

Ministry of Tourism & Aviation



Bahamian Residents General Public Survey November 1 - 22, 2008



Family Islands

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I. Introduction

1.1 Research Objectives

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

- Attitudes
- General Media
- Demographics

The Special Objectives of This Research Study are as follows:

- 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.
- To examine the attitudes of Bahamians on tourism
- To 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 with regards to 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 came 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 that 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, Family Islands Report

Personal interviews at 500 household dwellings were conducted in Abaco, Andros, Bimini, Eleuthera and Exuma. Bahamian residents between the ages of 15 and over were interviewed. The sample size had a $\pm 4.9\%$ 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.

III. RESULTS AND ANALYSIS

3.1 Demographics

- Gender distributions were virtually evenly split (51% male).
- The majority of respondents were 30-49 years (40%). Thirty one percent (31%) were under 30 years, and the remaining 28% were 50 and older.
- Almost all the respondents completed at least high school (91%). One out of five (21%) completed college/university and 15%, technical/vocational school.
- Looking at income levels, 41% had an annual salary of \$15,000 to under \$30,000. More than one quarter (27%) earned \$5,000 to under \$15,000 and one fifth (20%) made \$30,000 to under \$50,000.
- A little more than half (52%) of the respondents work in the tourism industry.
- The top three occupations of respondents were: taxi drivers (7%), managers (5%) and restaurateurs (4%).
- The five Family Islands surveyed namely Abaco, Eleuthera, Euxma, Andros and Bimini were equally represented.

3.2 Attitudes toward Employment in the Tourist Industry

Three out of four (74%) of the Family Island residents reported that they would choose to work in the tourism industry. Almost all (89 percent) of those working in the tourism industry declared that, given a choice, they would work in the tourism industry. However, only 59 percent of the non-tourism workers said they would choose to work in the tourism industry.

The islands of Eleuthera and Andros (85%) had the largest proportion of residents stating that they would choose to work in the tourism industry, while Exuma had the smallest (63%).

Among the respondents that stated they would choose to work in the main industry of The Bahamas, the overwhelming majority (88%) gave “enjoy meeting people /interesting/serving/meet interesting people/nice people” as the reason for their decision. The proportion of respondents that said the same thing was much lower in 2006 (54%) [Table 1A]. The proportion of Exumians (95%) that gave this reason was 12 percentage points higher than for the Abaconians (83%) [Table 1B].

Table 1A
Percent (%) of Respondents – Top Five Reasons Why Respondents Would Choose to Work in the Tourism Industry by Year (n=372)

REASONS	2008	2006	2005	2003
Enjoy Meeting People /Interesting/Serving/Meet Interesting People/Nice People	88	54	60	58
I Like My Job/Fun/Good Job	41	14	6	10
Pay Is Good/Can Make Money/Good Living/Higher Salaries/Secure Jobs	38	10	6	12
People's Person/Friendly Person	24	-	1	1

Becoming An Ambassador For Your Country/ Promoting The Bahamas	23	5	12	11
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Table 1B

Percent (%) of Respondents – Top Five Reasons Why Respondents Would Choose to Work in the Tourism Industry by Island (n=372)

REASONS	Abaco	Eleuthera	Exuma	Andros	Bimini
Enjoy Meeting People /Interesting/Serving/Meet Interesting People/Nice People	83	88	95	85	91
I Like My Job/Fun/Good Job	21	44	52	45	46
Pay Is Good/Can Make Money/Good Living/Higher Salaries/Secure Jobs	17	42	29	53	47
People's Person/Friendly Person	25	16	43	14	25
Becoming An Ambassador For Your Country/ Promoting The Bahamas	17	40	14	14	26

For the individuals that stated they would *not* choose to work in the tourism industry, nearly half (46%) cited that the volatility of the tourism industry as the reason for that choice. The second and third reasons given were they liked their non-tourism job and the belief that tourism positions are not lucrative enough [Table 2A]. Eleuthera was the only Family Island where the top reason was not the volatility of tourism [Table 2B].

Table 2A

Percent (%) of Respondents – Top Five Reasons Why Respondents Would Choose Not to Work in the Tourism Industry by Year (n=128)

REASONS	2008	2006	2005	2003
Unstable/Volatile/Too Many Variables/Seasonal/ No Job Security	46	-	7	11
I Like My Job/Good Job/Prefer Another Industry	38	17	11	20
Low Pay/No Money	29	14	11	12

I Do Not Like Meeting/Dealing With People/ I Am Not A People Person	17	-	19	10
Not Interested/Not My Field/I Do Not Like Tourism Industry	17	10	11	10

Table 2B

Percent (%) of Respondents – Top Five Reasons Why Respondents Would Choose Not to Work in the Tourism Industry by Island (n=128)

REASONS	Abaco	Eleuthera	Exuma	Andros	Bimini
Unstable/Volatile/Too Many Variables/Seasonal/ No Job Security	32	47	59	33	50
I Like My Job/Good Job/Prefer Another Industry	18	67	51	27	34
Low Pay/No Money	25	20	38	13	34
I Do Not Like Meeting/Dealing With People/ I Am Not A People Person	7	13	27	20	16
Not Interested/Not My Field/I Do Not Like Tourism Industry	18	13	16	7	25

A little more than half (52%) of the persons questioned stated that they felt that tourism was not first choice of high school and college graduates. Among this group, half (51%) mentioned the possible explanation is that the graduates are interested in other industries [Table 3A]. However, the top reason given by the Abaco residents was low salaries in tourism industry (31%) [Table 3B].

Table 3A

Percent (%) of Respondents – Top Five Reasons Why Tourism Jobs Are Not the First Choice for High School Graduates by Year (n=260)

REASONS	2008	2006	2005	2003
Interested In Another Industry/Many Other Jobs To Choose From	51	11	9	18
Low Salaries/Not Enough Money	33	23	12	21
Not Considered Prestigious/Bottom Jobs/Not Important Enough	31	25	15	18

Lack Of Knowledge/ Exposure	31	18	26	25
Prefer Office Type Jobs	21	-	4	-

Table 3B

Percent (%) of Respondents – Top Five Reasons Why Tourism Jobs Are Not the First Choice for High School Graduates by Island (n=260)

REASONS	Abaco	Eleuthera	Exuma	Andros	Bimini
Interested In Another Industry/Many Other Jobs To Choose From	26	52	62	59	60
Low Salaries/Not Enough Money	31	17	38	41	42
Not Considered Prestigious/Bottom Jobs/Not Important Enough	13	28	36	35	48
Lack Of Knowledge/ Exposure	26	45	33	35	14
Prefer Office Type Jobs	22	20	13	28	20

When asked to suggest what could be done to attract the best and brightest to tourism, 41% said “train/ educate in schools/ workshops/ seminars” and 13% stated “pay high salaries/ more money” [Table 4A]. However, the proportion of Abaco residents (55%) that gave the top suggestion was 22 percentage points higher than in Bimini (33%). One quarter (25%) of the Biminites made the suggestion “pay high salaries” [Table 4B].

Table 4A

Percent (%) of Respondents – Top Five Suggestions to Attract Best and Brightest to the Tourism Industry by Year (n=483)

SUGGESTIONS	2008	2006	2005	2003
Train/ Educate In Schools/ Workshops/ Seminars/ School Fairs	41	48	35	33
Pay High Salaries/ More Money/ Upgrade Salary	13	14	16	22
More Promotions/ More Information/ Educate Bahamians	8	8	13	16

More Interesting Benefits/ Incentives/ Make Jobs/Industry More Exciting	8	8	13	12
Advertise Market Properly/ Advertise More/ More Public Relations	5	-	10	8

Table 4B

Percent (%) of Respondents – Top Five Suggestions to Attract Best and Brightest to the Tourism Industry by Island (n=483)

SUGGESTIONS	Abaco	Eleuthera	Exuma	Andros	Bimini
Train/ Educate In Schools/ Workshops/ Seminars/ School Fairs	55	35	43	37	33
Pay High Salaries/ More Money/ Upgrade Salary	9	12	8	12	25
More Promotions/ More Information/ Educate Bahamians	3	14	9	13	1
More Interesting Benefits/ Incentives/ Make Jobs/Industry More Exciting	7	9	5	5	12
Advertise Market Properly/ Advertise More/ More Public Relations	9	3	4	6	5

3.3 Effects of Tourism

Job creation and the related effect of economic development were named the top two positive effects of tourism. However, both have lost respondents when compared to the 2006 survey results. Only 14% of the Biminities felt that job creation was a positive effect of tourism. This is compared with the 49% of the Abaco residents that mentioned that advantage of tourism.

Table 5A

**Percent (%) of Respondents – Top Five Positive Effects of Tourism
In The Bahamas by Year (n=491)**

ITEMS MENTIONED	2008	2006	2005	2003
More Jobs Created	33	35	48	41
Economy Booming / Economic Development/ Stable Economy/ Prosperity	17	22	13	14
Higher Standard Of Living/ Pleasant/ More Money/ Better Life	16	11	19	14
None	14	6	7	21
Tourist Arrivals Are Up/ More People Coming In/ Return Visitors	6	7	2	3

Table 5B

**Percent (%) of Respondents – Top Five Positive Effects of Tourism
In The Bahamas by Island (n=491)**

ITEMS MENTIONED	Abaco	Eleuthera	Exuma	Andros	Bimini
More Jobs Created	49	34	29	39	14
Economy Booming / Economic Development/ Stable Economy/ Prosperity	13	12	20	26	14
Higher Standard Of Living/ Pleasant/ More Money/ Better Life	10	18	29	13	8
None	5	12	12	13	28
Tourist Arrivals Are Up/ More People Coming In/ Return Visitors	9	2	3	1	16

Almost half (46%) of the Family Islanders surveyed thought there were not any negative effects of tourism (Table 6A). However, 11% mentioned crime. Two-thirds (67%) of the Abaconians did not feel that there were any negative effects of tourism. In comparison, only one-third (35%) of Exumians felt the same way.

Table 6A
Percent (%) of Respondents – Top Five Negative Effects of Tourism
In The Bahamas by Year (n=482)

ITEMS MENTIONED	2008	2006	2005	2003
None	46	50	52	63
Crime	11	13	14	11
Drugs	4	-	8	3
Overdevelopment/ Environment Destruction/ Damage/ Cutting Down The Mangroves	4	5	6	-
Bahamians Too Americanized/ Losing Culture/ Identity	4	-	3	-

Table 6B
Percent (%) of Respondents – Top Five Negative Effects of Tourism
In The Bahamas by Island (n=482)

ITEMS MENTIONED	Abaco	Eleuthera	Exuma	Andros	Bimini
None	67	40	35	42	47
Crime	4	15	18	11	7
Drugs	1	5	9	3	1
Overdevelopment/ Environment Destruction/ Damage/ Cutting Down The Mangroves	2	0	0	10	7
Bahamians Too Americanized/ Losing Culture/ Identity	1	8	4	2	3

3.4 Reasons to Visit The Bahamas

The friendliness of the Bahamian people was named by more than three quarters (78%) of those polled as a reason to visit the country. In comparison, only 48% of Family Islanders gave this reason in 2006. Although 92% of Eleutherians gave this reason, only 69% of the Abaco residents concurred.

Table 7A

Percent (%) of Respondents – Top Five Reasons (Other than “Sun, Sand and Sea”) for Visitors to Come to The Bahamas by Year (n=494)

ITEMS MENTIONED	2008	2006	2005	2003
People/Friendly People/Warm People/Hospitality/Beautiful People	78	48	45	46
Culture/Native Food And Drinks/Junkanoo/Festivals/Music	67	36	33	24
Family Islands/ Diverse/Tropical Island/ 700 Islands/Island Hopping	50	-	4	6
Beautiful Place/Best Place/Taste Of Paradise/ Better In The Bahamas	39	-	5	3
Atlantis/Beautiful Hotels/Nice Hotels/Great Accommodation	28	-	2	2

Table 7B

Percent (%) of Respondents – Top Five Reasons (Other than “Sun, Sand and Sea”) for Visitors to Come to The Bahamas by Island (n=494)

ITEMS MENTIONED	Abaco	Eleuthera	Exuma	Andros	Bimini
People/Friendly People/Warm People/Hospitality/Beautiful People	69	92	71	72	84
Culture/Native Food And Drinks/Junkanoo/Festivals/Music	56	72	65	62	80
Family Islands/ Diverse/Tropical Island/ 700 Islands/Island Hopping	33	66	38	51	62
Beautiful Place/Best Place/Taste Of Paradise/ Better In The Bahamas	18	48	39	44	47
Atlantis/Beautiful Hotels/Nice Hotels/Great Accommodation	13	32	22	29	44

3.5 Selected Other Measures of Attitude toward Tourism

- The majority (81 percent) of the individuals interviewed did NOT feel that Bahamians are developing a negative attitude to the large number of visitors to our shores. While 86% of Exumians shared this belief, only 74% of Abaconians felt the same way.
- Eighty-six percent (86%) of the Family Islands residents questioned felt that the Government was NOT doing sufficient to ensure that Bahamians are trained to take positions held by foreigners or expatriates in the tourism industry. Almost all (93%) of the Eleuthera residents expressed this view, but only 78% Biminities did.
- Sixty-one percent (61%) of the interviewees felt that the tourism industry does NOT use enough Bahamian food, music and other products or services. The proportion of Andros residents (78%) that had these sentiments was more than twice that for the Exumians (43%).
- The respondents were further asked to state two languages all Bahamians should speak in order to assist the tourism industry. Almost three-quarters (72%) said “English and Spanish” and 45% stated “English and French”.

3.6 Domestic Travel

Seventy percent (70%) of the Family Islanders had travelled to another Family Island in the past year; the mean was 3 (3.2) trips (range 0 to 50), with a mean of 2 (1.5) persons per trip (range 1 to 6 persons).

The mean total expenditure spent per trip is \$1,058 (range \$140 to \$4,445). Below is a breakdown of the mean spent per trip for the following:

- Transportation – \$332 (range \$140 to \$1,390)
- Lodging - \$163 (range \$0 to \$1,000)
- Food - \$126 (range \$0 to \$700)
- Recreation and Entertainment - \$74 (range \$0 to \$500)
- Shopping - \$358 (range \$0 to \$4,000)

Table 8

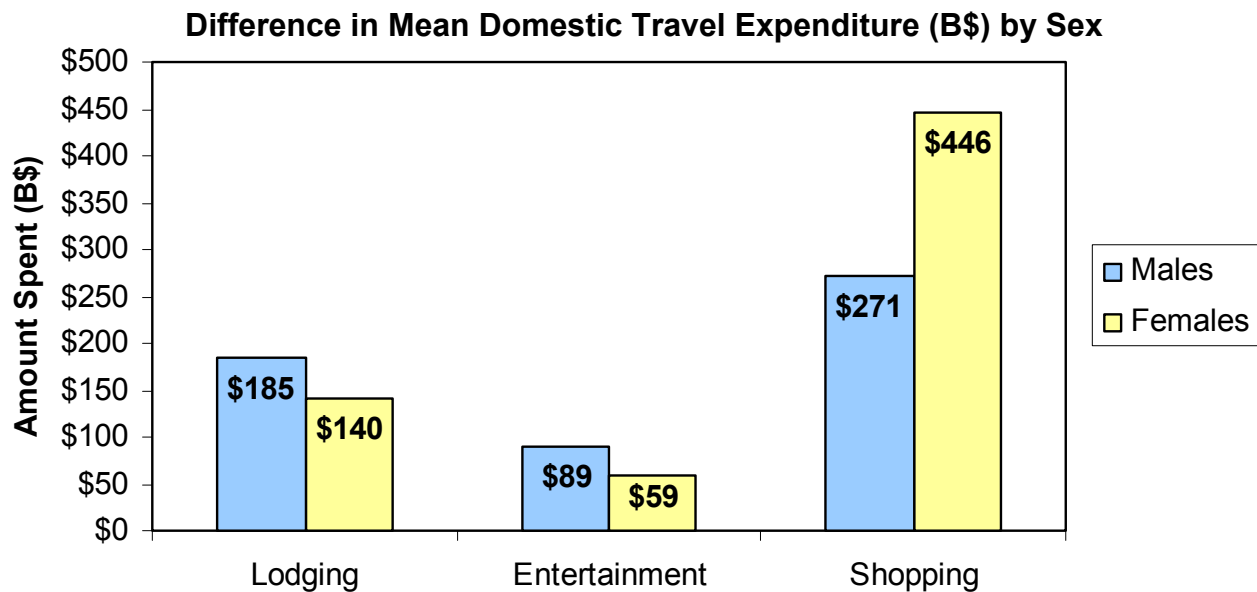
Average (Mean) Expenditure by Type of Expenditure (B\$): 2008, 2006

	2008	2006
Transportation (\$)	332	378
Lodging (\$)	163	239
Food (\$)	126	167
Recreation and Entertainment (\$)	74	98
Shopping (\$)	358	361
Total Expenditure (\$)	1,058	1,267

Demographics, such as age, sex, and tourism industry job, education and income were tested with expenditure categories to test for differences in average expenditure by these groups. There were no significant differences in mean expenditure by age, education or job. However, there were significant differences by sex and income group.

Males tended to spend more on lodging and entertainment than females, but much less on shopping. (*T-Test, p<=.05; Figure 1*)

Figure 1



For the most part, as income increased, so did expenditure (*Analysis of Variance, $p < 0.05$; Table 9*)

Table 9

Average (Mean) Difference in Expenditure (B\$) by Income levels (n=349)

	Under \$5,000	5,000 - \$14,999	\$15,000 - \$29,999	\$30,000 - \$49,999	\$50,000 or over
Lodging (\$)	88	106	179	224	150
Recreation and Entertainment (\$)	31	70	65	106	71
Shopping (\$)	252	336	340	360	771
Total Expenditure (\$)	700	876	1,040	1,148	1,341

The travel expenditure pattern varied significantly from island to island (*Analysis of Variance, $p < 0.05$; Table 9*).

