Select 10-Year Trendline Data on Visitor's Hotel Experience

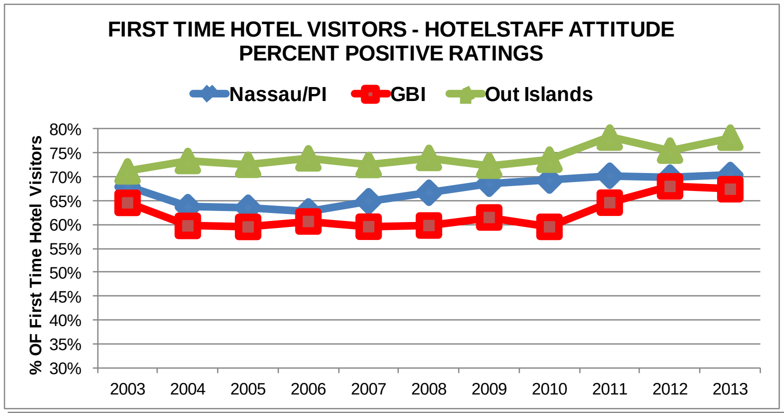
A Compilation of Positive and Negative Ratings Based Upon Immigration Departure Card Surveys

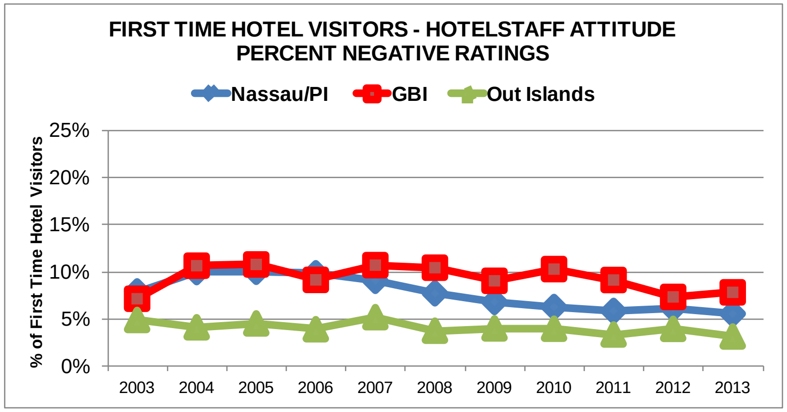
- *Trend Shows Improvements in Positive Ratings for Hotel Staff, Service and Value*
- *Family Islands Continue to Receive Overall Highest Ratings*

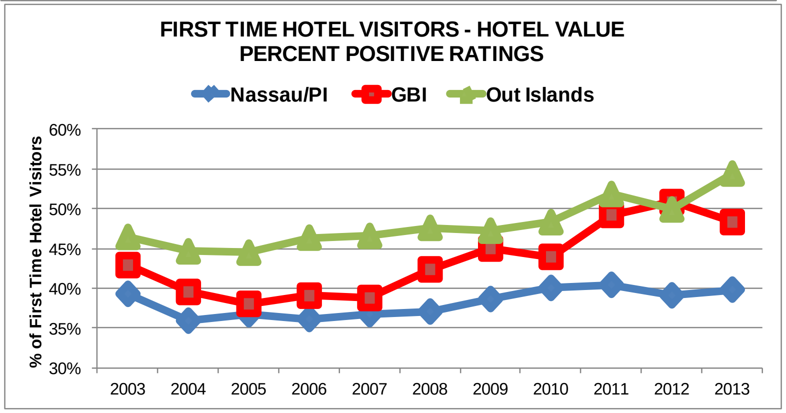
The immigration departure card asked the visitor to rate certain elements of their experience. One question asked is the likelihood to recommend The Islands of The Bahamas (TIOTB). By looking at how many hotel visitors said they were very likely to recommend TIOTB, we have a useful measure on how their experience contributes to the reputation of TIOTB. By confining this analysis to first time visitors, we focus on the most important impression, the first one. The data breaks down responses by groupings of Nassau/Paradise Island, Grand Bahama, and the Out Islands.

