

FAMILY ISLANDS

BAHAMIAN RESIDENTS' GENERAL PUBLIC SURVEY

MARCH 1 – 22, 2005



**ATTITUDES OF BAHAMIANS TOWARD TOURISM AND
THE EDUCATIONAL MEDIA USED TO INFORM
BAHAMIANS ABOUT THE TOURISM INDUSTRY**

ACKNOWLEDGEMENTS

This project would not have been successful without the assistance and contribution of many individuals. Many thanks to the following persons:

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EXECUTIVE SUMMARY

- ❖ In the Family Islands, 400 individuals were interviewed within the following consistencies: Andros, North Abaco, South Abaco, Exuma, North Eleuthera, and South Eleuthera. The sample size had a $\pm 4.9\%$ precision (error) at the 95% confidence level.
- ❖ Three-quarters of Family Island respondents claimed that they would choose to work in the tourism industry. The reasons given included: “enjoy meeting people/ interacting/ serving”; “becoming an ambassador for your country / promoting The Bahamas”, and get to “meet interesting people/ nice people”.
- ❖ Those who would not choose to work in tourism industry stated “don't like meeting/ dealing with people/ not people's person” as the main reason for their answer.
- ❖ “Lack of knowledge/ exposure” was the main reason why the Family Islanders felt that tourism was not the first choice for high school and college graduates.
- ❖ The individuals questioned in the Family Islands believed that the best and the brightest could be attracted to tourism by higher salaries.
- ❖ The most popular answer for positive things happening in tourism was “more jobs created”.
- ❖ The Family Islanders’ suggestions for convincing someone to come to The Bahamas were comparable to those of respondents from the two main islands -- rave about the Bahamian people (45 percent) and the culture (24 percent).
- ❖ The majority (85 percent) of Family Island residents did NOT feel that Bahamians were developing a negative attitude toward the large number of tourists coming to The Bahamas. **Fourteen percent** felt that Bahamians are developing a negative attitude.
- ❖ Seventy-four percent felt that the Government was NOT doing sufficient to ensure Bahamians are trained for positions held by foreigners in tourism industry.
- ❖ Sixty-two percent of the interviewees felt that the tourism industry does NOT use enough Bahamian food, music and other products or services.

- ❖ The desired Bahamian languages are: “English and Spanish” (71 percent) or “English and French” (54 percent).
- ❖ In 2005, 81 percent of the Family Islands’ interviewees felt that tourists are given their money’s worth, while visiting the Islands of The Bahamas. This represents a huge increase from to the 2003 figure (67 percent).
- ❖ A little more than half (52 percent) of the individuals questioned in the Family Islands that tourism has taken all our best beaches and land. This is a gain over from the 2003 figure (44 percent).
- ❖ A little more than two-thirds (68 percent) of the residents in the Family Islands stated that tourism will have to be the main industry in the Islands of The Bahamas for at least the next thirty years. This represents a 15 percentage points hike over the 2003 figure.

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.

- Current Working Definition of 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. (6)
- Current Working Definition of 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. (7)

Footnotes 1 – 7 derived from “Attitudes of Bahamians Toward Tourist & Tourism” by Pamela Stubbs July 1988

METHODOLOGY

This research project was divided into two phases:

PHASE 1: Development of Hypotheses and Questionnaire

Formulation of Null Hypotheses

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.

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 if they thought that black visitors are treated differently than white visitors. 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

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.

PHASE 2: Quantitative Research

Personal interviews at 400 household dwellings were conducted in Abaco, Andros, 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.

RESULTS AND ANALYSIS

GENERAL ATTITUDE QUESTIONS

IF YOU HAD A CHOICE, WOULD YOU CHOOSE TO WORK IN THE TOURISM INDUSTRY?

Seventy-six percent of the respondents reported that they would choose to work in the tourism industry. Almost all (91 percent) of those working in the tourism industry declared that given a choice they would work in the tourism industry. However, only 60 percent of the non-tourism workers said they would choose to work in the tourism industry. More of the females (83 percent) than the males (71 percent) interviewed claimed they would choose to work in the tourism industry.

The respondents were further asked to give reasons why they would/ would not choose to work in the main industry of The Bahamas. The top 10 reasons why respondents would choose to work in the tourism industry, if they had a choice, are shown in the table below. Forty-eight percent of these individuals gave “enjoy meeting people/ interacting/ serving” as the reason why tourism was their industry of choice.

TOP TEN REASONS WHY WOULD CHOOSE TO WORK IN TOURISM INDUSTRY

REASONS	2003	2005
Enjoy Meeting People/ Interacting/ Serving	45%	48%
Becoming An Ambassador For Your Country / Promoting The Bahamas	11%	12%
Meet Interesting People/ Nice People	12%	11%
Like My Job/ Fun/ Good Job	10%	6%
Pay Is Good/ Can Make Money/ Good Living	12%	6%
Learn More About Other Countries/ Culture	-	4%
Like To Travel/ Get To Travel	2%	3%
That's How I Earn My Living/ That's What I Do	7%	3%
Industry Exciting / Prestigious/ Challenging	4%	3%
People's Person/ Friendly Person	1%	1%

Table 2 in the Detailed Tables shows that many different reasons for choosing to work in the tourism industry were given by respondents and a review of Table 2 is recommended for qualitative reasons and to glean further insight.

For the individuals that stated they would not choose to work in the tourism industry, the top 10 reasons given are shown in the following table. Nineteen percent of the persons stated they would not choose tourism because they “don't like meeting/ dealing with people/ not people's person”.

**TOP TEN REASONS WHY WOULD NOT CHOOSE
TO WORK IN TOURISM INDUSTRY**

REASONS	2003	2005
Don't Like Meeting/ Dealing With People/ Not People's Person	10%	19%
Not Interested/ Not My Field / Don't Like It	10%	11%
Low Pay/ No Money	12%	11%
Like My Job/ Good Job/ Love Job	20%	11%
Prefer Another Industry	2%	11%
Unstable/ Volatile/ Too Many Variables	11%	7%
Not Stated	6%	4%
Have To Work Too Hard For Pay/ Too Taxing / Too Hectic/ Stressful	7%	3%
No Reason	6%	3%
Seasonal Job	1%	2%

Table 3 in the Detailed Tables shows that many different reasons for not choosing to work in the tourism industry were given by respondents and a review of Table 3 is recommended for qualitative reasons and to glean further insight.

WHY TOURISM IS NOT FIRST CHOICE OF HIGH SCHOOL AND COLLEGE GRADUATES

Thirty percent of the persons questioned stated that they felt that tourism was not first choice of high school and college graduates.

When the individuals who said that they felt that tourism was not the first choice of high school and college graduates were asked why they felt that way, they gave a whole variety of reasons. The top 12 reasons are outlined in the table below. One-quarter (26 percent) of those respondents reported “lack of knowledge/ exposure” and 15 percent claimed “not considered prestigious/ bottom jobs/ not important enough” as the reasons why they felt that tourism was not the first choice of high school and college graduates.

**TOP TWELVE REASONS WHY TOURISM IS NOT 1ST. CHOICE FOR
HIGH SCH. & COLLEGE GRADUATES**

REASONS	2003	2005
Lack Of Knowledge/ Exposure	25%	26%
Not Considered Prestigious/ Bottom Jobs/ Not Important Enough	18%	15%
Not Enough Money/ Low Salaries	21%	12%
Interested In Another Industry	18%	9%
Most Prefer Office Type Jobs	-	4%
Little Job Security/ Unstable	3%	3%
Industry Is Dull/ Not Exciting	1%	3%
No Experience	-	2%
Tourism Is Not A Productive/ Successful Industry	-	2%
Persons Want To Pursue Higher Education	-	2%
No Upward Mobility/ Future	-	2%
Want To Start Own Business	-	2%

Table 5 in the Detailed Tables shows the many different reasons given by the interviewees. A review of Table 5 is recommended for qualitative reasons and to glean further insight.

HOW TO ATTRACT THE BEST AND BRIGHTEST TO TOURISM

When asked to suggest what could be done to attract the best and brightest to tourism, 35 percent of interviewees said “train/ educate in schools/ workshops/ seminars” and 16 percent stated “pay high salaries/ more money”. Table 6 in the Detailed Tables shows that respondents gave many different suggestions. A review of Table 6 is recommended for qualitative reasons and to glean further insight.

**TOP TEN SUGGESTIONS TO ATTRACT THE BEST
& BRIGHTEST TO WORK IN TOURISM INDUSTRY**

SUGGESTIONS	2003	2005
Train/ Educate In Schools/ Workshops/ Seminars	33%	35%
Pay High Salaries/ More Money	22%	16%
More Interesting Benefits/ Incentives/Make Jobs/Industry More Exciting	12%	13%
More Promotions/ More Information/ Tourism Fair/ Tourism Cad	16%	13%
Advertise Market Properly	8%	10%
Not Stated	6%	5%
Bahamahost	1%	2%
Offer More Scholarships	1%	2%
Explain The Importance Of Tourism Industry	-	2%
More Opportunities/ Better Jobs/ Higher Positions	2%	1%

POSITIVE THINGS HAPPENING THAT ARE A RESULT OF TOURISM

To the question of what positive things were happening as a result of tourism, 48 percent said, "more jobs created". Table 7 in the Detailed Tables shows that respondents cited many different positive things happening as a result of tourism. A review of Table 7 is recommended for qualitative reasons and to glean further insight.

TOP TEN POSITIVE THINGS AS A RESULT OF TOURISM

ITEMS MENTIONED	2003	2005
More Jobs Created	41%	48%
Higher Standard Of Living/ Pleasant/ More Money/ Better Life	14%	19%
Economy Booming / Economic Development/ Stable Economy/ Pros	14%	13%
None	21%	7%
More Investment/ Foreign Investment	1%	5%
Infrastructure Improved/ Development	-	5%
More Hotels/ Hotels Upgraded/ Better Rooms/ Hotels Renovated	4%	4%
Bringing More Tourists To Country/ Returning Tourists / More	3%	2%
More Bahamians Are Becoming Business Owners	1%	2%
Construction Jobs/ Buildings Going Up	1%	2%

NEGATIVE THINGS HAPPENING THAT ARE A RESULT OF TOURISM

The slight majority (52 percent) of the persons interviewed said that they could not identify any negative thing that was happening as a result of tourism. However, about 14 percent enumerated “crime” as a negative thing that they felt was a result of tourism. Table 8 in the Detailed Tables shows that respondents cited many different negative things happening as a result of tourism. A review of Table 8 is recommended for qualitative reasons and to glean further insight.

TOP TEN NEGATIVE THINGS AS A RESULT OF TOURISM

ITEMS MENTIONED	2003	2005
None/ Nothing	63%	52%
Crime	11%	14%
Drugs	3%	8%
Sickness/ Disease	2%	4%
Bahamians Too Americanized/ Losing Culture/ Identity	1%	3%
Bad Habits/ Influence	-	3%
Tourists Try To Outsmart/ Cheat Bahamians/ Bad Attitude	-	3%
Ruin Natural Resources/ Straining Resources	2%	2%
Pollution/ Illegal Dumping	2%	1%
Illegal Immigration/ More Haitians	1%	1%

THINGS WOULD SAY TO CONVINCe SOMEONE TO VISIT THE BAHAMAS

When asked to reveal what they would say to convince someone to visit the Islands of The Bahamas, other than telling them about beaches and climate, a wide range of responses were enumerated. The top 10 are listed in the table below. Nearly half (45 percent) said that they would tell the potential tourist about the “people/ friendly people/ warm people/ hospitality/ beautiful women”. Twenty-four percent said that they would brag about “food/ native food/ drinks”.

