleased with friendliness of hotel staff. Hotel wait staff and housekeeping were very friendly and helpful. Atlantis is the best place to be (in our opinion). Staff at Cove excellent. I was able to experience the scenery of the Ashram. Melia hotel excellent. Lovely Atlantis Resort and beachfront Rob Lake magic show (at Atlantis), best experience yet in The Bahamas. Will come back for this. Loved the all inclusive amenities at RIU hotel. We love Breezes Bahamas. Resort had a wide range of activities. It was really enjoyable, the Melia Resort. The food service and friendliness of the staff at the Cove was top shelf.”
- Of the 1,113 negative comments received in 2015, the top six complaints made by visitors included: high prices, complaints about their hotel, poor attitudes of the people, litter, food (i.e. prices & quality), and poor service.

15. Visitor Demographics

DEMOGRAPHIC & PSYCHOGRAPHIC PROFILE ISLANDS OF THE BAHAMAS

	2015	2014
MAIN PURPOSE OF VISIT		
Vacation	74%	73%
Business	4%	5%
Honeymoon	6%	5%
Visiting friends and relatives	5%	5%
DECISION TO VISIT INFLUENCED BY:		
Beaches	69%	66%
Climate	53%	57%
Rest and Relaxation	45%	43%
ACTIVITIES VISITORS INTENDED TO DO		
Enjoy Beaches	84%	83%
Rest and Relax	71%	73%
Go Snorkeling	36%	34%
Shop	28%	30%
Go on Island Tour	16%	16%
Go To Casinos	16%	20%
LIKELY RETURN IN 1-5 YEARS	88%	88%
LIKELY RECOMMEND TO FRIENDS/REL	95%	95%
USED ONLINE SERVICE TO BOOK	67%	64%
USED TRAVEL AGENT	30%	31%
AGE*		
25 - 54 years old	52%	53%
55 years old or older	24%	23%
SEX*		
Male	48%	49%
Female	48%	48%
RACE		
White	80%	81%
Black	7%	6%
Hispanic	4%	5%
Mixed Race/Mixed Heritage	3%	3%
Asian/Pacific Islander	3%	3%
American Indian/Alaska Native	0%	0%
Other	1%	1%
EDUCATION		
College Graduate or Above	67%	67%
ANNUAL HOUSEHOLD INCOME		
\$25,001 to \$50,000	8%	9%
\$50,001 to \$75,000	10%	11%
\$75,001 or more	57%	57%
PREVIOUS VISITS		
First Time Visitor	43%	40%
Repeat Visitor	56%	59%
TRAVELLING PARTY SIZE		
One	17%	17%
Two	45%	44%
Three or more	36%	35%
HOUSEHOLD SIZE		
One	11%	11%
Two	42%	44%
Three-Four	35%	32%
COUNTRY OF ORIGIN		
USA	77%	78%
Canada	10%	10%
Europe	6%	6%
Other Countries	6%	7%
AVERAGE LENGTH OF STAY	6.7 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 2015 & 2014, Research and Statistics Dept. Bahamas Ministry of Tourism
 In 2015, Likelihood to return: Very Likely=56.5% and Somewhat Likely=31.1%, Likelihood to Recommend: VL= 70.5% and SL=24.1%. Likelihood of not returning: Somewhat Unlikely to return=7.6% and Not at all likely to return=3.0%
 Likelihood of not recommending: Somewhat Unlikely to recommend=3.0% and Not at all likely to recommend=0.9%
 All numbers are subject to revision.

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

INTERNET SEARCH ENGINES &/OR CONTENT PROVIDERS/ SOCIAL NETWORKS/PHOTO SHARING WEBSITES ISLANDS OF THE BAHAMAS 2015

		Bahamas	Nassau/P.I.	Grand Bahama	Out Islands
1	Google	81%	82%	87%	77%
2	Facebook	49%	48%	50%	49%
3	Yahoo	27%	29%	26%	23%
4	Youtube	27%	26%	29%	29%
5	Instagram	21%	21%	18%	23%
6	Pinterest	15%	14%	16%	15%
7	Linkedin	13%	14%	11%	12%
8	Twitter	11%	11%	10%	15%
9	MSN/Hotmail	9%	9%	7%	10%
10	AOL	8%	7%	8%	8%
11	Bing	7%	7%	6%	7%

Source: Tour Operator and Media Exit Survey 2015, 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 (81%), Facebook (49%), Yahoo (27%), YouTube (27%), Instagram (21%), Pinterest (15%), LinkedIn (13%) and Twitter (11%).
- 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 2015, approximately eight in ten (81%) stopovers used Google and roughly three in ten (27%) used Yahoo.
- The percentage of stopovers to the Bahamas using Instagram increased significantly between 2014 (11%) and 2015 (21%).
- Like Yahoo, the percentage of stopover visitors using AOL has declined over the years. In 2003, roughly one in three (36%) stopovers to the Bahamas used AOL.

All information in this brochure is based on the Tour Operator & Media Exit Survey 2015 and the Immigration Card, date of publication December 6, 2016.



Research and Statistics Department
Bahamas Ministry of Tourism
P.O. Box N-3701
Nassau, Bahamas
gdelancy@bahamas.com
Tel: 242-302-2094
www.Tourismtoday.com and www.bahamas.com