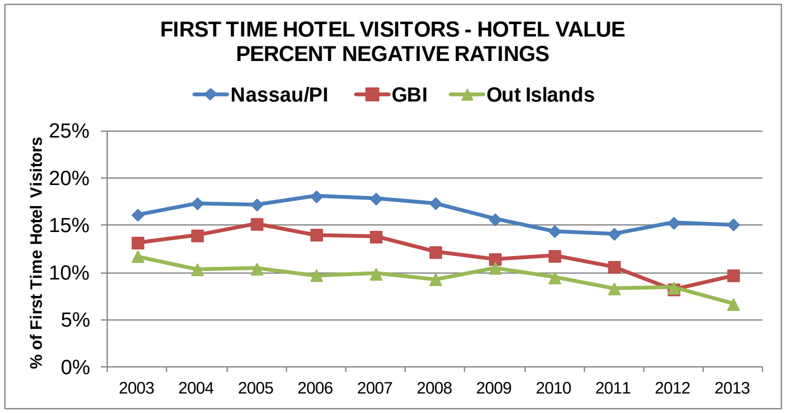
Hotel Staff Attitude and Hotel Value

Positive impressions would indicate that the visitor rated the experience better or much better than expected. Conversely, negative impressions mean the visitor experience was worse or much worse than expected. The results show an eleven year trendline.









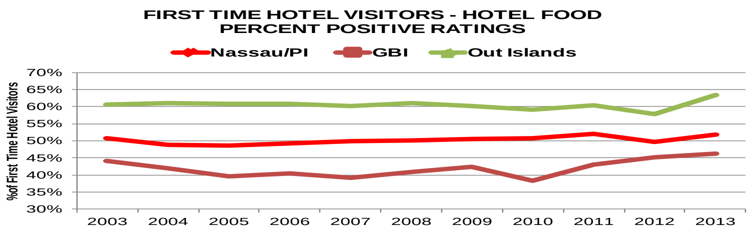
The results show that the Out Island positive experience with hotel staff increased the most throughout the period, trending upward since 2009. Since 2010, Grand Bahama has shown improvements with staff ratings. Nassau Paradise Island hotels experienced steady improvements as well.

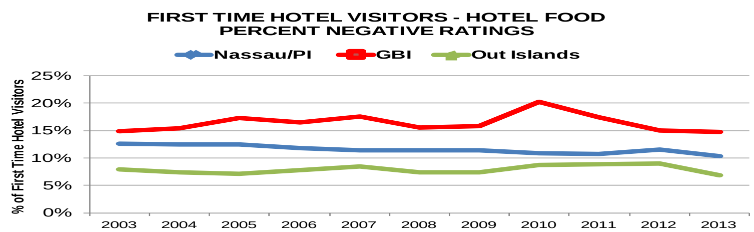
Another measure is hotel value for money. Again, the Out Islands fare best, but in general the destination is not exceeding expectations. This would reinforce the pricing challenges the nation's hotels are facing, while on one hand receiving overall favourable impressions on service and experience, but this is countered by a value perception measured against cost.