**TOP TEN THINGS THAT WOULD SAY TO CONVINC
SOMEONE TO VISIT THE BAHAMAS**

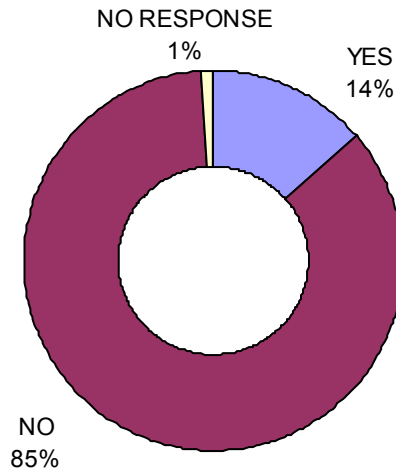
ITEMS MENTIONED	2003	2005
People/ Friendly People/ Warm People/ Hospitality/ Beautiful Women	46%	45%
Culture (Food)/ Native Food/ Drinks	16%	24%
Culture (Junkanoo)/ Festivals	4%	9%
Culture (Undefined)	8%	9%
Safe, Security, Clean/ Safe Country/ Low Crime Rate	6%	9%
Tranquility/ Peace And Quiet/ Beautiful Sunsets	11%	7%
Beautiful Place/ Best Place/ Taste Of Paradise/ Better In The Bahamas	3%	5%
Historical Sites/ Attractions/ Points Of Interest	7%	5%
Very Good Dive Sites/ Fishing/ Marine Life/ Our Blue Holes/	3%	5%
Come To Relax/ Place To Relax	5%	5%

Table 36 in the Detailed Tables outlines the respondents many different answers to this question. A review of Table 36 is recommended for qualitative reasons and to glean further insight.

WHETHER BAHAMIANS ARE DEVELOPING NEGATIVE ATTITUDE TOWARD THE LARGE NUMBER OF TOURISTS

The majority (85 percent) of the individuals interviewed did NOT feel that Bahamians are developing a negative attitude toward the large number of visitors to our shores.

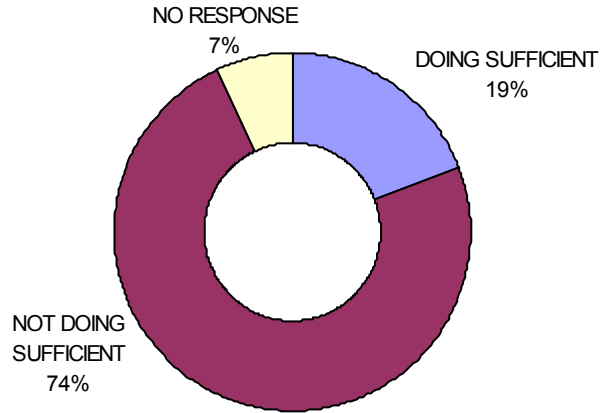
WHETHER BAHAMIANS DEVELOPING NEGATIVE ATTITUDE TOWARD THE LARGE NUMBER OF TOURISTS



WHETHER GOVERNMENT DOING SUFFICIENT TO ENSURE BAHAMIANS TRAINED FOR POSITIONS HELD BY FOREIGNERS IN TOURISM INDUSTRY

Three quarters (74 percent) of the 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.

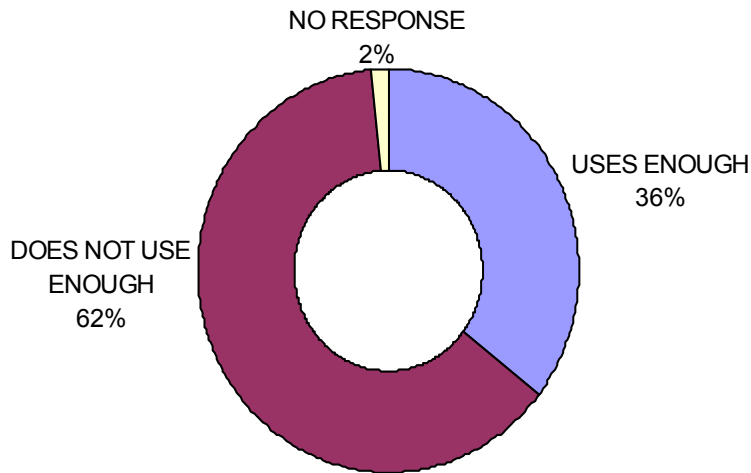
WHETHER GOVERNMENT DOING SUFFICIENT TO ENSURE BAHAMIANS TRAINED FOR POSITIONS HELD BY FOREIGNERS IN TOURISM INDUSTRY



WHETHER TOURISM USES ENOUGH BAHAMIAN FOOD, MUSIC AND OTHER PRODUCTS OR SERVICES

Sixty-two percent of the interviewees felt that the tourism industry does NOT use enough Bahamian food, music and other products or services.

WHETHER TOURISM USES ENOUGH BAHAMIAN FOOD, MUSIC AND OTHER PRODUCTS AND SERVICES



LANGUAGES THAT SHOULD BE SPOKEN BY BAHAMIANS

The respondents were further asked to state two languages all Bahamians should speak in order to assist the tourism industry. Almost three-quarters (71 percent) said “English and Spanish” and more than half (54 percent) stated “English and French”.

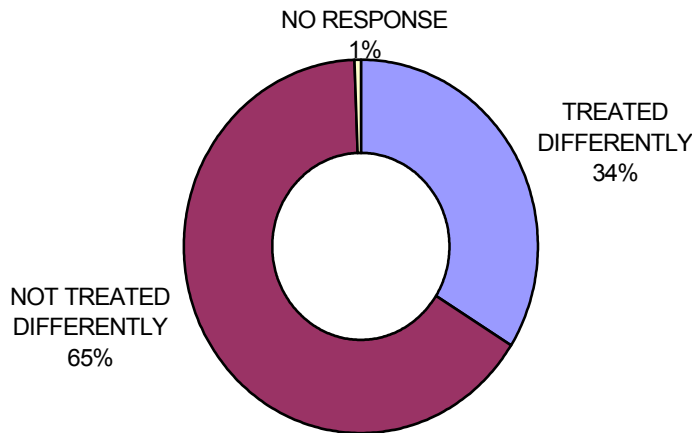
LANGUAGES ALL BAHAMIANS SHOULD SPEAK

LANGUAGES	2003	2005
English And Spanish	79%	71%
English And French	43%	54%
English And Creole	8%	6%
English And German	6%	3%
English And Italian	1%	1%

TREATMENT OF WHITE VISITORS VERSUS BLACK VISITORS

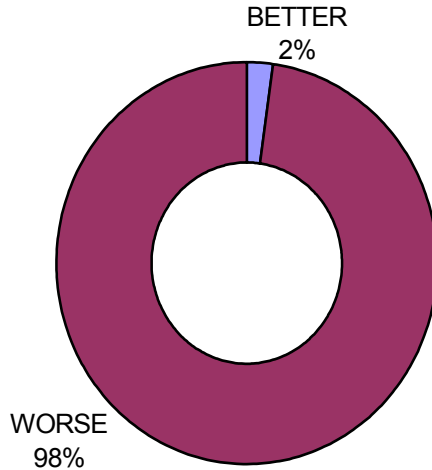
Sixty-five percent of the Family Islanders interviewed did NOT think that black visitors are treated differently than white visitors. Although only one-quarter (24 percent) of the tourism workers thought that black visitors are treated differently than white visitors, 45 percent of the non-tourism workers felt that way. More of those aged '15-29' (39 percent) than those aged '50+' (26 percent) shared the same sentiments.

WHETHER BLACK VISITORS TREATED DIFFERENTLY THAN WHITE VISITORS



Of the respondents that thought that black visitors are treated differently, almost all (98 percent) said that black visitors were treated WORSE than white visitors.

HOW BLACK VISITORS ARE TREATED DIFFERENTLY



Only 3 respondents felt that black visitors were treated BETTER than white visitors. Their responses are listed in the table below.

REASONS WHY WOULD BLACK VISITORS ARE TREATED BETTER THAN WHITE VISITORS

REASONS	2003	2005
Because Our Spirit Connects With The Colour Of The Person	-	33%
They Are Easier To Understand, To Serve	-	33%
Bahamians Relate Better To Blacks Because Come From Similar	-	33%

The top ten reasons given why black visitors are treated WORSE than white visitors are shown below. Eighteen percent of these respondents listed “Bahamians feel that only white visitors have money to spend” as the reason black visitors are treated worse.

TOP TEN REASONS WHY WOULD BLACK VISITORS ARE TREATED WORSE THAN WHITE VISITORS

REASONS	2003	2005
Bahamians Feel That Only White Visitors Have Money To Spend	2%	18%
Think That The Blacks Are Other Bahamians	16%	12%
Because Of Their Colour	1%	11%
Slave Mentality/ Feel As If Should Treat White Better/ Feel	20%	9%
Blacks Don't Spend At All/ As Much As White/ Whites Tip More	30%	14%
Just Because They Are Black	1%	7%
Bahamians Respect Whites More	-	5%
Just What I Observed/ Experienced	13%	4%
We Don't Appreciate Our Own	-	2%
Bahamians Are Prejudiced	-	2%

Table 44 in the Detailed Tables outlines the respondents many different answers to this question. A review of Table 44 is recommended for qualitative reasons and to glean further insight.

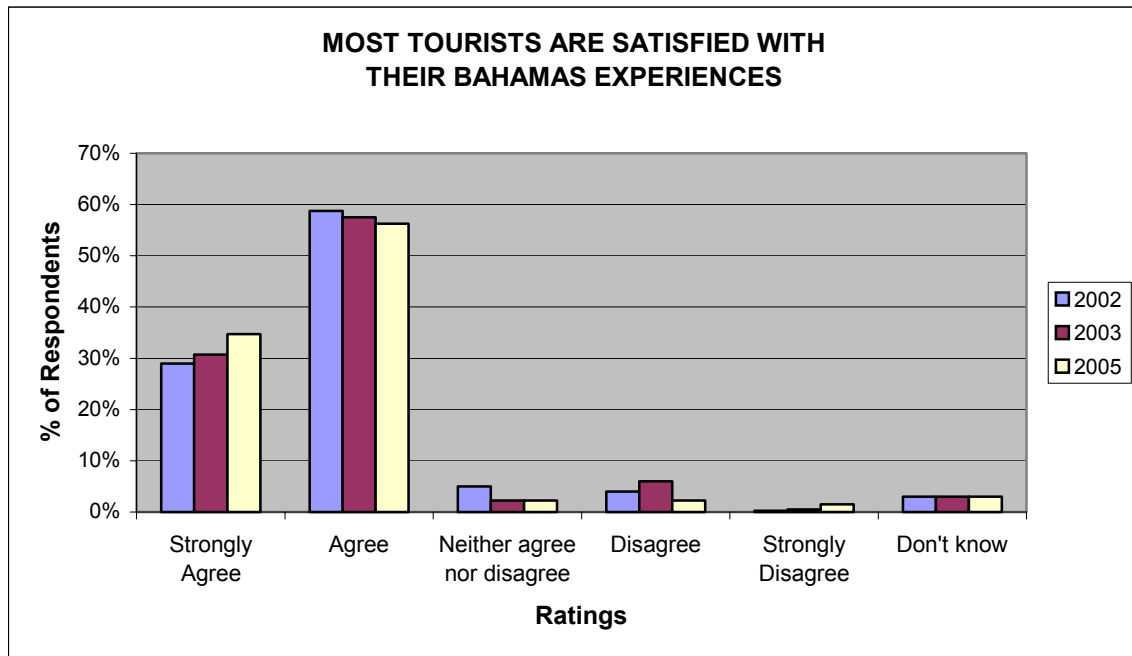
ATTITUDE RATINGS

ATTITUDE STATEMENT

MOST TOURISTS ARE SATISFIED WITH THEIR BAHAMAS EXPERIENCE			
	2002	2003	2005
Strongly Agree	29%	31%	35%
Agree	59%	58%	56%
Neither agree nor disagree	5%	2%	2%
Disagree	4%	6%	2%
Strongly Disagree	0%	1%	2%
Don't know	3%	3%	3%

In 2005, almost all (91 percent) of the interviewees strongly agreed or agreed – a slight increase from to the 2003 figure (89 percent).

