



NEW PROVIDENCE

Bahamas Ministry of Tourism
Bahamian Residents'
General Public Survey 2006
Prepared by
The Counsellors Ltd.

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I. Introduction

1.1 Research Objectives

This survey was designed to gather information from Bahamian residents on various issues and aspects of tourism and media habits. The Ministry of Tourism wants to know how much Bahamians know about tourism and how they feel about the tourism industry as a whole. The focus of the survey is concentrated on the following major areas:

- Attitudes
- General Media
- Demographics

The Specific Objectives of This Research Study are to:

- Examine the media habits of the Bahamian public in order to better channel educational information on tourism through media where it has a better chance of being viewed.
- Examine the attitudes of Bahamians on tourism
- Make relevant distinctions between attitudes of residents based on demographic criteria such as age, sex, annual income and education.

II. Methodology

2.1 Development of Hypotheses and Questionnaire

This research project was divided into two phases:

Phase 1: hypotheses development and

Phase 2: questionnaire design and sampling frame.

2.1.1 Formulation of Null Hypotheses

1. Bahamians who are directly employed or not directly employed in the tourism industry do not differ significantly in their attitudes towards tourists and tourism in general.
2. Bahamians in various age groups do not differ significantly in their attitudes towards tourists and tourism in general.
3. Bahamians of different sex do not differ significantly in their attitudes towards tourists and tourism in general.

2.1.2 The Questionnaire

This survey was designed to learn more about the attitudes of the Bahamian public regarding the tourism industry. Through the questions used in this questionnaire, the Ministry of Tourism sought to illuminate what the Bahamian public thought were the positive and negative aspects of tourism in the Bahamian community. Eleven questions asked: whether Bahamians would choose to work in the tourism industry; why jobs in tourism were not the first choice for High School and College graduates (The Counsellors 1998 Study); what should be done to attract the best and brightest to work in the tourism industry; what positive things they thought were happening as a result of tourism; what negative things they thought were happening as a result of tourism; what they would say (other than telling about our beaches and climate) to convince someone to visit The Bahamas; whether they felt that Bahamians are developing a negative attitude toward the large number of tourists; whether the Government is doing sufficient to ensure that Bahamians are trained to take positions held by foreigners in the tourism industry; whether they thought that the tourism industry uses enough of Bahamian food,

music and other products or services; what two languages should all Bahamians speak; and domestic tourism behaviour. The Ministry felt that this would better assist them in the understanding the attitudes of the Bahamian public towards the tourists who come to our shores.

The main part of the questionnaire was designed to examine the attitudes of the Bahamian public with regard to tourism. Included in this section of the questionnaire were 23 statements designed using the Likert scale of agreement/ disagreement (i.e. strongly agree, agree, neither agree nor disagree, disagree, strongly disagree, don't know).

Furthermore, the questions posed in this section were designed to elicit from the Bahamian public valuable information on:

- Whether or not they felt that most tourists who came to our shores were satisfied with their Bahamian experience
- Whether or not Bahamians generally felt they were doing the tourists a big favour when serving or helping them
- Did Bahamians believe that tourism only created lower end jobs for Bahamians at large
- Did each Bahamian say my job is related to tourism
- Whether or not they would object to their children working in the tourism industry
- Did the Bahamians interviewed believe that tourists are given their money's worth while visiting the Islands of The Bahamas
- Did many of the people interviewed believe that tourism did not affect them personally
- Whether they felt that only Bahamian art, Bahamian straw and Bahamian craft goods should be sold to tourists

- Did the Bahamians interviewed feel that Bahamians should be willing to go the extra mile to please tourists
- Whether or not Bahamians felt that the 15% gratuity should be eliminated
- Did the Islands of The Bahamas' advertisements make them feel good about their country
- Whether or not Bahamians felt that the tourists who came to the Islands of The Bahamas generally did not find what they were led to expect by the Ministry's advertising and promotions
- Did Bahamians feel that there were enough jobs in the tourism sector
- Did Bahamians consider jobs in tourism to be prestigious
- Whether or not Bahamians felt that many parents do not think it is a good idea for their children to have a career in tourism
- Did Bahamians feel that the salaries and benefits in the tourism sector were not on par with similar positions in the private sector
- Whether or not it was felt that there is little job security in the tourism sector
- Whether it was felt that tourism had all our best beaches and land
- Did Bahamians feel that the quality of the tourism product needed great improvement
- Whether or not it was felt that Bahamians gave other Bahamians good service or value for money
- Whether or not Bahamians felt that the standard of service in the Islands of The Bahamas needed improvement

- Did Bahamians feel that the costs such as wages, electricity, telephone and so on were higher in The Bahamas than in most parts of the region including the U.S.A. and Canada
- Whether it was generally felt by the Bahamians interviewed that tourism would be the main industry in the Islands of The Bahamas for at least the next thirty years

2.1.3 Demographics

In order to better understand the results of this survey, demographic criteria had to be established. Therefore, questions were posed that would set a demographic framework for the persons interviewed that would facilitate the analysis of the data collected. It was important to know the sex, age group, educational and income levels of the interviewees in order to better analyze the data obtained.

2.1.4 Phase 2: Quantitative Research, New Providence Report

Personal interviews at 300 household dwellings were conducted in New Providence. Bahamian residents between the ages of 15 and over were interviewed. Households surveyed were selected from the constituencies of: Montagu, Farm Road, Bamboo Town and Mount Moriah. The sample size had a $\pm 5.7\%$ precision (error) at the 95% confidence level.

The sampling plan involved the selection of persons based on **Quota and Convenience sampling**. The sex and age quota were based on frequency distributions from the 2000 Population Census (population was redistributed using 2002 political boundaries).

2.1.5 Phase 2: Quantitative Research, Grand Bahama Report

Personal interviews at 300 household dwellings were conducted in Grand Bahama. Bahamian residents between the ages of 15 and over were interviewed. Households in the constituencies of: Pine Ridge, Eight Mile Rock, West End, Lucaya, Marco City and High Rock were selected. The sample size had a $\pm 5.7\%$ precision (error) at the 95% confidence level.

The sampling plan involved the selection of persons based on **Quota and Convenience sampling**. The sex and age quota were based on frequency distributions from the 2000 Population Census (population was redistributed using 2002 political boundaries).

2.1.6 Phase 2: Quantitative Research, Family Islands Report

Personal interviews at 500 household dwellings were conducted in five Family Islands. Bahamian residents between the ages of 15 and over were interviewed. The survey took place in the constituencies of: North and South Abaco, Bimini, Eleuthera, Exuma and Central Andros. The sample size had a $\pm 4.4\%$ precision (error) at the 95% confidence level.

The sampling plan involved the selection of persons based on **Quota and Convenience sampling**. The sex and age quota were based on frequency distributions from the 2000 Population Census (population was redistributed using 2002 political boundaries).

2.1.7 Analysis

Data was entered using Microsoft Excel and SPSS 15.0. Analyses were done per island group (New Providence, Grand Bahama, Family Islands) using SPSS. Most presented are univariate (one variable) and bivariate (two variables); bivariate analyses compare mainly demographic items with attitude opinions using Pearson chi-square, Kendall's tau-c, T-Tests, and Analysis of Variance (ANOVA). Significance levels (p - values) were set at .05 or less - only significant findings are presented. Factor Analysis with the 23 main attitude items is also included.

The report was written using Microsoft Word.

III. Results – New Providence

3.1 Demographics

- Gender distributions were virtually evenly split (48% male).
- The majority of respondents were 30-49 years (42%). Thirty six percent were under 30 years, and the remaining 22% were 50 and older.
- Most respondents completed at least high school (60%). One out of five (20%) completed college/university, 15%, technical/vocational school, and 5% had primary education.
- Looking at income levels, almost half (46%) had an annual salary of \$15,000 to under \$30,000. Around one fifth (23%, 21% respectively) made \$5,000 to under \$15,000 and \$30,000 to under \$50,000. The remaining 8% had an annual salary of under \$5,000.
- A little more than half (53%) of the respondents work in the tourism industry.

3.2 Attitudes toward Employment in the Tourist Industry

Among those who would choose to work in the tourism industry (78%), the most popular reason by far (52%) was that they liked “meeting people” or were “people persons” (*Table 1*). At a distant second, almost one out five (19%) feel that a good salary can be earned in the tourism industry. Thirteen percent (13%) think working in the industry is a “good job”. Responses were comparable for past surveys.

Table 1
Percent (%) of Respondents – Top Five Reasons Why Respondents would Choose to Work in the Tourism Industry (n=232)

| Reasons | 2006 | 2005 | 2003 |
|-------------------------------------|-----------|------|------|
| Meeting people/ “People person” | 52 | 64 | 56 |
| Good salary | 19 | 20 | 12 |
| Like job/ Good job | 13 | 11 | 6 |
| Being an ambassador for The Bahamas | 5 | 4 | 6 |
| Exciting /Prestigious industry | 4 | 6 | 4 |
| Main/Important industry | 4 | 2 | 4 |

If having to decide on a career in tourism today, 87% of those who currently work in tourism would choose to work in this sector as opposed to 68% of non-tourism workers.

Among those who would choose *not* to work in the tourism industry (22%), the leading reason is that they are not “people persons” (18%) (*Table 2*). Not liking the tourism industry was a close second (17%), while low salary was third (14%). In 2005, in addition to not being interested in meeting people, the leading cause was the stressful nature of tourism work.

Proportionally more females (48%) than males (33%) gave meeting people as the top reason, while 21% of males, and only 11% of females, responded good salary as a reason for working in tourism.

Table 2

Percent (%) of Respondents – Top Five Reasons Why Respondents would Choose *Not* to Work in the Tourism Industry (n=66)

| Reasons | 2006 | 2005 | 2003 |
|---|-----------|------|------|
| Not a “people person” | 18 | 18 | 16 |
| Don't like tourism industry/Prefer another industry | 17 | 11 | 10 |
| Low salary | 14 | 14 | 6 |
| Work too hard/Stressful/Long hours | 14 | 18 | 8 |
| Industry unstable/Seasonal | 12 | 13 | 13 |
| Like my non-tourism job | 12 | 12 | 11 |

Approximately two out of three respondents (64%) think that tourism jobs are a first choice for graduates.

Of the remaining 36% who think that tourism jobs are *not* a first choice for graduates, around one out of five (26%) think that interest in another industry, as well as low salary, are deterrents to tourism careers (*Table 3*). Thirteen percent (13%) blame lack of knowledge of the tourism industry. Low salary was the leading reason in 2005.

Table 3

Percent (%) of Respondents – Top Five Reasons Why Tourism Jobs are Not the First Choice for High School Graduates (n=104)

| Reasons | 2006 | 2005 | 2003 |
|---------------------------------------|----------|------|------|
| Interest in another industry | 26 | 17 | 10 |
| Low salary | 23 | 33 | 9 |
| Lack of knowledge of tourism industry | 13 | 6 | 21 |
| Little job security | 9 | 9 | 6 |
| Prefer office jobs | 9 | 3 | 6 |

Sixty-nine percent (69%) of tourism industry workers, proportionally more than the 59% of non-tourism workers, feel that tourism jobs are the first choice for high school and college graduates.

The leading suggestion (40%) to attract the best and brightest to the tourism industry is to increase early training and education, especially at the school level (*Table 4*).

Twenty-one percent (21%) thought higher salaries was the best incentive, and 8% felt general promotions and information sharing is necessary. Responses were similar for previous surveys.

Table 4

Percent (%) of Respondents – Top Five Suggestions to Attract Best and Brightest to the Tourism Industry (n=297)

| Reasons | 2006 | 2005 | 2003 |
|--|------|------|------|
| Training /Educate in schools | 40 | 32 | 31 |
| Offer higher salaries | 21 | 22 | 27 |
| More promotions/ Information | 8 | 12 | 7 |
| Offer more benefits/Incentives/Make industry more attractive | 7 | 15 | 10 |
| Create higher positions/ Better job opportunities | 7 | 8 | 7 |

3.3 Effects of Tourism

Most respondents felt that the related factors of job creation (38%) and economic development (19%) were positive outcomes of tourism; this is a lingering opinion (*Table 5*). Increased foreign investment (12%) received slightly more responses when compared to previous survey years.