Table 10

Average (Mean) Difference in Expenditure (B\$) by Island (n=349)

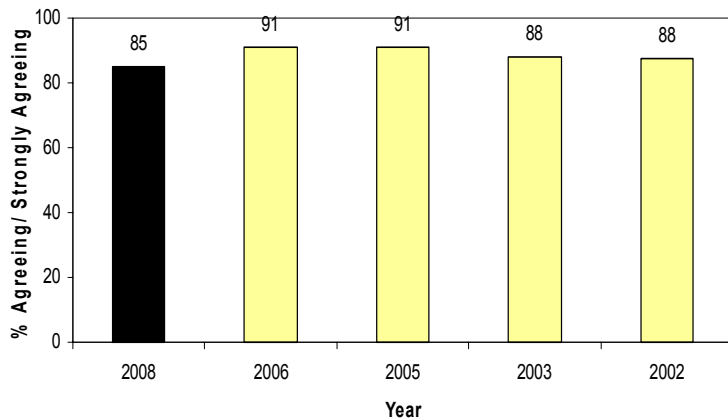
	Abaco	Eleuthera	Exuma	Andros	Bimini
Lodging (\$)	226	164	195	138	124
Food (\$)	124	153	167	108	104
Recreation and Entertainment (\$)	105	86	43	82	61
Shopping (\$)	222	232	552	497	207
Total Expenditure (\$)	1,000	948	1,363	1,151	808

3.7 General Attitude Statements

Following are the general attitude statements presented individually and compared with past surveys and between islands (Figures 2- 24). Discussed is the percent (%) that “Agreed/Strongly Agreed with each statement. Table 10 shows all response opinions for 2008.

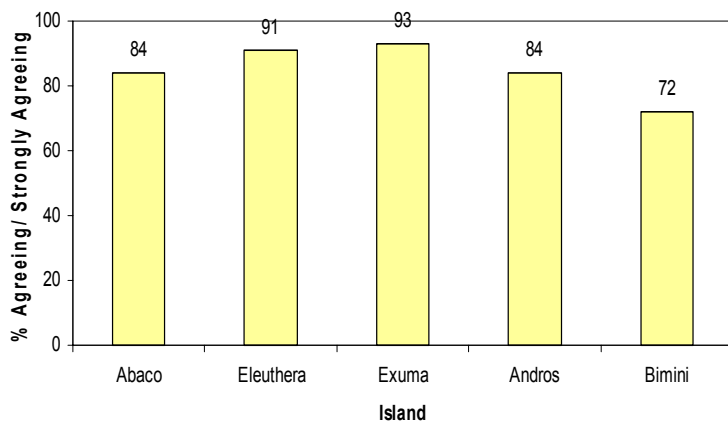
Figure 2-24

**Survey Year Comparison
Percent (%) of Respondents
"Agreeing/Strongly
Agreeing" – Most Tourists are satisfied with
Bahamian experience**

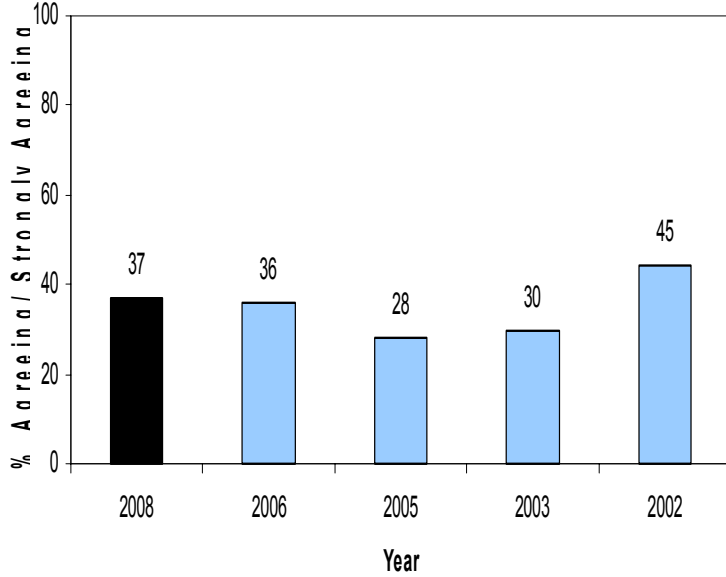


In 2008, 85% of the interviewees felt that most tourists were satisfied with their Bahamas experience, which is a decrease from the 2006 figure (91%).

Only 72% of the Biminities agreed with this statement, compared with 93% of the Exuma residents.

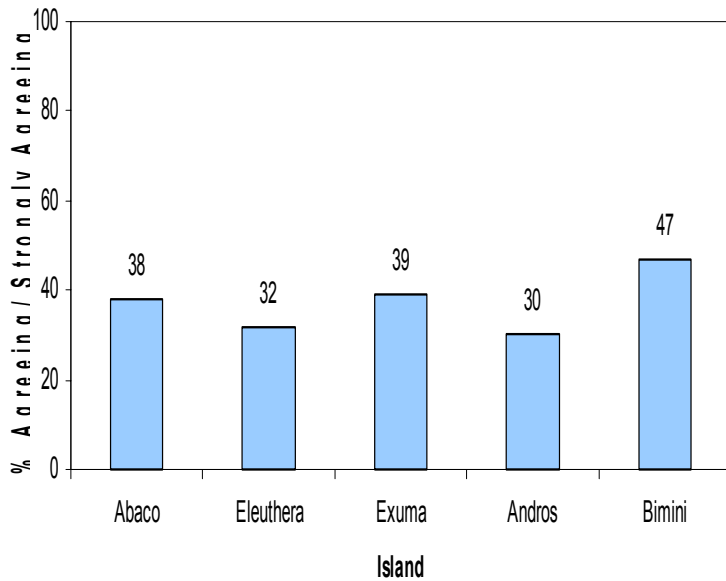


Survey Year Comparison Percent (%) of Respondents "Agreeing/Strongly Agreeing" – Most Bahamians make the tourist feel like they are doing the tourist a big favour when serving or helping the tourist.

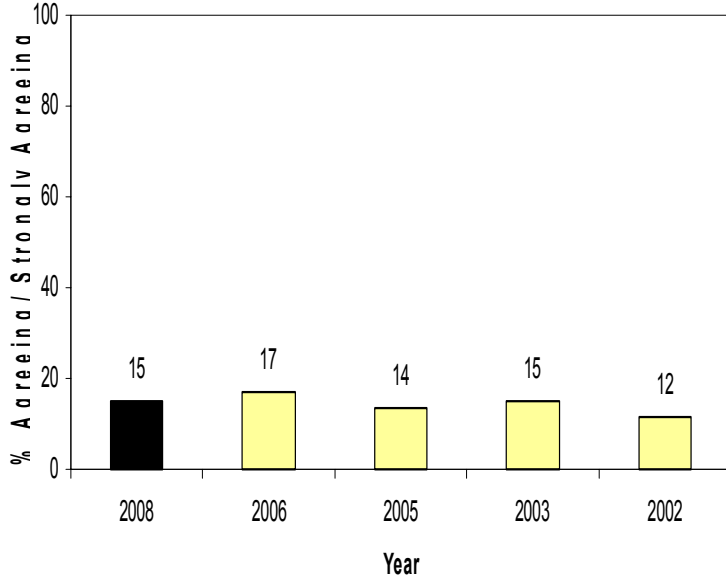


A little over a third (37%) of respondents thought that Bahamians serve tourists as if they are doing them a big favour. This is relatively unchanged since 2006.

Although, almost half of the Bimini residents (47%) agreed with this statement, only 30% of the Androsians felt the same way.

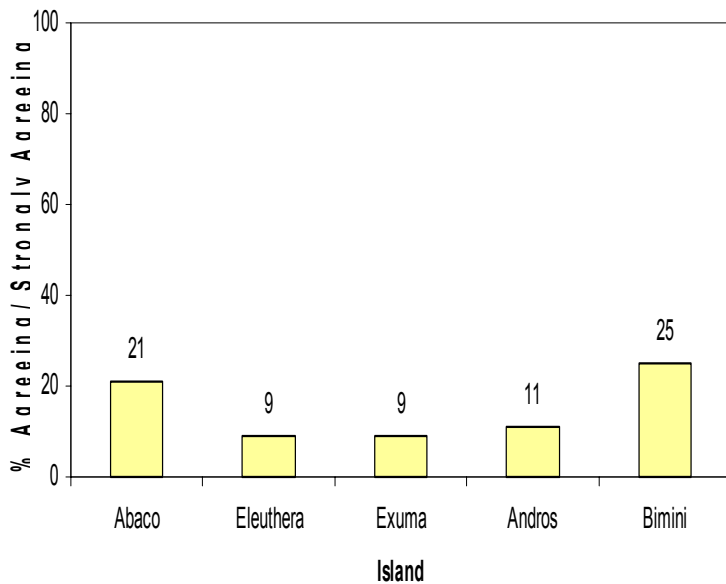


**Survey Year Comparison Percent (%) of Respondents "Agreeing/Strongly Agreeing" –
The only jobs tourism has created for Bahamians are jobs at the bottom of the ladder.**

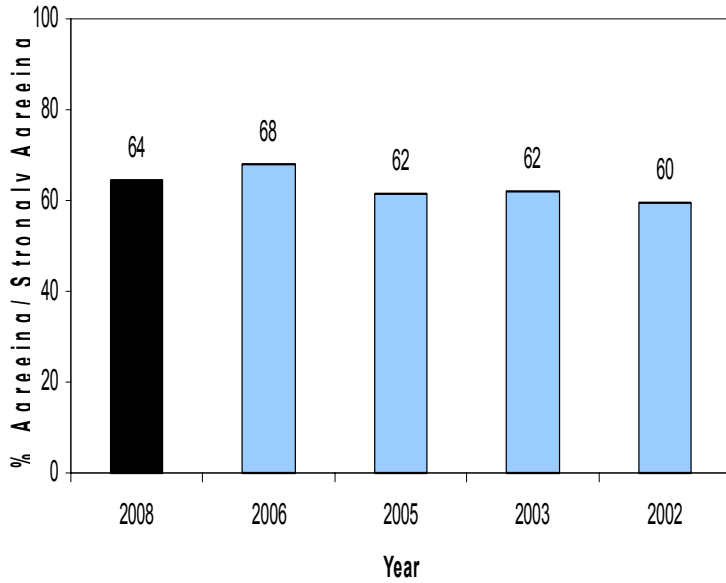


Not many Family Islanders thought tourism jobs are at the bottom of the ladder (15%). This is a slight decrease since 2006 (17%).

One quarter of Bimini residents had this opinion, compared with 9% of the Eleuthera and Exuma residents.

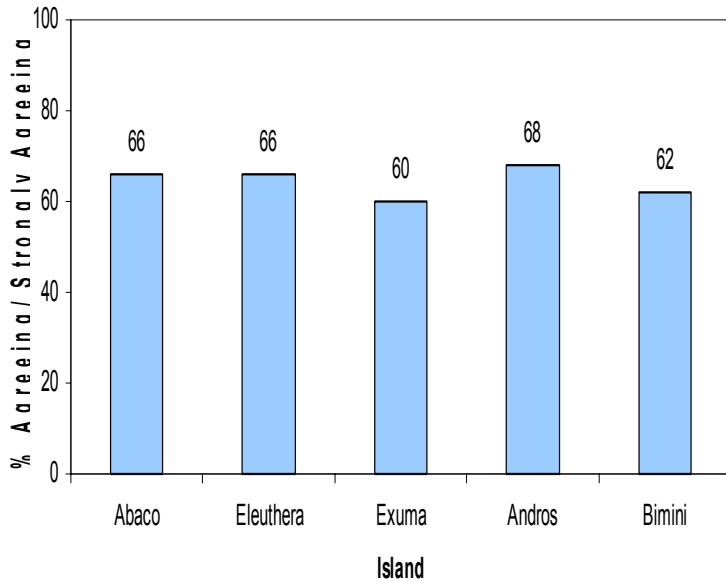


Survey Year Comparison Percent (%) of Respondents "Agreeing/Strongly Agreeing" – My job is related to tourism.

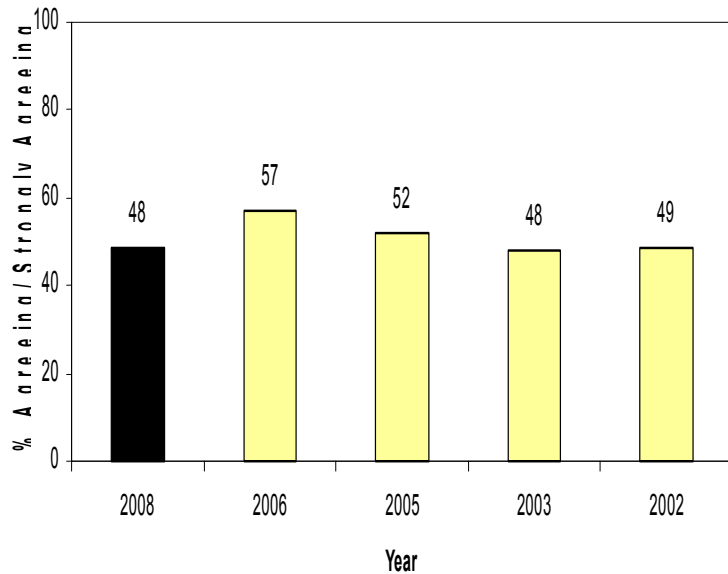


In 2008, 64% of the interviewees thought that their job was tourism related. This is slightly lower than in 2006 (68%).

Sixty-eight percent (68%) of the Andros residents stated that their job was tourism related. Only 60% of the respondents on the island of Exuma made the same claim.

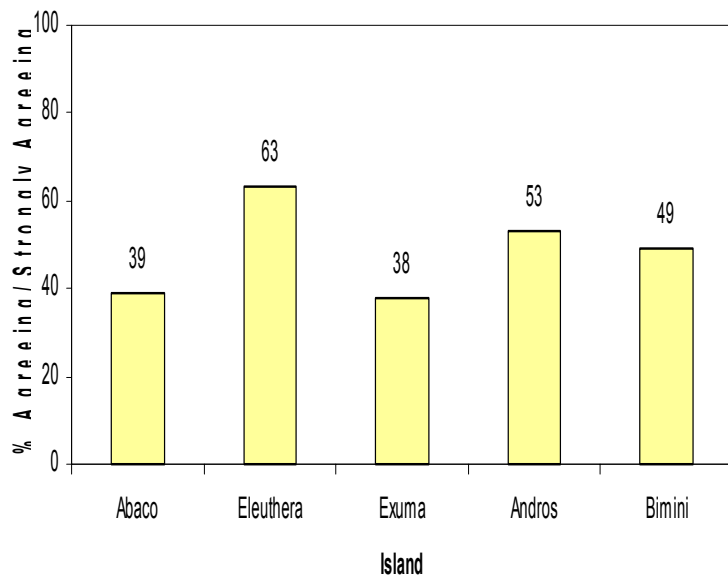


Survey Year Comparison Percent (%) of Respondents "Agreeing/Strongly Agreeing" – I would like my child, if I have one, to work in the tourism industry.

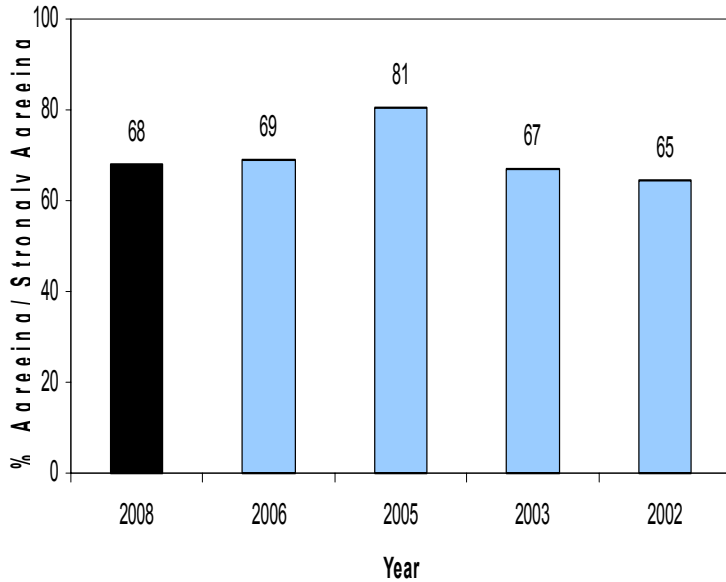


About half (48%) of the Family Islanders would like their child to work in the tourism industry. This represents a 9 percentage point decrease from 2006.

The Exuma residents (38%) are less willing to have their child work in the tourism industry than the respondents in Eleuthera (63%).

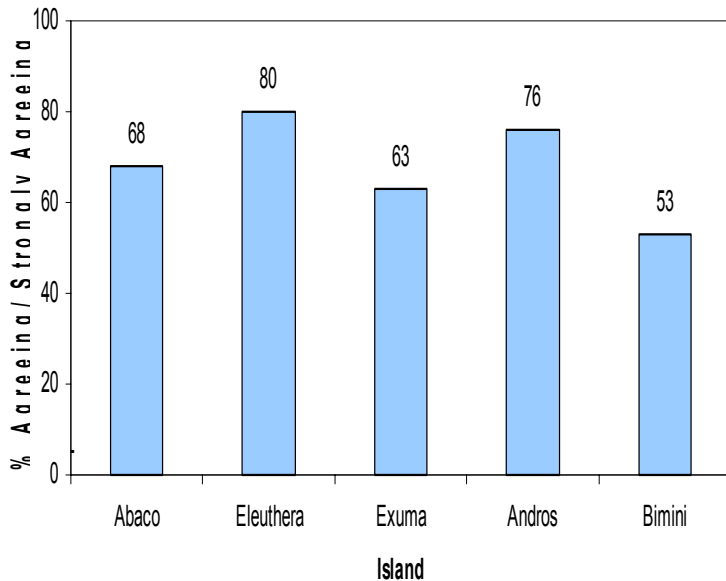


Survey Year Comparison Percent (%) of Respondents "Agreeing/Strongly Agreeing" – Tourists are given their money's worth while visiting the Islands of The Bahamas.

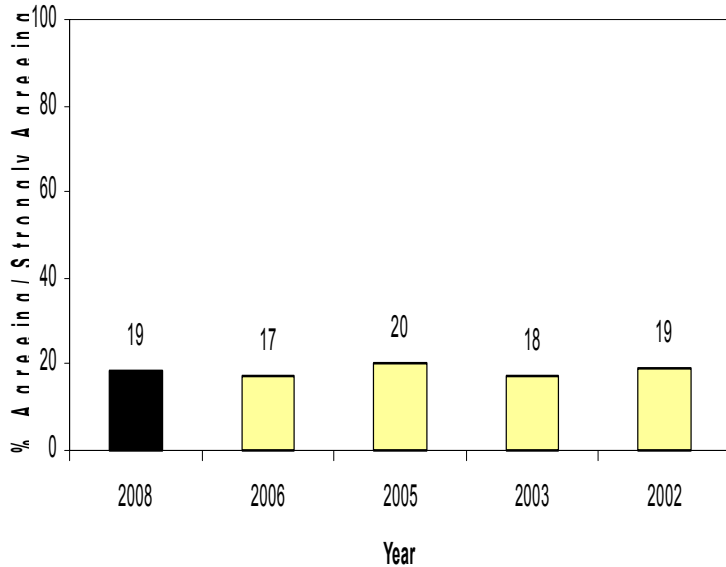


Seven out of ten (68%) respondents felt that tourists get their money's worth while visiting The Bahamas. With the exception in 2005, which peaked at 81%, percentages remained comparable to previous surveys.