ATTITUDE STATEMENT – GRAPH

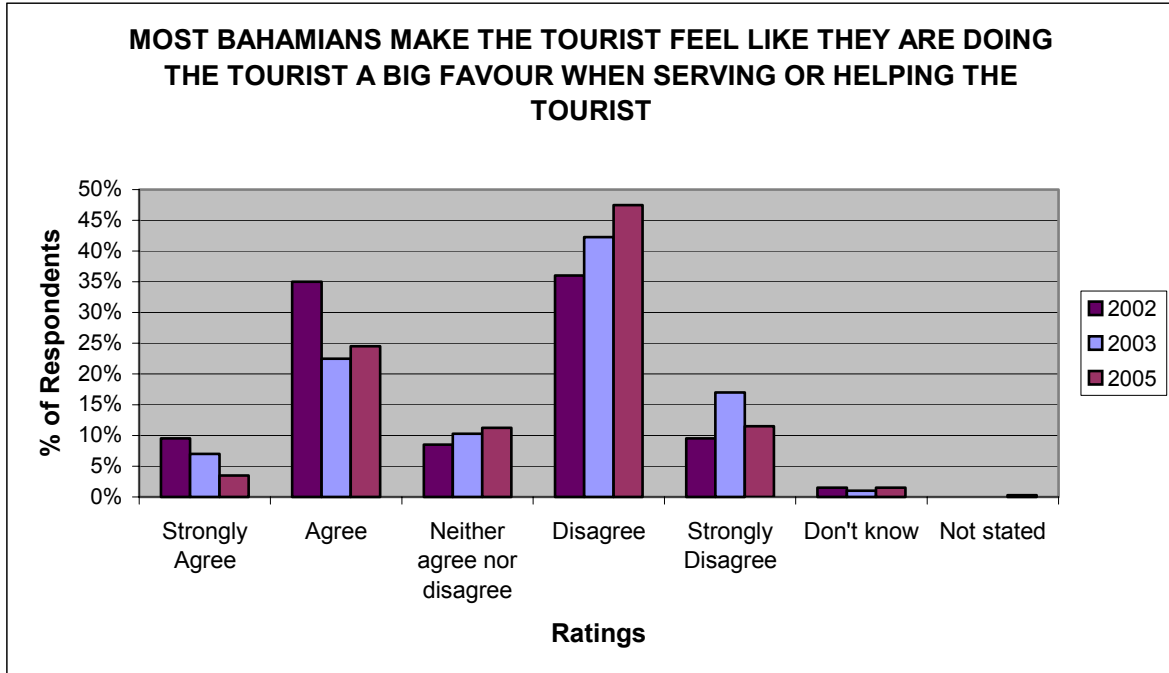


ATTITUDE STATEMENT

MOST BAHAMIANS MAKE THE TOURIST FEEL LIKE THEY ARE DOING THE TOURIST A BIG FAVOUR WHEN SERVING OR HELPING THE TOURIST			
	2002	2003	2005
Strongly Agree	10%	7%	4%
Agree	35%	23%	25%
Neither agree nor disagree	9%	10%	11%
Disagree	36%	42%	48%
Strongly Disagree	10%	17%	12%
Don't know	2%	1%	2%
Not stated	0%	0%	0%

In 2005, 60 percent of the respondents strongly disagreed or disagreed – very similar to that of 2003 (59 percent).

ATTITUDE STATEMENT – GRAPH

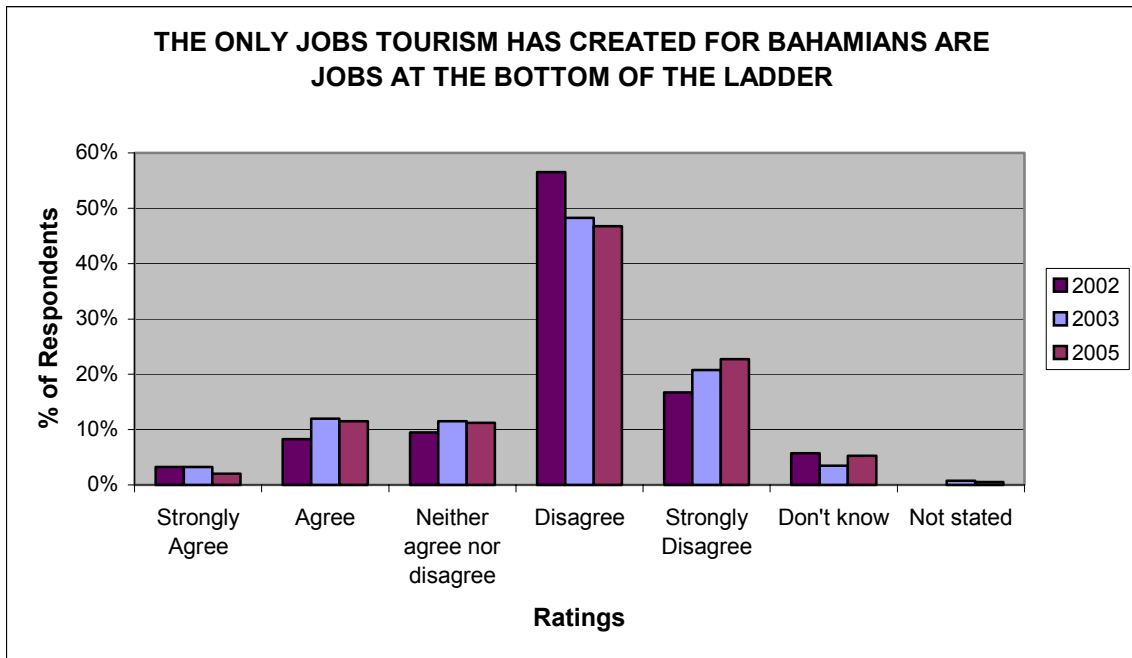


ATTITUDE STATEMENT

THE ONLY JOBS TOURISM HAS CREATED FOR BAHAMIANS ARE JOBS AT THE BOTTOM OF THE LADDER.			
	2002	2003	2005
Strongly Agree	3%	3%	2%
Agree	8%	12%	12%
Neither agree nor disagree	10%	12%	11%
Disagree	57%	48%	47%
Strongly Disagree	17%	21%	23%
Don't know	6%	4%	5%
Not stated	0%	1%	1%

In 2005, 70 percent of the Family Islands' residents interviewed strongly disagreed or disagreed – very similar to the 2003 figure (69 percent).

ATTITUDE STATEMENT – GRAPH

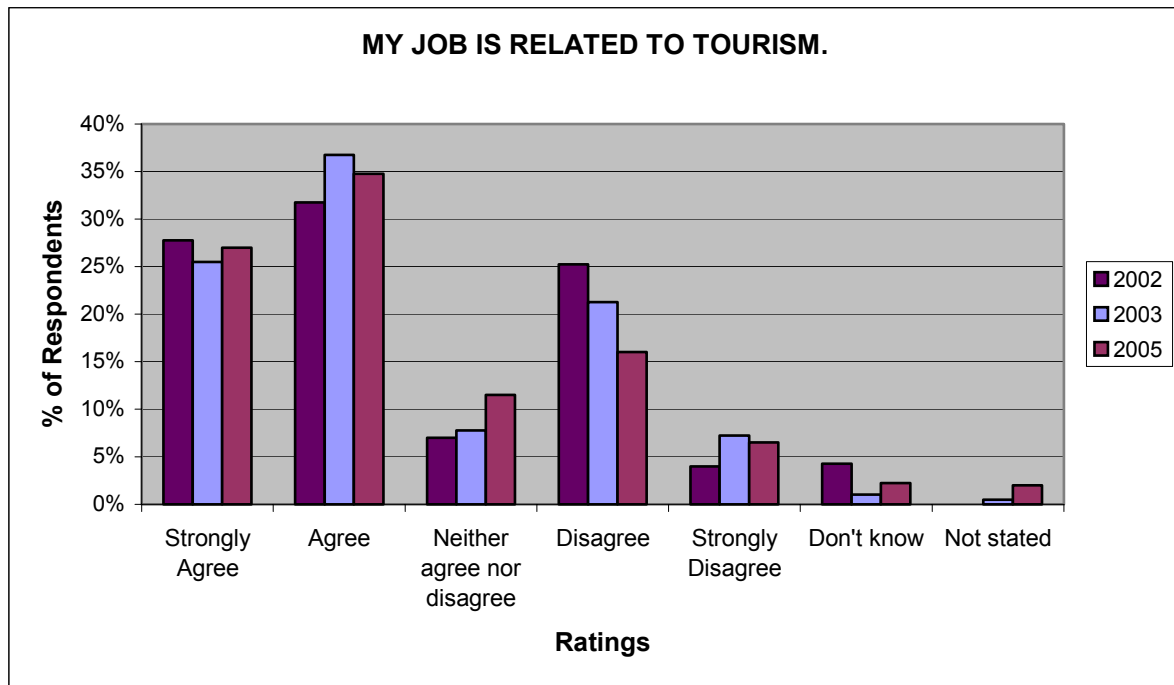


ATTITUDE STATEMENT

MY JOB IS RELATED TO TOURISM.			
	2002	2003	2005
Strongly Agree	28%	26%	27%
Agree	32%	37%	35%
Neither agree nor disagree	7%	8%	12%
Disagree	25%	21%	16%
Strongly Disagree	4%	7%	7%
Don't know	4%	1%	2%
Not stated	0%	1%	2%

In 2005, 62 percent of the interviewees strongly agreed or agreed –very similar to the 2003 figure (63 percent). As expected, much more of the tourism workers (90 percent) than the non-tourism workers (30 percent) felt their job was related to tourism. More of those aged '50+' (72 percent) than any other age group shared these sentiments.

ATTITUDE STATEMENT – GRAPH

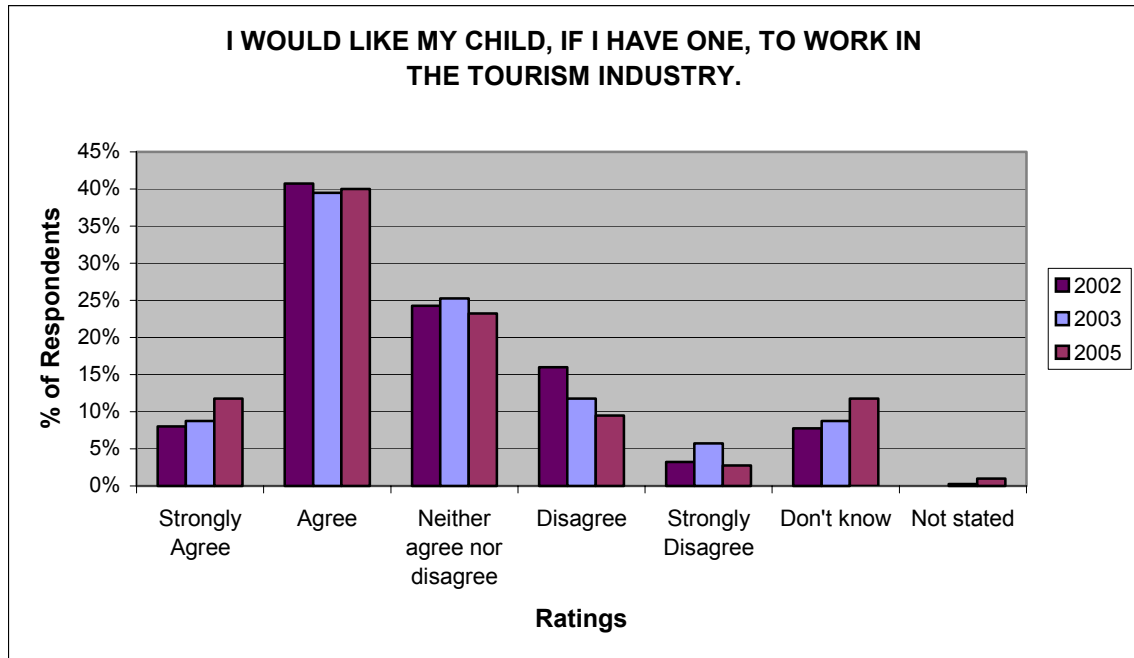


ATTITUDE STATEMENT

I WOULD LIKE MY CHILD, IF I HAVE ONE, TO WORK IN THE TOURISM INDUSTRY.			
	2002	2003	2005
Strongly Agree	8%	9%	12%
Agree	41%	40%	40%
Neither agree nor disagree	24%	25%	23%
Disagree	16%	12%	10%
Strongly Disagree	3%	6%	3%
Don't know	8%	9%	12%
Not stated	0%	0%	1%

In 2005, 52 percent of the interviewees strongly agreed or agreed – a slight advance over the 2003 figure (49 percent). More of the tourism workers (59 percent) than the non-tourism workers (43 percent); and a greater proportion of the '50+' year olds (67 percent) than '15-29' year olds (45 percent) maintained these same views.

