

ISLANDS OF THE BAHAMAS

TOUR OPERATOR & MEDIA SURVEY

SUMMARY



RESEARCH AND STATISTICS DEPARTMENT
MINISTRY OF TOURISM
2016

TABLE OF CONTENTS

	Page No.
1. Why Did Visitors Come to The Bahamas?	3
2. What Influenced their Decision to Visit The Bahamas?	3
3. What Activities Did They Intend to Do While in The Bahamas?	4
4. When Did the Stopover Visitors Make Their Reservations?	5
5. Did Stopovers Use an Online Service to Book Their Reservations?	5
a) Which Online Services Were Most Popular	6
6. Did Stopover Visitors to the Bahamas use a Tour Operator/Travel Agent to Book Any of Their Reservations?	6
a) Which Tour Operators/Travel Agents Were Most Popular	6
7. What Electronic Media Did Stopover Visitors to The Bahamas Use Most When Planning Their Vacation?	7
8. What Were the Favorite Television Stations Watched by Stopover Visitors to The Bahamas?	8
9. What Time Were Stopover Visitors Most Likely to Watch Television?	9
10. Did Stopovers Use Print Media When They Were Planning Their Vacations?	9
11. Use of Newspapers	10
12. Use of Magazines	12
13. How Did Stopover Visitors Rate Their Product Experiences?	13
14. What Were the Top Compliments and Complaints Given by Stopovers to The Bahamas	14
15. What Internet Search Engines, Content Providers, Social Networks, or Photo Sharing Websites Did Stopover Visitors to the Bahamas Use?	17
16. Visitor Demographics	18

1. Why Did Visitors Come to The Bahamas?

- Approximately three in every four (74%) stopover visitors came to The Bahamas on a vacation;
- One in every twenty (5%) stopovers came on a honeymoon, and one in every twenty-five came to visit friends & relatives (4%) or on a business trip (4%).

2. What Influenced their Decision to Visit The Bahamas?

TOP INFLUENCES FOR DECIDING TO VISIT THE BAHAMAS ISLANDS OF THE BAHAMAS 2016

	Bahamas	Nassau/P.I.	Grand Bahama	Out Islands
Beaches	65%	65%	69%	65%
Climate	51%	52%	50%	47%
Rest and Relaxation	45%	43%	50%	45%
Friendly People	28%	28%	28%	30%
Hotel Facilities	24%	29%	17%	15%
Never Been Here Before	23%	23%	29%	19%
Easy to Get to	22%	23%	23%	20%
Safety of Islands	19%	18%	21%	20%
Good Package Deals	18%	16%	36%	10%
Exotic Islands	14%	13%	13%	20%
Best Value for Money	11%	9%	25%	7%
Sports	9%	7%	8%	19%
Friend recommended Bah.	9%	9%	11%	11%
Casinos	9%	12%	4%	2%
Heard a lot about Bahamas	9%	9%	9%	8%
Had Friends in Bah.	7%	7%	7%	10%
Wanted to Experience Culture	6%	6%	9%	6%
Travel Agent/TO	4%	3%	5%	4%
Shopping	4%	4%	4%	2%
Nightlife	3%	3%	3%	2%
Saw Ad on TV	2%	3%	0%	1%
Bahamas Website	2%	2%	2%	1%
Junkanoo/Other Bah. Festival	1%	1%	0%	1%
Saw Ad in Magazine	0%	0%	0%	1%
Other	11%	11%	7%	11%
Non Response	6%	6%	7%	6%

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

- Stopover visitors to the Bahamas were primarily influenced to visit the Bahamas by the beaches, the climate and the rest and relaxation that they expected to enjoy in the destination. Approximately two in three (65%) stopover visitors to the Bahamas were influenced to visit because of the beaches and roughly half of them

were influenced to visit because of the climate (51%) and the rest and relaxation (45%) that they expected to enjoy in the destination;

- Stopovers were also influenced to visit because of a myriad of other things including the friendly people that they expected to meet (or had already met during past trips to the Bahamas) and the hotel facilities in the destination. Approximately three in every ten (28%) stopovers were influenced to visit because of the friendly people in the Bahamas and approximately one in every four (24%) were influenced to visit because of the hotel facilities in the destination;
- The casino was of particular interest to approximately one in ten (12%) stopovers to Nassau/Paradise Island;
- Good package deals and best value for money were of particular interest to stopovers to Grand Bahama, an island that tended to attract a more budget oriented consumer than Nassau/Paradise Island and the Out Islands;
- 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 2016