Eighty percent (80%) of Eleutherians agreed with this statement, which is 27 percentage points higher than in Bimini (53%).

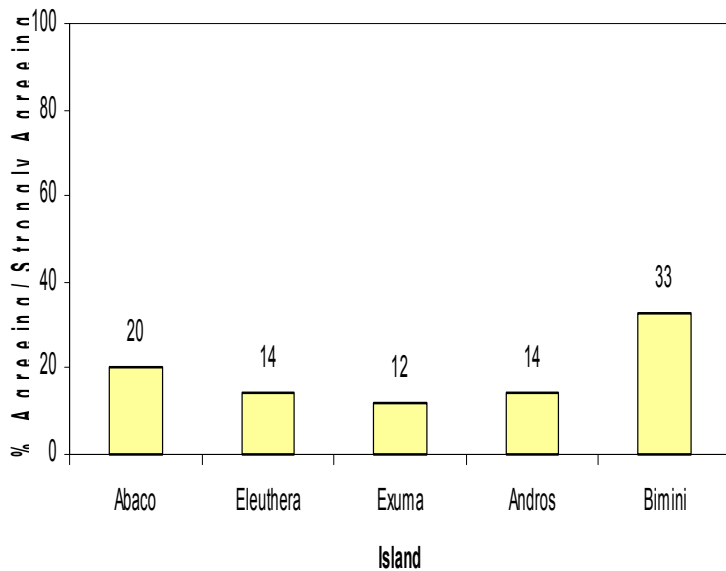


Survey Year Comparison Percent (%) of Respondents "Agreeing/Strongly Agreeing" – Tourism does not affect me personally.

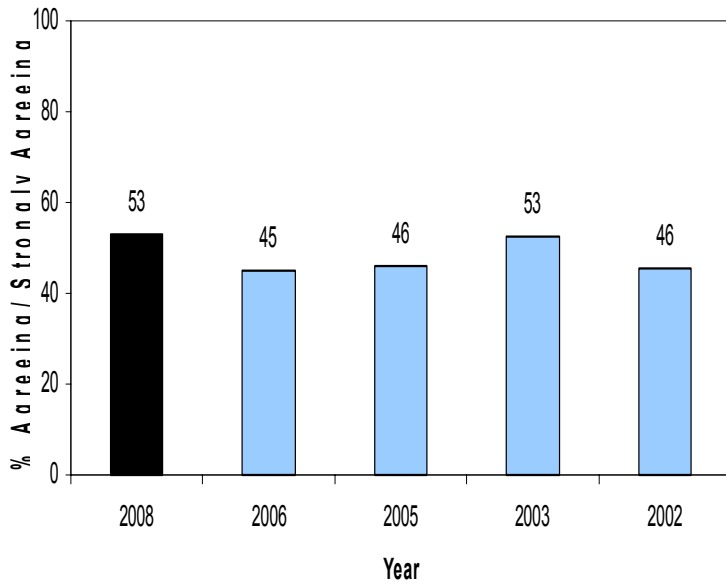


A minority (19%) felt that tourism does not affect them personally, virtually no change from 2002.

The proportion of Bimini residents (33%) that agreed with this statement was almost three times that of the Exumians (12%).

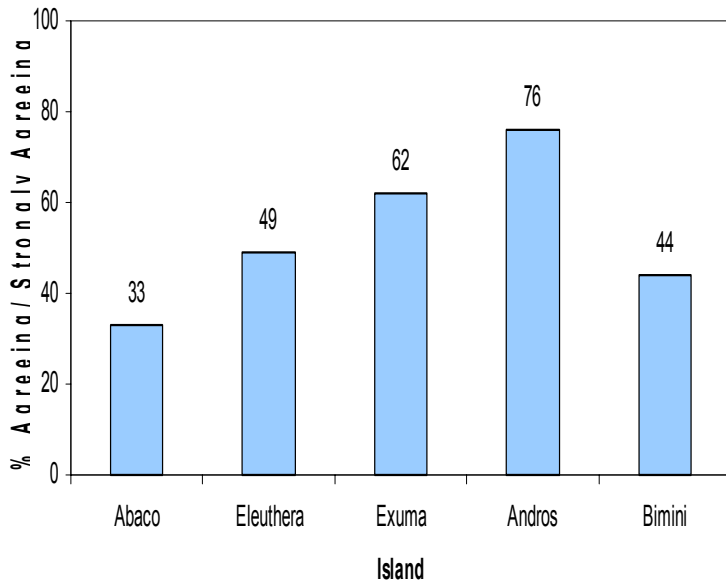


Survey Year Comparison Percent (%) of Respondents "Agreeing/Strongly Agreeing" – Only Bahamian art, straw and craft goods should be allowed to be sold to tourists.

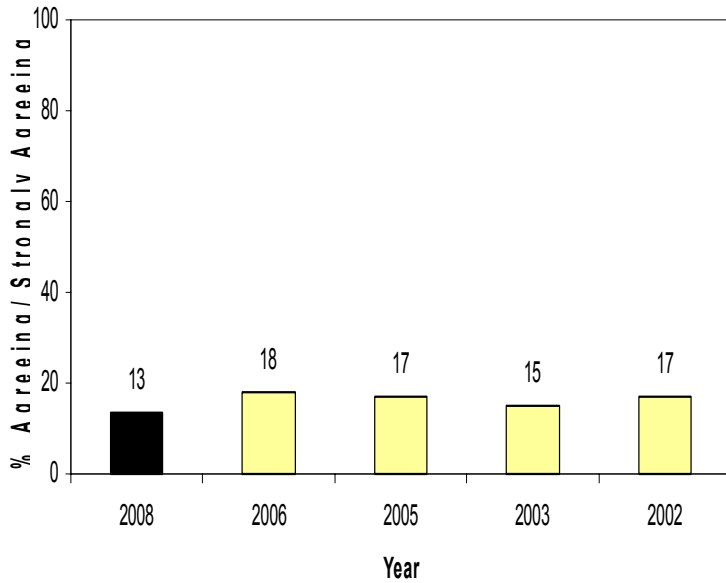


A little more than half (53%) opined that only Bahamian art and crafts should be sold to tourists. This is the highest this proportion has been since 2003.

More than twice as many Androsians (76%) as Abaconians (33%) agreed with this statement.

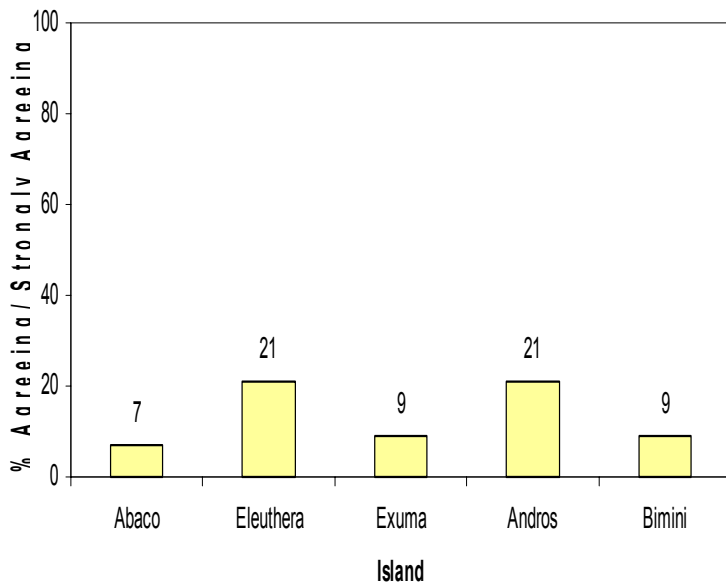


**Survey Year Comparison Percent (%) of Respondents "Agreeing/Strongly Agreeing" –
*Just because tourism is the main industry, does not mean that Bahamians are willing to go the extra mile to please tourists.***

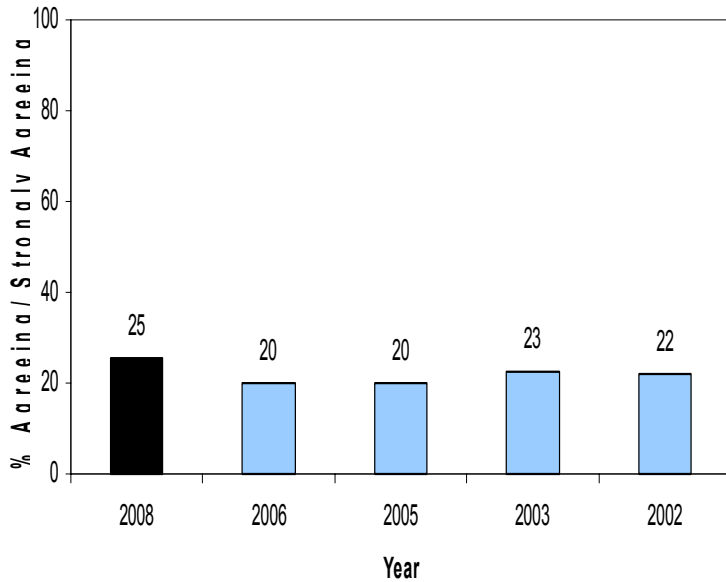


In 2008, only 13% agreed that there is no need for Bahamians to go the extra mile to please tourists. This was a record low for this attitude.

Three times as many Eleuthera and Andros residents (21%) as Abaconians (7%) had this opinion.

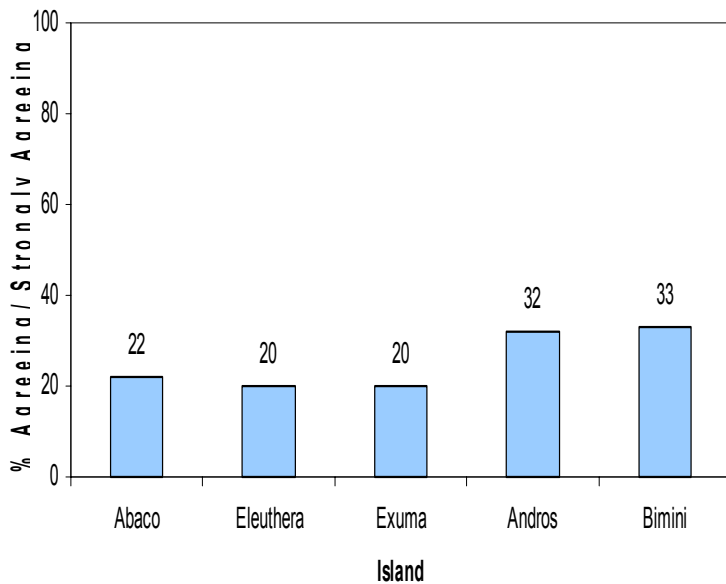


Survey Year Comparison Percent (%) of Respondents "Agreeing/Strongly Agreeing" – The 15% gratuity should be eliminated.

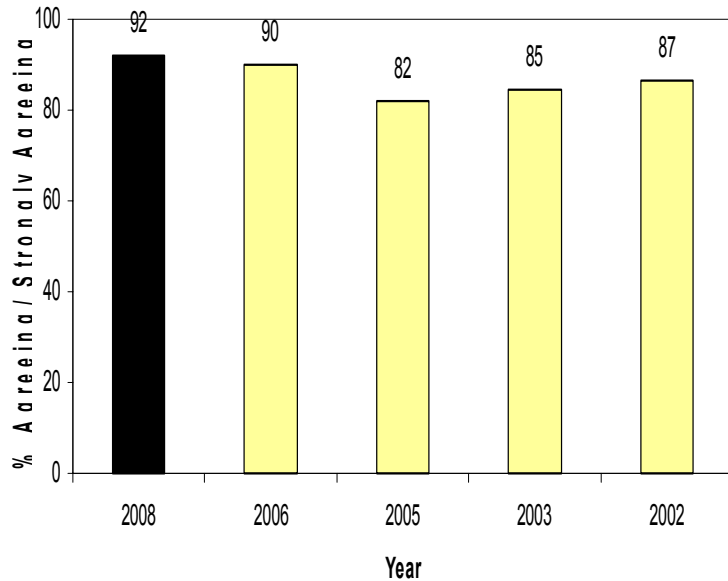


In 2008, one out of four (25%) respondents thought that the 15% gratuity should be eliminated, an unchanging attitude since 2002.

One out of three (33%) Biminites had this opinion, but only 20% of the Eleuthera and Exuma residents.

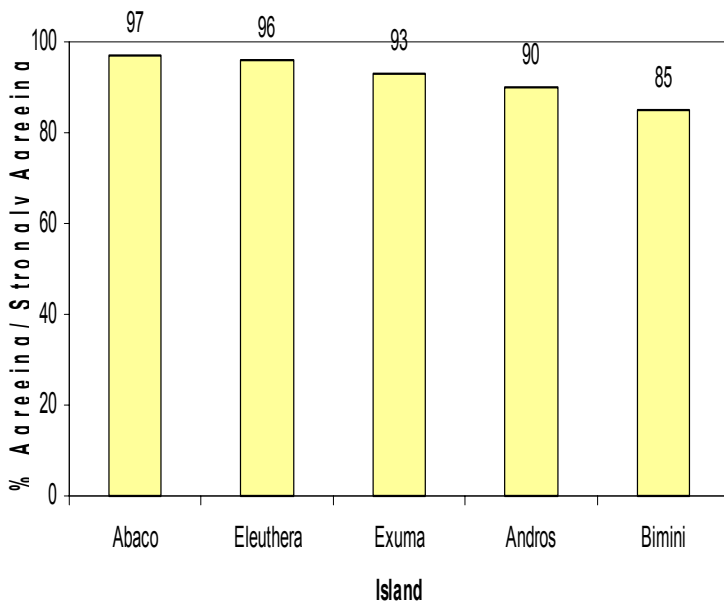


Survey Year Comparison Percent (%) of Respondents "Agreeing/Strongly Agreeing" – The Islands of the Bahamas' advertisements make me feel good about my country.

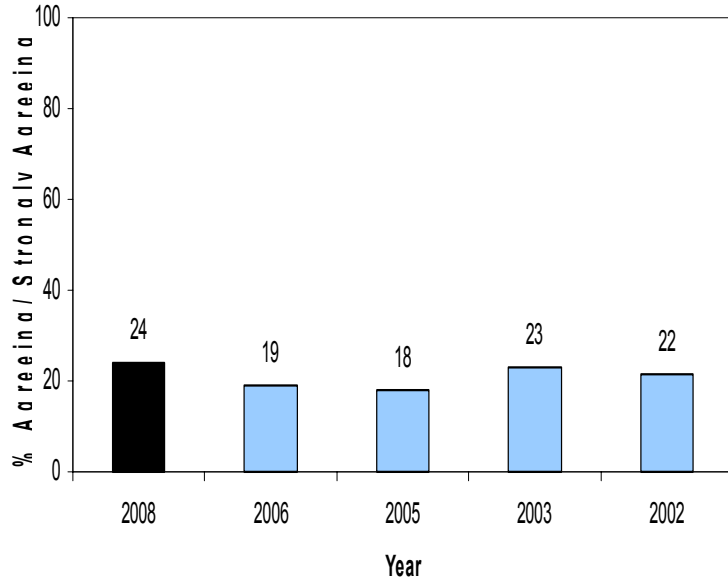


Most Family Islanders (92%) felt proud about the Islands of The Bahamas ad campaign; favourability had peaked in 2008, a slight increase from 2006 at 90%.

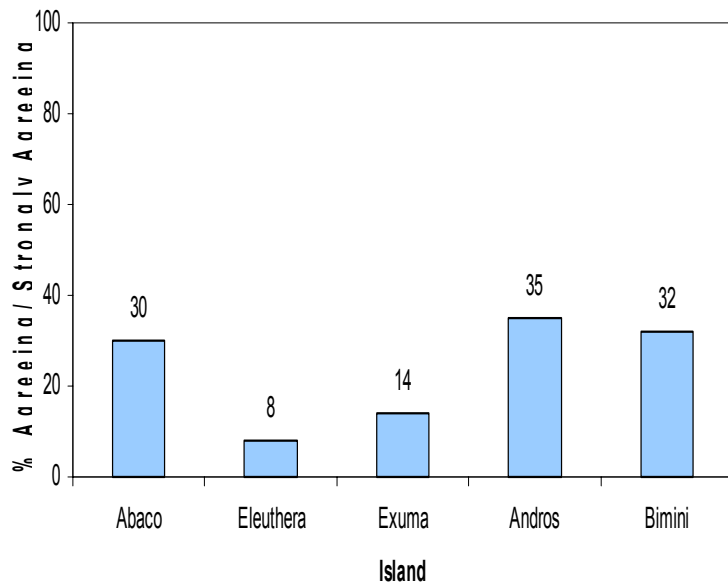
Almost all (97%) of the Abaco respondents had that feeling, as opposed to 85% of the Bimini residents.



Survey Year Comparison Percent (%) of Respondents "Agreeing/Strongly Agreeing" – When tourists come to the Islands of The Bahamas they generally do not find what they were led to expect by our advertising and promotions.

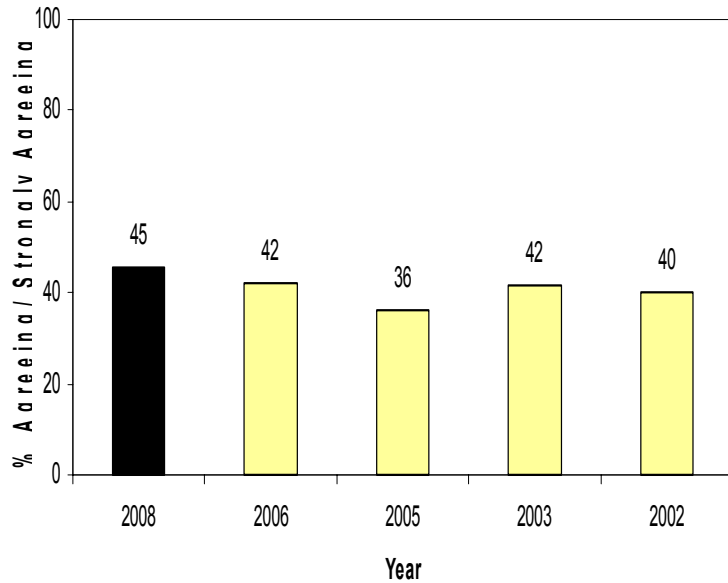


About one quarter (24%) thought that when tourists visit The Bahamas, they are disappointed from what they have been led to expect from advertising and promotions. This represented a moderate increase since 2006 (19%).