ATTITUDE STATEMENT – GRAPH

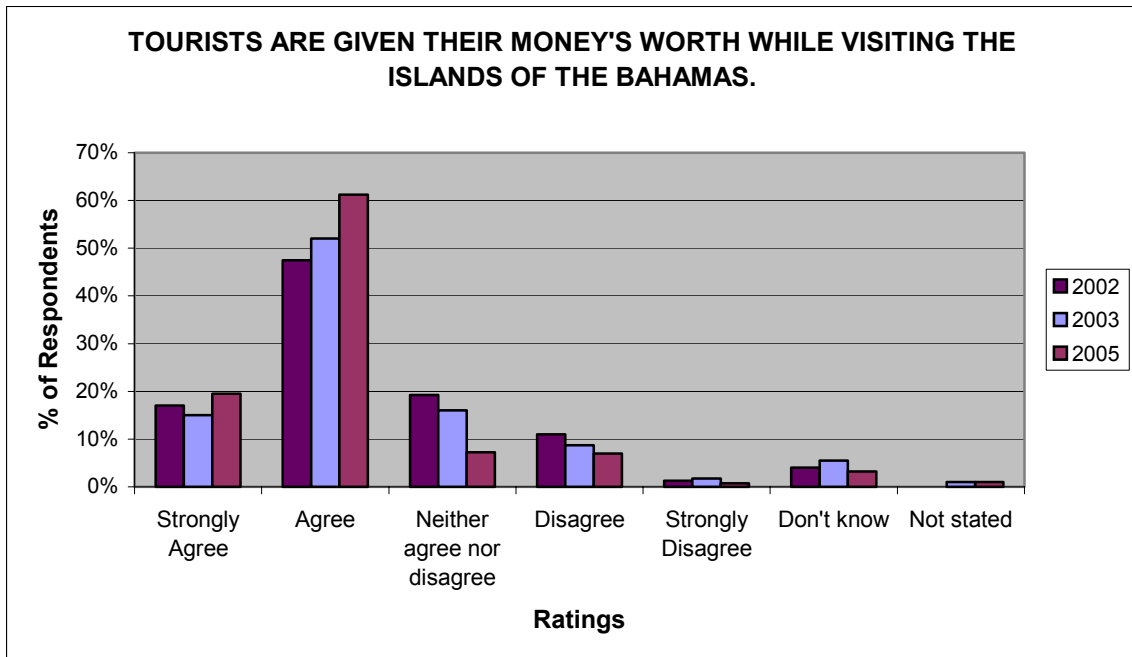


ATTITUDE STATEMENT

TOURISTS ARE GIVEN THEIR MONEY'S WORTH WHILE VISITING THE ISLANDS OF THE BAHAMAS.			
	2002	2003	2005
Strongly Agree	17%	15%	20%
Agree	48%	52%	61%
Neither agree nor disagree	19%	16%	7%
Disagree	11%	9%	7%
Strongly Disagree	1%	2%	1%
Don't know	4%	6%	3%
Not stated	0%	1%	1%

In 2005, 81 percent of the interviewees strongly agreed or agreed, which represents a huge increase from to the 2003 figure (67 percent). More of the tourism workers (85 percent) than the non-tourism workers (76 percent) shared these sentiments.

ATTITUDE STATEMENT – GRAPH

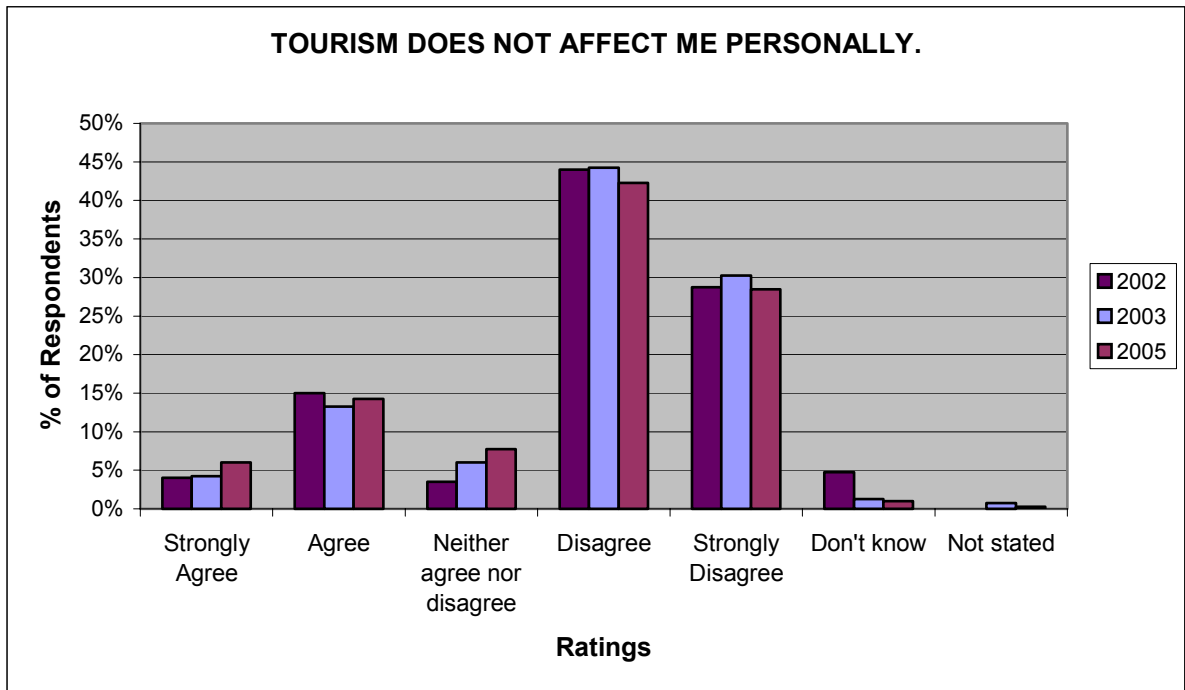


ATTITUDE STATEMENT

TOURISM DOES NOT AFFECT ME PERSONALLY.			
	2002	2003	2005
Strongly Agree	4%	4%	6%
Agree	15%	13%	14%
Neither agree nor disagree	4%	6%	8%
Disagree	44%	44%	42%
Strongly Disagree	29%	30%	29%
Don't know	5%	1%	1%
Not stated	0%	1%	0%

In 2005, 71 percent of the interviewees strongly disagreed or disagreed – similar to the 2003 figure (74 percent). More of the tourism workers (81 percent) than the non-tourism workers (59 percent) strongly disagreed or disagreed with this statement.

ATTITUDE STATEMENT – GRAPH

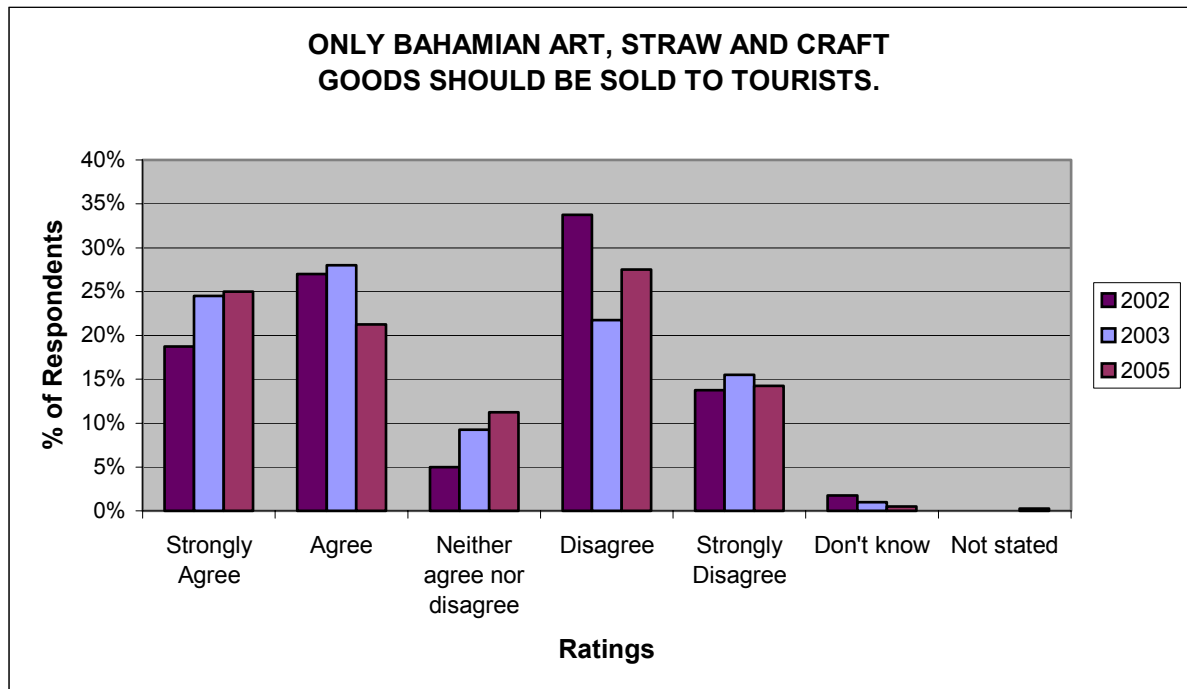


ATTITUDE STATEMENT

ONLY BAHAMIAN ART, STRAW AND CRAFT GOODS SHOULD BE SOLD TO TOURISTS.			
	2002	2003	2005
Strongly Agree	19%	25%	25%
Agree	27%	28%	21%
Neither agree nor disagree	5%	9%	11%
Disagree	34%	22%	28%
Strongly Disagree	14%	16%	14%
Don't know	2%	1%	1%
Not stated	0%	0%	0%

In 2005, 46 percent of the interviewees strongly agreed or agreed – a decrease from the 2003 figure (53 percent). While 57 percent of the individuals '50+' strongly agreed or agreed with this statement, only 40 percent of those '15-29' did the same.