Table 5

Percent (%) of Respondents – Top Five Positive Effects of Tourism In The Bahamas (n=288)

| Reasons | 2006 | 2005 | 2003 |
|--------------------------------|----------|-----------|----------|
| Creation of jobs | 38 | 40 | 41 |
| Economic development | 19 | 19 | 11 |
| Increased foreign investment | 12 | 8 | 6 |
| More/Better Hotels | 8 | 6 | 7 |
| Higher living standards | 6 | 17 | 3 |

None – 8%

Although half of respondents (51%) felt that there were not any negative effects of tourism, crime was by far the most cited “side effect” of the tourism industry (26%) (*Table 6*). The flip side of foreign investment, exploitation by foreign investors, received 5% of responses, a noticeable increase from 1% in 2005.

Table 6

Percent (%) of Respondents – Top Five Negative Effects of Tourism

In The Bahamas (n=300)

| Reasons | 2006 | 2005 | 2003 |
|-----------------------------------|----------|----------|----------|
| Crime | 26 | 29 | 18 |
| Exploitation by foreign investors | 5 | 1 | - |
| Bad Attitudes of Tourists | 4 | 7 | 4 |
| Drugs | 3 | 6 | 9 |
| Losing culture/Identity | 3 | 4 | 1 |

None – 51%

3.4 Reasons to Visit The Bahamas

Respondents were asked what other features of The Bahamas, other than the much used beaches and climate, they would draw on to convince visitors to come to here (Table 7). The most popular reason by far was the good characteristics of Bahamian people, such as their warmth, friendliness, and hospitality (52%). Bahamian cuisine (31%) and general culture (22%) also received many responses. When compared to 2005, there were increases in the percentage of these top three responses.

Table 7

Percent (%) of Respondents – Top Five Reasons (Other than “Sun, Sand and Sea”) for Visitors to Come to The Bahamas (n=300) *

| Reasons | 2006 | 2005 | 2003 |
|--------------------------------------|-----------|------|------|
| Warm/ Friendly People/ Hospitality | 52 | 46 | 49 |
| Bahamian cuisine | 31 | 20 | - |
| General Bahamian culture | 22 | 15 | - |
| Junkanoo | 12 | 15 | 13 |
| Bahamian experience/ Paradise | 10 | 7 | 5 |
| None/Don't Visit – 1% | | | |

* Multiple responses were given, but are presented individually.

3.5 Selected Other Measures of Attitude toward Tourism

- Nine out of ten respondents (89%) feel that Bahamians are *not* developing a negative attitude toward the large number of visitors.
- Most (72%) felt that the Bahamas government is *not* doing sufficient to train Bahamians for positions in the tourism industry now predominantly held by expatriates.
- Fifty eight percent (58%) responded that the tourism industry does *not* use sufficient Bahamian food, music, and other products and services.
- Most New Providence residents think that all Bahamians should speak two languages, be it English and Spanish (87%), or English and French (79%).

3.6 Domestic Travel

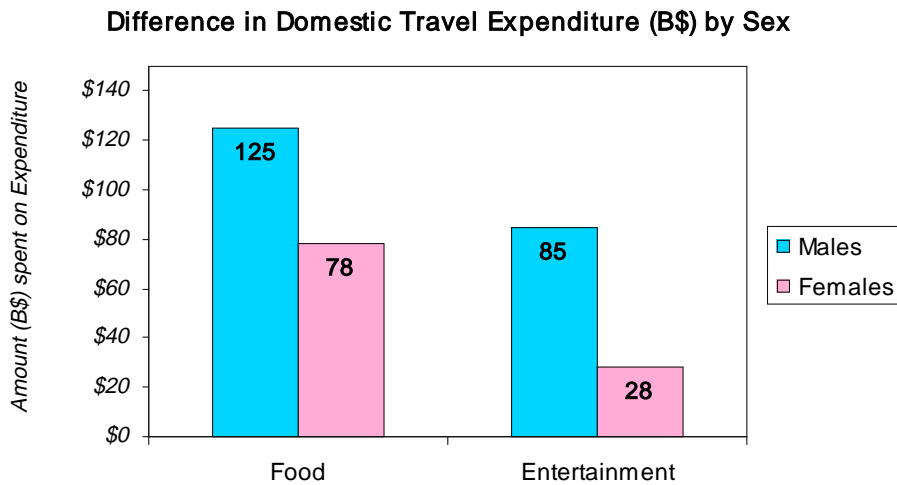
Less than half (44%) respondents have travelled to another Family Island in the past year; the average (median) was 2 trips (range 1 to 30), with a median of 1 person per trip (range 1 to 6 persons).

The median total expenditure spent per trip is \$340 (range \$0 to \$2,650). Below is a breakdown of the median average spent per trip for the following:

- Transportation – \$110 (range \$0 to \$900)
- Lodging - \$0 (range \$0 to \$1,500)
- Food - \$80 (range \$0 to \$600)
- Entertainment - \$15 (range \$0 to \$500)
- Shopping - \$0 (range \$0 to \$500)

Males tended to spend more on food and entertainment than females (*T-Test*, $p \leq .05$; *Figure 1*)

Figure 1



For the most part, as income increased, so did expenditure (*Analysis of Variance [ANOVA employs means when comparing groups, as presented here, rather than medians, hence the difference in the overall median above, and the means shown here], $p < 0.05$; Table 8*).

Table 8

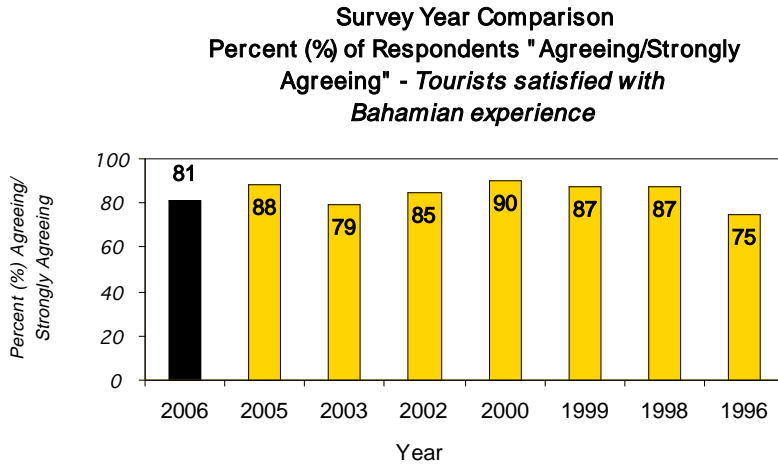
**Average (Mean) Difference in Expenditure (B\$) by Income levels
(n=131)**

| | Income Level | | | | |
|------------------------|---------------|---------------------|----------------------|----------------------|------------------|
| | Under \$5,000 | \$5,000 - <\$15,000 | \$15,000 - <\$30,000 | \$30,000 - <\$50,000 | \$50,000 or over |
| Transportation (\$) | 104 | 149 | 125 | 237 | 243 |
| Lodging (\$) | 78 | 111 | 137 | 270 | 278 |
| Entertainment (\$) | 45 | 16 | 44 | 126 | 96 |
| Total Expenditure (\$) | 330 | 400 | 449 | 836 | 791 |

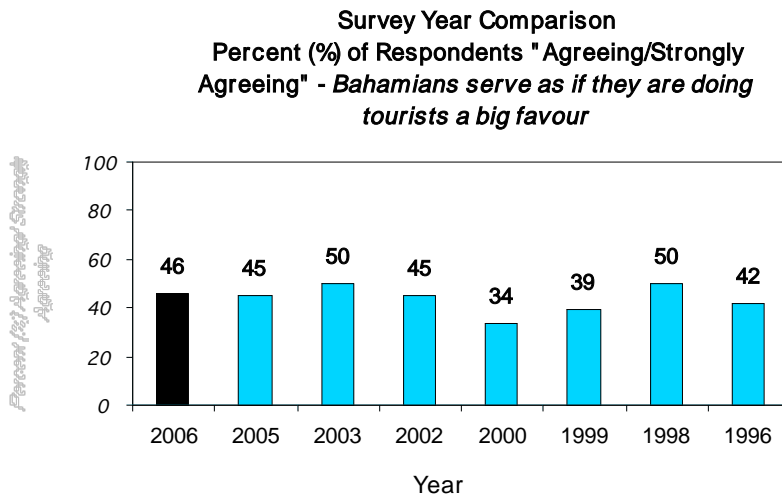
3.7 General Attitude Statements

Following are the general attitude statements presented individually and compared with past surveys (*Figures 2- 24*). Discussed is the percent (%) that “Agreed/Strongly Agreed with each statement. *Table 8* shows all response opinions for 2006.

Figures 2-24

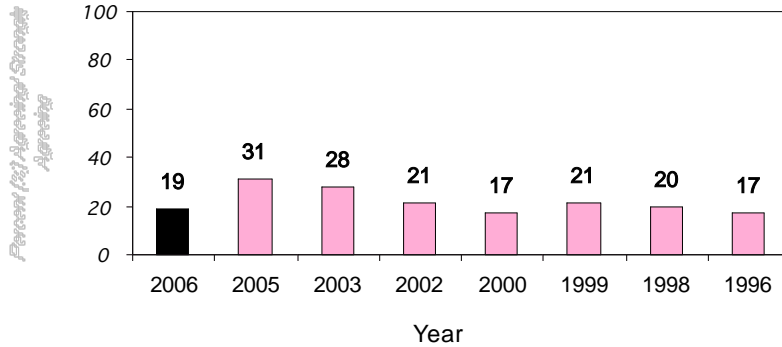


Most (81%) respondents in 2006 agreed/strongly agreed that tourists are satisfied with their Bahamian experience. This sentiment was similar for previous periods, reaching a peak in 2000 at 9 out of 10 respondents.



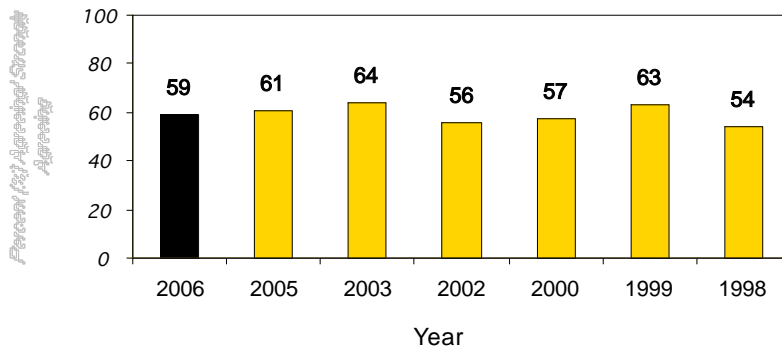
Less than half (46%) agreed that Bahamians serve as if they are doing the tourists a big favour. This trend was similar for other survey years, with the lowest point being in 2000 (34%).

Survey Year Comparison
Percent (%) of Respondents "Agreeing/Strongly Agreeing" - Tourism jobs for Bahamians are at the bottom of the ladder



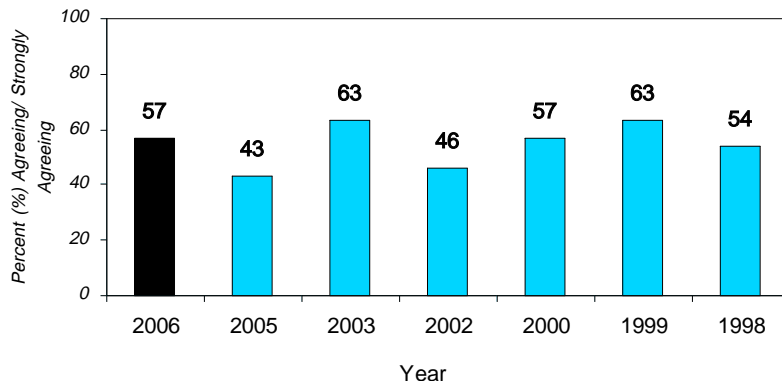
Around one out of five respondents (19%), a minority, think that tourism jobs are at the bottom of the ladder. This is in contrast to the previous year in 2005, when one out of three (31%) agreed to this statement. Other survey years, however, yielded similar results.

Survey Year Comparison
Percent (%) of Respondents "Agreeing/Strongly Agreeing" - My job is Tourism related



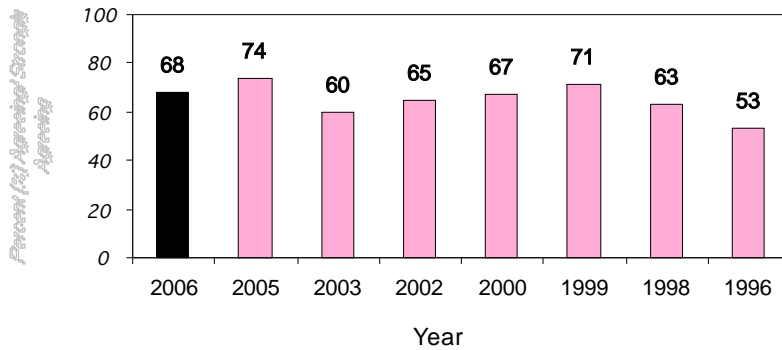
Six out of ten Bahamian respondents hold jobs that are tourism related (59%) in 2006. More or less, this proportion has not changed in eight years.