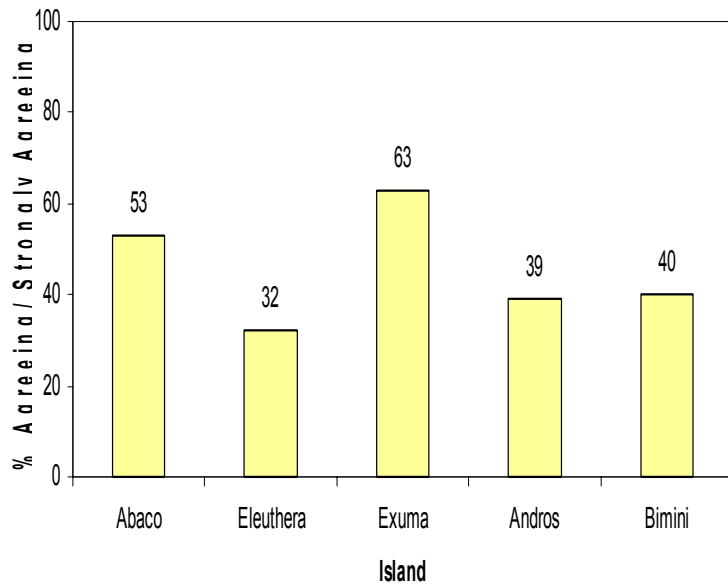
More than four times as many Androsians (35%) as Eleuthera residents (8%) revealed that they felt this way.

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

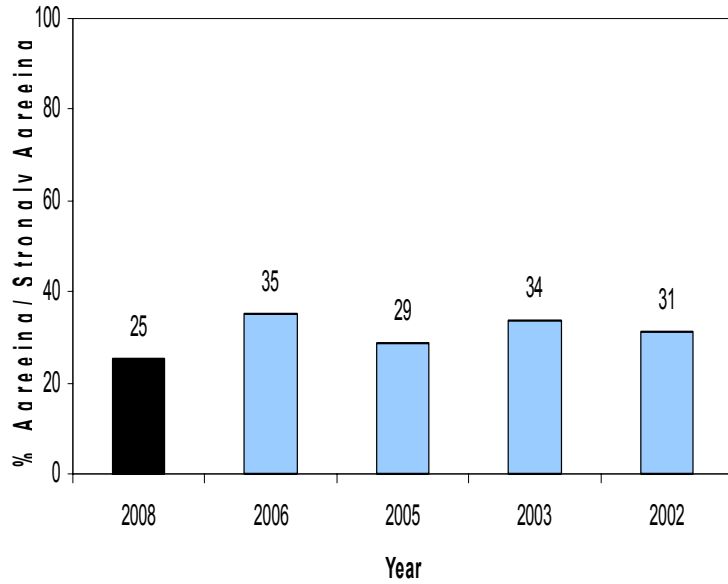


Forty-five percent (45%) of Family Islanders thought that there are not enough jobs in the tourism sector, a proportion similar to previous surveys.

Nearly twice as many Exumians (63%) as Eleuthera respondents (32%) had this opinion.

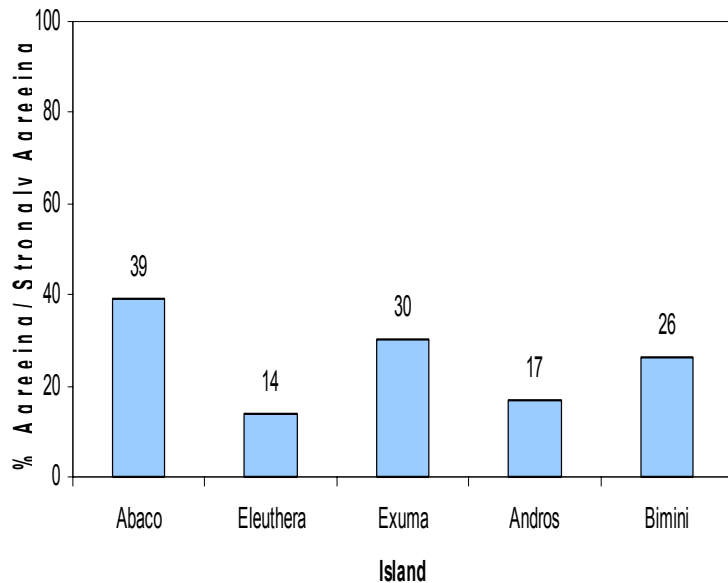


Survey Year Comparison Percent (%) of Respondents "Agreeing/Strongly Agreeing" – Jobs in tourism are not considered very prestigious.

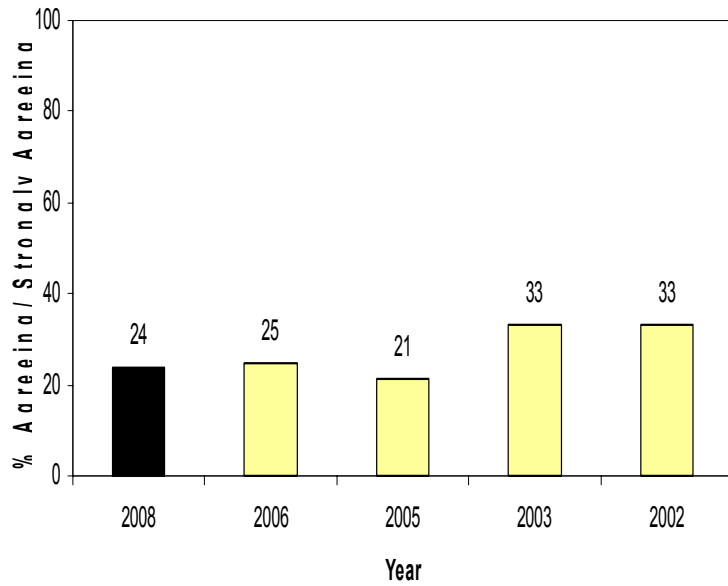


One quarter (25%) of respondents in 2008 did not consider tourism jobs as prestigious. This was a marked decrease from 2006 (35%) and represented an increase in favourability.

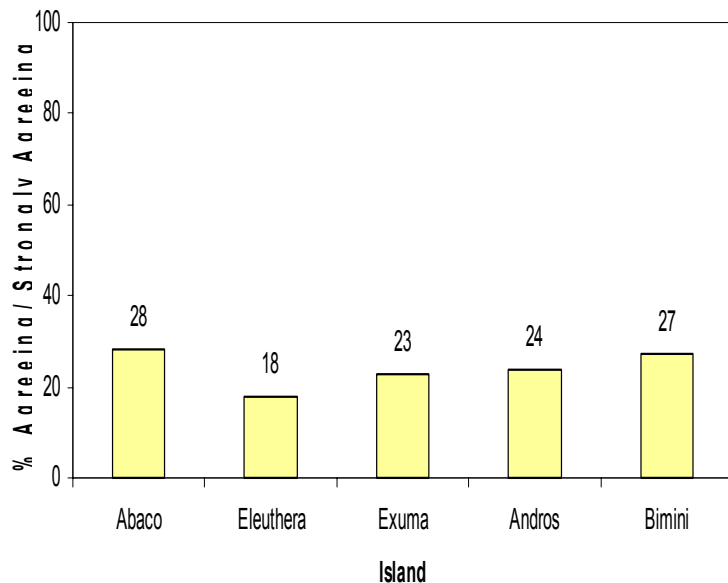
Nearly three times as many Abaconians (39%) cited this opinion compared with the Eleuthera residents (14%).



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

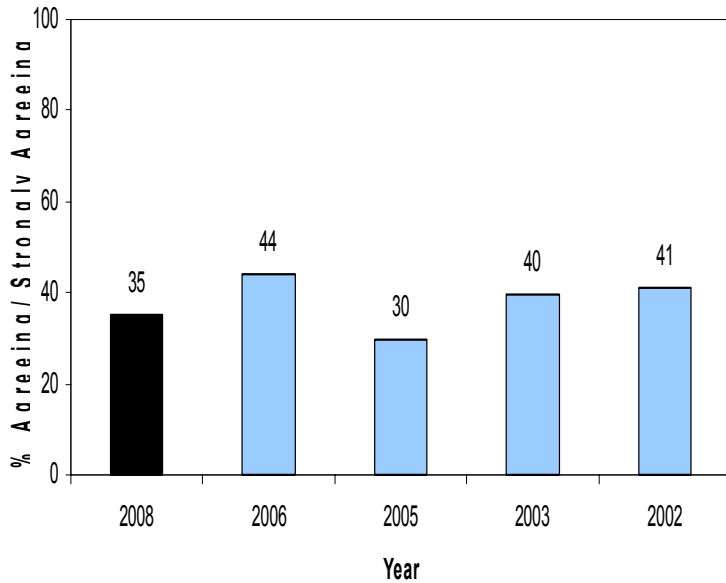


A quarter (24%) in 2008 thought that many parents are against the idea of their children pursuing a career in tourism. This was an increase in favourability since 2002 and 2003, but comparable to 2006.



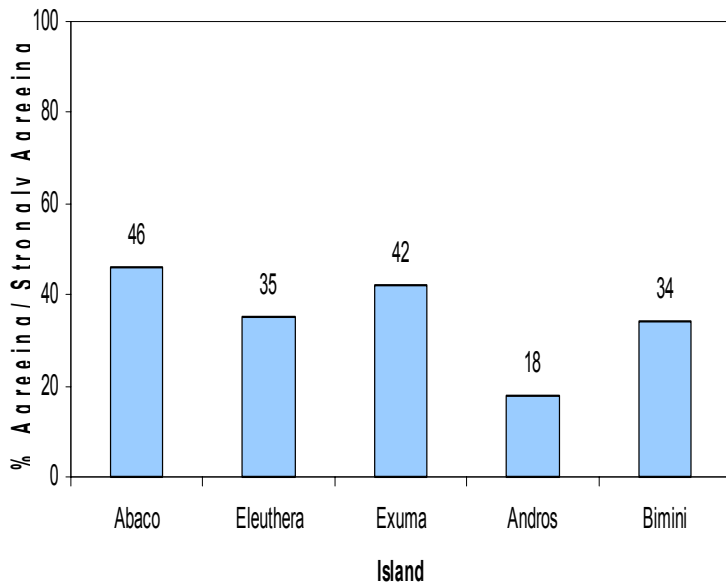
More than one quarter of Abaconians (28%) and Biminities (27%) shared that they had this attitude.

Survey Year Comparison Percent (%) of Respondents "Agreeing/Strongly Agreeing" – The salaries and benefits in the tourism sector are not on par with similar positions in the private sector.

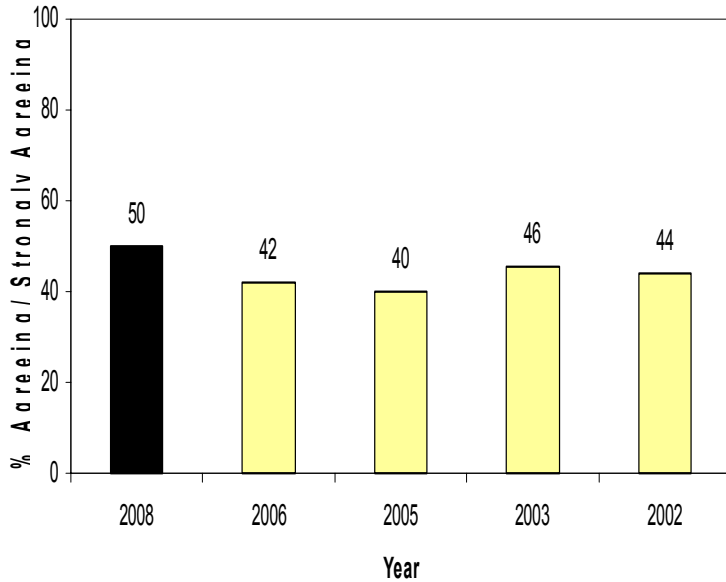


About a third (35%) of Family Islanders was of the opinion that tourism salaries are not on par with similar positions in the private sector. This was a 9 percentage point decrease from 2006 (44%) -- an increase in favourability.

Nearly three times as many Abaco respondents (46%) as Androsians (18%) agreed with this statement.

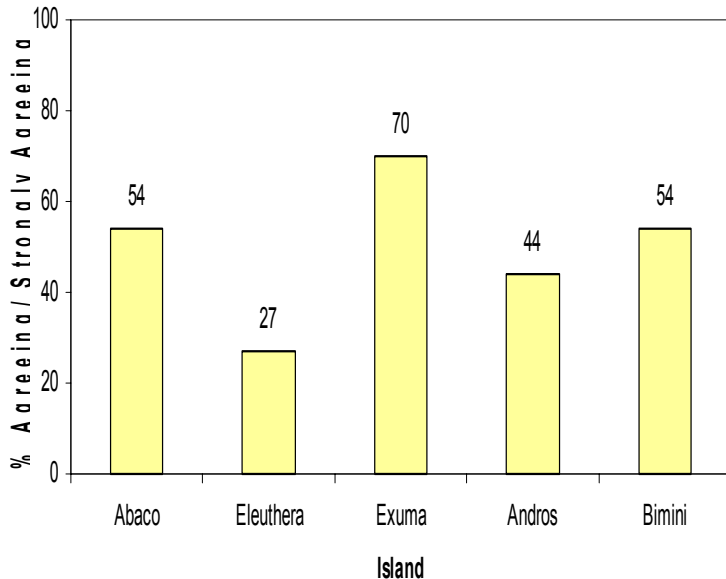


Survey Year Comparison Percent (%) of Respondents "Agreeing/Strongly Agreeing" – There is little job security in the tourism sector.

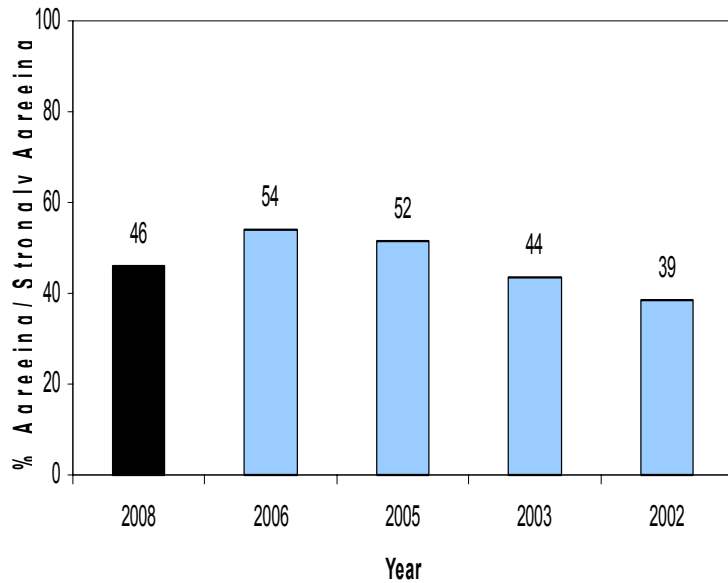


Half of those surveyed thought there is little job security in the tourism sector. That was 8 percentage points higher than in 2006 (42%) and a record high for this attitude amongst Family Islanders.

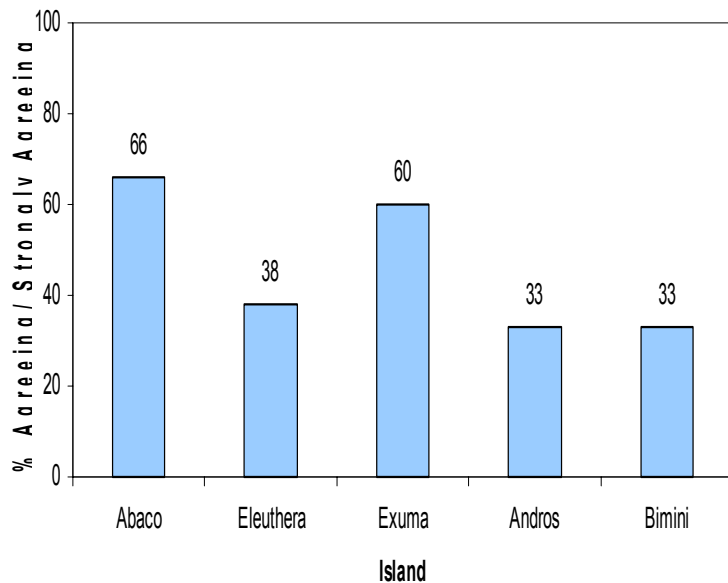
Seventy percent (70%) of Exumians revealed that they felt this way, which is much less than the Eleutherians (27%).



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

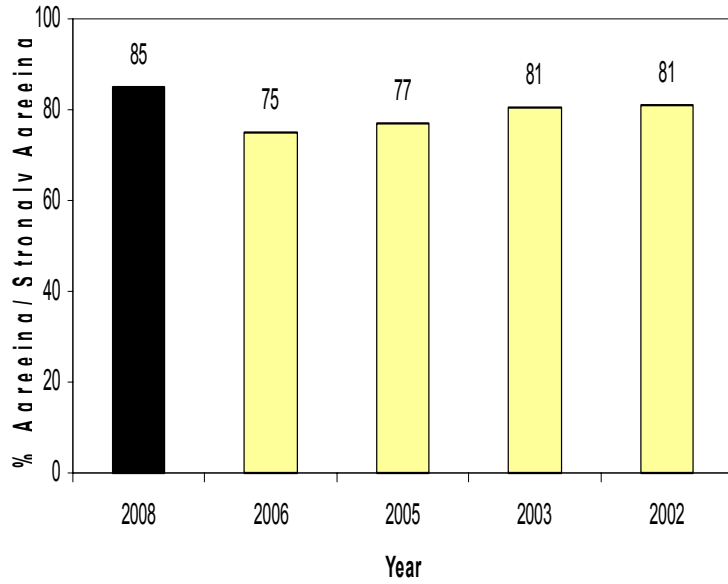


A little less than half (46%) of the Family Island residents surveyed agreed that tourism has taken the best beaches and land. However, this was a moderate decrease since 2006-- an increase in favourability.