ATTITUDE STATEMENT – GRAPH

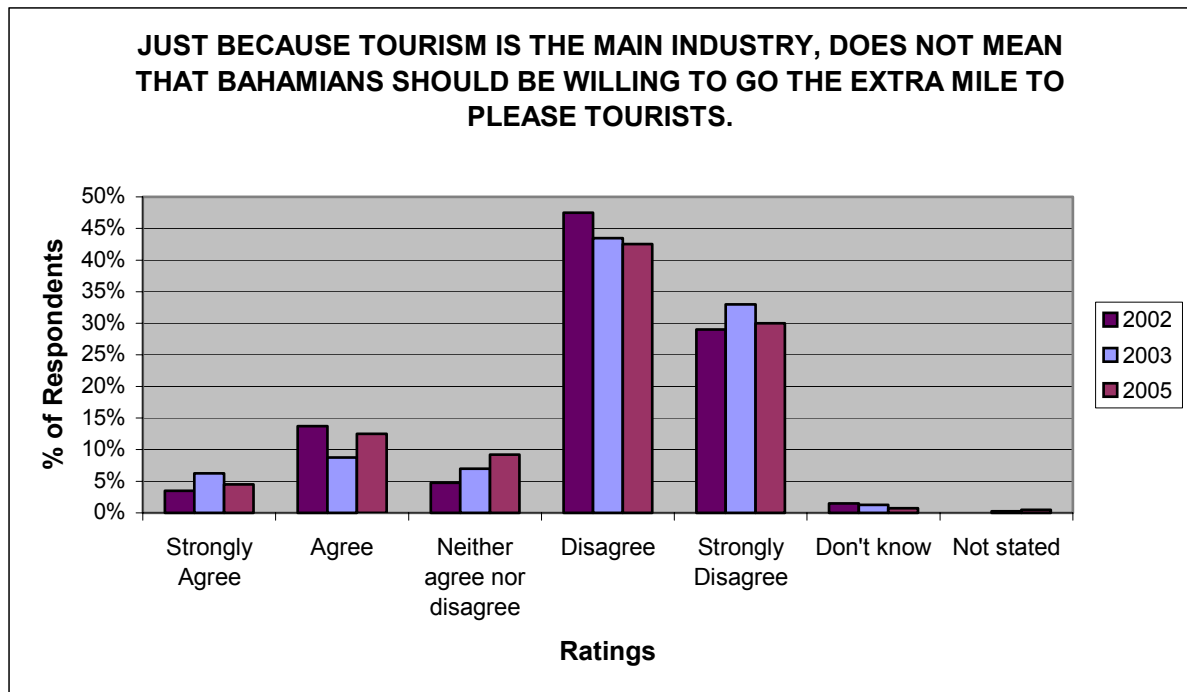


ATTITUDE STATEMENT

JUST BECAUSE TOURISM IS THE MAIN INDUSTRY, DOES NOT MEAN THAT BAHAMIANS SHOULD BE WILLING TO GO THE EXTRA MILE TO PLEASE TOURISTS.			
	2002	2003	2005
Strongly Agree	4%	6%	5%
Agree	14%	9%	13%
Neither agree nor disagree	5%	7%	9%
Disagree	48%	44%	43%
Strongly Disagree	29%	33%	30%
Don't know	2%	1%	1%
Not stated	0%	0%	1%

In 2005, 73 percent of the interviewees strongly disagreed or disagreed – a decrease from the 2003 figure (77 percent). More of the tourism workers (77 percent) versus the non-tourism workers (67 percent) strongly disagreed or disagreed with this statement.

ATTITUDE STATEMENT – GRAPH

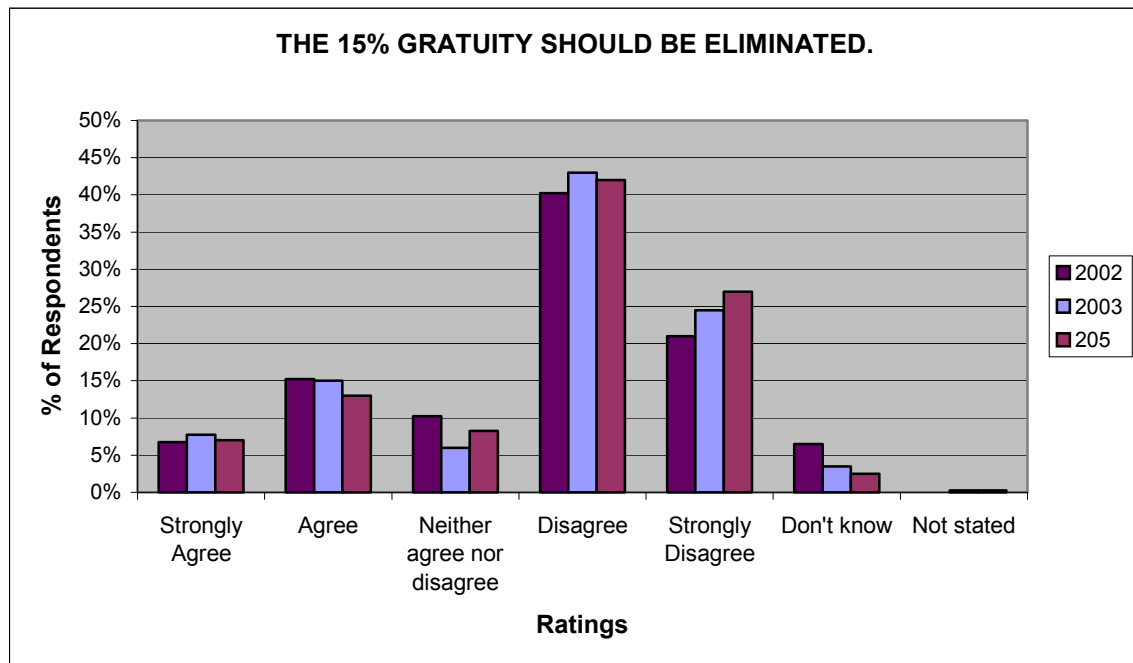


ATTITUDE STATEMENT

THE 15% GRATUITY SHOULD BE ELIMINATED.			
	2002	2003	205
Strongly Agree	7%	8%	7%
Agree	15%	15%	13%
Neither agree nor disagree	10%	6%	8%
Disagree	40%	43%	42%
Strongly Disagree	21%	25%	27%
Don't know	7%	4%	3%
Not stated	0%	0%	0%

In 2005, 69 percent of the interviewees strongly disagreed or disagreed – very similar the 2003 figure (68 percent). A larger proportion of the tourism workers (76 percent) than the non-tourism workers (61 percent) shared these sentiments.

ATTITUDE STATEMENT – GRAPH

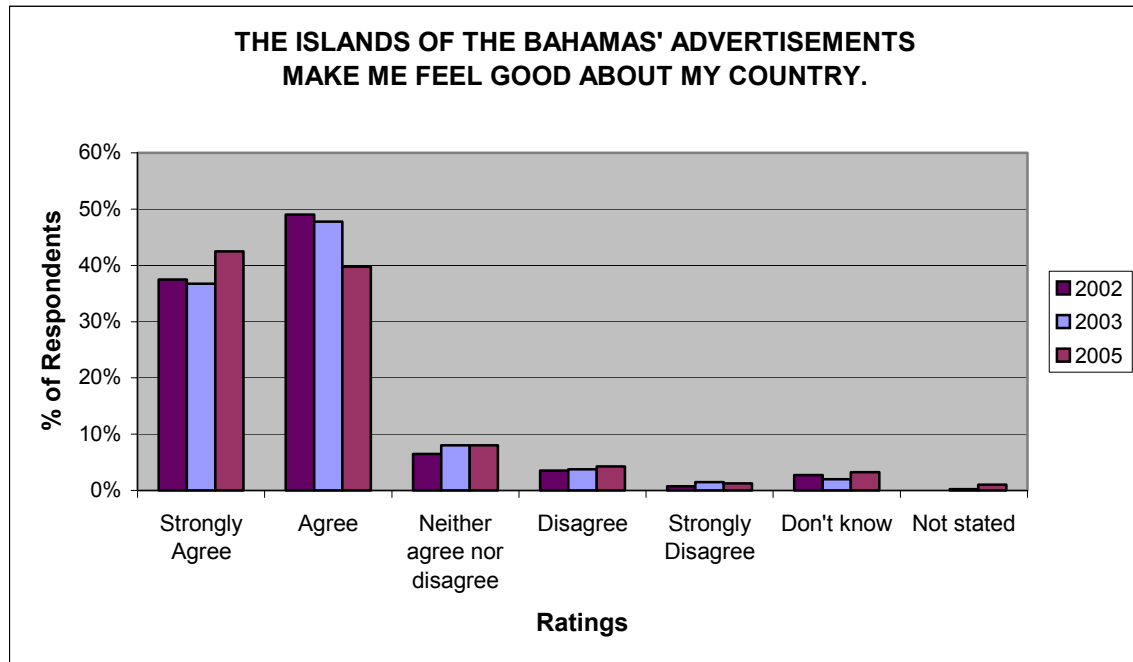


ATTITUDE STATEMENT

THE ISLANDS OF THE BAHAMAS' ADVERTISEMENTS MAKE ME FEEL GOOD ABOUT MY COUNTRY.			
	2002	2003	2005
Strongly Agree	38%	37%	43%
Agree	49%	48%	40%
Neither agree nor disagree	7%	8%	8%
Disagree	4%	4%	4%
Strongly Disagree	1%	2%	1%
Don't know	3%	2%	3%
Not stated	0%	0%	1%

In 2005, 83 percent of the interviewees strongly agreed or agreed – similar to the 2003 figure (85 percent). More the tourism workers (88 percent) than the non-tourism workers (76 percent); and more of those aged '50+' (89 percent) than those aged '15-29' (79 percent) thought the same way.

ATTITUDE STATEMENT – GRAPH

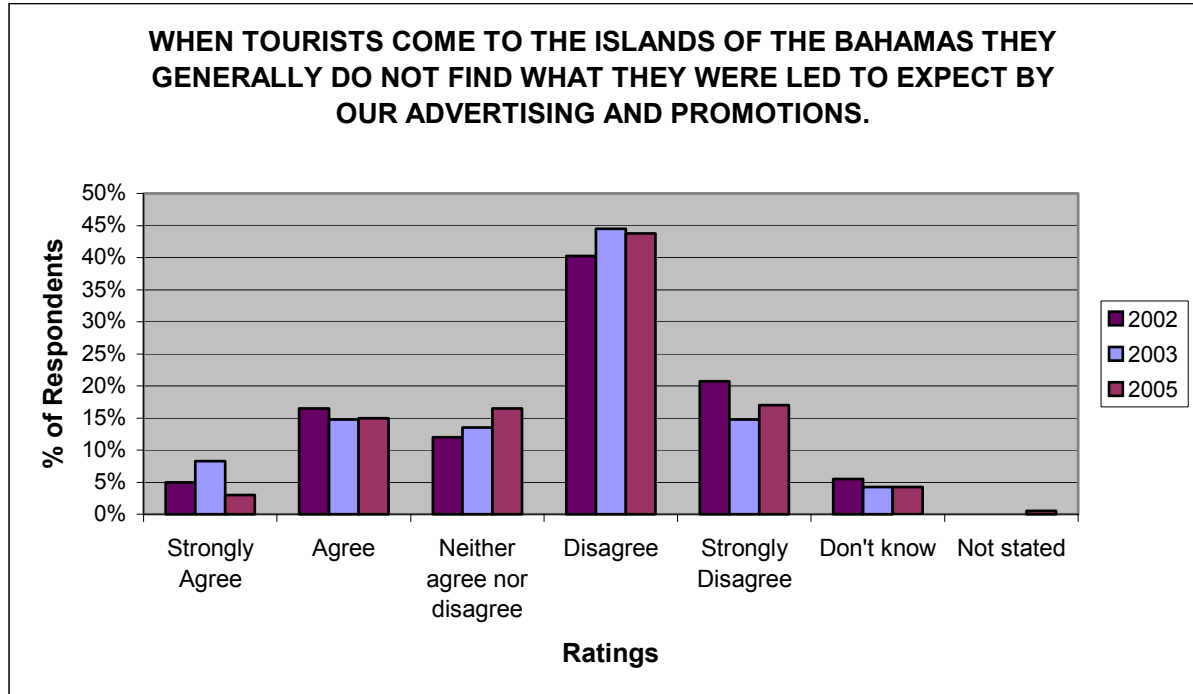


ATTITUDE STATEMENT

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.			
	2002	2003	2005
Strongly Agree	5%	8%	3%
Agree	17%	15%	15%
Neither agree nor disagree	12%	14%	17%
Disagree	40%	45%	44%
Strongly Disagree	21%	15%	17%
Don't know	6%	4%	4%
Not stated	0%	0%	1%

In 2005, 61 percent of the interviewees strongly disagreed or disagreed – very similar to the 2003 figure (60 percent). More of the males (68 percent) than the females (54 percent) felt that same way.