	Bahamas	Nassau/P.I.	Grand Bahama	Out Islands
Enjoy Beaches	83%	83%	88%	80%
Rest and Relax	72%	73%	77%	66%
Go Snorkeling	34%	30%	38%	46%
Shop	30%	30%	41%	19%
Go to Casinos	18%	23%	16%	4%
Go on Island Tour	16%	14%	20%	23%
Go Diving	9%	7%	8%	15%
Go Sailing	7%	5%	9%	13%
Go Deep Sea Fishing	5%	4%	4%	10%
Go Golfing	4%	3%	5%	7%
Go Bonefishing	4%	2%	2%	11%
Go to Junkanoo/Oth. Festival	3%	3%	3%	3%
Go Birdwatching	3%	2%	4%	5%
Other Activities	7%	7%	7%	7%
Non Response	6%	6%	7%	5%

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

- Most of the stopover visitors to The Bahamas intended to enjoy the beaches (83%) and rest and relax (72%);
- Approximately one in three (34%) of them wanted to go snorkeling and three in ten (30%) intended to go shopping;
- Approximately two in ten (18%) stopovers wanted to go to the casinos and approximately one in every six (16%) wanted to go on an island tour;
- 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 2016

	All Bah.	Nassau/P.I.	Grand Bah.	Out Isl.
Same Week of Travel	6%	6%	6%	6%
Same Month of Travel	13%	12%	13%	14%
1 to 3 Months Before Travel	45%	47%	43%	38%
4 to 7 Months Before Travel	26%	25%	27%	25%
8 to 12 Months Before Travel	7%	6%	8%	10%
More than 12 months Before Travel	1%	1%	1%	3%
Non-Response	3%	2%	2%	4%

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

- Stopover visitors to The Bahamas primarily booked their reservations anywhere from the same month of travel to seven months in advance of travel. Almost half (45%) the stopovers, booked their reservations one to three months before travel.

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

DID YOU USE AN ONLINE SERVICE TO BOOK ANY OF YOUR RESERVATIONS ISLANDS OF THE BAHAMAS 2016

	All Bahamas		Nassau/P.I.		Grand Bahama		Out Islands	
	2016	2015	2016	2015	2016	2015	2016	2015
Used Online Service	68%	67%	67%	66%	77%	74%	65%	65%
Did Not Use Online Service	30%	32%	32%	34%	21%	25%	32%	33%
	USA		Canada		Europe		Other Countries	
Used Online Service	69%	68%	62%	60%	61%	63%	67%	68%
Did Not Use Online Service	29%	31%	36%	40%	37%	36%	31%	31%

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

- Approximately two in every three stopover visitors to the Bahamas Overall (68%), Nassau/Paradise Island (67%), 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 (77%) 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
2016**

Expedia.com	RCI.com	Aaa.com	Southernair.com
Atlantis.com	VRBO.com	Airmiles.com	Studentcity.com
Delta.com/deltavacations.com	Priceline.com	Applevacations.com	Tickettogo.com
Aa.com	Bookit.com	Bahamar.com	Travelzoo.com
Jetblue.com	Americanexpress.com	Bestfares.com	Usairwaysvacations.com
Sandals.com	Bahamas.com	Bestwestern.com	Vacationstogo.com
Bahamasair.com	Cheaptickets.com	Carlsonwagonlit.com	
Travelocity.com	Cheapflights.com	Cheapair.com	
United.com	Wyndham.com	Clubmed.com/clubmed.ca	
Orbitz.com	Westjet.com	Comfortsuites.com	
Sunwing.ca/sunwing.com	Spg.com	Copaair.com	
Melia.com	Homeaway.com	Costco.com	
Cheapcaribbean.com	Intervalinternational.com	Fourseasons.com	
Breezes.com	Bahamasvacations.com	Islandoutpost.com	
Aircanada.com	Britishairways.com/ba.com	Itravel2000.com	
Hilton.com	Tripadvisor.com	Kamalame.com	
Southwest.com	Hotwire.com	Libertytravel.com	
Kayak.com	Spiritair.com	Omegaworldtravel.com	
Riu.com	Regtag.ca	Selloffvacation.com	
Hotels.com	Grandbahamavacations.com	Smallhope.com	

This list is not all-inclusive of every online service used. The 1st two columns in yellow contain the top 40 online services; the next two columns are top services listed in alphabetical order. (Source: Tour Media Exit Survey, 2016)

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 of their reservations in 2016.