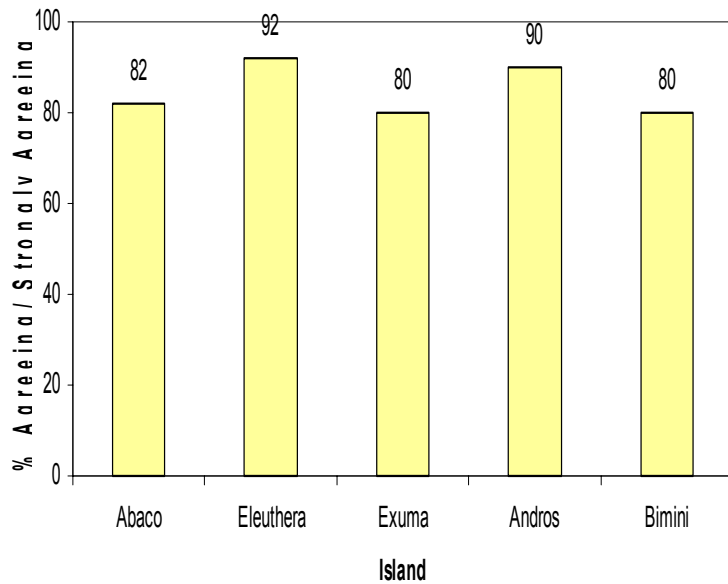
Twice as many Abaconians (66%) and Exumians (60%) as Androsians and Biminians (33%) felt that tourism has taken all the best beaches.

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

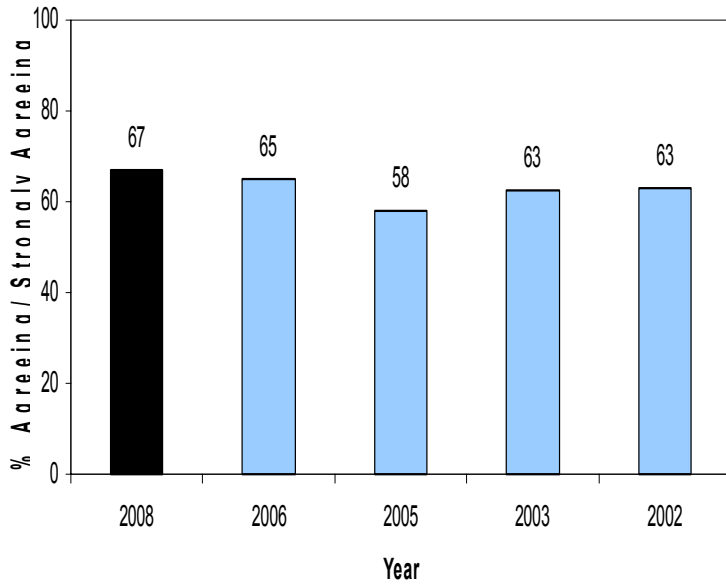


Eighty-five percent (85%) of respondents thought that the quality of the tourism product needs improvement. This was a marked increase since 2006 (75%)-- a record high for this attitude.

Almost all of the Eleuthera (92%) and Andros (90%) respondents expressed these sentiments, which was much higher than for the Bimini and Exuma residents (82%).

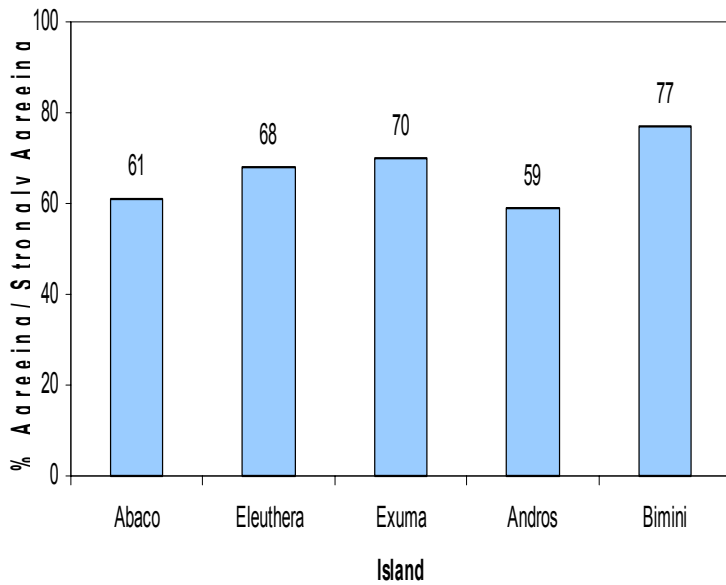


Survey Year Comparison Percent (%) of Respondents "Agreeing/Strongly Agreeing" – Bahamians do not give other Bahamians good service or value for money.

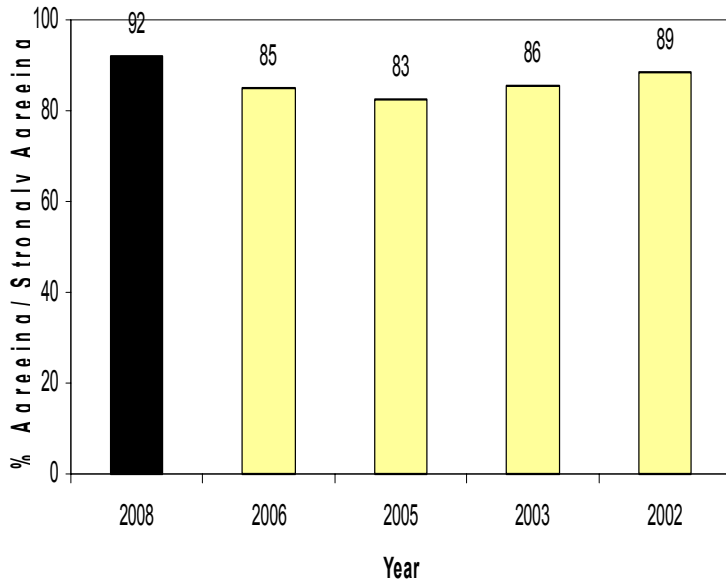


The majority of respondents have always thought that Bahamians are not very hospitable to other Bahamians.

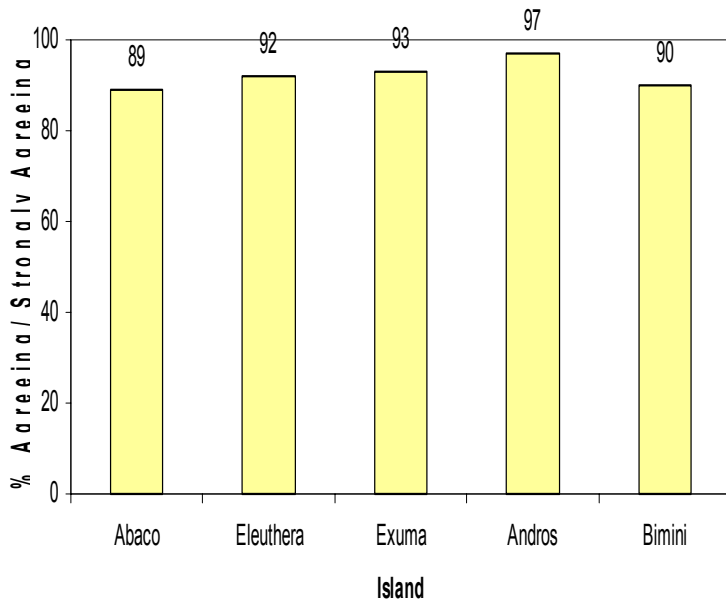
The proportion of Bimini residents (77%) that shared this sentiment was 18 percentage points higher than that of the Androsians (59%).



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

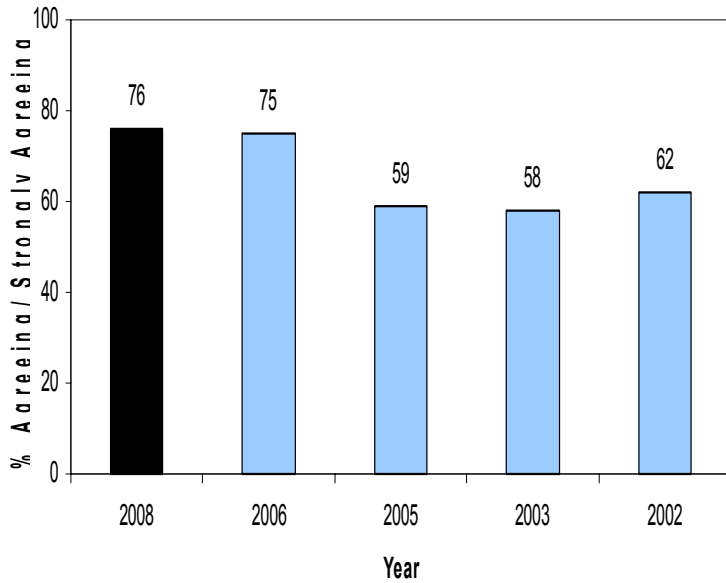


In 2008, almost all (92%) of interviewees thought that the standard of service in The Bahamas needs improvement. This was 7 percentage points higher than 2006 (85%) and represented a record high for this attitude amongst Family Islanders.

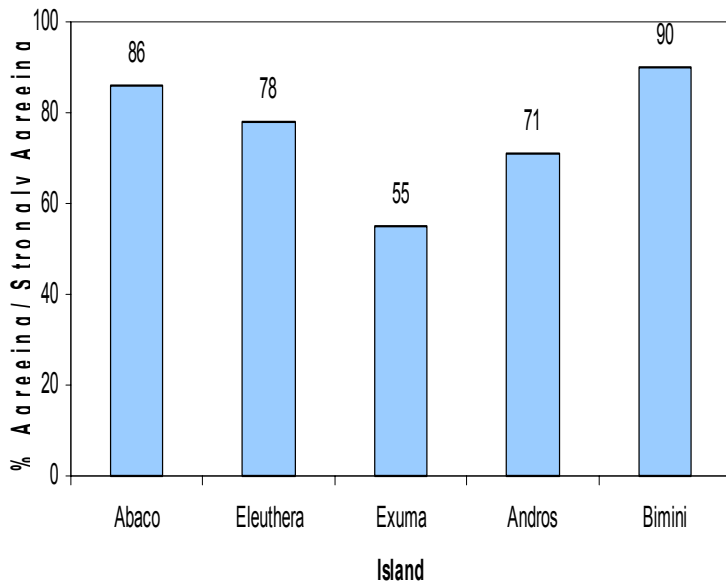


Ninety-seven percent (97%) of the residents on Andros Island felt that the standard of service in the Bahamas needs improvement, which was 8 percentage points higher than in Abaco (89%).

Survey Year Comparison Percent (%) of Respondents "Agreeing/Strongly Agreeing" – Costs such as wages, electricity, telephone and so on are higher in The Bahamas than in most parts of the region including the U.S.A. and Canada.

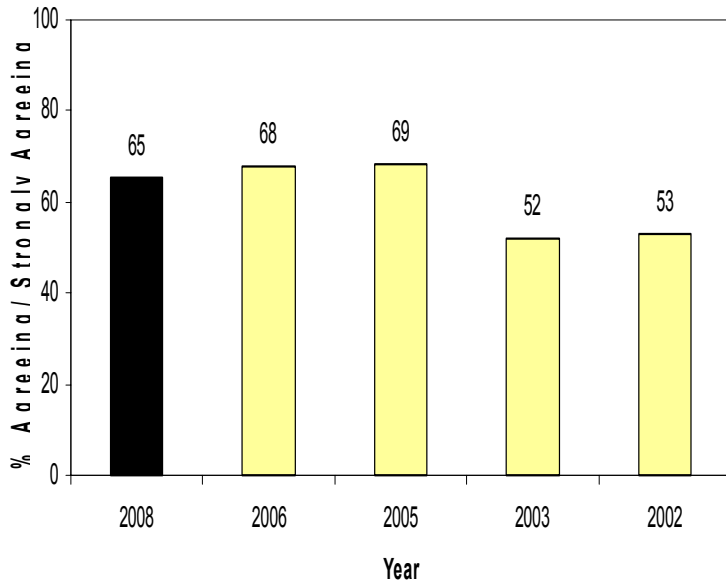


In 2008, three out of four (76%) surveyed agreed with the statement that wage and utility costs are higher in The Bahamas than in other countries in the region. This sentiment was relatively unchanged since 2006 (75%) but is much higher than in 2003 (58%).



Nine out of ten Biminities (90%) agreed with this statement, which was nearly twice the number of Exumians (55%).

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



About two-thirds (65%) of Family Islanders opined that tourism will have to be the main industry for the next thirty years – a slight decrease since 2006 (68%).

Eight out of ten Eleuthera residents (80%) has this opinion, which was almost twice as many as the Exumians (47%).

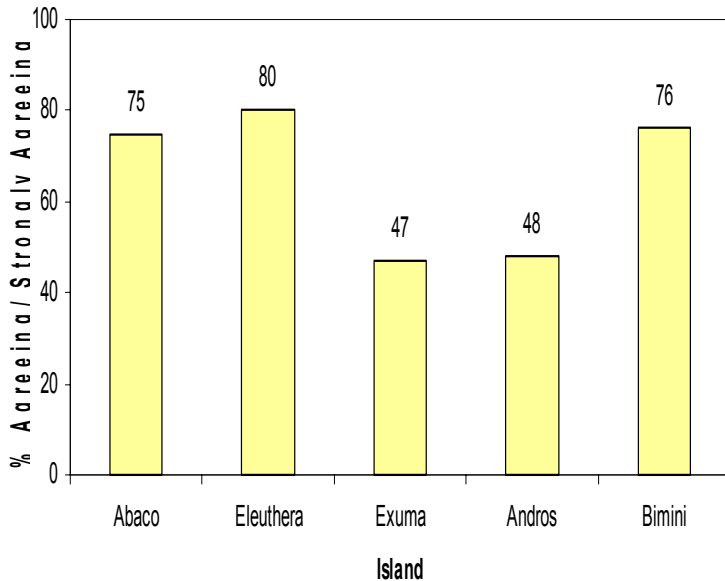


Table 11

**Percent (%) of Respondents: All Responses to
General Attitude Statements, 2008**

Statement	Strongly Agree	Agree	Neither agree nor disagree	Disagree	Strongly Disagree	Don't know
Most tourists are satisfied with their Bahamas experience.	17	68	6	5	1	3
Most Bahamians make the tourist feel like they are doing the tourist a big favour when serving or helping the tourist.	10	28	13	39	9	1
The only jobs tourism has created for Bahamians are jobs at the bottom of the ladder.	4	11	9	58	13	4
My job is related to tourism.	29	36	12	19	3	1
I would like my child, if I have one, to work in the tourism industry.	8	40	22	14	4	11
Tourists are given their money's worth while visiting the Islands of The Bahamas.	9	59	16	11	2	3
Tourism does not affect me personally.	7	12	7	49	25	1
Only Bahamian art, straw and craft goods should be allowed to be sold to tourists.	21	32	12	26	8	1
Just because tourism is the main industry, does not mean that Bahamians are willing to go the extra mile to please tourists.	4	10	7	55	24	1
The 15% gratuity should be eliminated.	8	17	13	42	18	2
The Islands of the Bahamas' advertisements make me feel good about my country.	38	54	4	2	1	1
When tourists come to the Islands of The Bahamas they generally do not find what they were led to expect by our advertising and promotions.	3	21	15	43	13	4
There are not enough jobs in the tourism sector.	7	38	12	28	6	8

Statement	Strongly Agree	Agree	Neither agree nor disagree	Disagree	Strongly Disagree	Don't know
Jobs in tourism are not considered very prestigious.	1	24	17	41	11	6
Many parents do not think it is a good idea for their children to have a career in tourism.	3	21	15	41	9	11
The salaries and benefits in the tourism sector are not on par with similar positions in the private sector.	7	28	12	21	5	27
There is little job security in the tourism sector.	11	39	14	22	3	10
Tourism has taken all our best beaches and land.	13	33	13	33	4	4
The quality of the tourism product needs great improvement,	26	58	7	5	1	2
Bahamians do not give other Bahamians good service or value for money.	30	37	11	16	5	1
Standard of service in the Islands of The Bahamas needs improvement.	33	59	4	3	0	1
Costs such as wages, electricity, telephone and so on are higher in The Bahamas than in most parts of the region including the U.S.A.. and Canada.	35	41	7	2	0	14
Tourism will have to be the main industry in the Islands of The Bahamas for at least the next thirty years.	20	46	15	11	4	5

3.8 Media Usage

The television station that was watched the most by Family Islanders is ZNS (News). CNN (44%) was the second most popular television station.

Table 12A

Percent (%) of Respondents – Top Ten Local and International Television Stations Watched by Year (n=499)

Television Stations	2008	2006	2005	2003
ZNS (NEWS)	75	93	53	66
CNN	44	39	35	42
ALL CABLE CHANNELS	25	-	24	2
LIFETIME	24	8	14	14
ZNS 13	22	-	22	-
ZNS (OTHER PROGRAMMES)	22	-	19	-
FOX	19	11	12	12
TNT	15	-	6	5
TBN	13	17	13	19
CBS	11	11	9	20

Table 12B

Percent (%) of Respondents – Top Ten Local and International Television Stations Watched by Island (n=499)

Television Stations	Abaco	Eleuthera	Exuma	Andros	Bimini
ZNS (NEWS)	83	80	52	77	83
CNN	49	36	41	59	35
ALL CABLE CHANNELS	2	27	30	22	42
LIFETIME	30	23	17	33	19
ZNS 13	21	31	6	28	24
ZNS (OTHER PROGRAMMES)	18	20	14	34	22
FOX	30	21	12	15	16
TNT	16	16	20	9	12
TBN	5	16	22	15	9
CBS	12	19	5	4	14

The ZNS AM stations and Radio Abaco (93.5) were the top three radio stations in the Family Islands overall. Although, Radio Abaco did not have any listeners in the other islands, almost all (92%) of the Abaco residents said that they listened to that station. Additionally, the most popular radio station in Exuma was Breeze (71%).

Table 13A

Percent (%) of Respondents – Top Ten Local and International Radio Stations Listened to by Year (n=494)

Radio Stations	2008	2006	2005	2003
ZNS 1540 AM	49	38	41	36
ZNS 1240 AM	20	14	13	15
RADIO ABACO (93.5)	18	12	20	23
100 JAMZ	18	-	18	13
104.5 FM	16	-	9	11
BREEZE (98.3)	14	-	-	-
LOVE 97	13	-	5	4
101.9 JOY FM	13	-	3	3
NONE	12	10	9	6
ISLAND FM	4	-	0	0

Table 13B

Percent (%) of Respondents – Top Ten Local and International Radio Stations Listened to by Island (n=494)

Radio Stations	Abaco	Eleuthera	Exuma	Andros	Bimini
ZNS 1540 AM	17	75	58	72	23
ZNS 1240 AM	14	32	11	37	8
RADIO ABACO (93.5)	92	0	0	0	0
100 JAMZ	8	25	5	29	21
104.5 FM	4	27	6	33	9
BREEZE (98.3)	0	0	71	0	0
LOVE 97	3	23	10	20	10
101.9 JOY FM	1	11	14	34	4
NONE	5	8	6	4	37
ISLAND FM	6	8	0	3	2

The Punch was the most popular newspaper in the Family Islands, with two-thirds of respondents. Between 2006 and 2008, The Tribune and The Guardian had gained in readership but by not quite enough to overtake The Punch. In Abaco, The Tribune was more widely read than The Punch.