ATTITUDE STATEMENT – GRAPH

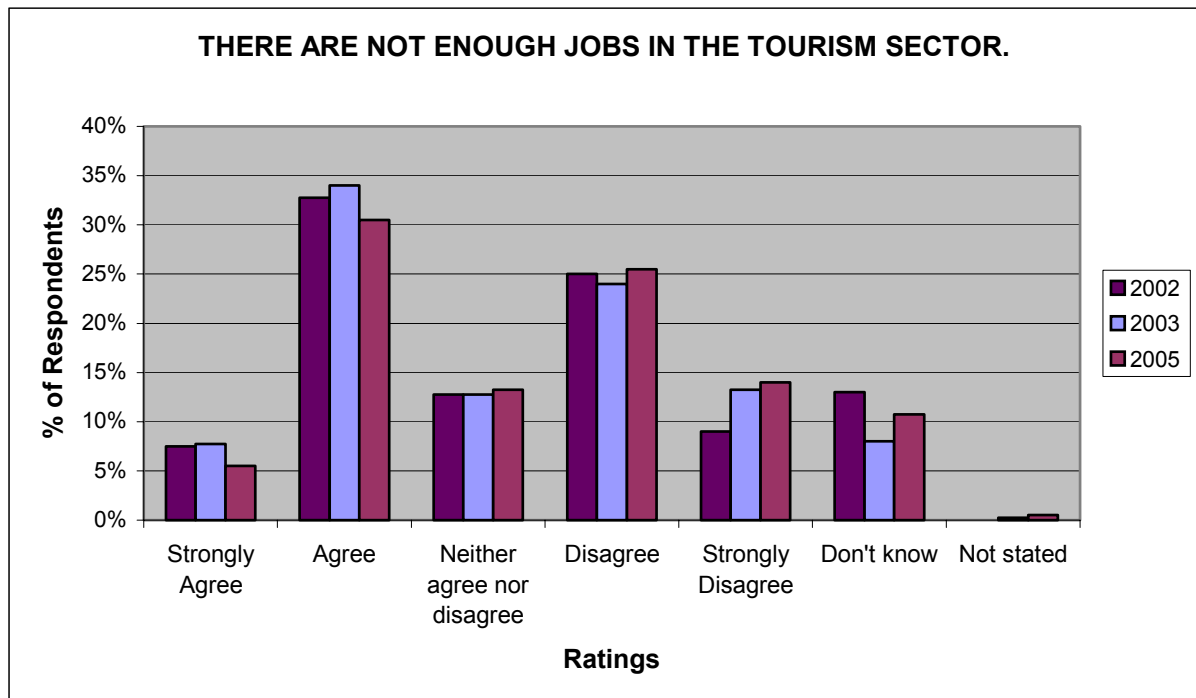


ATTITUDE STATEMENT

THERE ARE NOT ENOUGH JOBS IN THE TOURISM SECTOR.			
	2002	2003	2005
Strongly Agree	8%	8%	6%
Agree	33%	34%	31%
Neither agree nor disagree	13%	13%	13%
Disagree	25%	24%	26%
Strongly Disagree	9%	13%	14%
Don't know	13%	8%	11%
Not stated	0%	0%	1%

In 2005, 40 percent of the interviewees strongly disagreed or disagreed – a small increase from the 2003 figure (37 percent). More of the tourism workers (45 percent) than the non-tourism workers (33 percent); and more of those aged '50+' (59 percent) than those '30-49' (49 percent) shared the same sentiments.

ATTITUDE STATEMENT – GRAPH

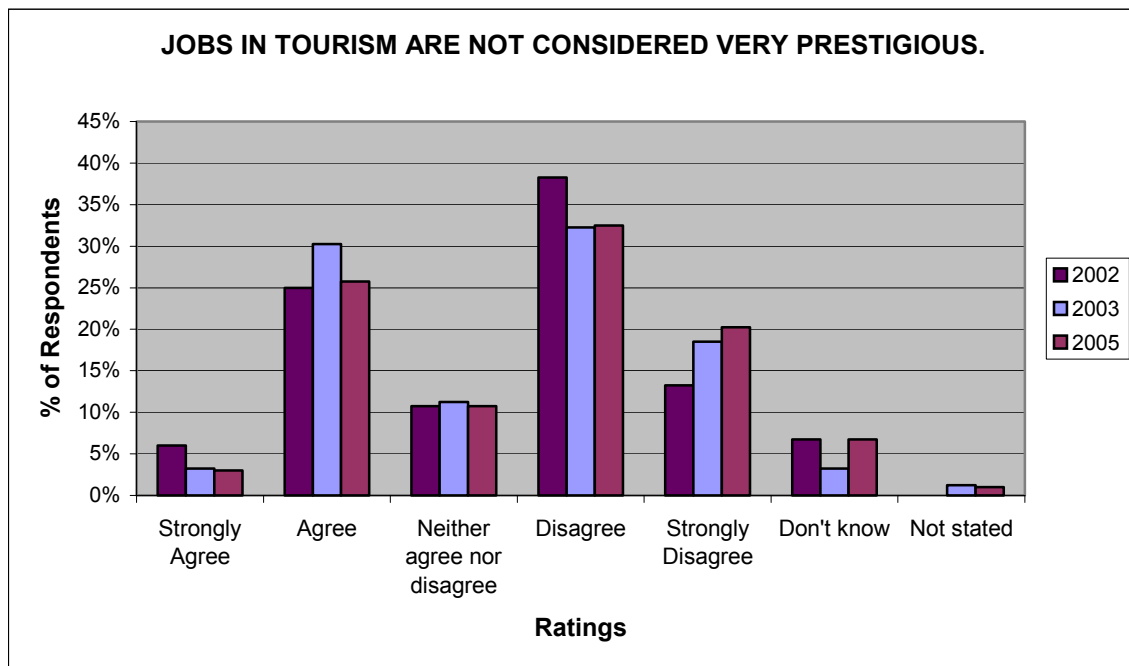


ATTITUDE STATEMENT

JOBS IN TOURISM ARE NOT CONSIDERED VERY PRESTIGIOUS.			
	2002	2003	2005
Strongly Agree	6%	3%	3%
Agree	25%	30%	26%
Neither agree nor disagree	11%	11%	11%
Disagree	38%	32%	33%
Strongly Disagree	13%	19%	20%
Don't know	7%	3%	7%
Not stated	0%	1%	1%

In 2005, 53 percent of the interviewees strongly disagreed or disagreed – similar to the 2003 figure (51 percent). More of the tourism workers (57 percent) than the non-tourism workers (48 percent); and more of those aged '50+' (59 percent) than those '30-49' (49 percent) asserted that they had identical opinions.

ATTITUDE STATEMENT – GRAPH

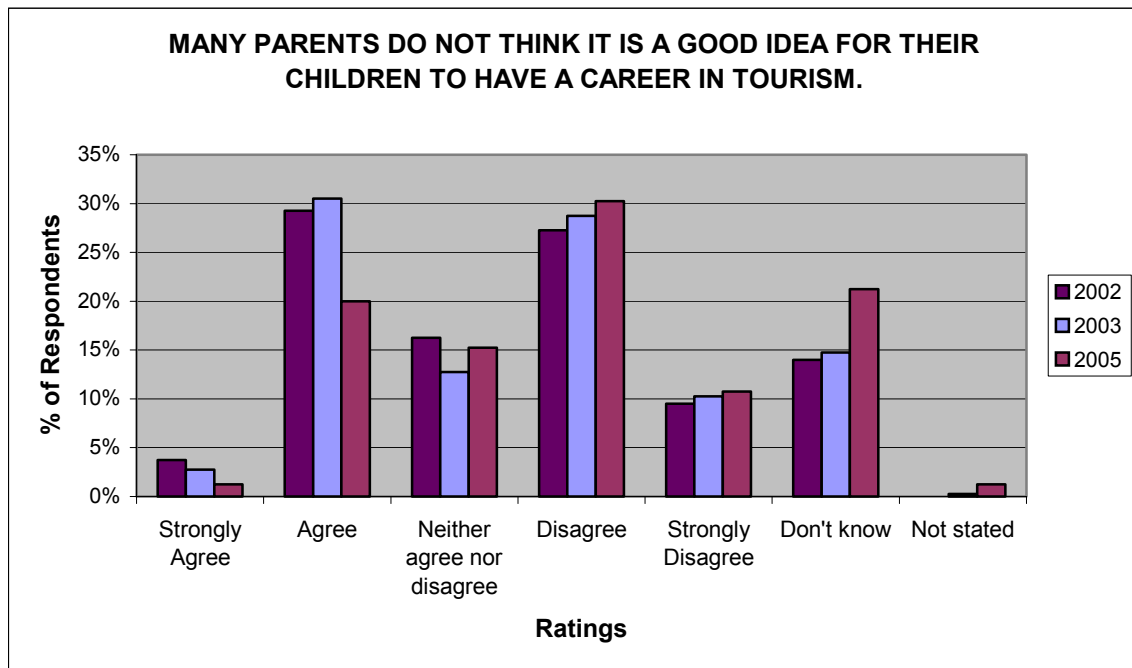


ATTITUDE STATEMENT

MANY PARENTS DO NOT THINK IT IS A GOOD IDEA FOR THEIR CHILDREN TO HAVE A CAREER IN TOURISM.			
	2002	2003	2005
Strongly Agree	4%	3%	1%
Agree	29%	31%	20%
Neither agree nor disagree	16%	13%	15%
Disagree	27%	29%	30%
Strongly Disagree	10%	10%	11%
Don't know	14%	15%	21%
Not stated	0%	0%	1%

In 2005, 41 percent of the interviewees strongly disagreed or disagreed – similar to the 2003 figure (39 percent).