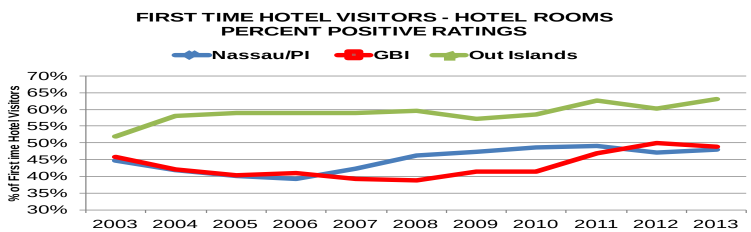
<u>Hotel Food, Rooms and Service</u>

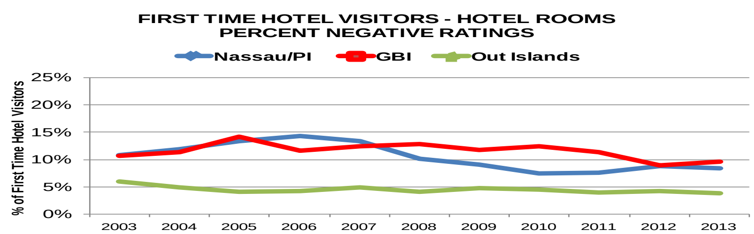
Hotel food negative ratings for Nassau/Paradise Island and Out Island hotels showed a steady decline, and while positive ratings on food increased, they did not increase proportionate to the decline. This suggests that the food experience was 'as expected' rather than better than or much better than expected. The Out Islands continued to outrank NPI and GBI showing a steady improvement in visitors rating food better or much better than expected.

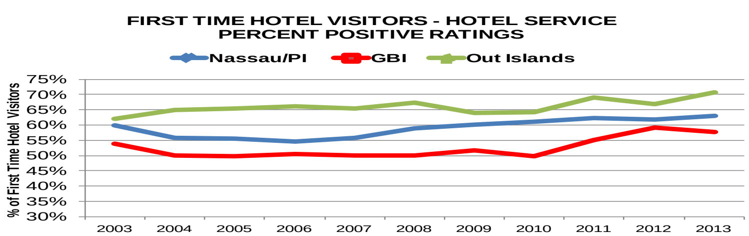
The percentage of visitors rating hotel rooms better or much better than expected increased marginally for GBI and NPI but again the Out Islands showed the greatest improvement. GBI and NPI took a dip early on but then showed steady improvement. Impressive gains were made by all three island groupings for service.

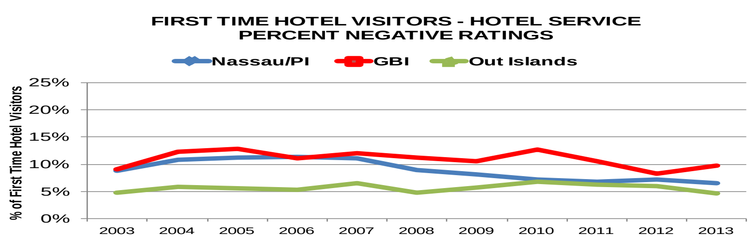












Closer Look at Nassau/Cable Beach/Paradise Island Experiences

The following tables highlight critical observations drawn from the trends in ratings above, in general showing modest levels of improvements for service, attitudes, rooms and food for Nassau and Paradise Island and lesser levels of improvements for Cable Beach.