Table 14A

Percent (%) of Respondents – Top Five Local and International Newspapers Read by Year (n=498)

Newspapers	2008	2006	2005	2003
The Punch	66	47	49	45
The Tribune	64	36	42	38
The Guardian	62	31	40	22
Miami Herald	17	17	20	20
None	13	16	14	21

Table 14B

Percent (%) of Respondents – Top Five Local and International Newspapers Read by Island (n=498)

Newspapers	Abaco	Eleuthera	Exuma	Andros	Bimini
The Punch	64	73	63	70	60
The Tribune	74	65	60	64	55
The Guardian	59	62	62	71	57
Miami Herald	14	10	17	24	22
None	4	9	17	10	23

Almost half (47%) of the Family Islanders did not read any magazines. Nevertheless, amongst those who do, Ebony and Oprah were the most popular and had gained in readership since 2006.

Table 15A

Percent (%) of Respondents – Top Five Local and International Magazines Read by Year (n=496)

Magazines	2008	2006	2005	2003
None	47	59	66	56
Ebony	20	7	6	9
Oprah	14	3	3	4
Jet	14	7	4	7
Time	10	3	3	6

Table 15B

Percent (%) of Respondents – Top Five Local and International Magazines Read by Island (n=496)

Magazines	Abaco	Eleuthera	Exuma	Andros	Bimini
None	45	42	50	39	59
Ebony	8	26	14	35	15
Oprah	7	14	13	26	10
Jet	12	13	10	21	12
Time	10	9	7	17	8

3.9 Associations

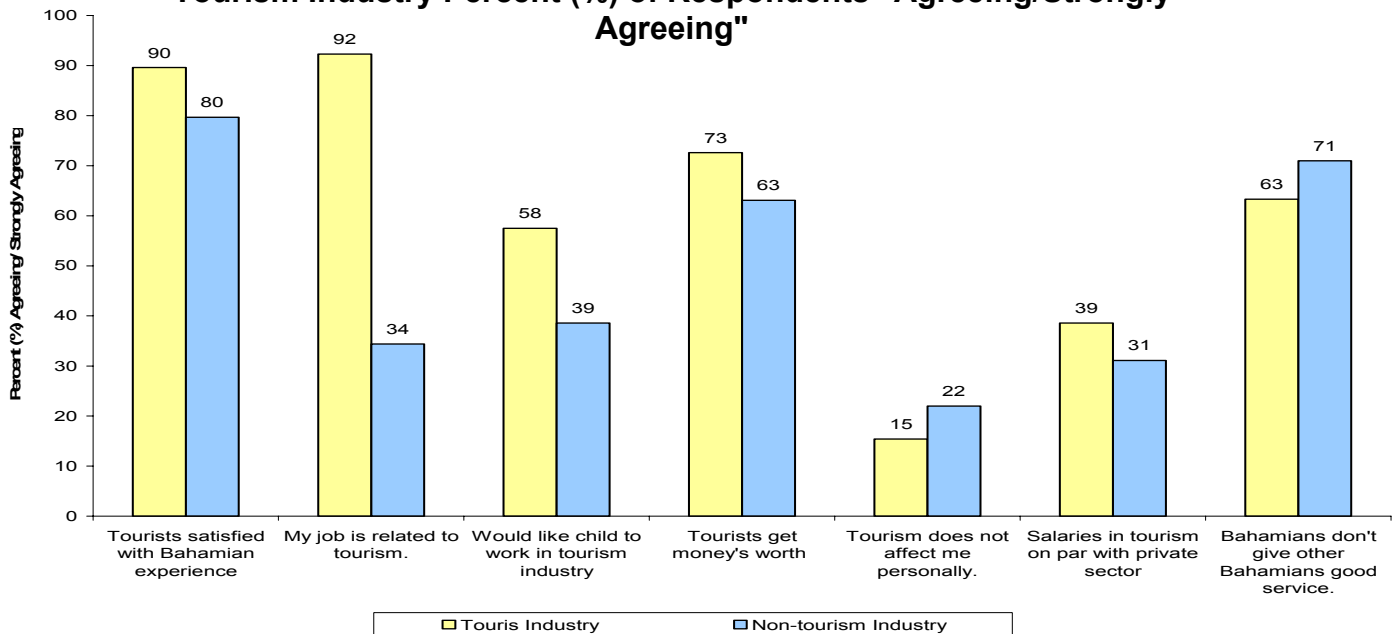
Demographics, such as age, sex, and tourism industry job, education and income were tested with attitude items to test for differences in opinion by these groups.

3.9.1 Associations by whether Job is in Tourism Industry

Respondents who worked in tourism seemed more likely to agree that most tourists are satisfied with their Bahamian experience; their job is related to tourism; they would like their child to work in the tourism industry; tourists are given their money's worth while visiting the Bahamas; and that the salaries and benefits in the tourism sector are on par with similar positions in the private sector. (*Pearson chi-square, $p \leq 0.05$; Figure 25*).

They appeared less likely to agree to the statements: that tourism does not affect them personally; and that Bahamians do not give other Bahamians good service or value for money.

Figure 25
Differences in Selected Attitude Statements by Whether Job is in the Tourism Industry Percent (%) of Respondents "Agreeing/Strongly Agreeing"

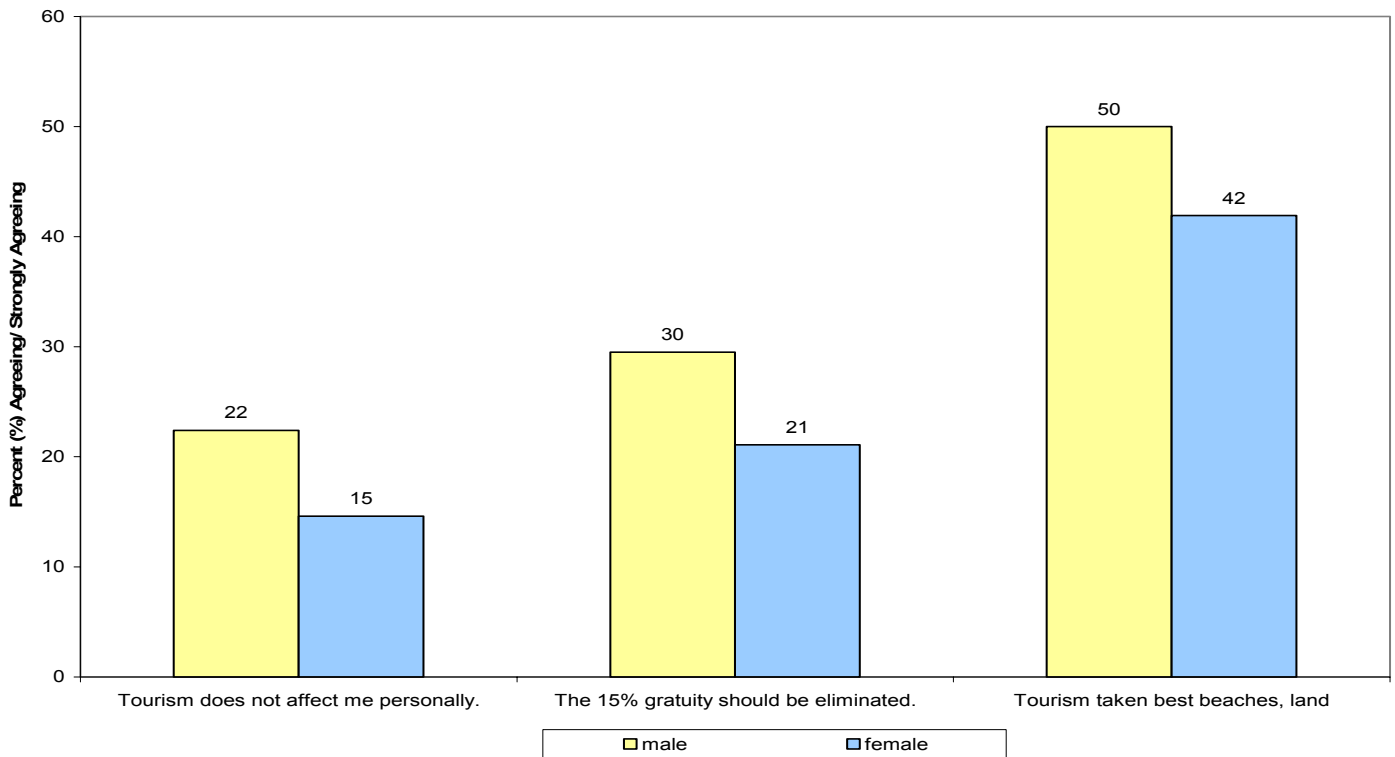


3.9.2 Associations by Sex

Less of Family Island female respondents tended to agree with certain statements: tourism does not affect them personally; the 15% gratuity should be eliminated; and that tourism has taken all our best beaches and lands. (*Pearson chi-square*<0.05); Figure 26)

Figure 26

**Differences in Selected Attitude Statements by Sex
Percent (%) of Respondents "Agreeing/Strongly Agreeing"**

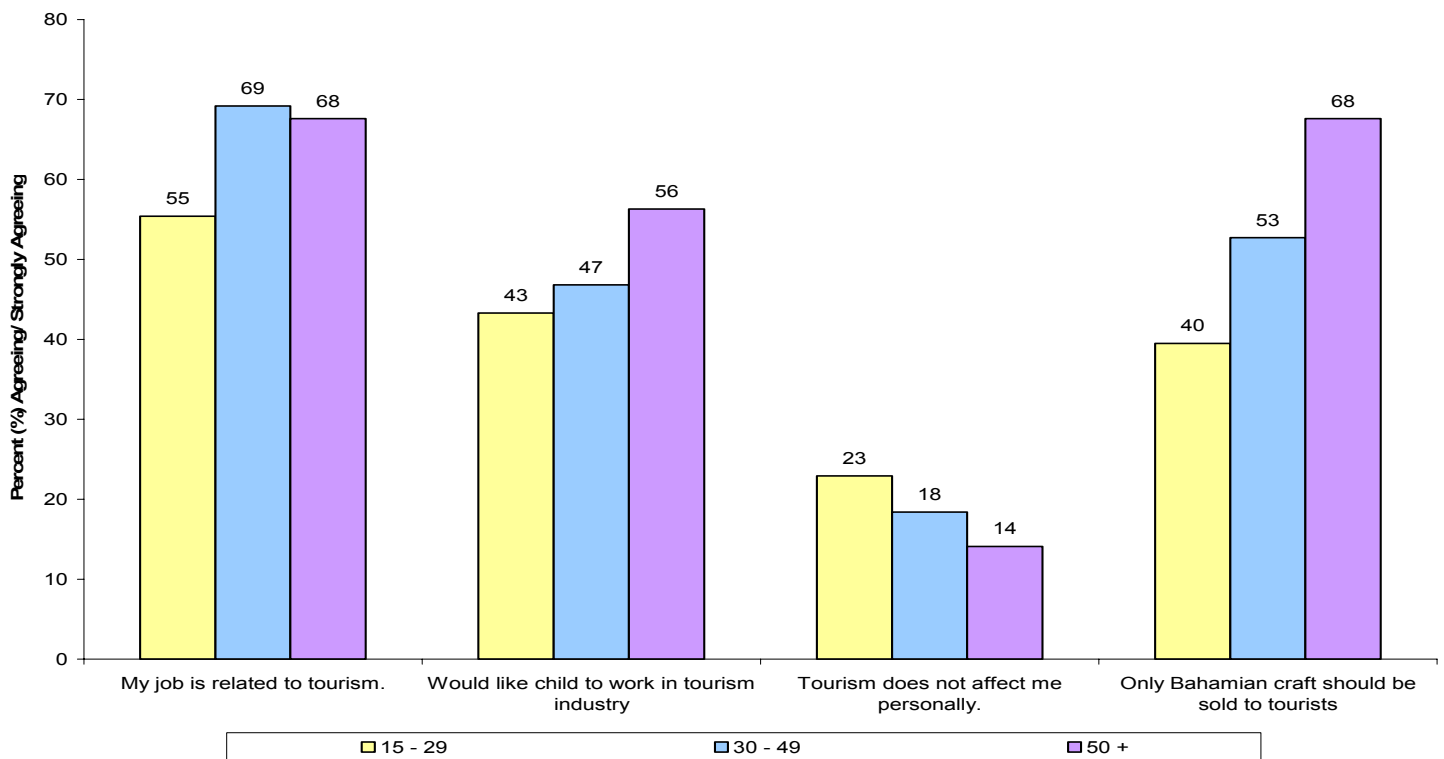


3.9.3 Associations by Age-Group

As the age of the respondent increased, they were more likely to respond positively to a few of statements, namely, their job is related to tourism; that they would like their child to work in the tourism industry; and that only Bahamian art, straw and craft goods should be allowed to be sold to tourists (*positive low to moderate Kendall's tau-c, Figure 27*). Additionally, there was an inverse relationship between age of the respondent and the statement "tourism does not affect me personally" (*negative low to moderate Kendall's tau-c, Figure 27*).

Figure 27

**Differences in Selected Attitude Statements by Age-Group
Percent (%) of Respondents "Agreeing/Strongly Agreeing"**

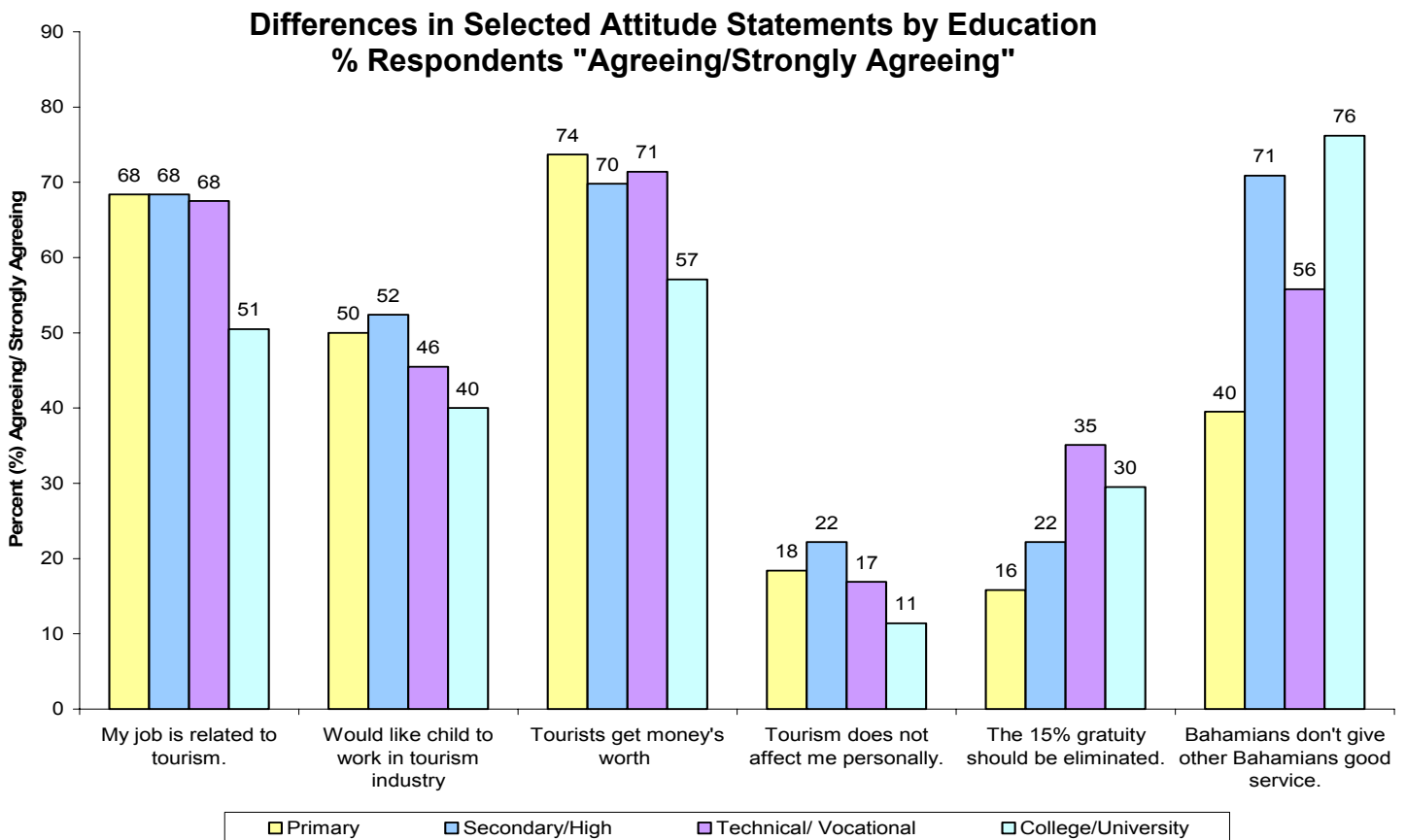


3.9.4 Associations by Education

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: their job is related to tourism; that they would like their child to work in the tourism industry; whether tourists get money's worth; and that tourism does not affect them personally (*negative low to moderate Kendall's tau-c; Figure 28*).

There appears to be a positive relationship between the educational level of respondents and the level of agreement to the following statements: the 15% gratuity should be eliminated; and that Bahamians do not give other Bahamians good service or value for money (*positive low to moderate Kendall's tau-c; Figure 28*).