ATTITUDE STATEMENT – GRAPH

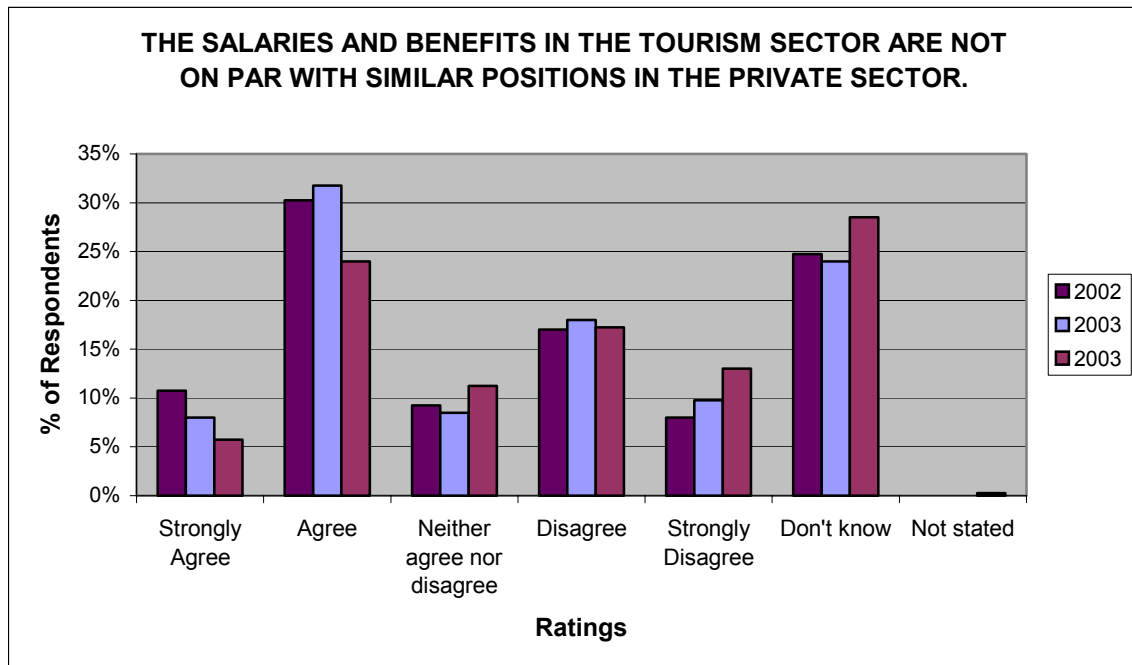


ATTITUDE STATEMENT

THE SALARIES AND BENEFITS IN THE TOURISM SECTOR ARE NOT ON PAR WITH SIMILAR POSITIONS IN THE PRIVATE SECTOR.			
	2002	2003	2003
Strongly Agree	11%	8%	6%
Agree	30%	32%	24%
Neither agree nor disagree	9%	9%	11%
Disagree	17%	18%	17%
Strongly Disagree	8%	10%	13%
Don't know	25%	24%	29%
Not stated	0%	0%	0%

In 2005, 30 percent of the interviewees strongly disagreed or disagreed—which was similar to the 2003 figure (28 percent). More of the tourism workers (36 percent) than the non-tourism workers (24 percent); and more of those aged '50+' (37 percent) than those '30-49' (27 percent) had identical opinions.

ATTITUDE STATEMENT – GRAPH

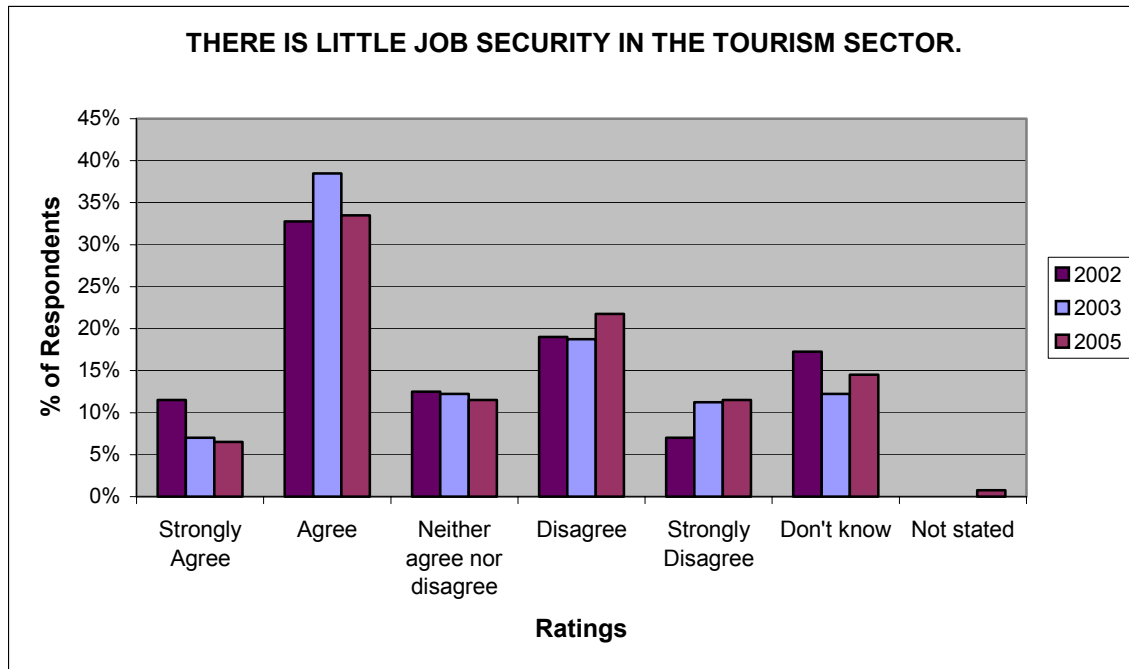


ATTITUDE STATEMENT

THERE IS LITTLE JOB SECURITY IN THE TOURISM SECTOR.			
	2002	2003	2005
Strongly Agree	12%	7%	7%
Agree	33%	39%	34%
Neither agree nor disagree	13%	12%	12%
Disagree	19%	19%	22%
Strongly Disagree	7%	11%	12%
Don't know	17%	12%	15%
Not stated	0%	0%	1%

In 2005, 41 percent of the interviewees strongly agreed or agreed – a decrease from the 2003 figure (46 percent). More of those '30-49' (44 percent) than those '15-29' (35 percent) felt there was little job security in the tourism sector.

ATTITUDE STATEMENT – GRAPH

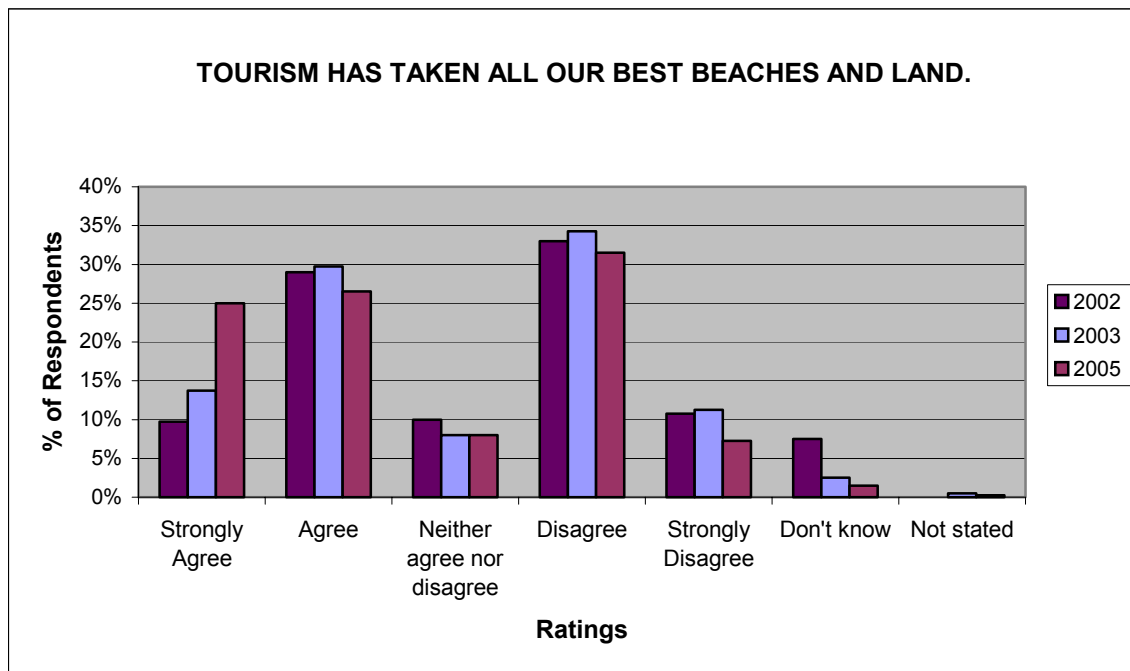


ATTITUDE STATEMENT

TOURISM HAS TAKEN ALL OUR BEST BEACHES AND LAND			
	2002	2003	2005
Strongly Agree	10%	14%	25%
Agree	29%	30%	27%
Neither agree nor disagree	10%	8%	8%
Disagree	33%	34%	32%
Strongly Disagree	11%	11%	7%
Don't know	8%	3%	2%
Not stated	0%	1%	0%

In 2005, a little more than half (52 percent) of the individuals questioned said that they either strongly agreed or agreed with the statement “tourism has taken all our best beaches and land”. This is a gain over from the 2003 figure (44 percent).

ATTITUDE STATEMENT – GRAPH

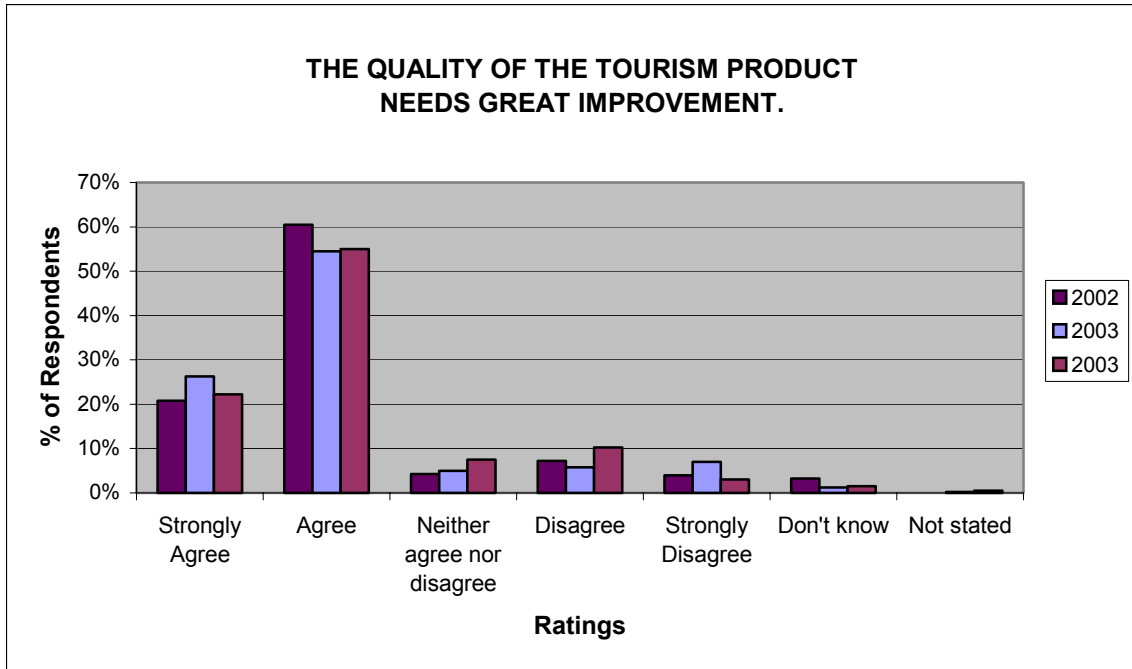


ATTITUDE STATEMENT

THE QUALITY OF THE TOURISM PRODUCT NEEDS GREAT IMPROVEMENT.			
	2002	2003	2003
Strongly Agree	21%	26%	22%
Agree	61%	55%	55%
Neither agree nor disagree	4%	5%	8%
Disagree	7%	6%	10%
Strongly Disagree	4%	7%	3%
Don't know	3%	1%	2%
Not stated	0%	0%	1%

In 2005, 77 percent of the interviewees strongly agreed or agreed – a decrease from to the 2003 figure (81 percent).