Survey Year Comparison
Percent (%) of Respondents "Agreeing/Strongly Agreeing" - I would like my child to work in the Tourism industry



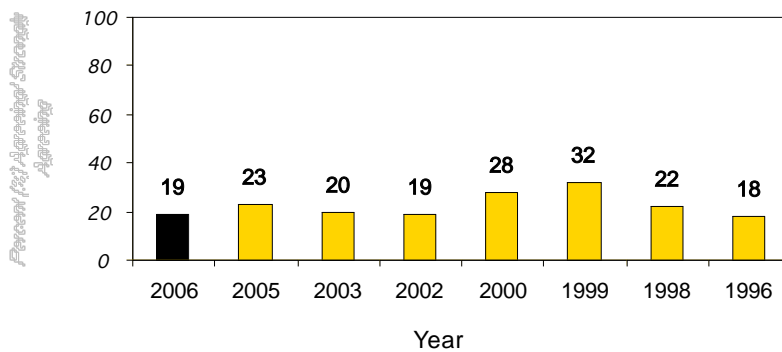
Similar to the above results, almost 6 out of 10 respondents (57%) would like their child to work in the tourism industry in 2006. Earlier surveys showed similar proportions, but in 2002 and 2005, less than half (46%, 43% respectively) felt this way.

Survey Year Comparison
Percent (%) of Respondents "Agreeing/Strongly Agreeing" - Tourists get money's worth when visiting The Bahamas



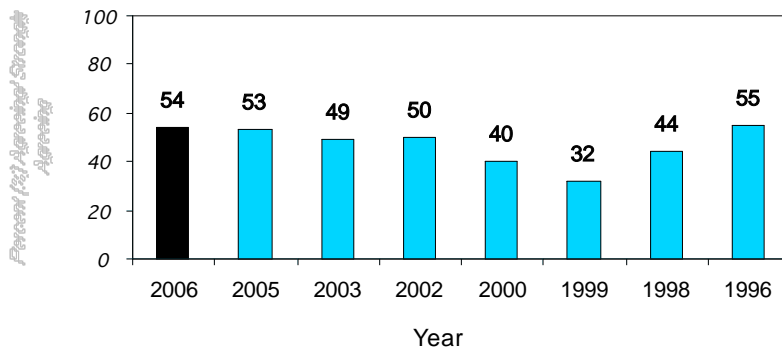
For 2006 (68%) and previous surveys, around seven out of ten respondents thought that tourists get their money's worth when visiting The Bahamas.

Survey Year Comparison
Percent (%) of Respondents "Agreeing/Strongly Agreeing" - Tourism does not affect me personally



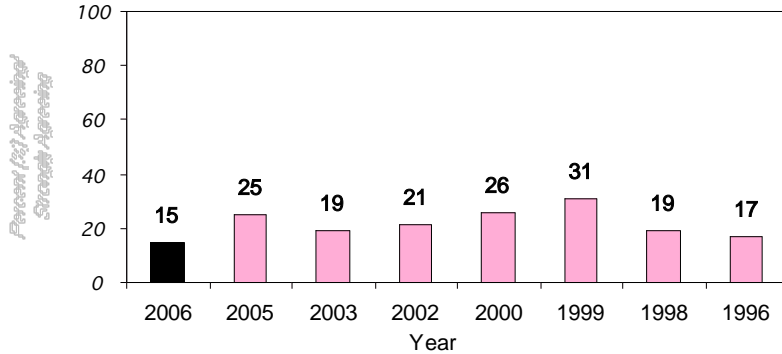
A minority (19%) in 2006 believe that tourism does not affect them personally. This has changed relatively little in ten years, reaching a peak at 32% in 1999.

Survey Year Comparison
Percent (%) of Respondents "Agreeing/Strongly Agreeing" - Only Bahamian art, straw and craft goods should be allowed to be sold to tourists



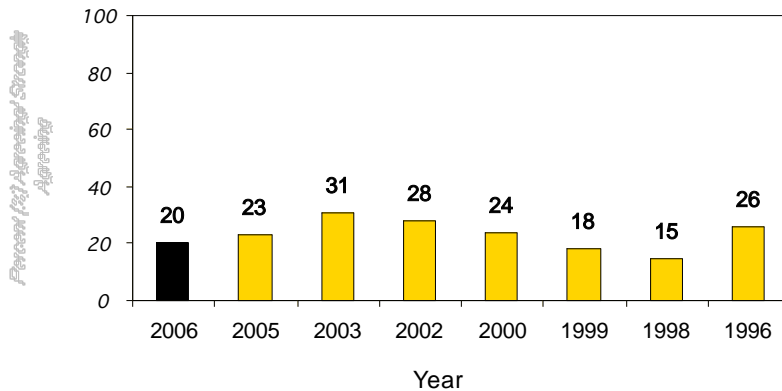
Around half (54%) of New Providence residents feel that only Bahamian arts and craft should be sold to tourists, with little change since 1996. There were slight decreases, however, between 1998 and 2000; in 1999, only 32% agreed to this statement.

Survey Year Comparison
Percent (%) of Respondents "Agreeing/Strongly Agreeing" - *Just because tourism is the main industry, does not mean that Bahamians should be willing to go the extra mile to please tourists*



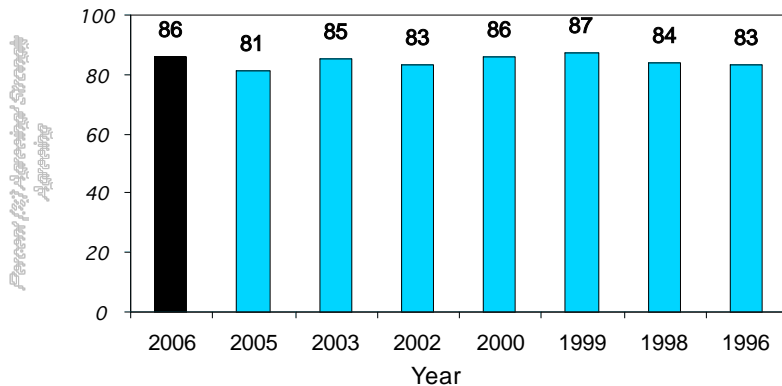
In 2006, a small minority (15%) agreed that Bahamians should not go the extra mile to please tourists, the smallest percentage when compared to earlier surveys: In 1999, 2000, and 2005, proportionally twice as many agreed to this statement.

Survey Year Comparison
Percent (%) of Respondents "Agreeing/Strongly Agreeing" - *The 15% gratuity should be eliminated*



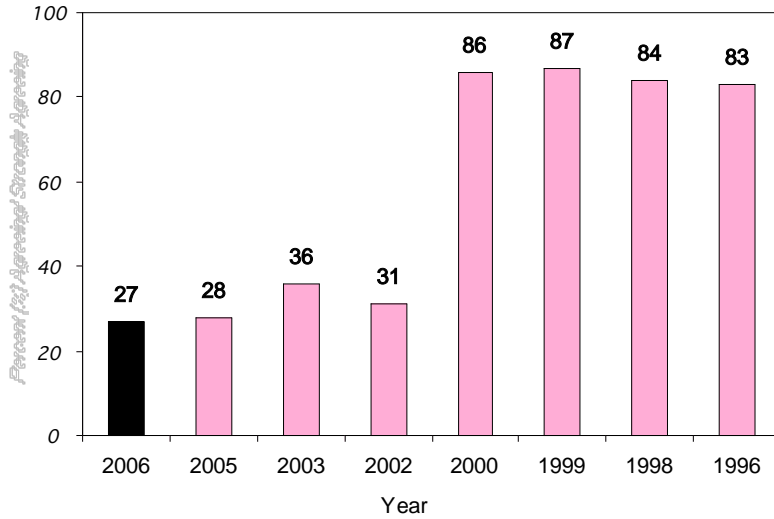
Only one out of five residents in 2006 thought that the 15% gratuity should be eliminated. Little has changed in ten years, reaching a peak at 31% in 2003.

Survey Year Comparison
Percent (%) of Respondents "Agreeing/Strongly Agreeing" - *The Islands of The Bahamas' advertisements make me feel good about my country*



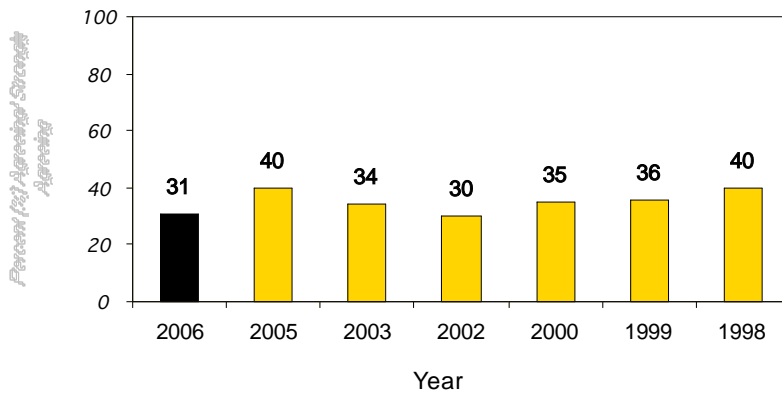
The overwhelming majority of respondents feel proud of The Bahamas when it comes to Islands of The Bahamas ad campaigns (86% in 2006), with negligible change in ten years.

Survey Year Comparison
Percent (%) of Respondents "Agreeing/Strongly Agreeing" - Tourists generally do not find what they were led to expect from ads and promotions



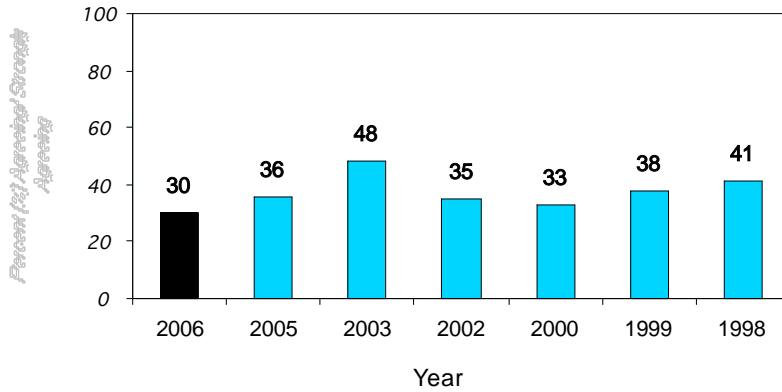
When it comes to tourist expectations, there was a complete turn around of opinion since 2000. From 1996 to 2000, the results were much less positive, with most respondents (83% to 86%) agreeing that tourists are usually disappointed when coming to The Bahamas. Since 2002, however, approximately one third (31% to 27%) felt this way, a much more favourable response.

Survey Year Comparison
Percent (%) of Respondents "Agreeing/Strongly Agreeing" - There are not enough jobs in the tourism sector



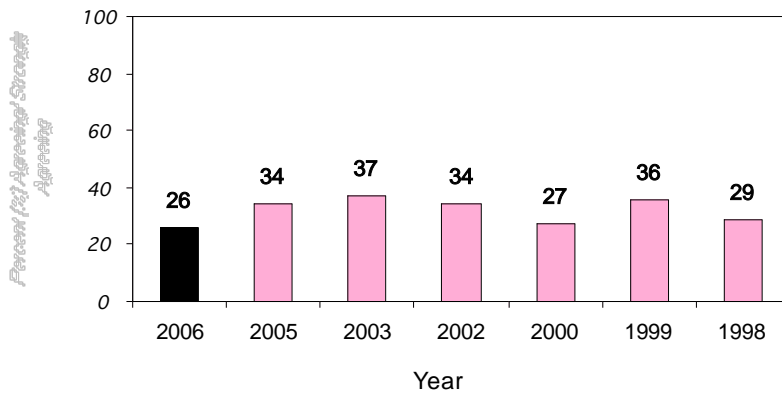
A minority (31%) agreed in 2006 that there are not enough jobs in the tourism sector, with little change from previous surveys.