Figure 28

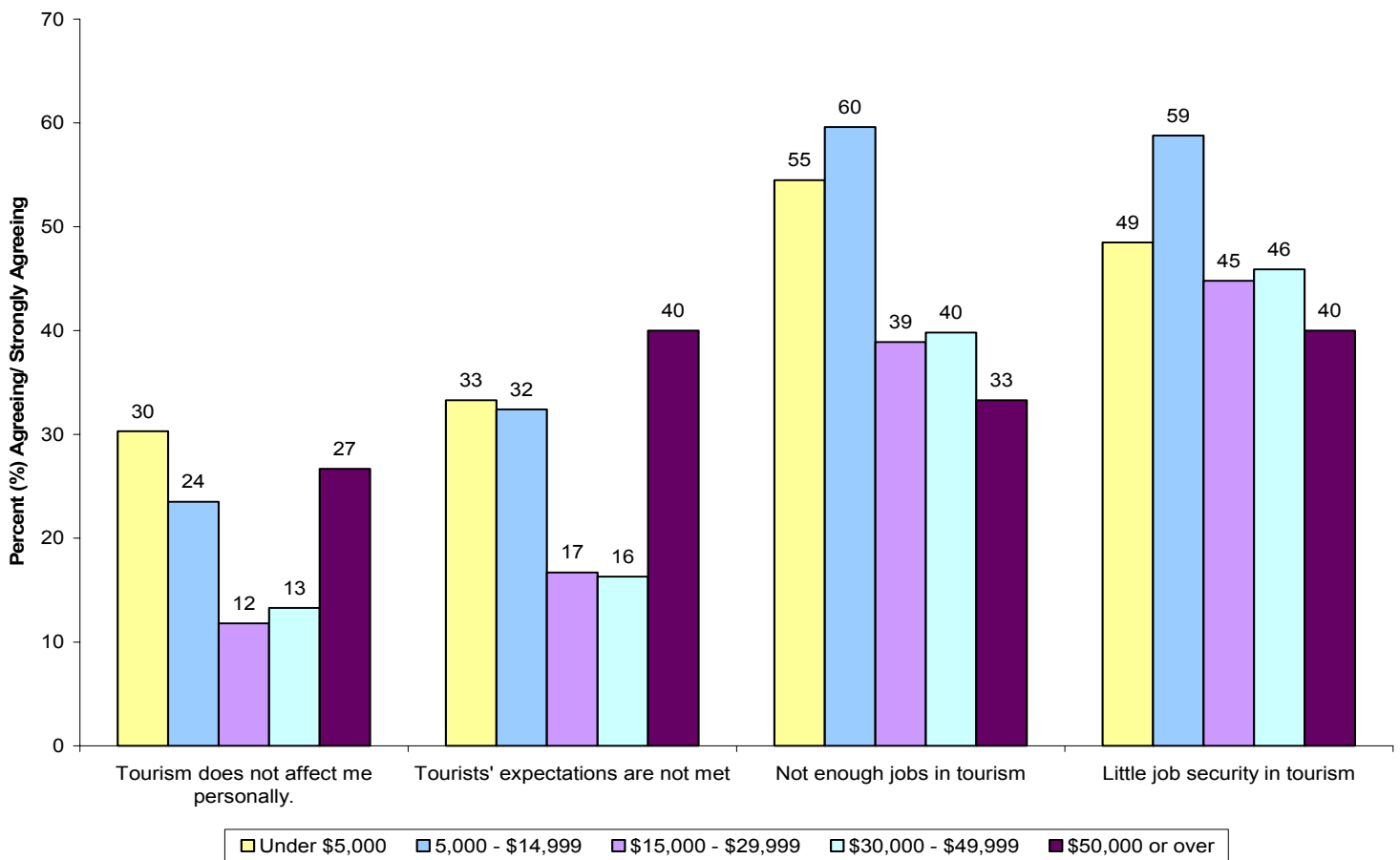


3.9.5 Associations by Income

As income increased, the less likely respondents appeared to agree: that there are not enough jobs in the tourism sector; and whether there is little job security in tourism (*low to moderate negative Kendalls' tau-c; Figure 28*). The respondents with incomes \$15,000 - \$49,000 were less likely to agree that tourism does not affect them personally; and that the tourists' expectations are not met when visiting The Bahamas.

Figure 28

**Difference in Selected Attitude Statements by Income
Percent (%) of Respondents "Agreeing/Strongly Agreeing"**



IV. Conclusions

- Since 2006, in a number of areas there seems to have been an increase in the Family Islanders' favourability towards the tourism industry:
 - More respondents stated that they would choose to work in the tourism industry because they enjoyed meeting people.
 - More respondents said that they would try to convince someone to come to The Bahamas by telling them about the friendliness and hospitality of the Bahamian people.
 - More respondents opined that only Bahamian art, straw and craft goods should be allowed to be sold to tourists.
 - Fewer respondents said that they did not consider tourism jobs as prestigious.
 - Fewer Family Islanders were of the opinion that tourism salaries are not on par with similar positions in the private sector.
 - Fewer respondents agreed that tourism has taken all our best beaches and land.
- For a couple of attitude statements the Family Islanders' responses have become less favourable:
 - Fewer respondents felt that most tourists are satisfied with their Bahamian experience.
 - More Family Islanders felt that the quality of the tourism product needs great improvement.

- The Family Islanders are NOT a homogenous group of individuals, with regards to attitudes towards tourism. Therefore, there were also very significant differences in attitudes BETWEEN the islands.
- ABACO residents were more likely than other Family Islanders to agree that:
 - The Islands of the Bahamas' advertisements make them feel good about their country.
 - Jobs in tourism are not considered very prestigious.
 - The salaries and benefits in the tourism sector are not on par with similar positions in the private sector.
 - Tourism has taken all our best beaches and land.
- ELEUTHERA residents were more likely than other Family Islanders to agree that:
 - They would like their child, if they have one, to work in the tourism industry.
 - Tourists are given their money's worth while visiting the Islands of The Bahamas.
 - Just because tourism is the main industry, does not mean that Bahamians are willing to go the extra mile to please tourists.
 - The quality of the tourism product needs great improvement,
 - Tourism will have to be the main industry in the Islands of The Bahamas for at least the next thirty years.

- EXUMA residents were more likely than other Family Islanders to agree that:
 - There are not enough jobs in the tourism sector.
 - There is little job security in the tourism sector.

- ANDROS residents were more likely than other Family Islanders to agree that:
 - Their job is related to tourism.
 - Only Bahamian art, straw and craft goods should be allowed to be sold to tourists.
 - Just because tourism is the main industry, does not mean that Bahamians are willing to go the extra mile to please tourists.
 - When tourists come to the Islands of The Bahamas they generally do not find what they were led to expect by our advertising and promotions.
 - Standard of service in the Islands of The Bahamas needs improvement.

- BIMINI residents were more likely than other Family Islanders to agree that:
 - The only jobs tourism has created for Bahamians are jobs at the bottom of the ladder.
 - Tourism does not affect them personally.
 - The 15% gratuity should be eliminated.
 - Bahamians do not give other Bahamians good service or value for money.
 - Costs such as wages, electricity, telephone and so on are higher in The Bahamas than in most parts of the region including the U.S.A. and Canada.

- There were many associations with attitude statements by several demographics:
 - Respondents with **jobs in the tourism industry** were more likely to agree that:
 - Most tourists are satisfied with their Bahamian experience.
 - Their job was related to tourism.
 - They would like their child to work in the tourism industry.
 - Tourists are given their money's worth while visiting The Bahamas.
 - The salaries and benefits in the tourism sector are on par with similar positions in the private sector.

And less likely to agree that:

- Bahamians don't give other Bahamians good service.
 - Tourism does not affect them personally.
- More **male** respondents seemed to agree with certain statements:
 - Tourism does not affect them personally.
 - The 15% gratuity should be eliminated.
 - Tourism has taken all our best beaches and lands.
 - As the **age of the respondent** increased, the less likely they seem to respond positively to:
 - Tourism does not affect them personally.

And more likely to agree that:

- Their job is related to tourism.
- They would like their child to work in the tourism industry.
- Only Bahamian art, straw and craft goods should be allowed to be sold to the tourists.

- The higher the **education of the respondent**, the less likely they seem to respond positively to:
 - Their job is related to tourism.
 - They would like their child to work in the tourism industry.
 - Tourists get their money's worth when visiting The Bahamas.
 - Tourism does not affect them personally.

And more likely to agree that:

- The 15% gratuity should be eliminated.
- Their job is related to tourism.
- Bahamians do not give other Bahamians good service.

- As **income** of the respondent increases, they were less likely to agree that:
 - Tourism does not affect them personally
 - Tourists' expectations are not met when visiting The Bahamas
 - There are not enough jobs in the tourism sector
 - There is little job security in tourism

- With regards to media usage:
 - The television station that was watched the most by Family Islanders is ZNS (News). CNN was the second most popular television station.
 - The ZNS AM stations and Radio Abaco (93.5) were the top three radio stations in the Family Islands overall. Although, Radio Abaco did not have any listeners in the other islands, almost all of the Abaco residents said that they listened to that station. Additionally, the most popular radio station in Exuma was Breeze.
 - The Punch was the most popular newspaper in the Family Islands. Between 2006 and 2008, The Tribune and The Guardian had

gained in readership but by not quite enough to overtake The Punch. In Abaco, The Tribune was more widely read than The Punch.

- Amongst the Family Islanders that do read magazines, Ebony and Oprah were the most popular and had gained in readership since 2006.

V. Appendix

Table A-1

5.1 Percent (%) of Respondents – Responses to General Attitude Statements by Survey Year 1996-2008

STATEMENT	SURVEY YEAR				
	2008	2006	2005	2003	2002
Most Tourists Are Satisfied With Their Bahamas Experience.					
Strongly Agree	17	30	35	31	29
Agree	68	61	56	58	59
Neither Agree Nor Disagree	6	3	2	2	5
Disagree	5	5	2	6	4
Strongly Disagree	1	1	2	1	0
Don't Know	3	1	3	3	3
Most Bahamians Make The Tourist Feel Like They Are Doing The Tourist A Big Favour When Serving Or Helping The Tourist.					
Strongly Agree	10	10	4	7	10
Agree	28	26	25	23	35
Neither Agree Nor Disagree	13	11	11	10	9
Disagree	39	39	48	42	36
Strongly Disagree	9	13	12	17	10
Don't Know	1	1	2	1	2
The Only Jobs Tourism Has Created For Bahamians Are Jobs At The Bottom Of The Ladder.					
Strongly Agree	4	5	2	3	3
Agree	11	12	12	12	8
Neither Agree Nor Disagree	9	8	11	12	10
Disagree	58	55	47	48	57
Strongly Disagree	13	17	23	21	17
Don't Know	4	4	5	4	6
My Job Is Related To Tourism.					
Strongly Agree	29	34	27	26	28
Agree	36	34	35	37	32
Neither Agree Nor Disagree	12	9	12	8	7
Disagree	19	16	16	21	25
Strongly Disagree	3	6	7	7	4
Don't Know	1	1	2	1	4

Table A-1 cont'd

STATEMENT	SURVEY YEAR				
	2008	2006	2005	2003	2002
I Would Like My Child, If I Have One, To Work In The Tourism Industry.					
Strongly Agree	8	13	12	9	8
Agree	40	44	40	40	41
Neither Agree Nor Disagree	22	17	23	25	24
Disagree	14	12	10	12	16
Strongly Disagree	4	4	3	6	3
Don't Know	11	9	12	9	8
Tourists Are Given Their Money's Worth While Visiting The Islands Of The Bahamas.					
Strongly Agree	9	14	20	15	17
Agree	59	55	61	52	48
Neither Agree Nor Disagree	16	14	7	16	19
Disagree	11	10	7	9	11
Strongly Disagree	2	2	1	2	1
Don't Know	3	5	3	6	4
Tourism Does Not Affect Me Personally.					
Strongly Agree	7	5	6	4	4
Agree	12	11	14	13	15
Neither Agree Nor Disagree	7	7	8	6	4
Disagree	49	42	42	44	44
Strongly Disagree	25	33	29	30	29
Don't Know	1	1	1	1	5
Only Bahamian Art, Straw And Craft Goods Should Be Sold To Tourists.					
Strongly Agree	21	19	25	25	19
Agree	32	27	21	28	27
Neither Agree Nor Disagree	12	13	11	9	5
Disagree	26	26	28	22	34
Strongly Disagree	8	15	14	16	14
Don't Know	1	1	1	1	2

Table A-1 cont'd

STATEMENT	SURVEY YEAR				
	2008	2006	2005	2003	2002
Just Because Tourism Is The Main Industry, Does Not Mean That Bahamians Should Be Willing To Go The Extra Mile To Please Tourists.					
Strongly Agree	4	4	5	6	4
Agree	10	14	13	9	14
Neither Agree Nor Disagree	7	6	9	7	5
Disagree	55	44	43	44	48
Strongly Disagree	24	30	30	33	29
Don't Know	1	2	1	1	2
The 15% Gratuity Should Be Eliminated.					
Strongly Agree	8	6	7	8	7
Agree	17	14	13	15	15
Neither Agree Nor Disagree	13	11	8	6	10
Disagree	42	38	42	43	40
Strongly Disagree	18	29	27	25	21
Don't Know	2	3	3	4	7
The Islands Of The Bahamas' Advertisements Make Me Feel Good About My Country.					
Strongly Agree	38	43	43	37	38
Agree	54	47	40	48	49
Neither Agree Nor Disagree	4	3	8	8	7
Disagree	2	3	4	4	4
Strongly Disagree	1	1	1	2	1
Don't Know	1	3	3	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 Promotions.					
Strongly Agree	3	3	3	8	5
Agree	21	16	15	15	17
Neither Agree Nor Disagree	15	16	17	14	12
Disagree	43	41	44	45	40
Strongly Disagree	13	20	17	15	21
Don't Know	4	3	4	4	6

Table A-1 cont'd

STATEMENT	SURVEY YEAR				
	2008	2006	2005	2003	2002
There Are Not Enough Jobs In The Tourism Sector.					
Strongly Agree	7	9	6	8	8
Agree	38	32	31	34	33
Neither Agree Nor Disagree	12	9	13	13	13
Disagree	28	26	26	24	25
Strongly Disagree	6	13	14	13	9
Don't Know	8	11	11	8	13
Jobs In Tourism Are Not Considered Very Prestigious.					
Strongly Agree	1	7	3	3	6
Agree	24	28	26	30	25
Neither Agree Nor Disagree	17	8	11	11	11
Disagree	41	32	33	32	38
Strongly Disagree	11	16	20	19	13
Don't Know	6	9	7	3	7
Many Parents Do Not Think It Is A Good Idea For Their Children To Have A Career In Tourism.					
Strongly Agree	3	5	1	3	4
Agree	21	20	20	31	29
Neither Agree Nor Disagree	15	15	15	13	16
Disagree	41	30	30	29	27
Strongly Disagree	9	16	11	10	10
Don't Know	11	14	21	15	14
The Salaries And Benefits In The Tourism Sector Are Not On Par With Similar Positions In The Private Sector.					
Strongly Agree	7	11	6	8	11
Agree	28	33	24	32	30
Neither Agree Nor Disagree	12	11	11	9	9
Disagree	21	15	17	18	17
Strongly Disagree	5	9	13	10	8
Don't Know	27	22	29	24	25

Table A-1 cont'd

STATEMENT	SURVEY YEAR				
	2008	2006	2005	2003	2002
There Is Little Job Security In The Tourism Sector.					
Strongly Agree	11	16	7	7	12
Agree	39	26	34	39	33
Neither Agree Nor Disagree	14	11	12	12	13
Disagree	22	23	22	19	19
Strongly Disagree	3	11	12	11	7
Don't Know	10	12	15	12	17
Tourism Has Taken All Our Best Beaches And Land.					
Strongly Agree	13	27	25	14	10
Agree	33	27	27	30	29
Neither Agree Nor Disagree	13	8	8	8	10
Disagree	33	32	32	34	33
Strongly Disagree	4	4	7	11	11
Don't Know	4	3	2	3	8
The Quality Of The Tourism Product Needs Great Improvement.					
Strongly Agree	26	24	22	26	21
Agree	58	51	55	55	61
Neither Agree Nor Disagree	7	8	8	5	4
Disagree	5	10	10	6	7
Strongly Disagree	1	5	3	7	4
Don't Know	2	2	2	1	3
Bahamians Do Not Give Other Bahamians Good Service Or Value For Money.					
Strongly Agree	30	32	20	23	28
Agree	37	33	39	39	35
Neither Agree Nor Disagree	11	9	18	8	13
Disagree	16	19	17	19	16
Strongly Disagree	5	6	4	10	6
Don't Know	1	1	1	1	2
Standard Of Service In The Islands Of The Bahamas Needs Improvement.					
Strongly Agree	33	31	27	33	29
Agree	59	54	56	53	60
Neither Agree Nor Disagree	4	4	7	3	2
Disagree	3	5	6	4	4
Strongly Disagree	0	6	3	7	4
Don't Know	1	2	1	0	2

Table A-1 cont'd

STATEMENT	SURVEY YEAR				
	2008	2006	2005	2003	2002
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.					
Strongly Agree	35	41	25	28	30
Agree	41	34	35	30	32
Neither Agree Nor Disagree	7	4	10	9	6
Disagree	2	5	4	6	6
Strongly Disagree	0	3	3	7	6
Don't Know	14	12	24	20	21
Tourism Will Have To Be The Main Industry In The Islands Of The Bahamas For At Least The Next Thirty Years.					
Strongly Agree	20	34	34	25	21
Agree	46	34	34	28	32
Neither Agree Nor Disagree	15	13	13	14	16
Disagree	11	10	10	21	20
Strongly Disagree	4	4	4	9	5
Don't Know	5	6	4	4	7

Table A-2

5.2 Percent (%) of Respondents – Responses to General Attitude Statements by Island

STATEMENT	ISLAND				
	Abaco	Eleuthera	Exuma	Andros	Bimini
Most Tourists Are Satisfied With Their Bahamas Experience.					
Strongly Agree	20	32	14	8	12
Agree	64	59	79	76	60
Neither Agree Nor Disagree	6	3	2	3	17
Disagree	6	1	4	11	5
Strongly Disagree	0	2	1	0	1
Don't Know	4	3	0	2	5
Most Bahamians Make The Tourist Feel Like They Are Doing The Tourist A Big Favour When Serving Or Helping The Tourist.					
Strongly Agree	5	9	10	4	20
Agree	33	23	29	26	27
Neither Agree Nor Disagree	14	8	12	18	14
Disagree	26	44	45	49	33
Strongly Disagree	19	16	3	2	4
Don't Know	3	0	0	1	2
The Only Jobs Tourism Has Created For Bahamians Are Jobs At The Bottom Of The Ladder.					
Strongly Agree	6	2	2	3	9
Agree	15	7	7	8	16
Neither Agree Nor Disagree	13	4	7	9	11
Disagree	49	53	67	73	50
Strongly Disagree	14	31	8	6	8
Don't Know	3	3	9	1	6
My Job Is Related To Tourism.					
Strongly Agree	28	41	25	29	21
Agree	38	25	35	39	41
Neither Agree Nor Disagree	16	6	16	17	4
Disagree	15	22	21	10	25
Strongly Disagree	3	4	1	1	7
Don't Know	0	1	1	2	2