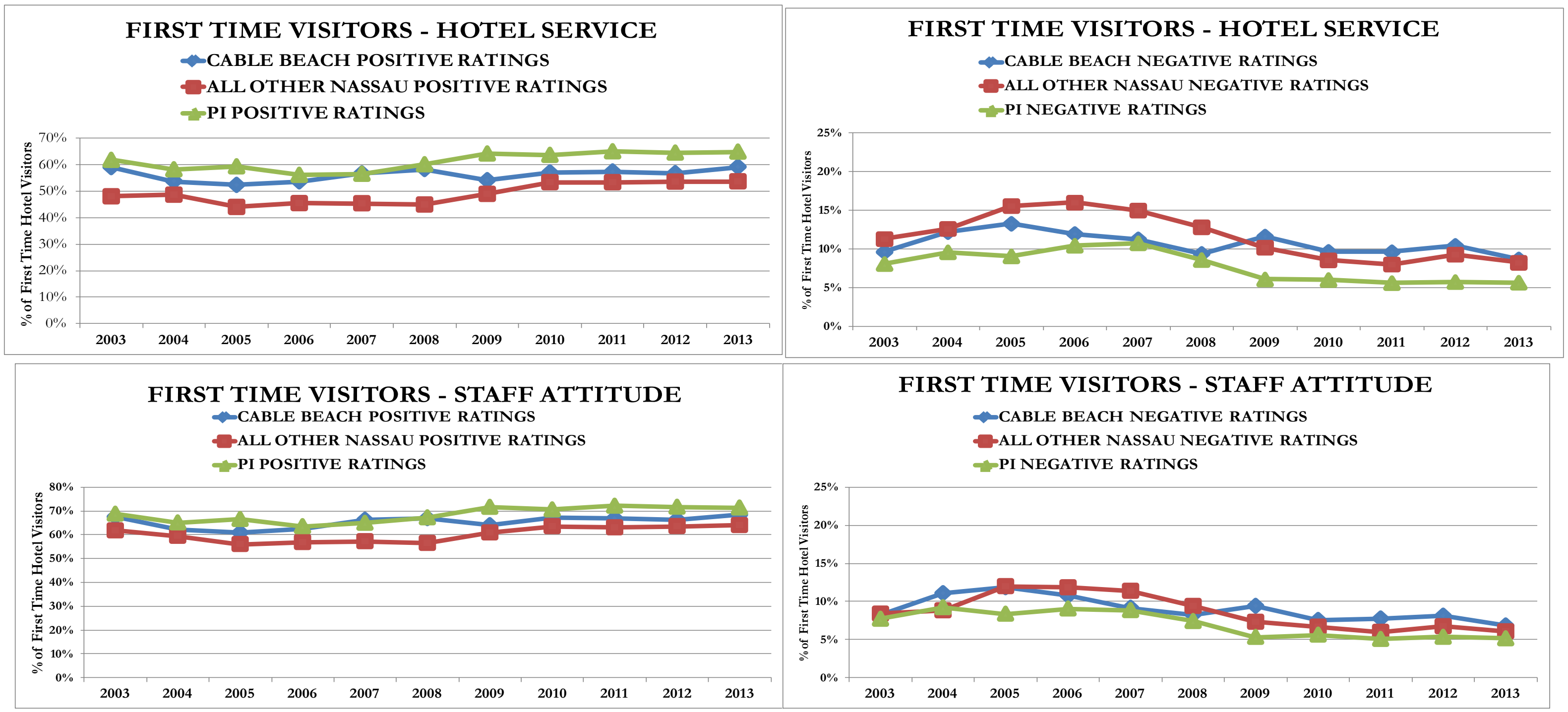


Figure 18

Island Area	2000 % Positive Impression	2013 % Positive Impression	2013 Rank	Comment
Paradise Island				
Hotel Food	51.4%	53.7%	1	Jumped to current level in 2009. Up from 52.1% in 2012
Hotel Rooms	49.5%	50.6%	1	Major improvement since 2009. Same as 2012, 50.2%.
Hotel Service	61.7%	64.8%	1	Gradual increase to 2009, not

				much since. Same as 2012, 64.5%
Staff Attitude	68.8%	71.4%	1	Topped 75 around 2009 and stays. Same as 2012, 71.7%.
<u>Cable Beach</u>				
Hotel Food	51.5%	47.6%	2	Declined to current level in 2009. Up from 44.5% in 2012
Hotel Rooms	38.2%	41.5%	2	Increase gained in 2009/10 Down from 42.4% in 2012
Hotel Service	59.0%	59.1%	2	Increase to current levels in 2006/08. Up from 56.7% in 2012
Staff Attitude	67.5%	68.3%	2	Pretty consistent throughout 11 years. Up from 66.3% in 2012
<u>Other Nassau</u>				
Hotel Food	39.5%	43.8%	3	Sharp rise in 2009. Up from 42.7% in 2012
Hotel Rooms	37.2%	41.5%	2	Matched Cable Beach in 2009. Down from 42.4% in 2012
Hotel Service	48.0%	53.6%	3	Increased between 2009/10. Same as 2012, 53.5%
Staff Attitude	61.8%	64.0%	3	Sudden rise in 2009/10. Same as 2012, 63.6%