**ISLANDS OF THE BAHAMAS
USE OF TRAVEL AGENT
2016**

	All Bahamas		Nassau/P.I.		Grand Bahama		Out Islands	
	2016	2015	2016	2015	2016	2015	2016	2015
Used Travel Agent	28%	30%	27%	27%	33%	37%	27%	32%
Did Not Use Travel Agent	70%	69%	72%	72%	64%	62%	69%	65%
	USA		Canada		Europe		Other Countries	
Used Travel Agent	24%	27%	43%	44%	46%	47%	32%	29%
Did Not Use Travel Agent	74%	72%	54%	55%	51%	52%	64%	68%

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

- Some of the stopovers to the Bahamas that used tour operators/travel agents used the following top TO/TA's: AAA Travel /Triple A/Triple AAA, Flight Centre, Liberty Travel, Sandals/Sandals Vacations, Club Med, American Express Travel, Majestic Tours, Omega World Travel, Marlin Travel, Apple Vacations, Carlson Wagonlit Travel, Anthony Travel, Angler Adventures, Funjet Vacations, RCI/RCI

Vacations/Travel, Atlantis Travel, Costco Travel, CAA Travel, Trail Finders, Air Canada Vacations, Apple Tours, Dan Knowles Tours, Travel Vacations, Travel Leaders, Maritz, Student City, 11th Hour Vacations, Yellow Dog, Atlantic Travel, Black Beard Cruises/Charters, GOGO Worldwide Vacations/GOGO Tours, Vacation to Go, Destinations, Trip Central, Martin Travel, A+ Travel/A Plus Travel, Casino Connections, Delta Connections, Globe Travel, and Travel Express.

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 2016

	Bahamas	Nassau/P.I.	Grand Bahama	Out Islands
Internet	83%	83%	87%	78%
Network Television	9%	10%	9%	6%
Specialty Cable Channels	6%	6%	8%	5%
Specialty News Channels	6%	7%	6%	5%
Radio	2%	2%	2%	2%

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

- Approximately, eight in ten (83%) stopover visitors used the Internet as the electronic media most frequently when planning their vacation. Approximately one in ten (9%) stopover visitors used Network television the most when planning their vacation and approximately one in every fifteen of them used specialty cable channels (6%) or specialty news channels (6%).

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

**TOP 20 FAVORITE TELEVISION NETWORKS/STATIONS
ISLANDS OF THE BAHAMAS
2016**

Bahamas		% Informants	Nassau/P.I.		% Informants
1	ESPN	22%	ESPN		23%
2	NBC	18%	NBC		19%
3	ABC	17%	CNN		18%
4	CNN	17%	ABC		17%
5	HGTV (Home & Garden Network)	15%	HGTV (Home & Garden Network)		15%
6	HBO	13%	CBS		13%
7	CBS	13%	HBO		13%
8	FOX	11%	FOX		11%
9	FOXN	8%	FOXN		9%
10	FOOD (Food Network)	7%	FOOD (Food Network)		7%
11	DISC (Discovery Channel)	6%	DISC (Discovery Channel)		7%
12	TNT	6%	TNT		6%
13	BRAVO	5%	BRAVO		5%
14	USA	4%	USA		5%
15	HIST(History Channel)	4%	HIST(History Channel)		5%
16	TBS	4%	TBS		4%
17	TLC (The Learning Channel)	3%	LIFE (Lifetime)		4%
18	MSNBC	3%	DSNY (Disney Channel)		4%
19	LIFE (Lifetime)	3%	MSNBC		3%
20	DSNY (Disney Channel)	3%	TLC (The Learning Channel)		3%
Grand Bahama		% Informants	Out Islands		% Informants
1	HGTV (Home & Garden Network)	17%	ESPN		22%
2	HBO	17%	ABC		20%
3	ESPN	16%	NBC		18%
4	ABC	16%	CNN		16%
5	NBC	14%	HGTV (Home & Garden Network)		14%
6	CNN	14%	CBS		12%
7	CBS	13%	FOX		12%
8	FOX	8%	HBO		12%
9	FOOD (Food Network)	7%	FOOD (Food Network)		7%
10	TLC (The Learning Channel)	6%	FOXN		7%
11	DISC (Discovery Channel)	6%	TNT		7%
12	TNT	5%	DISC (Discovery Channel)		7%
13	MSNBC	5%	BRAVO		6%
14	FOXN	4%	Other Movie Networks		5%
15	BRAVO	4%	TBS		4%
16	USA	4%	E! (E! Entertainment)		3%
17	A & E (Arts & Entertainment Network)	4%	PBS (Public Broadcasting Station)		3%
18	HIST(History Channel)	4%	MSNBC		3%
19	TBS	4%	HIST(History Channel)		3%
20	SHW (Showtime)	3%	TLC (The Learning Channel)		3%