Table A-2 cont'd

STATEMENT	ISLAND				
	Abaco	Eleuthera	Exuma	Andros	Bimini
I Would Like My Child, If I Have One, To Work In The Tourism Industry.					
Strongly Agree	9	11	7	4	11
Agree	30	52	31	49	38
Neither Agree Nor Disagree	18	15	25	30	20
Disagree	13	14	21	12	11
Strongly Disagree	3	3	3	3	9
Don't Know	27	5	12	2	11
Tourists Are Given Their Money's Worth While Visiting The Islands Of The Bahamas.					
Strongly Agree	7	26	4	3	6
Agree	61	54	59	73	47
Neither Agree Nor Disagree	17	14	23	3	23
Disagree	10	6	8	17	15
Strongly Disagree	2	0	0	2	4
Don't Know	3	0	6	2	5
Tourism Does Not Affect Me Personally.					
Strongly Agree	5	5	2	5	18
Agree	15	9	10	9	15
Neither Agree Nor Disagree	15	2	10	3	5
Disagree	44	43	58	53	45
Strongly Disagree	20	41	20	28	17
Don't Know	1	0	0	2	0
Only Bahamian Art, Straw And Craft Goods Should Be Sold To Tourists.					
Strongly Agree	8	27	30	24	16
Agree	25	22	32	52	28
Neither Agree Nor Disagree	15	0	9	19	16
Disagree	36	37	22	3	32
Strongly Disagree	14	14	7	0	5
Don't Know	1	0	0	1	3

Table A-2 cont'd

STATEMENT	ISLAND				
	Abaco	Eleuthera	Exuma	Andros	Bimini
Just Because Tourism Is The Main Industry, Does Not Mean That Bahamians Should Be Willing To Go The Extra Mile To Please Tourists.					
Strongly Agree	2	4	2	5	5
Agree	5	17	7	16	4
Neither Agree Nor Disagree	4	3	5	20	3
Disagree	63	39	69	50	54
Strongly Disagree	25	37	16	8	32
Don't Know	1	0	1	0	2
The 15% Gratuity Should Be Eliminated.					
Strongly Agree	11	8	6	7	9
Agree	11	12	14	25	24
Neither Agree Nor Disagree	10	1	11	27	16
Disagree	45	41	51	34	37
Strongly Disagree	19	35	15	6	13
Don't Know	3	3	3	0	1
The Islands Of The Bahamas' Advertisements Make Me Feel Good About My Country.					
Strongly Agree	55	65	26	19	25
Agree	42	31	67	71	60
Neither Agree Nor Disagree	2	2	1	5	9
Disagree	1	1	2	3	2
Strongly Disagree	0	1	0	0	2
Don't Know	0	0	4	1	2
When Tourists Come To The Islands Of The Bahamas They Generally Do Not Find What They Were Led To Expect By Our Advertising And Promotions.					
Strongly Agree	2	1	3	3	5
Agree	28	7	11	32	27
Neither Agree Nor Disagree	21	6	14	12	24
Disagree	30	55	60	44	28
Strongly Disagree	16	28	7	6	7
Don't Know	3	2	4	2	9

Table A-2 cont'd

STATEMENT	ISLAND				
	Abaco	Eleuthera	Exuma	Andros	Bimini
There Are Not Enough Jobs In The Tourism Sector.					
Strongly Agree	14	5	6	7	3
Agree	39	27	57	32	37
Neither Agree Nor Disagree	15	6	6	23	9
Disagree	16	45	15	34	29
Strongly Disagree	11	10	3	1	7
Don't Know	5	7	13	2	15
Jobs In Tourism Are Not Considered Very Prestigious.					
Strongly Agree	4	0	0	1	2
Agree	35	14	30	16	24
Neither Agree Nor Disagree	21	4	26	11	21
Disagree	25	47	30	61	43
Strongly Disagree	12	30	5	6	4
Don't Know	3	5	9	5	6
Many Parents Do Not Think It Is A Good Idea For Their Children To Have A Career In Tourism.					
Strongly Agree	4	3	0	1	5
Agree	24	15	23	23	22
Neither Agree Nor Disagree	23	4	18	15	15
Disagree	16	52	42	54	40
Strongly Disagree	10	20	4	3	6
Don't Know	23	5	13	4	12
The Salaries And Benefits In The Tourism Sector Are Not On Par With Similar Positions In The Private Sector.					
Strongly Agree	15	9	2	3	5
Agree	31	26	40	15	29
Neither Agree Nor Disagree	18	3	11	21	6
Disagree	11	25	8	42	17
Strongly Disagree	6	16	0	2	3
Don't Know	18	20	39	17	40

Table A-2 cont'd

STATEMENT	ISLAND				
	Abaco	Eleuthera	Exuma	Andros	Bimini
There Is Little Job Security In The Tourism Sector.					
Strongly Agree	7	3	23	7	15
Agree	47	24	47	37	39
Neither Agree Nor Disagree	16	8	9	33	6
Disagree	16	40	9	18	25
Strongly Disagree	4	13	0	0	0
Don't Know	10	11	11	5	15
Tourism Has Taken All Our Best Beaches And Land.					
Strongly Agree	32	4	13	11	3
Agree	34	34	47	22	30
Neither Agree Nor Disagree	11	5	8	29	12
Disagree	14	46	30	33	42
Strongly Disagree	4	9	1	2	3
Don't Know	3	2	0	3	10
The Quality Of The Tourism Product Needs Great Improvement.					
Strongly Agree	30	32	16	35	19
Agree	52	60	64	55	61
Neither Agree Nor Disagree	7	2	13	5	10
Disagree	4	4	5	4	10
Strongly Disagree	3	0	0	0	0
Don't Know	4	2	2	1	0
Bahamians Do Not Give Other Bahamians Good Service Or Value For Money.					
Strongly Agree	35	20	38	15	40
Agree	26	48	32	44	37
Neither Agree Nor Disagree	9	1	13	29	4
Disagree	18	25	13	11	13
Strongly Disagree	11	2	4	1	6
Don't Know	1	3	0	0	0
Standard Of Service In The Islands Of The Bahamas Needs Improvement.					
Strongly Agree	39	36	27	40	24
Agree	50	56	66	57	66
Neither Agree Nor Disagree	8	2	1	2	5
Disagree	0	5	3	1	5
Strongly Disagree	1	1	0	0	0
Don't Know	2	0	2	0	0

Table A-2 cont'd

STATEMENT	ISLAND				
	Abaco	Eleuthera	Exuma	Andros	Bimini
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.					
Strongly Agree	57	30	15	25	49
Agree	29	48	40	46	41
Neither Agree Nor Disagree	2	5	7	20	3
Disagree	2	5	1	2	2
Strongly Disagree	0	0	1	0	0
Don't Know	10	12	35	7	5
Tourism Will Have To Be The Main Industry In The Islands Of The Bahamas For At Least The Next Thirty Years.					
Strongly Agree	36	20	11	7	24
Agree	39	60	36	41	52
Neither Agree Nor Disagree	11	4	14	33	11
Disagree	7	10	18	13	8
Strongly Disagree	0	4	16	1	0
Don't Know	7	2	4	5	5

5.3 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. Therefore, the higher the mean, the higher the extent of agreement. Presented below are the statements that were significant (*T-Tests, ANOVA, p < .05*) for the demographics: whether the respondent’s job is in the tourism industry or not, sex, age, education, income and island.

Table A-3

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

STATEMENT	Tourism Industry	Non-Tourism Industry
Most tourists are satisfied with their Bahamas experience.	4.04	3.90
My job is related to tourism.	4.39	2.94
I would like my child, if I have one, to work in the tourism industry.	3.48	3.28
Tourists are given their money's worth while visiting the Islands of The Bahamas.	3.72	3.57
Tourism does not affect me personally.	2.07	2.47
The salaries and benefits in the tourism sector are not on par with similar positions in the private sector.	3.19	3.08
Bahamians do not give other Bahamians good service or value for money.	3.61	3.83

Table A-4

5.3.2 Average (Mean) Differences in Attitude Statements: Sex

STATEMENT	Male	Female
Tourism does not affect me personally.	2.36	2.16
The 15% gratuity should be eliminated.	2.67	2.44
Tourism has taken all our best beaches and land.	3.29	3.09

Table A-5

5.3.3 Average (Mean) Differences in Attitude Statements: Age

STATEMENT	15 - 29 YEARS	30 - 49 YEARS	50 + YEARS
My job is related to tourism.	3.50	3.75	3.84
I would like my child, if I have one, to work in the tourism industry.	3.35	3.32	3.51
Tourism does not affect me personally.	2.36	2.29	2.11
Only Bahamian art, straw and craft goods should be allowed to be sold to tourists.	3.01	3.33	3.65

Table A-6

5.3.4 Average (Mean) Differences in Attitude Statements: Education

STATEMENT	Primary	Secondary/ High	Technical/ Vocational	College/ University
My job is related to tourism.	3.86	3.75	3.83	3.37
I would like my child, if I have one, to work in the tourism industry.	3.33	3.48	3.28	3.24
Tourists are given their money's worth while visiting the Islands of The Bahamas.	3.78	3.71	3.66	3.42
Tourism does not affect me personally.	2.41	2.34	2.08	2.15
The 15% gratuity should be eliminated.	2.44	2.42	2.88	2.70
Bahamians do not give other Bahamians good service or value for money.	3.05	3.79	3.45	4.00

Table A-7

5.3.5 Average (Mean) Differences in Attitude Statements: Income

STATEMENT	Under \$5,000	5,000 - \$14,999	\$15,000 - \$29,999	\$30,000 - \$49,999	\$50,000 or over
Tourism does not affect me personally.	2.63	2.41	2.07	2.04	2.60
When tourists come to the Islands of The Bahamas they generally do not find what they were led to expect by our advertising and promotions.	2.92	2.82	2.34	2.35	2.80
There are not enough jobs in the tourism sector.	3.44	3.50	2.99	2.93	2.93
There is little job security in the tourism sector.	3.52	3.60	3.24	3.19	3.07

Table A-8

5.3.6 Average (Mean) Differences in Attitude Statements: Island

STATEMENT	Abaco	Eleuthera	Exuma	Andros	Bimini
Most tourists are satisfied with their Bahamas experience.	4.02	4.22	4.01	3.83	3.81
Most Bahamians make the tourist feel like they are doing the tourist a big favour when serving or helping the tourist.	2.78	2.65	2.98	2.81	3.27
The only jobs tourism has created for Bahamians are jobs at the bottom of the ladder.	2.48	1.93	2.21	2.28	2.66
My job is related to tourism.	3.73	3.79	3.63	3.89	3.45
I would like my child, if I have one, to work in the tourism industry.	3.40	3.57	3.21	3.40	3.35
Tourists are given their money's worth while visiting the Islands of The Bahamas.	3.63	4.00	3.63	3.59	3.38
Tourism does not affect me personally.	2.40	1.94	2.16	2.08	2.72
Only Bahamian art, straw and craft goods should be allowed to be sold to tourists.	2.77	3.11	3.56	3.99	3.19
Just because tourism is the main industry, does not mean that Bahamians are willing to go the extra mile to please tourists.	1.95	2.12	2.09	2.60	1.94
The 15% gratuity should be eliminated.	2.48	2.14	2.43	2.93	2.79
The Islands of the Bahamas' advertisements make me feel good about my country.	4.51	4.58	4.22	4.08	4.06
When tourists come to the Islands of The Bahamas they generally do not find what they were led to expect by our advertising and promotions.	2.69	1.95	2.40	2.81	2.95
There are not enough jobs in the tourism sector.	3.31	2.70	3.55	3.10	3.00
Jobs in tourism are not considered very prestigious.	2.94	2.02	2.89	2.42	2.76

STATEMENT	Abaco	Eleuthera	Exuma	Andros	Bimini
Many parents do not think it is a good idea for their children to have a career in tourism.	2.95	2.24	2.69	2.64	2.77
The salaries and benefits in the tourism sector are not on par with similar positions in the private sector.	3.47	2.84	3.59	2.70	3.27
There is little job security in the tourism sector.	3.41	2.59	3.95	3.35	3.52
Tourism has taken all our best beaches and land.	3.80	2.78	3.41	3.07	2.87
The quality of the tourism product needs great improvement,	4.06	4.22	3.93	4.22	3.89
Bahamians do not give other Bahamians good service or value for money.	3.57	3.61	3.87	3.61	3.92
Standard of service in the Islands of The Bahamas needs improvement.	4.29	4.21	4.21	4.36	4.09
Costs such as wages, electricity, telephone and so on are higher in The Bahamas than in most parts of the region including the U.S.A. and Canada.	4.57	4.17	4.05	4.01	4.44
Tourism will have to be the main industry in the Islands of The Bahamas for at least the next thirty years.	4.12	3.84	3.08	3.42	3.97

5.4 Domestic Travel Average (Median Expenditure)

Seventy percent (70%) of the Family Islanders had travelled to another Family Island in the past year; the median was 2 trips (range 0 to 50), with a median of 1 person per trip (range 1 to 6 persons).

The median total expenditure spent per trip is \$884 (range \$140 to \$4,445).

Below is a breakdown of the median spent per trip for the following:

- Transportation – \$275 (range \$140 to \$1,390)
- Lodging - \$75 (range \$0 to \$1,000)
- Food - \$100 (range \$0 to \$700)
- Recreation and Entertainment - \$40 (range \$0 to \$500)
- Shopping - \$230 (range \$0 to \$4,000)

Table A-9

5.4.1 Expenditure on Domestic Travel by Expenditure Category

	Minimum	Maximum	Mean	Median
Transportation (\$)	140	1,390	332	275
Lodging (\$)	0	1,000	163	75
Food (\$)	0	700	126	100
Recreation and Entertainment (\$)	0	500	74	40
Shopping (\$)	0	4,000	358	230
Total Expenditure (\$)	140	4,445	1,058	884

5.5 Factor Analysis

Factor analysis was conducted on the 23 attitude items to test for groups of similarities in responses. Presented below are the five groups that emerged, namely, tourism employment opponents, tourism advocates, tourism service critics, general tourism opponents and non-tourism supporters. When compared to 2006¹, in the Family Islands, there appear to be weaker correlations between the statements and the factors “tourism employment opponents”, “tourism service critics” and “general tourism opponents”.

Table A-10

Factor Analysis - Attitude Statements

STATEMENT	Group 1 Tourism Employment Opponents	Group 2 Tourism Advocates	Group 3 Tourism Service Critics	Group 4 General Tourism Opponents	Group 5 Non- Tourism Supporters
Most tourists are satisfied with their Bahamas experience.		Group 2 Tourism Advocates 0.528			
Most Bahamians make the tourist feel like they are doing the tourist a big favour when serving or helping the tourist.	Group 1 Tourism Employment Opponents 0.436				
The only jobs tourism has created for Bahamians are jobs at the bottom of the ladder.	Group 1 Tourism Employment Opponents 0.527				
My job is related to tourism.		Group 2 Tourism Advocates 0.34			
I would like my child, if I have one, to work in the tourism industry.		Group 2 Tourism Advocates 0.444			
Tourists are given their money's worth while visiting the Islands of The Bahamas.		Group 2 Tourism Advocates 0.494			

¹ Bahamian Residents Survey Report, Family Islands, 2006
Ministry of Tourism & Aviation

Table A-10 cont'd

Factor Analysis - Attitude Statements

STATEMENT	Group 1 Tourism Employment Opponents	Group 2 Tourism Advocates	Group 3 Tourism Service Critics	Group 4 General Tourism Opponents	Group 5 Non- Tourism Supporters
Tourism does not affect me personally.		Group 2 Tourism Advocates - 0.307			Group 5 Non- Tourism Supporters 0.438
Only Bahamian art, straw and craft goods should be allowed to be sold to tourists.				Group 4 General Tourism Opponents 0.322	
Just because tourism is the main industry, does not mean that Bahamians are willing to go the extra mile to please tourists.				Group 4 General Tourism Opponents 0.394	
The 15% gratuity should be eliminated.					Group 5 Non- Tourism Supporters 0.348
The Islands of the Bahamas' advertisements make me feel good about my country.		Group 2 Tourism Advocates 0.534			
When tourists come to the Islands of The Bahamas they generally do not find what they were led to expect by our advertising and promotions.	Group 1 Tourism Employment Opponents 0.557				
There are not enough jobs in the tourism sector.	Group 1 Tourism Employment Opponents 0.521				
Jobs in tourism are not considered very prestigious.	Group 1 Tourism Employment Opponents 0.578				

Table A-10 cont'd

Factor Analysis - Attitude Statements

STATEMENT	Group 1 Tourism Employment Opponents	Group 2 Tourism Advocates	Group 3 Tourism Service Critics	Group 4 General Tourism Opponents	Group 5 Non- Tourism Supporters
Many parents do not think it is a good idea for their children to have a career in tourism.	Group 1 Tourism Employment Opponents 0.501				
The salaries and benefits in the tourism sector are not on par with similar positions in the private sector.	Group 1 Tourism Employment Opponents 0.481				
There is little job security in the tourism sector.	Group 1 Tourism Employment Opponents 0.568				
Tourism has taken all our best beaches and land.					Group 5 Non- Tourism Supporters -0.450
The quality of the tourism product needs great improvement,	Group 1 Tourism Employment Opponents 0.441		Group 3 Tourism Service Critics 0.302		
Bahamians do not give other Bahamians good service or value for money.				Group 4 General Tourism Opponents 0.410	
Standard of service in the Islands of The Bahamas needs improvement.			Group 3 Tourism Service Critics 0.438		
Costs such as wages, electricity, telephone and so on are higher in The Bahamas than in most parts of the region including the U.S.A. and Canada.				Group 4 General Tourism Opponents -0.427	

Table A-10 cont'd

Factor Analysis - Attitude Statements

STATEMENT	Group 1 Tourism Employment Opponents	Group 2 Tourism Advocates	Group 3 Tourism Service Critics	Group 4 General Tourism Opponents	Group 5 Non- Tourism Supporters
Tourism will have to be the main industry in the Islands of The Bahamas for at least the next thirty years.		Group 2 Tourism Advocates 0.539			

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Interviewers – New Providence	Leanda Anderson – MOTA Brendalee Adderley – DOS Samantha Adderley – MOTA Francina Davis – MOTA Cleo Ellis – MOTA Maria Johnson – MOTA Christina Lewis – MOTA Francia Oliver – MOTA Yasmine Rolle – MOTA Margo Rose – MOTA

Princess Simms – MOTA
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Ayanna Archer
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Francita Pratt
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Thelma Sturupp

Interviewers – Abaco

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Interviewers – Andros

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Peter Douglas
Reverend Newton Hamilton
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Interviewers – Bimini

Antoinette Stuart
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Interviewers – Exuma

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Jackie Taylor-Smith
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5.7 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 (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)
- **Pearson's Chi-square** A Pearson's 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)
- **Kendall's tau-c** This tests the strength of association of the cross tabulations when both variables are measured at the ordinal level. It makes adjustments for ties and is most suitable for rectangular tables. Values range from -1 (100% negative association, or perfect inversion) to +1 (100% positive association, or perfect agreement). A value of zero indicates the absence of association.
- **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)

- **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 centers/ 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>