Survey Year Comparison
Percent (%) of Respondents "Agreeing/Strongly Agreeing" - *Jobs in tourism are not considered very prestigious*



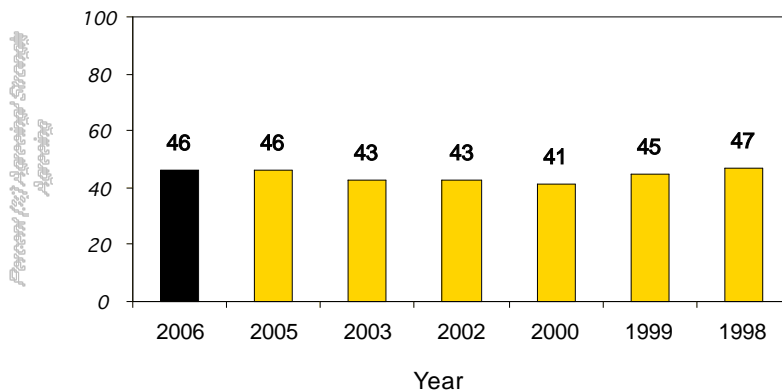
Less than one out of three residents felt that jobs in tourism are not prestigious in 2006. There were similar previous results; in 2003, however, almost half (48%) agreed with this item.

Survey Year Comparison
Percent (%) of Respondents "Agreeing/Strongly Agreeing" - *Many parents do not think it is a good idea for their children to have career in tourism*



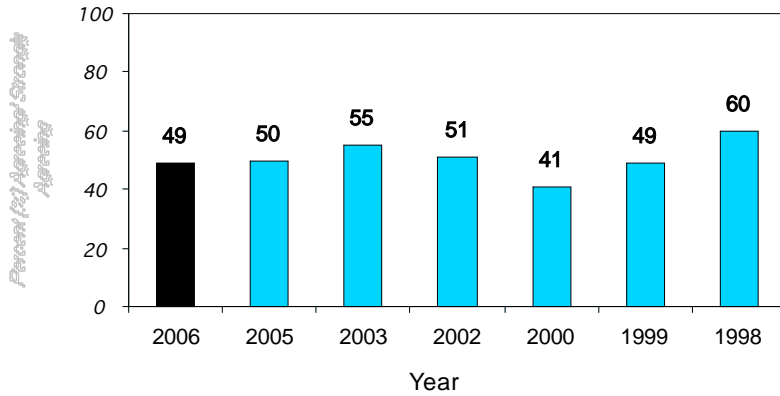
For the most part, there were moderate changes since 1998 when it comes to children pursuing a career in tourism. 2006 saw the most favourable response, however, as only a quarter (26%) agreed with this statement.

Survey Year Comparison
Percent (%) of Respondents "Agreeing/Strongly Agreeing" - *Tourism salaries not on par with similar positions in private sector*



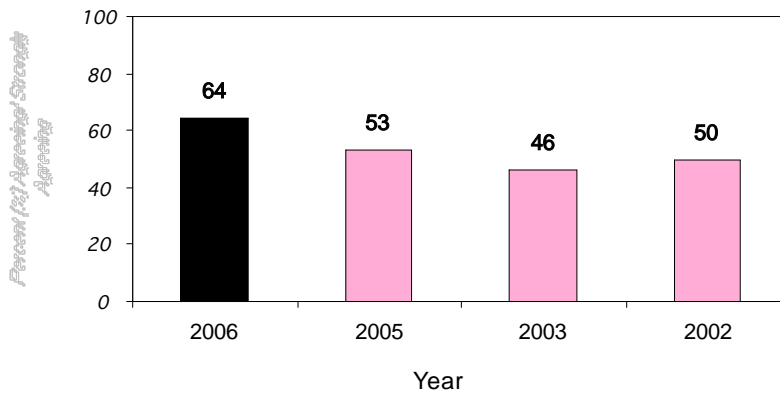
From 1998 to 2006, less than half of respondents (41% to 47%) agreed that tourism salaries are not on par with similar salaries in the private sector.

Survey Year Comparison
Percent (%) of Respondents "Agreeing/Strongly Agreeing" - There is little job security in the tourism sector



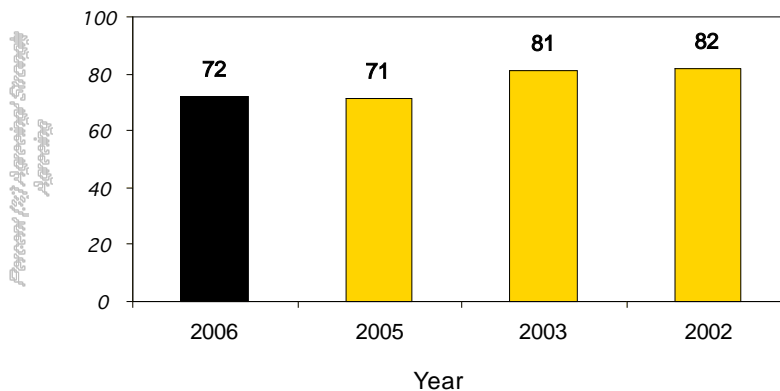
Around half (49%) in 2006 agreed that there is little job security in the tourism sector, a more positive attitude when compared to 1998 (60%), but comparable to intervening years.

Survey Year Comparison
Percent (%) of Respondents "Agreeing/Strongly Agreeing" - Tourism has taken all our best beaches and land



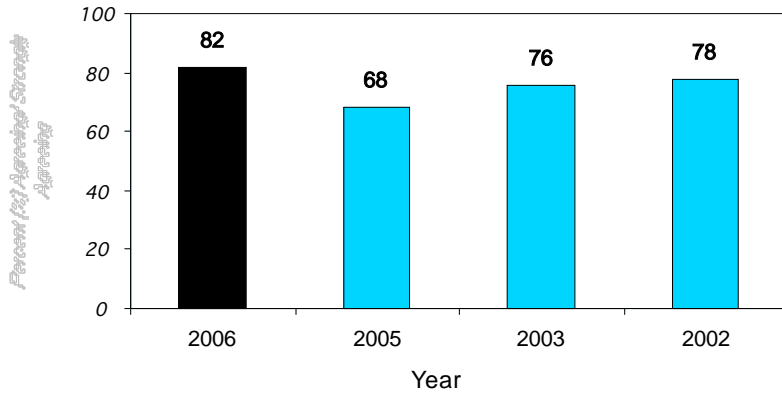
Proportionally more respondents in 2006 felt that The Bahamas' best beaches and lands are being "taken" by the tourism industry (64%).

Survey Year Comparison
Percent (%) of Respondents "Agreeing/Strongly Agreeing" - The quality of the tourism product needs great improvement



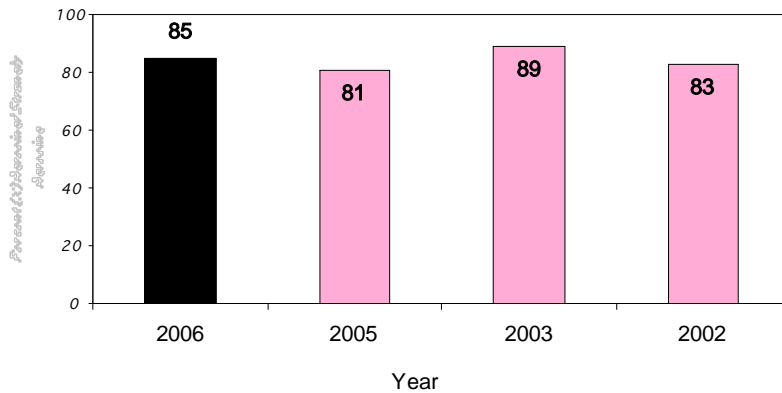
Seventy two percent agreed that the tourism product quality needs great improvement in 2006, a moderate change when compared to 2002-2003 (82%, 81%).

Survey Year Comparison
Percent (%) of Respondents "Agreeing/Strongly Agreeing" - Bahamians do not give other Bahamians good service or value for money



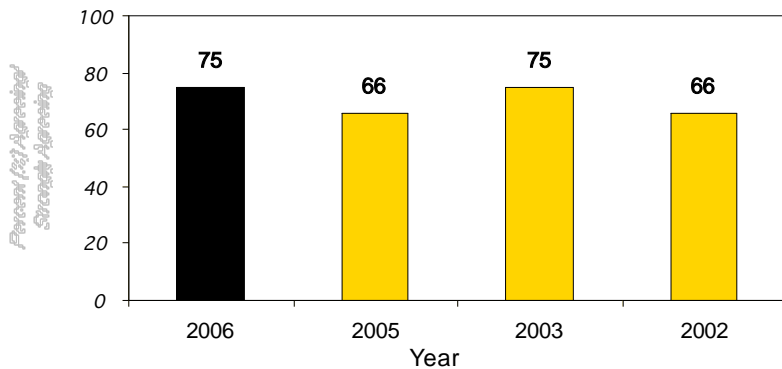
In 2006, most (82%) Bahamas residents felt that Bahamians are not very serviceable to other Bahamians, a slight contrast to the year before, at 68%.

Survey Year Comparison
Percent (%) of Respondents "Agreeing/Strongly Agreeing" - Standard of service in The Bahamas needs improvement



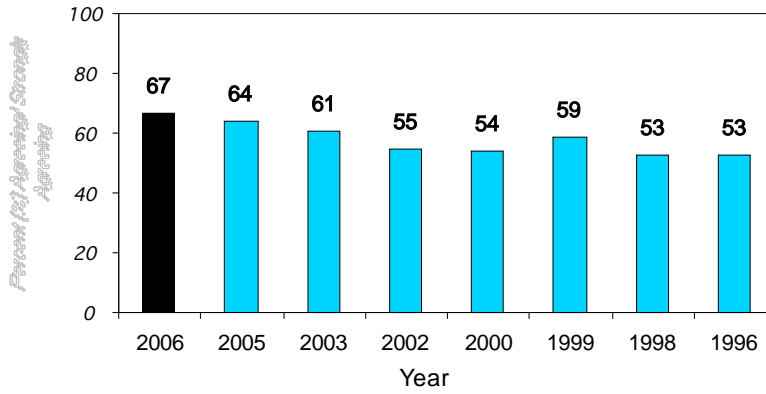
Again in 2006, the overwhelming majority of Bahamians (85%) agreed that service standards in The Bahamas needs improvement, a similar opinion to previous surveys.

Survey Year Comparison
Percent (%) of Respondents "Agreeing/Strongly Agreeing" - Costs such as wages, electricity and telephone are higher in the Bahamas than most parts in region including USA and Canada



Three out of four respondents (75%) in 2006 feel that wage and utility costs are higher here when compared to the region, with little change from past responses.

Survey Year Comparison
Percent (%) of Respondents "Agreeing/Strongly Agreeing" - Tourism will have to be the main industry in The Bahamas for at least the next thirty years



Since 1996, proportionally more and more residents feel that tourism will have to be the main industry for the next thirty years – from 53% in 1996 to 67% in 2006.