Source: Tour Operator and Media Exit Survey 2016, 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 (70%) stopovers to the Out islands watched television compared to approximately eight in ten to Nassau/Paradise Island (78%) and Grand Bahama (79%).

- 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 2016, approximately two in every ten stopovers to the Bahamas who watched television watched ESPN (22%), NBC (18%), ABC (17%) or CNN (17%). Other popular networks watched by stopover visitors to the Bahamas included HGTV, 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 (Food Network), children’s channels (DSNY/Disney Channel) and educational channels like (DISC Discovery Channel, TLC/The Learning Channel, HIST/The History Channel).

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

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

2016

	Bahamas		Nassau/P.I.		Grand Bahama		Out Islands	
	2016	2015	2016	2015	2016	2015	2016	2015
Newspapers	33%	36%	34%	37%	29%	36%	32%	34%
Magazines	73%	69%	73%	68%	72%	65%	74%	75%
Other Print Media	7%	8%	8%	8%	10%	8%	6%	7%

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 2016

In 2016, approximately one in six (16%) stopover visitors to the Bahamas used print media when they were planning their vacations. The number of stopover visitors who used print media when planning their vacations declined over the years but stabilized in 2014 at 16%. In 2010, 25% of stopover visitors to the Bahamas used print media to plan their vacations compared to 21% in 2011, 20% in 2012, 20% in 2013, 16% in 2014, and 16% in 2015.

Of these stopover visitors who used print media to plan their vacations, one in three (33%) used newspapers and approximately seven in ten (73%) used magazines.

11. Use of Newspapers

In 2016, although only 16% of stopover visitors used print media when planning their vacations, 42% 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, and 45% in 2015.

**TOP 20 FAVORITE NEWSPAPERS READ BY VISITORS
ISLANDS OF THE BAHAMAS
2016**

Bahamas		% Informants	Nassau/P.I.		% Informants
1	New York Times	30%	New York Times		29%
2	USA Today	26%	USA Today		26%
3	Wall Street Journal	19%	Wall Street Journal		17%
4	Washington Post	8%	Daily News		8%
5	Daily News	7%	Washington Post		8%
6	New York Post	6%	New York Post		6%
7	Toronto Star	5%	Toronto Star		5%
8	Globe & Mail	4%	Globe & Mail		4%
9	Miami Herald	3%	Times		4%
10	Times	3%	Post		3%
11	Boston Globe	3%	Newsday		3%
12	Atlanta Journal Constitution	3%	Miami Herald		3%
13	Post	3%	Boston Globe		3%
14	New York Daily News	2%	Atlanta Journal Constitution		3%
15	Newsday	2%	New York Daily News		3%
16	Chicago Tribune	2%	Chicago Tribune		2%
17	Dallas Morning News	1%	Dallas Morning News		1%
18	Sun Sentinel	1%	Sun/The Sun News		1%
19	Sun/The Sun News	1%	Orlando Sentinel		1%
20	Palm Beach Post	1%	Sun Sentinel		1%
Grand Bahama		% Informants	Out Islands		% Informants
1	New York Times	27%	New York Times		37%
2	USA Today	26%	Wall Street Journal		29%
3	Wall Street Journal	16%	USA Today		28%
4	Toronto Star	7%	Washington Post		11%
5	Globe & Mail	7%	New York Post		7%
6	Washington Post	7%	Miami Herald		6%
7	Daily News	5%	Daily News		5%
8	Chicago Tribune	4%	Atlanta Journal Constitution		4%
9	New York Post	4%	Boston Globe		3%
10	Sun/The Sun News	3%	Sun Sentinel		3%
11	Boston Globe	3%	Globe & Mail		3%
12	Dallas Morning News	3%	Palm Beach Post		3%
13	Times	2%	Toronto Star		3%
14	Denver Post	2%	Times		3%
15	Miami Herald	2%	Chicago Tribune		2%
16	La Press (Montreal, Quebec)	1%	New York Daily News		2%
17	Sun Sentinel	1%	Orlando Sentinel		1%
18	New York Daily News	1%	Denver Post		1%
19	Orlando Sentinel	1%	Dallas Morning News		1%
20	Seattle Times	1%	Post		1%

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

- The most popular newspaper read by stopover visitors to the Bahamas was the New York Times. Three in every ten (30%) stopovers who read newspapers read the New York Times. USA Today and the Wall Street Journal were the next two popular newspapers read by stopover visitors to the Bahamas.