Table 8

**Percent (%) of Respondents:
All Responses to General Attitude Statements, 2006**

| Comment | Strongly Agree | Agree | Neither Agree nor Disagree | Disagree | Strongly Disagree | Don't Know |
|---|----------------|-------|----------------------------|----------|-------------------|------------|
| Most tourists are satisfied with their Bahamas experience. | 24 | 57 | 9 | 8 | 0 | 1 |
| Most Bahamians make the tourists feel like they are doing the tourist a big favour when serving or helping the tourist. | 9 | 37 | 9 | 39 | 6 | 0 |
| The only jobs tourism has created for Bahamians are jobs at the bottom of the ladder. | 5 | 15 | 11 | 56 | 11 | 2 |
| My job is related to tourism. | 36 | 23 | 2 | 28 | 10 | 1 |
| I would like my child, if I have one, to work in the tourism industry. | 11 | 47 | 17 | 14 | 7 | 4 |
| Tourists are given their money's worth while visiting the Islands of The Bahamas. | 20 | 49 | 13 | 16 | 2 | 1 |
| Tourism does not affect me personally. | 5 | 14 | 7 | 40 | 33 | 1 |
| Only Bahamian art, straw and craft goods should be allowed to be sold to tourists. | 22 | 32 | 9 | 29 | 9 | 0 |
| Just because tourism is the main industry does not mean that Bahamians should be willing to go the extra mile to please tourists. | 5 | 9 | 5 | 51 | 29 | 0 |
| The 15% gratuity should be eliminated. | 7 | 13 | 8 | 33 | 38 | 2 |
| The Islands of the Bahamas' advertisements make me feel good about my country. | 40 | 46 | 6 | 3 | 1 | 5 |

Table 8 cont'd.

| Comment | Strongly Agree | Agree | Neither Agree nor Disagree | Disagree | Strongly Disagree | Don't Know |
|--|----------------|-------|----------------------------|----------|-------------------|------------|
| When tourists come to the Islands of The Bahamas they generally do not find what they were led to expect by our advertising and promotion. | 4 | 23 | 11 | 40 | 16 | 6 |
| There are not enough jobs in the tourism sector. | 4 | 27 | 9 | 45 | 11 | 5 |
| Jobs in tourism are not considered very prestigious. | 5 | 25 | 14 | 44 | 9 | 3 |
| Many parents do not think it is a good idea for their children to have a career in Tourism. | 4 | 21 | 17 | 40 | 10 | 7 |
| The salaries and benefits in the tourism sector are not on par with similar positions in the private sector. | 8 | 39 | 16 | 20 | 8 | 10 |
| There is little job security in the tourism sector. | 10 | 39 | 10 | 32 | 6 | 3 |
| Tourism has taken all our best beaches and land. | 24 | 40 | 11 | 23 | 1 | 2 |
| The quality of the tourism product needs great improvement. | 20 | 52 | 8 | 15 | 2 | 3 |
| Bahamians do not give other Bahamians good service or value for money. | 40 | 42 | 8 | 9 | 1 | 1 |
| Standard of service in The Islands of The Bahamas needs improvement. | 29 | 56 | 4 | 7 | 0.3 | 3 |
| Costs such as wages, electricity, telephone and so on are higher in the Bahamas than in most parts of the region including the USA and Canada. | 34 | 41 | 7 | 8 | 0 | 10 |
| Tourism will have to be the main industry in The Islands of The Bahamas for at least the next thirty years. | 23 | 44 | 12 | 14 | 2 | 5 |

3.8 Media Usage

ZNS is the most watched station “in the past month” (63%) (*Table 9*). Other popular television stations included CNN (25%), Lifetime (23%), TNT (20%), and USA (19%). Little has changed in what residents watch in two years.

Table 9

Percent (%) of Respondents – Top Ten Local and International Television Stations Watched (n=300)

| TV Stations | 2006 | 2005 | 2003 |
|-------------|------|------|------|
| ZNS | 63 | 68 | 66 |
| CNN | 25 | 19 | 20 |
| Lifetime | 23 | 30 | 33 |
| TNT | 20 | 16 | 17 |
| USA | 19 | 12 | 10 |
| CBS | 19 | 13 | 10 |
| ABC | 17 | 11 | 10 |
| Cable 12 | 17 | NK | NK |
| Fox | 14 | 14 | 11 |
| NBC | 11 | 6 | NK |

None – 3%

* Multiple responses were given, but are presented individually.

100 JAMZ is listened to by half of respondents (*Table 10*), followed by 104.5 FM (35%), and JOY 101.9 (28%). Radio listening habits appear not to have substantially changed since 2003.

Table 10

Percent (%) of Respondents – Top Ten Local and International Radio Stations Listened to (n=300)

| Radio Stations | 2006 | 2005 | 2003 |
|-------------------|----------|------|------|
| 100 JAMZ | 50 | 42 | 49 |
| 104.5 FM | 35 | 40 | 34 |
| JOY 101.9 FM | 28 | 29 | 23 |
| 97.5 (LOVE 97) | 23 | 18 | 22 |
| 94.9 (MORE FM) | 18 | 11 | 9 |
| ZNS 1540 AM | 11 | 15 | 13 |
| ZNS 1240 AM | 10 | 17 | 18 |
| COOL 96 | 5 | NK | NK |
| 102.9 (ISLAND FM) | 4 | 1 | 3 |
| GEMS | 1 | NK | NK |

None – 2%

* *Multiple responses were given, but are presented individually.*

Almost two out of three New Providence residents have read The Guardian (65%) and The Tribune (61%) in the past month (*Table 11*). Around half (48%) have read The Punch. It appears that the Tribune has gained some new readers since 2003.

Table 11

Percent (%) of Respondents – Top Five Local and International Newspapers Read (n=300)

| Newspapers | 2006 | 2005 | 2003 |
|---------------------------|----------|------|------|
| The Guardian | 65 | 65 | 70 |
| The Tribune | 61 | 50 | 51 |
| The Punch | 48 | 38 | 42 |
| The Miami Herald | 20 | 22 | 23 |
| The Bahama Journal | 8 | 4 | NK |

None – 9%

* *Multiple responses were given, but are presented individually.*

Most respondents had not read a magazine in the past month (65%). Nonetheless, the more popular magazines were Ebony (9%), Oprah (8%), and Jet (5%). While Ebony and Jet appeared to have slightly dipped in popularity since 2003, Oprah seemed to have gained more readers.

Table 9

Percent (%) of Respondents – Top Ten Local and International Magazines Read (n=300)

| Magazines | 2006 | 2005 | 2003 |
|--------------------|----------|------|------|
| Ebony | 9 | 13 | 9 |
| Oprah | 8 | 5 | 5 |
| Jet | 5 | 8 | 8 |
| Sports Illustrated | 5 | 2 | 3 |
| Cosmopolitan | 4 | 2 | 2 |
| Men's Health | 3 | 2 | NK |
| People | 3 | 3 | 3 |
| Enquirer | 2 | 1 | NK |
| Soap Digest | 2 | 2 | NK |
| Time | 2 | 4 | 4 |

None – 65%

* *Multiple responses were given, but are presented individually.*

3.9 Associations

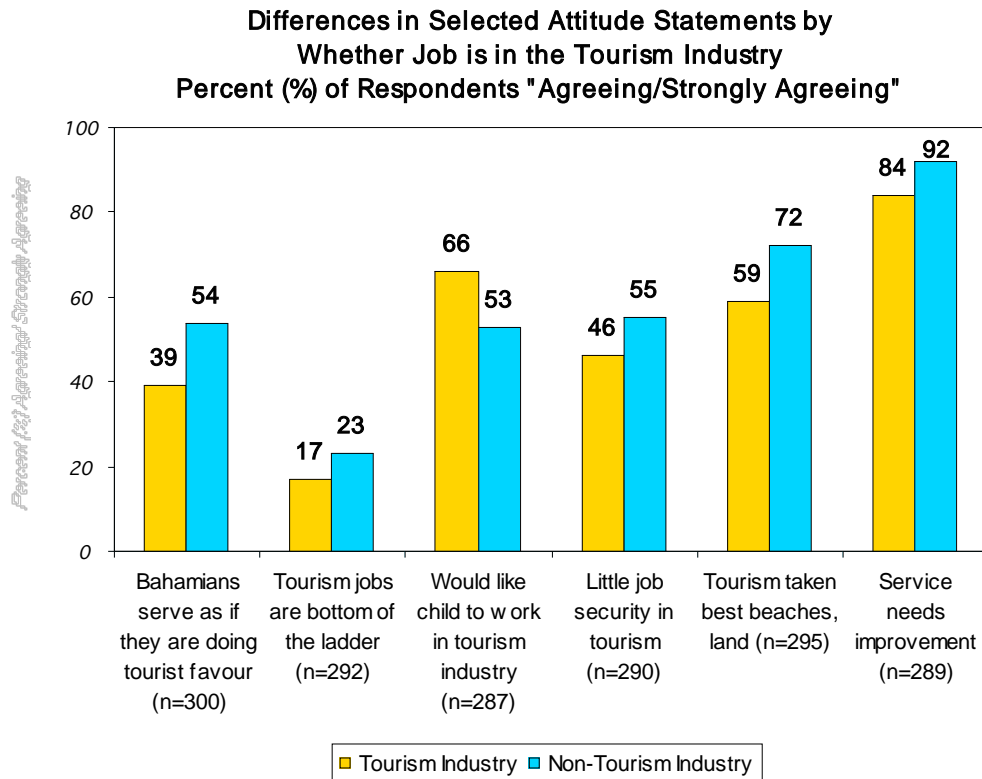
Demographics, such as age, sex, and tourism industry job, and income were tested with attitude items to test for differences in opinion by these groups. While there were virtually no significant differences by age or sex, many were found by tourism industry job, income, and education.

3.9.1 Associations by whether Job is in Tourism Industry

Respondents who work for the tourism industry appeared likely to answer more favourably for some attitude items, especially those with a negative slant, than those who did not work in a tourism job (*Pearson chi-square, p<=0.05; Figure 25*).

Respondents who work in tourism seemed less likely to agree that Bahamians serve as if they are doing the tourists a big favour, that tourism jobs are at the bottom of the ladder, there is little job security in tourism, tourism has taken best beaches and land, and that service standards need improvement. Further, they appeared more likely to agree that they would like their child to work in the tourism industry.

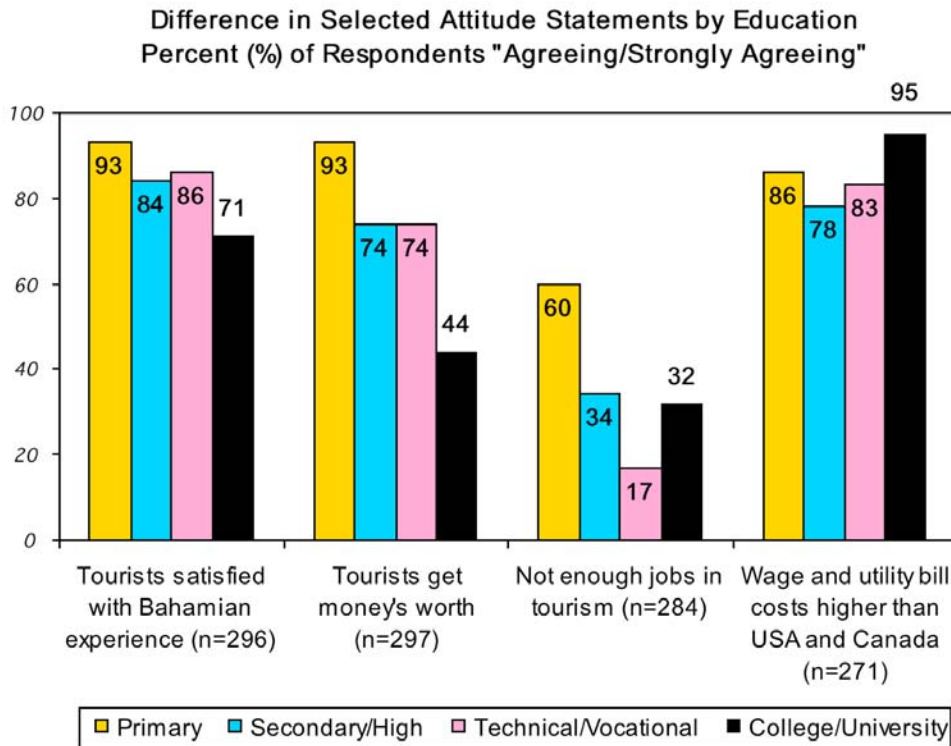
Figure 25



3.9.2 Associations by Education

For the most part, it appears that the higher the educational level of respondents, the less likely they were to respond positively to some statements, namely whether tourists are satisfied with their experience, and that tourists get their money's worth (negative low to moderate *Kendall's tau-c*; *Figure 26*). When it comes to tourism jobs, however, the few with primary education answered much less favourably, that is, agreeing that there are not enough jobs in tourism, than those with higher levels of education.

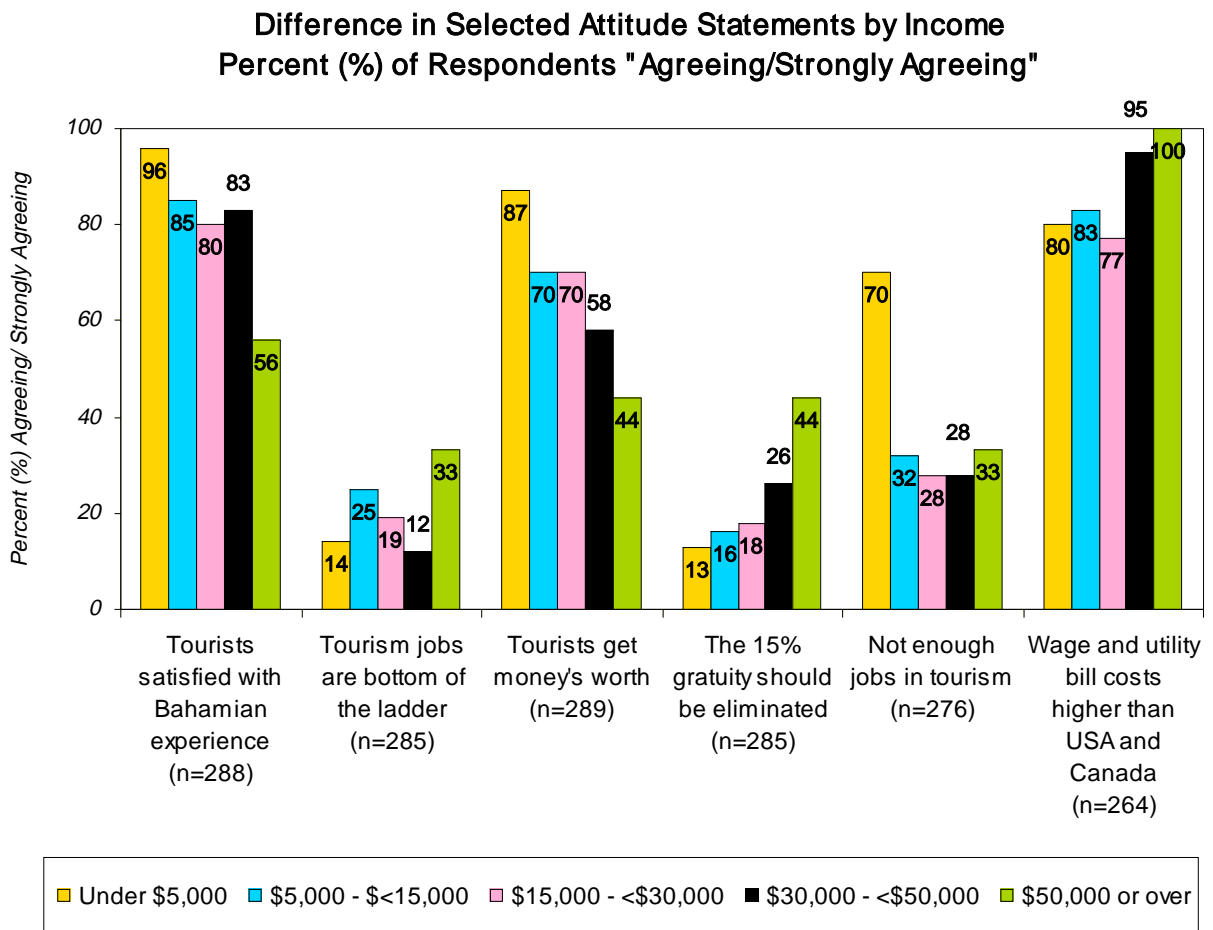
Figure 26



3.9.3 Associations by Income

For selected attitude items, those with higher incomes tended to answer less favourably (low to moderate negative and positive *Kendalls' tau-c*, *Figure 27*): As income increased, the less likely respondents appeared to agree that tourists are satisfied with their Bahamian experience, and that tourists get their money's worth. Also, respondents making \$50,000 or more seemed more likely to agree that tourism jobs are at the bottom of the ladder, and that the 15% gratuity should be eliminated. When it comes to not being enough jobs in tourism, however, those in the lowest income bracket stood apart by far in their agreement.

Figure 27



IV. Conclusions

- Most New Providence respondents appear to look positively upon employment in the tourism industry.
 - Tourism workers seem to be happy with their decision to work in tourism.
- Respondents looked at tourism as a people centred career.
 - “Meeting people” or conversely, “Not a people person” remains the top reason for working/not working in tourism.
 - The warmth and hospitality of Bahamian people is a top cited incentive to visit The Bahamas.
- Interest in another industry and low salary are the main perceived reasons why tourism industry jobs are not a first choice for graduates.
- The increase in training awareness, especially in schools, seems tantamount to attracting the best and brightest to work in the tourism industry.
- Jobs and economic development are seen as the top positive effects of tourism.
- Half responded that there are no negative effects of tourism.
 - Crime was the most named negative effect of tourism.
- Domestic travel is moderately common, with the unsurprising result that as income increased, so did expenditure.
 - Males spent more on food and entertainment than females.
- Most respondents responded somewhat positively toward the attitude items. Over 60% think that:
 - Bahamians are not developing a negative attitude toward the large number of visitors.
 - Tourists are satisfied with their Bahamas experiences.

- Tourism jobs are *not* at the bottom of the ladder, a moderate improvement in favourability from previous surveys.
- Tourism personally affects them.
- Bahamians should be willing to go the extra mile to please tourists.
- The 15% gratuity should *not* be eliminated.
- They feel proud of The Bahamas when viewing tourism ad campaigns.
- Tourists generally find what they expect of The Bahamas through advertisements. This opinion was a complete turn around in favourability when compared to surveys prior to 2002.
- There are enough jobs in tourism.
- Tourism jobs are prestigious.
- Parents think it is a good idea for their child to pursue a career in tourism.
- There were opinions, however, that were more negative, especially in the areas of service. Around 60% or more felt that:
 - Quality of the Bahamian tourism product needs improvement.
 - Bahamians are not serviceable to other Bahamians, an attitude that has grown even less positive.
 - Service standards need improvement.
 - Tourism has taken all the best beaches and land.
 - The Bahamas government is not doing sufficient to train Bahamians in high level tourism positions.

- The tourism industry does not use sufficient Bahamian foods, culture, products, and services.
- Respondents were essentially split when it came to:
 - Bahamians serving as if they are doing tourists a big favour.
 - Only Bahamian made arts and craft should be sold to tourists.
 - Tourism salaries are not on par with private sector salaries in similar job positions.
 - There is little job security in tourism.
- With regards to media usage :
 - Respondents were news watchers, be it local and international, as ZNS (assumption was made to watch news) and CNN were the top two television stations watched. The women's station, Lifetime, is also popular.
 - The Guardian, The Tribune, and The Punch were each read by at least half of the respondents.
 - Most New Providence residents do not read magazines. Among those named, however, the black market targeted Ebony, Oprah, and Jet were the most read. Sports Illustrated also emerged as a popular magazine.
- While there were no significant differences by age and sex, associations by whether job was tourism related, education, and income (there were similar findings for the latter two because of high correlation with each other) became apparent. Tourism industry workers responded more favourably to several attitude variables including:
 - Bahamians serve as if they are doing a favour.
 - Tourism jobs are at the bottom of the ladder.

- They would like their child to work in the tourism industry.
- There is little job security in tourism.
- Tourism has taken all the best beaches and land.
- Service needs improvement.
- Respondents with higher income and education generally responded less positively when it came to:
 - Tourists being satisfied with the Bahamian experience.
 - Tourists get their money's worth.
 - The 15% gratuity should be eliminated.

Interestingly, those with lower levels of income and education were more likely to agree that there were not enough jobs in tourism.

- Most respondents felt that Bahamians should speak two languages, adding Spanish or French to English.

V. Recommendations

- An increase in training and education in schools, specifically high schools, is important in increasing awareness among youth with regards to the types of jobs and number of attractive positions available in the tourism sector.
- An increase in tourism pay scales is also needed to attract bright Bahamians.
- A mandatory training in service and hospitality schedule for all tourism workers is sorely needed.
- Tourism officials should maintain/ improve relations with police with regards to tourism policing.
- Potential visitors, be they foreign or Bahamian, to the Family Islands, are still an untapped market. While the increase in anchor projects may have increased visitors and jobs, their unspoiled beauty can be even more promoted in the fairly new eco-tourism market.
- While The Bahamas has an extensive media campaign, there are still untapped media resources in which ads can be targeted to Bahamians to promote the tourism job market.

VI. Appendix

Table A-1

6.1 Percent (%) of Respondents – Responses to General Attitude Statements by Survey Year 1996-2006

| Comment | Survey Year | | | | | | | |
|--|-------------|------|------|------|------|------|------|------|
| | 2006 | 2005 | 2003 | 2002 | 2000 | 1999 | 1998 | 1996 |
| Most tourists are satisfied with their Bahamas experience. | | | | | | | | |
| <i>Strongly Agree</i> | 24 | 19 | 14 | 22 | 21 | 28 | 20 | 12 |
| <i>Agree</i> | 57 | 69 | 65 | 63 | 69 | 59 | 67 | 63 |
| <i>Neither Agree nor Disagree</i> | 9 | 4 | 7 | 10 | 3 | 6 | 7 | 8 |
| <i>Disagree</i> | 8 | 6 | 9 | 4 | 5 | 4 | 4 | 13 |
| <i>Strongly Disagree</i> | 0 | 1 | 2 | 0 | 1 | 1 | 1 | 1 |
| <i>Don't Know</i> | 1 | 1 | 2 | 1 | 1 | 1 | 1 | 3 |
| Most Bahamians make the tourists feel like they are doing the tourist a big favour when serving or helping the tourist. | | | | | | | | |
| <i>Strongly Agree</i> | 9 | 7 | 11 | 8 | 11 | 12 | 16 | 7 |
| <i>Agree</i> | 37 | 38 | 39 | 37 | 23 | 27 | 34 | 35 |
| <i>Neither Agree nor Disagree</i> | 9 | 13 | 9 | 15 | 16 | 19 | 15 | 10 |
| <i>Disagree</i> | 39 | 34 | 35 | 34 | 42 | 33 | 25 | 43 |
| <i>Strongly Disagree</i> | 6 | 5 | 4 | 5 | 6 | 8 | 9 | 4 |
| <i>Don't Know</i> | 0 | 2 | 1 | 2 | 2 | 0 | 1 | 1 |
| The only jobs tourism has created for Bahamians are jobs at the bottom of the ladder. | | | | | | | | |
| <i>Strongly Agree</i> | 5 | 7 | 12 | 6 | 8 | 6 | 7 | 4 |
| <i>Agree</i> | 15 | 24 | 16 | 15 | 9 | 15 | 13 | 13 |
| <i>Neither Agree nor Disagree</i> | 11 | 11 | 11 | 9 | 13 | 8 | 10 | 9 |
| <i>Disagree</i> | 56 | 45 | 48 | 54 | 51 | 48 | 44 | 57 |
| <i>Strongly Disagree</i> | 11 | 9 | 12 | 13 | 15 | 22 | 24 | 14 |
| <i>Don't Know</i> | 2 | 2 | 1 | 2 | 2 | 2 | 2 | 4 |
| My job is related to tourism. | | | | | | | | |
| <i>Strongly Agree</i> | 36 | 32 | 28 | 24 | 30 | 27 | 26 | |
| <i>Agree</i> | 23 | 29 | 36 | 32 | 27 | 36 | 28 | |
| <i>Neither Agree nor Disagree</i> | 2 | 6 | 6 | 9 | 6 | 7 | 15 | |
| <i>Disagree</i> | 28 | 19 | 15 | 26 | 28 | 17 | 18 | |
| <i>Strongly Disagree</i> | 10 | 11 | 15 | 7 | 7 | 9 | 8 | |
| <i>Don't Know</i> | 1 | 3 | 0 | 2 | 2 | 2 | 2 | |

Table A-1 cont'd.