12. Use of Magazines

Although only 16% of stopover visitors used print media when planning their vacations approximately half (48%) 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, and 52% in 2015.

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

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

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

13. How Did Stopover Visitors Rate Their Product Experiences?

**PRODUCT SATISFACTION RATINGS
ISLANDS OF THE BAHAMAS
2016**

All Bahamas	Excellent	Good	OK	Not So Good	Awful	DK	Categories Combined	
							Excellent or Good	Not So Good or Awful
Beaches	63%	24%	5%	1%	0%	2%	87%	1%
Climate	58%	28%	7%	1%	0%	0%	87%	2%
Attitude of People	56%	28%	9%	2%	1%	0%	84%	3%
Easy to Get to	34%	35%	16%	3%	1%	3%	69%	4%
Food in Restaurants	31%	37%	15%	3%	1%	7%	68%	3%
Restaurant Service	32%	33%	16%	4%	1%	7%	65%	5%
Hotel Service	35%	29%	13%	3%	1%	12%	64%	4%
Hotel Rooms	30%	32%	16%	3%	1%	12%	62%	3%
Overall Value for Money	21%	37%	25%	7%	2%	2%	58%	9%
Food in Hotels	26%	30%	17%	4%	1%	14%	56%	5%
Value for Money in Hotels	18%	30%	22%	7%	2%	12%	48%	9%
Bahamas Overall	46%	39%	9%	1%	0%	1%	85%	1%

Includes cruise stopover visitors e.g. in GBI

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

- In 2016, 85% 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 stopovers thought that the beaches (87%) and the climate (87%) were Excellent or Good.
- Roughly eight in every ten (84%) stopovers thought that the attitudes of the people were excellent or good.
- Roughly, seven in ten stopovers thought that the ease of getting to the destination (69%), the food in restaurants (68%), and the restaurant service (65%) were excellent or good.
- Approximately six in ten stopovers thought that the hotel service (64%), the hotel rooms (62%), and the overall value for money (58%) were excellent or good.
- It is important to note however that although six in ten stopovers thought that the overall value for money was excellent or good, approximately one in every ten (9%) thought that it was not so good or awful.
- More than half (56%) the stopovers thought that the food in the hotels was excellent or good.
- Approximately half (48%) the stopovers thought that the value for money in the hotels was excellent or good but approximately one in every ten (9%) thought that it was not so good or awful.

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

TOURIST COMMENTS POSITIVE VS. NEGATIVE COMMENTS ALL BAHAMAS

TOP 6 COMPLIMENTS			TOP 6 COMPLAINTS		
	2016	2015		2016	2015
General	33%	36%	Prices (neg)	16%	15%
People	28%	24%	Hotel (neg)	11%	13%
Scenery/Sightseeing	9%	8%	People (neg)	10%	11%
Beaches	5%	5%	Litter (neg)	8%	7%
Food	3%	2%	Food (neg)	7%	7%
Hotel	3%	3%	Service (neg)	6%	7%
No. of Comments	2,136	2,733	No. of Comments	967	1,113

In 2015, 5% of the complaints received were about VAT/Taxes. In 2016, the complaints received about VAT/Taxes fell back down to 2% as it had been in 2014 and were therefore not in the top 6 complaints.

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

- Of the 2,136 positive comments received in 2016 from the survey, the top six compliments made by visitors included General Comments, people, scenery/sightseeing, beaches, food, and hotel.
- **General:** One in every three (33%) compliments received from visitors were general comments like: "All my times visiting here I have never had a bad experience. Very nice getaway. Best trip down south of all times. We really enjoyed our stay. Family had a great time. People need to see the out islands because those represent the real Bahamas. Very welcoming for tourists. We had an amazing visit. Nice and convenient. Very enjoyable. Love The Bahamas. The Bahamas was a wonderful place to visit and is a catalyst to visiting other countries/outside of the US territories. Always a pleasure to come back. We had the most enjoyable 3 days stay at Love Beach in a private home. We have traveled all over the world and this has been a great trip; we were really impressed at how much the Bahamas cares about Tourism. Like to see women in position of power and men helping with cleaning. Enjoyed these seven days immensely. Very nice; like the British influence. I love Eleuthera and Abaco - The family islands will always be a holiday destination for me. Have been coming for 6 years. Love it so much, last visit I bought a little house on Eleuthera. I love the Bahamas vibe. Actually considering retiring here someday. Love it here; we plan to return soon. Stunning. Thank you! Hospitality was Amazing. Favorite place in the world. We love the Abacos. I worked for AUTECH for 7 years - I love it here on Andros Island. A thrill to be back in Bimini and have so much fun again. Expectations were very high for coming and having an amazing time, and surely they (expectations) were met. Amazing every trip here gets better and better. Always a pleasure to be in Bimini and hang with Hank. First time in Bimini. Loved it!"

- **People:** Approximately three in every ten (28%) compliments received from stopover visitors were about the positive attitudes of the people like “Everyone was super nice and friendly. The people are so friendly and helpful. My husband and I really appreciate how kind and humorous the Bahamians were. We went on a swimming pig tour and Stocking island tour - Both Captain Justine and Captain Steve were professional, entertaining. We love how friendly and service oriented all of the people in Bahamas are. People are amazing; very friendly. Everyone was super nice and friendly. I enjoyed meeting locals; they were all so friendly. The people here are the friendliest in the world; I want to do more here. Love the people and naturalness. Everybody was friendly and helped to make our stay relaxing and fun. In Green Turtle Cay, Donny's Marina is a fantastic, wonderful, caring man. The Bahamian people are beautiful inside and out! Smart, happy, full of life! That is what makes visiting here so fun. I would come back because of the people. I love the great way the locals treat you. My favorite thing about visiting the Bahamas was the people here. We came by sailboat and the people are wonderfully kind and generous. The friendliest, happiest people I've met on vacation. You have the nicest island people of all the islands I have ever been too. Taxi drivers were all so nice. Taxi drivers were very kind and friendly as well as everyone we met.”
- **Scenery/Sightseeing:** Approximately one in every ten (9%) compliments received from visitors were about the scenery/sightseeing like: “Beautiful, spent most of our time at Staniel Cay. Bimini is one of the most beautiful places on earth, protect it. Beautiful waters, tropical fishes, turtles, reefs and beaches. Absolutely beautiful. Beautiful and amazing scenery. Absolutely gorgeous. It is very beautiful & we always feel welcomed. Long Island is beautiful and worth the trip. You have a beautiful country, a lot to offer. Beautiful island, fond memories Thank You. South Andros is lovely. Beautiful place with lots of development potential. Loved the Exumas, beautiful.”
- **Beaches:** One in every twenty (5%) compliments received from stopover visitors were positive comments about the beaches like: “Beautiful beaches. Beaches are the most beautiful I've ever seen. The beaches are spectacular. Excellent beaches. Amazing beaches. Great water and beaches. Love secluded beaches. The beaches/views were astonishing.”
- **Food:** Approximately one in every thirty (3%) compliments received from stopover visitors were about the food like: “Delicious food. Food was overall great. Excellent food at Drifters. Excellent food. Love the local food. Excellent food at Daddy Brown's Conch Stand at Lucaya. Seafood was amazing. Awesome food. Really liked the Bahamian dishes, all were unique, tasty. It's a pleasure to see friends and enjoy Bimini's good food. Enjoyed the food, the conch salad. Food was outstanding.”
- **Hotel:** Approximately one in every thirty (3%) compliments received from stopovers were about the hotel where they stayed like: “Pelican Bay is wonderful, Bahamians are friendly, helpful and hospitable. Memories Resort was clean. Sandals top notch! We met the most amazing staff Trevor and Andre at the Hilton; they took very good care of us, went above and beyond normal service. The Dolphin House was awesome. Good service at Sandals. The staff at the RIU are exceptional. The staff at the Breezes Hotel was the best people, very accommodating and friendly. Love the Ashram. Atlantis was great. Our stay at Sandals was amazing.