| Comment | Survey Year | | | | | | | |
|---|-------------|------|------|------|------|------|------|------|
| | 2006 | 2005 | 2003 | 2002 | 2000 | 1999 | 1998 | 1996 |
| I would like my child, if I have one, to work in the tourism industry. | | | | | | | | |
| <i>Strongly Agree</i> | 11 | 6 | 14 | 10 | 30 | 27 | 26 | |
| <i>Agree</i> | 47 | 37 | 49 | 36 | 27 | 36 | 28 | |
| <i>Neither Agree nor Disagree</i> | 17 | 26 | 15 | 25 | 6 | 7 | 15 | |
| <i>Disagree</i> | 14 | 15 | 10 | 17 | 28 | 17 | 18 | |
| <i>Strongly Disagree</i> | 7 | 7 | 7 | 6 | 7 | 9 | 8 | |
| <i>Don't Know</i> | 4 | 8 | 5 | 6 | 2 | 2 | 2 | |
| Tourists are given their money's worth while visiting the Islands of The Bahamas. | | | | | | | | |
| <i>Strongly Agree</i> | 20 | 14 | 7 | 9 | 14 | 18 | 13 | 5 |
| <i>Agree</i> | 49 | 60 | 53 | 56 | 53 | 53 | 50 | 48 |
| <i>Neither Agree nor Disagree</i> | 13 | 13 | 16 | 14 | 14 | 16 | 17 | 19 |
| <i>Disagree</i> | 16 | 9 | 17 | 14 | 12 | 8 | 14 | 19 |
| <i>Strongly Disagree</i> | 2 | 2 | 4 | 4 | 3 | 3 | 2 | 2 |
| <i>Don't Know</i> | 1 | 2 | 2 | 3 | 3 | 2 | 3 | 5 |
| Tourism does not affect me personally. | | | | | | | | |
| <i>Strongly Agree</i> | 5 | 7 | 8 | 4 | 9 | 10 | 6 | 2 |
| <i>Agree</i> | 14 | 16 | 12 | 15 | 19 | 22 | 16 | 16 |
| <i>Neither Agree nor Disagree</i> | 7 | 7 | 4 | 8 | 6 | 5 | 7 | 3 |
| <i>Disagree</i> | 40 | 34 | 39 | 44 | 39 | 40 | 38 | 52 |
| <i>Strongly Disagree</i> | 33 | 34 | 35 | 27 | 25 | 22 | 30 | 25 |
| <i>Don't Know</i> | 1 | 1 | 1 | 2 | 1 | 1 | 1 | 1 |
| Only Bahamian art, straw and craft goods should be allowed to be sold to tourists. | | | | | | | | |
| <i>Strongly Agree</i> | 22 | 16 | 23 | 14 | 19 | 11 | 21 | 16 |
| <i>Agree</i> | 32 | 37 | 26 | 36 | 21 | 21 | 23 | 39 |
| <i>Neither Agree nor Disagree</i> | 9 | 5 | 11 | 9 | 8 | 9 | 11 | 6 |
| <i>Disagree</i> | 29 | 31 | 28 | 28 | 35 | 42 | 31 | 33 |
| <i>Strongly Disagree</i> | 9 | 8 | 11 | 9 | 15 | 15 | 11 | 3 |
| <i>Don't Know</i> | 0 | 2 | 1 | 4 | 1 | 1 | 2 | 2 |

Table A-1 cont'd.

| Comment | Survey Year | | | | | | | |
|---|-------------|------|------|------|------|------|------|------|
| | 2006 | 2005 | 2003 | 2002 | 2000 | 1999 | 1998 | 1996 |
| Just because tourism is the main industry does not mean that Bahamians should be willing to go the extra mile to please tourists. | | | | | | | | |
| <i>Strongly Agree</i> | 5 | 5 | 8 | 6 | 9 | 12 | 6 | 2 |
| <i>Agree</i> | 9 | 20 | 11 | 15 | 17 | 19 | 13 | 15 |
| <i>Neither Agree nor Disagree</i> | 5 | 4 | 5 | 6 | 9 | 6 | 6 | 3 |
| <i>Disagree</i> | 51 | 38 | 45 | 46 | 38 | 35 | 41 | 56 |
| <i>Strongly Disagree</i> | 29 | 32 | 29 | 24 | 27 | 26 | 34 | 22 |
| <i>Don't Know</i> | 0 | 1 | 1 | 3 | 0 | 2 | 1 | 1 |
| The 15% gratuity should be eliminated. | | | | | | | | |
| <i>Strongly Agree</i> | 7 | 8 | 16 | 10 | 10 | 6 | 5 | 7 |
| <i>Agree</i> | 13 | 15 | 15 | 18 | 14 | 12 | 10 | 19 |
| <i>Neither Agree nor Disagree</i> | 8 | 8 | 11 | 9 | 11 | 10 | 13 | 7 |
| <i>Disagree</i> | 33 | 30 | 30 | 36 | 35 | 39 | 40 | 48 |
| <i>Strongly Disagree</i> | 38 | 35 | 25 | 22 | 28 | 30 | 28 | 18 |
| <i>Don't Know</i> | 2 | 2 | 1 | 5 | 2 | 2 | 2 | 2 |
| The Islands of the Bahamas' advertisements make me feel good about my country. | | | | | | | | |
| <i>Strongly Agree</i> | 40 | 31 | 27 | 30 | 31 | 35 | 36 | 19 |
| <i>Agree</i> | 46 | 50 | 58 | 53 | 55 | 52 | 48 | 64 |
| <i>Neither Agree nor Disagree</i> | 6 | 8 | 6 | 9 | 7 | 8 | 6 | 8 |
| <i>Disagree</i> | 3 | 3 | 3 | 4 | 3 | 3 | 4 | 5 |
| <i>Strongly Disagree</i> | 1 | 2 | 1 | 0 | 0 | 1 | 1 | 0 |
| <i>Don't Know</i> | 5 | 5 | 4 | 4 | 3 | 1 | 2 | 3 |
| When tourists come to the Islands of The Bahamas they generally do not find what they were led to expect by our advertising and promotion. | | | | | | | | |
| <i>Strongly Agree</i> | 4 | 5 | 6 | 6 | 31 | 35 | 36 | 19 |
| <i>Agree</i> | 23 | 23 | 30 | 25 | 55 | 52 | 48 | 64 |
| <i>Neither Agree nor Disagree</i> | 11 | 14 | 20 | 17 | 7 | 8 | 6 | 8 |
| <i>Disagree</i> | 40 | 37 | 32 | 40 | 3 | 3 | 4 | 5 |
| <i>Strongly Disagree</i> | 16 | 13 | 7 | 11 | 0 | 1 | 1 | 0 |

| | | | | | | | | |
|-------------------|---|---|---|---|---|---|---|---|
| <i>Don't Know</i> | 6 | 6 | 5 | 2 | 3 | 1 | 2 | 3 |
|-------------------|---|---|---|---|---|---|---|---|

Table A-1 cont'd.

| Comment | Survey Year | | | | | | | |
|---|-------------|------|------|------|------|------|------|------|
| | 2006 | 2005 | 2003 | 2002 | 2000 | 1999 | 1998 | 1996 |
| There are not enough jobs in the tourism sector. | | | | | | | | |
| <i>Strongly Agree</i> | 4 | 7 | 6 | 7 | 6 | 7 | 7 | |
| <i>Agree</i> | 27 | 33 | 28 | 23 | 29 | 29 | 33 | |
| <i>Neither Agree nor Disagree</i> | 9 | 10 | 12 | 20 | 13 | 12 | 14 | |
| <i>Disagree</i> | 45 | 36 | 43 | 38 | 41 | 36 | 33 | |
| <i>Strongly Disagree</i> | 11 | 9 | 8 | 7 | 7 | 11 | 7 | |
| <i>Don't Know</i> | 5 | 4 | 2 | 5 | 3 | 4 | 5 | |
| Jobs in tourism are not considered very prestigious. | | | | | | | | |
| <i>Strongly Agree</i> | 5 | 4 | 7 | 4 | 5 | 7 | 7 | |
| <i>Agree</i> | 25 | 32 | 41 | 31 | 28 | 31 | 34 | |
| <i>Neither Agree nor Disagree</i> | 14 | 15 | 12 | 17 | 17 | 18 | 10 | |
| <i>Disagree</i> | 44 | 33 | 32 | 32 | 40 | 36 | 29 | |
| <i>Strongly Disagree</i> | 9 | 11 | 5 | 10 | 7 | 7 | 12 | |
| <i>Don't Know</i> | 3 | 3 | 2 | 6 | 2 | 1 | 2 | |
| Many parents do not think it is a good idea for their children to have a career in Tourism. | | | | | | | | |
| <i>Strongly Agree</i> | 4 | 4 | 9 | 4 | 4 | 6 | 3 | |
| <i>Agree</i> | 21 | 30 | 28 | 30 | 23 | 30 | 26 | |
| <i>Neither Agree nor Disagree</i> | 17 | 19 | 17 | 19 | 24 | 23 | 23 | |
| <i>Disagree</i> | 40 | 29 | 30 | 32 | 36 | 30 | 25 | |
| <i>Strongly Disagree</i> | 10 | 7 | 5 | 6 | 8 | 5 | 9 | |
| <i>Don't Know</i> | 7 | 10 | 10 | 9 | 5 | 5 | 13 | |
| The salaries and benefits in the tourism sector are not on par with similar positions in the private sector. | | | | | | | | |
| <i>Strongly Agree</i> | 8 | 8 | 6 | 12 | 7 | 14 | 7 | |
| <i>Agree</i> | 39 | 38 | 37 | 31 | 34 | 31 | 40 | |
| <i>Neither Agree nor Disagree</i> | 16 | 15 | 18 | 13 | 18 | 17 | 14 | |
| <i>Disagree</i> | 20 | 26 | 22 | 26 | 21 | 21 | 23 | |
| <i>Strongly Disagree</i> | 8 | 6 | 5 | 6 | 6 | 7 | 6 | |
| <i>Don't Know</i> | 10 | 7 | 11 | 11 | 14 | 9 | 10 | |

Table A-1 cont'd.

| Comment | Survey Year | | | | | | | |
|---|-------------|------|------|------|------|------|------|------|
| | 2006 | 2005 | 2003 | 2002 | 2000 | 1999 | 1998 | 1996 |
| There is little job security in the tourism sector. | | | | | | | | |
| <i>Strongly Agree</i> | 10 | 15 | 14 | 13 | 10 | 9 | 20 | |
| <i>Agree</i> | 39 | 35 | 41 | 38 | 31 | 40 | 40 | |
| <i>Neither Agree nor Disagree</i> | 10 | 17 | 14 | 8 | 16 | 15 | 9 | |
| <i>Disagree</i> | 32 | 24 | 22 | 27 | 28 | 24 | 19 | |
| <i>Strongly Disagree</i> | 6 | 5 | 6 | 8 | 6 | 8 | 3 | |
| <i>Don't Know</i> | 3 | 3 | 3 | 7 | 9 | 4 | 8 | |
| Tourism has taken all our best beaches and land. | | | | | | | | |
| <i>Strongly Agree</i> | 24 | 18 | 14 | 15 | | | | |
| <i>Agree</i> | 40 | 35 | 32 | 35 | | | | |
| <i>Neither Agree nor Disagree</i> | 11 | 10 | 12 | 9 | | | | |
| <i>Disagree</i> | 23 | 30 | 34 | 30 | | | | |
| <i>Strongly Disagree</i> | 1 | 5 | 7 | 10 | | | | |
| <i>Don't Know</i> | 2 | 2 | 1 | 1 | | | | |
| The quality of the tourism product needs great improvement. | | | | | | | | |
| <i>Strongly Agree</i> | 20 | 17 | 21 | 20 | | | | |
| <i>Agree</i> | 52 | 54 | 60 | 62 | | | | |
| <i>Neither Agree nor Disagree</i> | 8 | 11 | 5 | 10 | | | | |
| <i>Disagree</i> | 15 | 13 | 10 | 5 | | | | |
| <i>Strongly Disagree</i> | 2 | 3 | 1 | 2 | | | | |
| <i>Don't Know</i> | 3 | 0 | 2 | 1 | | | | |
| Bahamians do not give other Bahamians good service or value for money. | | | | | | | | |
| <i>Strongly Agree</i> | 40 | 26 | 28 | 32 | | | | |
| <i>Agree</i> | 42 | 42 | 48 | 46 | | | | |
| <i>Neither Agree nor Disagree</i> | 8 | 9 | 12 | 9 | | | | |
| <i>Disagree</i> | 9 | 20 | 9 | 10 | | | | |
| <i>Strongly Disagree</i> | 1 | 1 | 1 | 0 | | | | |
| <i>Don't Know</i> | 1 | 1 | 1 | 2 | | | | |

Table A-1 cont'd.

| Comment | Survey Year | | | | | | | |
|---|-------------|------|------|------|------|------|------|------|
| | 2006 | 2005 | 2003 | 2002 | 2000 | 1999 | 1998 | 1996 |
| Standard of service in The Islands of The Bahamas needs improvement. | | | | | | | | |
| <i>Strongly Agree</i> | 29 | 28 | 29 | 27 | | | | |
| <i>Agree</i> | 56 | 53 | 60 | 56 | | | | |
| <i>Neither Agree nor Disagree</i> | 4 | 7 | 4 | 10 | | | | |
| <i>Disagree</i> | 7 | 9 | 4 | 3 | | | | |
| <i>Strongly Disagree</i> | 0 | 0 | 1 | 1 | | | | |
| <i>Don't Know</i> | 3 | 1 | 2 | 3 | | | | |
| Costs such as wages, electricity, telephone and so on are higher in The Bahamas than in most parts of the region including the USA and Canada. | | | | | | | | |
| <i>Strongly Agree</i> | 34 | 32 | 24 | 30 | | | | |
| <i>Agree</i> | 41 | 34 | 51 | 36 | | | | |
| <i>Neither Agree nor Disagree</i> | 7 | 11 | 10 | 11 | | | | |
| <i>Disagree</i> | 8 | 10 | 4 | 8 | | | | |
| <i>Strongly Disagree</i> | 0 | 1 | 2 | 2 | | | | |
| <i>Don't Know</i> | 10 | 12 | 9 | 13 | | | | |
| Tourism will have to be the main industry in The Islands of The Bahamas for at least the next thirty years. | | | | | | | | |
| <i>Strongly Agree</i> | 23 | 24 | 20 | 14 | 15 | 20 | 19 | 7 |
| <i>Agree</i> | 44 | 40 | 41 | 41 | 39 | 39 | 34 | 46 |
| <i>Neither Agree nor Disagree</i> | 12 | 15 | 18 | 11 | 12 | 14 | 14 | 9 |
| <i>Disagree</i> | 14 | 12 | 12 | 21 | 22 | 17 | 16 | 29 |
| <i>Strongly Disagree</i> | 2 | 2 | 2 | 7 | 8 | 6 | 9 | 4 |
| <i>Don't Know</i> | 5 | 7 | 7 | 6 | 4 | 4 | 6 | 6 |

6.2 Average (Mean) Differences in Attitude Statements

The 23 general attitude statements were tested for differences in means (*Strongly Agree* – 5; *Agree* – 4; *Neither Agree nor Disagree* – 3; *Disagree* – 2; *Strongly Disagree* – 1) by several demographics (T-Tests, ANOVA, $p < .05$). Therefore, the higher the mean, the higher the extent of agreement.

Presented below are the significant results for three demographics: whether the respondent's job is in the tourism industry or not, education, and income.

Table A-2

6.2.1 Average (Mean) Differences in Attitude Statements: Tourism Industry vs. Non Tourism Industry Job

| Comment | Non-Tourism Industry | |
|---|----------------------|----------------------|
| | Tourism Industry | Non-Tourism Industry |
| Most Bahamians make the tourists feel like they are doing the tourist a big favour when serving or helping the tourist. | 2.84 | 3.27 |
| My job is related to tourism. | 4.62 | 2.18 |
| I would like my child, if I have one, to work in the tourism industry. | 3.58 | 3.21 |
| Tourism does not affect me personally. | 1.82 | 2.56 |
| There is little job security in the tourism sector. | 2.99 | 3.32 |
| Tourism has taken all our best beaches and land. | 3.46 | 3.83 |
| Bahamians do not give other Bahamians good service or value for money. | 3.98 | 4.26 |
| Standard of service in The Islands of The Bahamas needs improvement. | 3.95 | 4.25 |
| Costs such as wages, electricity, telephone and so on are higher in the Bahamas than in most parts of the region including the USA and Canada. | 3.99 | 4.24 |

Table A-3

6.2.2 Average (Mean) Differences in Attitude Statements: Education

| Comment | Education | | | |
|---|-----------|--------------------|--------------------------|------------------------|
| | Primary | Secondary/ High | Technical/ Vocational | College/ University |
| Most tourists are satisfied with their Bahamas experience. | 4.07 | 4.07 | 4.00 | 3.67 |
| Most Bahamians make the tourists feel like they are doing the tourist a big favour when serving or helping the tourist. | 2.93 | 2.97 | 2.82 | 3.43 |
| My job is related to tourism. | 2.64 | 3.77 | 3.55 | 2.80 |
| I would like my child, if I have one, to work in the tourism industry. | 3.79 | 3.59 | 3.26 | 2.88 |
| Tourists are given their money's worth while visiting the Islands of The Bahamas. | 3.93 | 3.82 | 3.86 | 3.10 |
| The 15% gratuity should be eliminated. | 1.79 | 2.15 | 1.78 | 2.60 |
| There are not enough jobs in the tourism sector. | 3.13 | 2.74 | 2.31 | 2.62 |
| Many parents do not think it is a good idea for their children to have a career in Tourism. | 2.38 | 2.76 | 2.27 | 2.81 |
| The quality of the tourism product needs improvement | 3.67 | 3.76 | 3.66 | 4.25 |
| Standard of service in The Islands of The Bahamas needs improvement. | 4.00 | 3.99 | 3.95 | 4.47 |
| Costs such as wages, electricity, telephone and so on are higher in The Bahamas than in most parts of the region including the USA and Canada. | 3.93 | 4.01 | 4.13 | 4.40 |

Table A-4

6.2.3 Average (Mean) Differences in Attitude Statements:

Income

| Comment | Under \$5,000 | \$5,000 - <\$15,000 | \$15,000 - <\$30,000 | \$30,000 - <\$50,000 | \$50,000 or over |
|---|---------------|---------------------|----------------------|----------------------|------------------|
| The only jobs tourism has created for Bahamians are jobs at the bottom of the ladder. | 2.27 | 2.75 | 2.37 | 2.27 | 2.22 |
| My job is related to tourism. | 2.35 | 3.45 | 3.79 | 3.42 | 2.44 |
| Tourists are given their money's worth while visiting the Islands of The Bahamas. | 4.04 | 3.79 | 3.69 | 3.46 | 3.00 |
| The 15% gratuity should be eliminated. | 1.96 | 1.98 | 2.05 | 2.63 | 3.11 |
| There are not enough jobs in the tourism sector. | 3.55 | 2.74 | 2.54 | 2.47 | 3.00 |
| Costs such as wages, electricity, telephone and so on are higher in The Bahamas than in most parts of the region including the USA and Canada. | 4.07 | 4.10 | 3.99 | 4.30 | 5.00 |

6.3 Factor Analysis

Factor analysis was conducted on the 23 attitude items to test for groups of similarities in responses. Presented below are the four groups that emerged:

Table A-5

Factor Analysis - Attitude Statements

| Comment | Group 1 – Tourism Critics | Group 2 - Tourism Jobs Supporters | Group 3 - Tourism Advocates | Group 4 – General Tourism Opponents |
|---|--|--|--|--|
| Most tourists are satisfied with their Bahamas experience. | | | Group 3 - Tourism Advocates (.777) | |
| Most Bahamians make the tourists feel like they are doing the tourist a big favour when serving or helping the tourist. | Group 1 – Tourism Critics (.479) | | Group 3 - Tourism Advocates (-.473) | |
| The only jobs tourism has created for Bahamians are jobs at the bottom of the ladder. | | Group 2 - Tourism Jobs Supporters (-.468) | | Group 4 – General Tourism Opponents (.451) |
| My job is related to tourism. | | Group 2 - Tourism Jobs Supporters (.495) | | |
| I would like my child, if I have one, to work in the tourism industry. | | Group 2 - Tourism Jobs Supporters (.731) | | |
| Tourists are given their money's worth while visiting the Islands of The Bahamas. | | | Group 3 - Tourism Advocates (.802) | |
| Tourism does not affect me personally. | | Group 2 - Tourism Jobs Supporters (-.465) | | Group 4 – General Tourism Opponents (.464) |
| Only Bahamian art, straw and craft goods should be allowed to be sold to tourists. | Group 1 – Tourism Critics (.412) | | | |
| Just because tourism is the main industry does not mean that Bahamians should be willing to go the extra mile to please tourists. | | | | Group 4 – General Tourism Opponents (.588) |
| The 15% gratuity should be eliminated. | | | Group 3 - Tourism Advocates (-.533) | |

Table A-5 cont'd.

Factor Analysis - Attitude Statements

| Comment | Group 1 – Tourism Critics | Group 2 - Tourism Jobs Supporters | Group 3 - Tourism Advocates | Group 4 – General Tourism Opponents |
|--|--|--|--|---|
| The Islands of The Bahamas' advertisements make me feel good about my country. | | | | Group 4 – General Tourism Opponents (-.583) |
| When tourists come to The Islands of The Bahamas they generally do not find what they were led to expect by our advertising and promotion. | | | Group 3 - Tourism Advocates (-.467) | Group 4 – General Tourism Opponents (.545) |
| There are not enough jobs in the tourism sector. | | | | |
| Jobs in tourism are not considered very prestigious. | | Group 2 - Tourism Jobs Supporters (-.570) | | |
| Many parents do not think it is a good idea for their children to have a career in Tourism. | | Group 2 - Tourism Jobs Supporters (-.653) | | |
| The salaries and benefits in the tourism sector are not on par with similar positions in the private sector. | Group 1 – Tourism Critics (.656) | | | |
| There is little job security in the tourism sector. | | Group 2 - Tourism Jobs Supporters (-.654) | | |
| Tourism has taken all our best beaches and land. | Group 1 – Tourism Critics (.520) | | | |
| The quality of the tourism product needs great improvement. | Group 1 – Tourism Critics (.520) | | Group 3 - Tourism Advocates (-.571) | |
| Bahamians do not give other Bahamians good service or value for money. | Group 1 – Tourism Critics (.693) | | | |
| Standard of service in The Islands of The Bahamas needs improvement. | Group 1 – Tourism Critics (.514) | | Group 3 - Tourism Advocates (-.425) | |
| Costs such as wages, electricity, telephone and so on are higher in The Bahamas than in most parts of the region including the USA and Canada. | Group 1 – Tourism Critics (.635) | | | |
| Tourism will have to be the main industry in The Islands of The Bahamas for at least the next thirty years. | | | | |

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| | |
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6.5 Definition of Terms

In order to better understand all of the terms to be used in this Study, a list of important definitions is provided below.

- **Analysis of Variance (ANOVA)** ANOVA (one-way) is used to test for differences in means among three or more independent groups. (2)
- **Attitude** An attitude can be defined as a predisposition or state of mind that causes an individual to behave, react or respond to certain ideas, objects, people and situations in a manner that is favourable or unfavourable. (1)
- **Attitude Scale** This is the working set of definitions that have been developed in order to measure the construct "attitude". (1)
- **Chi-Square** A chi-square test for independence evaluates statistically significant differences between proportions for two or more groups in a data set. (2)
- **Factor Analysis** Factor analysis is a statistical technique used to explain variability among observed random variables in terms of fewer unobserved random variables called factors. The observed variables are modeled as linear combinations of the factors, plus "error" terms. Factor analysis originated in psychometrics, and is used in behavioral sciences, social sciences, marketing, product management, operations research, and other applied sciences that deal with large quantities of data. (2)
- **Likert Scale** This is a scale in which the respondents are asked to indicate the degree of agreement or disagreement with each of a series of statements and the response of each interviewee is scored and summarized. (1)
- **Mean** The arithmetic mean is the "standard" average, often simply called the "mean". The mean may often be confused with the median or mode. The mean is the arithmetic average of a set of values, or distribution. (2)
- **Median** A median is a number dividing the higher half of a sample, a population, or a probability distribution from the lower half. The median of a finite list of numbers can be found by arranging all the observations from lowest value to highest value and picking the middle one. (2)

- **Questionnaire** This is the measuring tool used to collect relevant data and provides a frame of reference on which to build the analysis. (1)
- **Stratified Convenience Sample** This is a conveniently selected sample that allows for some stratification of the respondents based on demographic criteria such as age, sex. (1)
- **T-Test** A test of the null hypothesis that the means of two normally distributed populations are equal. Given two data sets, each characterized by its mean, standard deviation and number of data points, we can use some kind of *t* test to determine whether the means are distinct, provided that the underlying distributions can be assumed to be normal. (2)
- **Workers Directly employed in the Tourism Industry** This categorization refers to all those persons who are directly involved in the Tourism industry. For example, taxi drivers, tour operators, straw vendors, hair braiders, surrey drivers, hotel employees, jitney drivers, restaurateurs, jet ski operators, etc. Persons in this category may or may not have direct “contact” with the tourists but receive their weekly or monthly salaries as a direct result of tourist activity. For example, some persons within the Ministry of Tourism, Promotion Boards, or Hotel Corporation do not have contact with tourists on a daily basis but receive their salaries as a direct result of tourist activities in our country. (1)
- **Workers not directly employed in the Tourism Industry** This refers to those workers who are not directly working in the Tourism industry but may have contact with tourists. For example, bank employees, medical centres/ hospitals, students – 15+ years, government (except staff at MOT & Hotel Corporation), food stores, construction workers, etc. (1)

1 Source: “Attitudes of Bahamians toward Tourist & Tourism” by Pamela Stubbs, July 1988

2 Source: Wikipedia, the free encyclopedia: <http://en.wikipedia.org>