Sandals Dive shops employees wonderful. Atlantis exceeded expectations. I love Marriott. The Grand Lucayan, wonderful hotel. Rochelle and Trey at Freeport Resort were great. Fortuna was good. Bell Channel Resort is excellent as well. The staff at Lighthouse Point were very helpful and pleasant; it is only because of Lighthouse staff that I would return. We loved our stay at Grand Lucayan. We think the dive operations at Small Hope Bay Lodge are super; great guide, great attention to safety and enjoyment. Love staff at Small Hope.” The comments about hotel were often entwined with comments about of the people of the Bahamas.

- Of the 967 negative comments received in 2016, 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. 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 2016

		Bahamas	Nassau/P.I.	Grand Bahama	Out Islands
1	Google	83%	84%	87%	80%
2	Facebook	49%	48%	52%	48%
3	Youtube	27%	27%	30%	28%
4	Instagram	26%	25%	25%	30%
5	Yahoo	24%	25%	25%	19%
6	Pinterest	15%	15%	19%	14%
7	Linkedin	12%	12%	14%	12%
8	Twitter	12%	11%	12%	13%
9	AOL	8%	9%	5%	7%
10	MSN/Hotmail	7%	6%	8%	7%
11	Bing	6%	6%	7%	6%

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

- The most popular Internet search engines, content providers, social media networks, or photo sharing websites used by stopovers that visited the Bahamas were Google (83%), Facebook (49%), YouTube (27%), Instagram (26% vs. 21% in 2015), Yahoo (24% in 2016 vs. 27% in 2015), Pinterest (15%), LinkedIn (12%) and Twitter (12%).
- 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 2016, approximately one in four (24%) used Yahoo and approximately eight in ten (83%) stopovers used Google.
- The percentage of stopovers to the Bahamas using Instagram has increased significantly over the years. In 2014, approximately one in ten (11%) stopovers to the Bahamas used Instagram but in 2016, that percentage had increased to approximately two in ten (26%).
- Like Yahoo, the percentage of stopover visitors using AOL has declined over the years. In 2003, roughly one in three (36%) stopovers to the Bahamas used AOL, in 2016 however, only 8% of them used this service.

16. Visitor Demographics

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

	2016	2015
MAIN PURPOSE OF VISIT		
Vacation	74%	74%
Honeymoon	5%	6%
Visiting friends and relatives	4%	5%
Business	4%	4%
DECISION TO VISIT INFLUENCED BY:		
Beaches	65%	69%
Climate	51%	53%
Rest and Relaxation	45%	45%
ACTIVITIES VISITORS INTENDED TO DO		
Enjoy Beaches	83%	84%
Rest and Relax	72%	71%
Go Snorkeling	34%	36%
Shop	30%	28%
Go To Casinos	18%	16%
Go on Island Tour	16%	16%
LIKELY RETURN IN 1-5 YEARS	86%	88%
LIKELY RECOMMEND TO FRIENDS/REL	93%	95%
USED ONLINE SERVICE TO BOOK	68%	67%
USED TRAVEL AGENT	28%	30%
AGE*		
25 - 54 years old	52%	52%
55 years old or older	23%	24%
SEX*		
Male	47%	48%
Female	48%	48%
RACE		
White	79%	80%
Black	7%	7%
Hispanic	5%	4%
Mixed Race/Mixed Heritage	4%	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%	8%
\$50,001 to \$75,000	10%	10%
\$75,001 or more	56%	57%
PREVIOUS VISITS		
First Time Visitor	43%	43%
Repeat Visitor	56%	56%
TRAVELLING PARTY SIZE		
One	17%	17%
Two	45%	45%
Three or more	36%	36%
HOUSEHOLD SIZE		
One	11%	11%
Two	41%	42%
Three-Four	34%	35%
COUNTRY OF ORIGIN		
USA	78%	77%
Canada	9%	10%
Europe	6%	6%
Other Countries	7%	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 2016 & 2015, Research and Statistics Dept. Bahamas Ministry of Tourism
In 2016, Likelihood to return: Very Likely=55.9% and Somewhat Likely=29.9%, Likelihood to Recommend: VL= 70.0% and SL=23.3%. Likelihood of not returning: Somewhat Unlikely to return=7.8% and Not at all likely to return=4.0%
Likelihood of not recommending: Somewhat Unlikely to recommend=3.4% and Not at all likely to recommend=1.2%
All numbers are subject to revision.

All information in this brochure is based on the Tour Operator & Media Exit Survey 2016 and the Immigration Card, date of publication October 16, 2017.

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



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