ATTITUDE STATEMENT – GRAPH

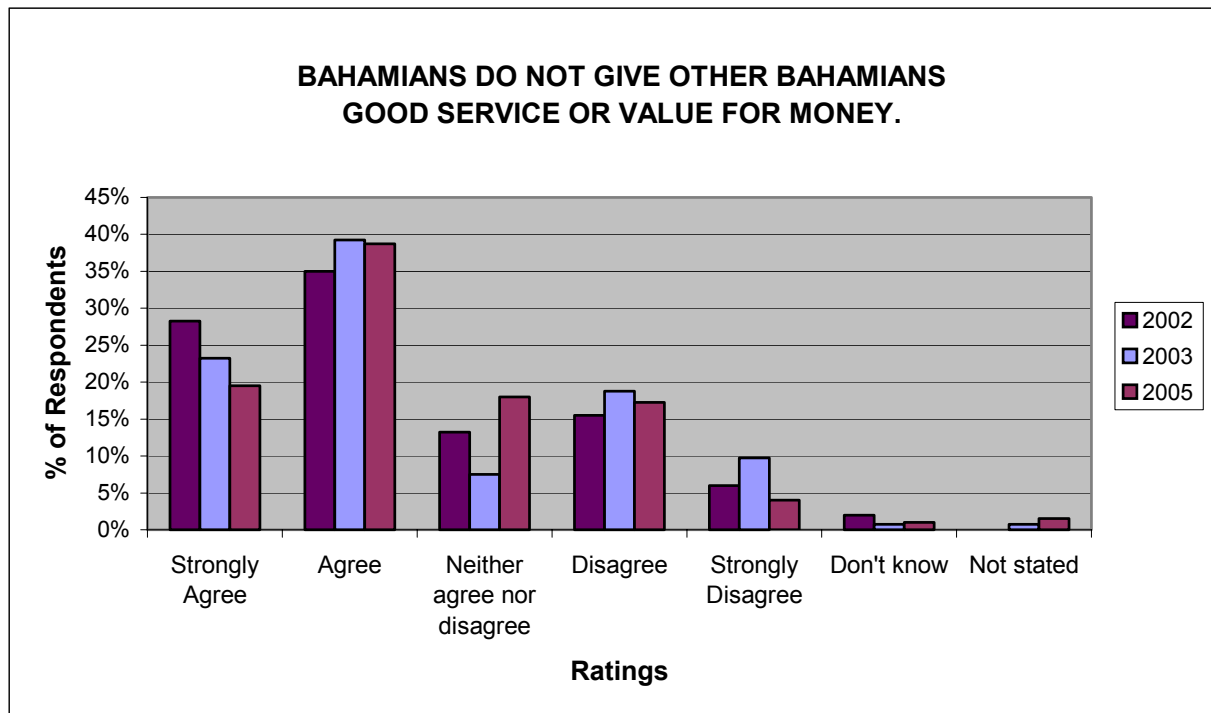


ATTITUDE STATEMENT

BAHAMIANS DO NOT GIVE OTHER BAHAMIANS GOOD SERVICE OR VALUE FOR MONEY.			
	2002	2003	2005
Strongly Agree	28%	23%	20%
Agree	35%	39%	39%
Neither agree nor disagree	13%	8%	18%
Disagree	16%	19%	17%
Strongly Disagree	6%	10%	4%
Don't know	2%	1%	1%
Not stated	0%	1%	2%

In 2005, 59 percent of the interviewees strongly agreed or agreed – a decrease from the 2003 figure (62 percent). More of the non-tourism workers (64 percent) than the tourism workers (53 percent); more of the males (63 percent) than the females (54 percent); and more of those aged '15-29' (62 percent) than those '50+' (49 percent) share the same sentiments.

ATTITUDE STATEMENT – GRAPH

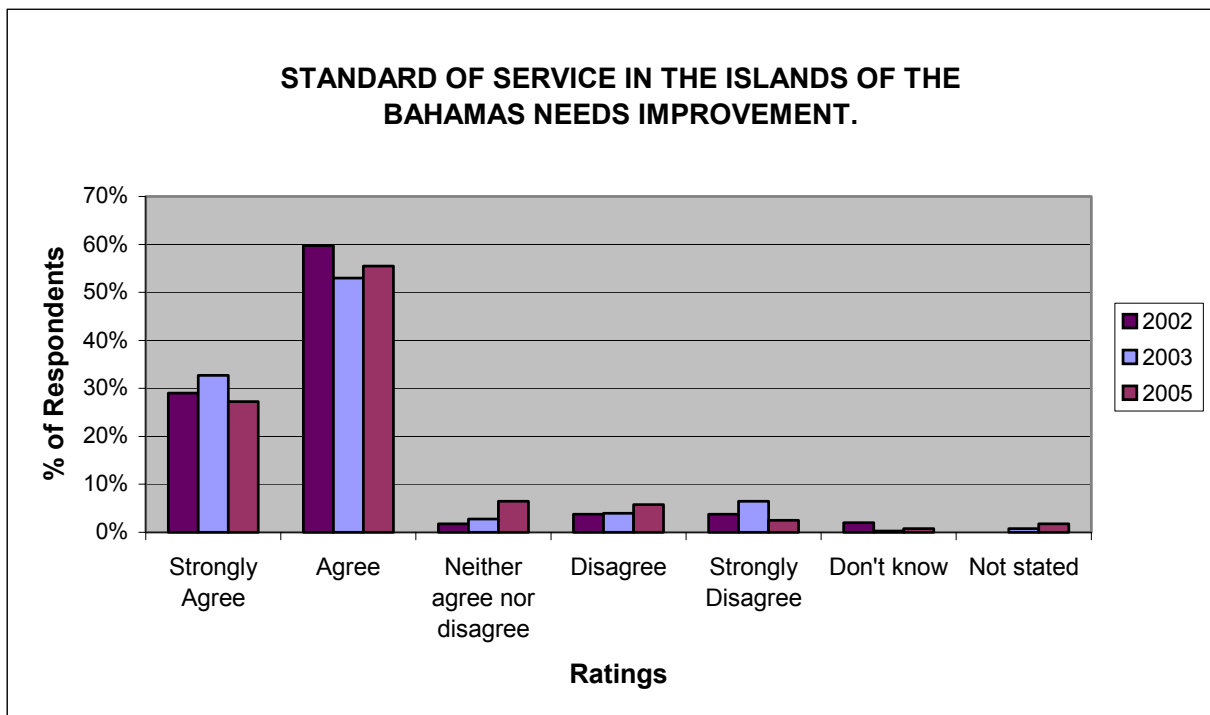


ATTITUDE STATEMENT

STANDARD OF SERVICE IN THE ISLANDS OF THE BAHAMAS NEEDS IMPROVEMENT.			
	2002	2003	2005
Strongly Agree	29%	33%	27%
Agree	60%	53%	56%
Neither agree nor disagree	2%	3%	7%
Disagree	4%	4%	6%
Strongly Disagree	4%	7%	3%
Don't know	2%	0%	1%
Not stated	0%	1%	2%

In 2005, 83 percent of the interviewees strongly agreed or agreed – a decrease from the 2003 figure (86 percent).

ATTITUDE STATEMENT – GRAPH

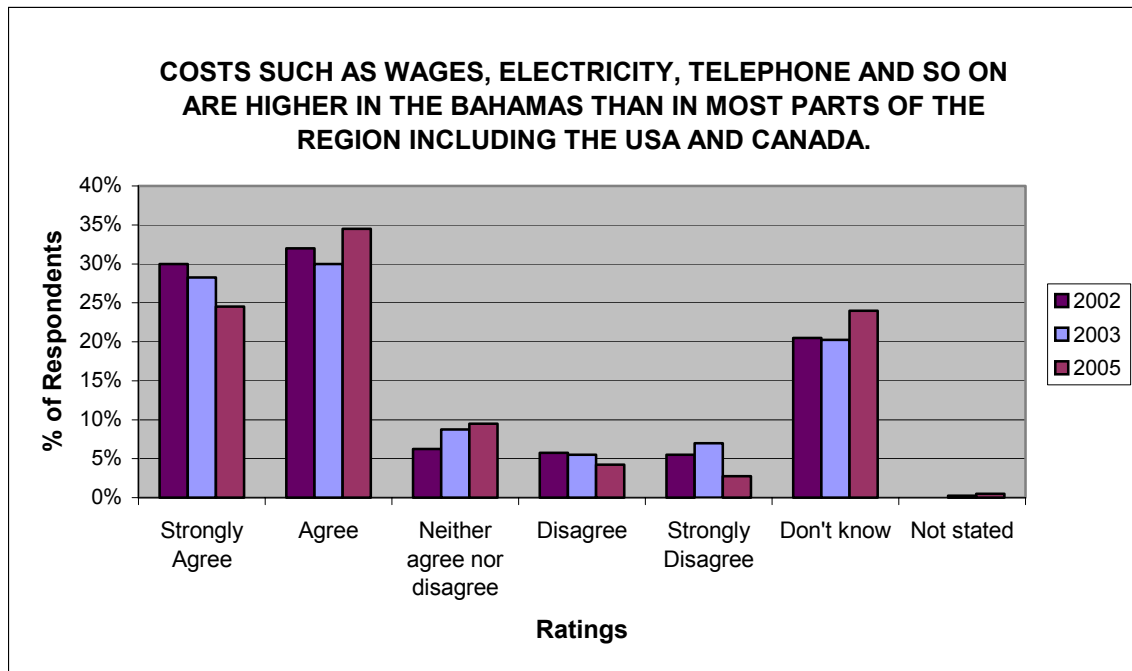


ATTITUDE STATEMENT

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.			
	2002	2003	2005
Strongly Agree	30%	28%	25%
Agree	32%	30%	35%
Neither agree nor disagree	6%	9%	10%
Disagree	6%	6%	4%
Strongly Disagree	6%	7%	3%
Don't know	21%	20%	24%
Not stated	0%	0%	1%

In 2005, 60 percent of the interviewees strongly agreed or agreed, which was similar to the 2003 figure (58 percent). More of those aged '30-49' (63 percent than those '50+' (54 percent) shared these sentiments.

ATTITUDE STATEMENT – GRAPH

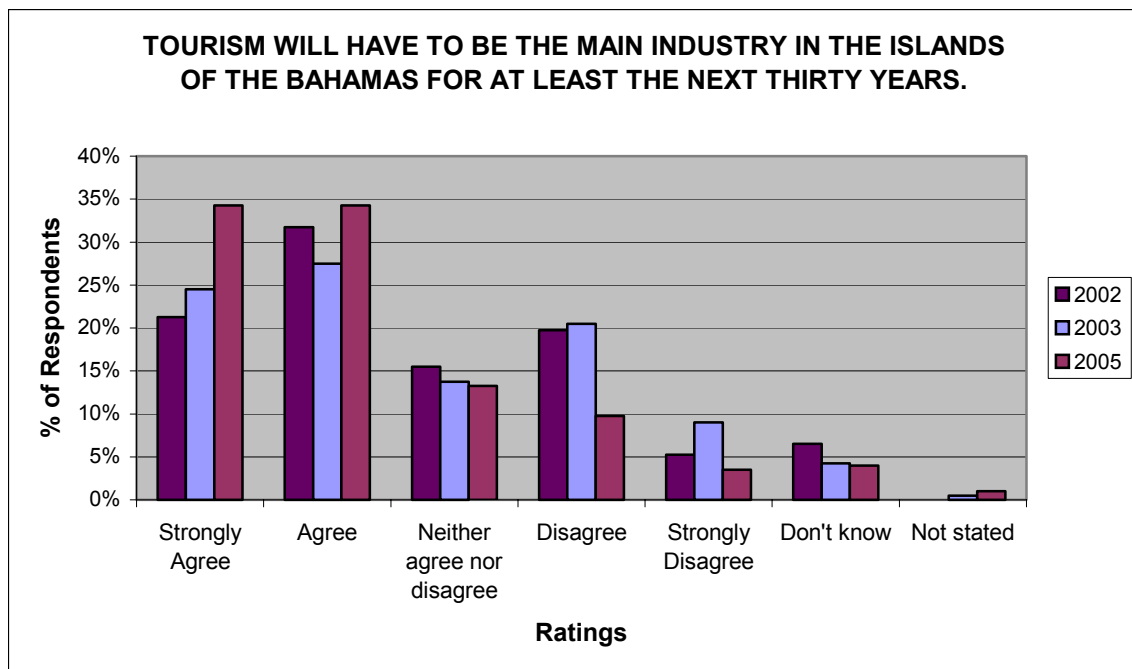


ATTITUDE STATEMENT

TOURISM WILL HAVE TO BE THE MAIN INDUSTRY IN THE ISLANDS OF THE BAHAMAS FOR AT LEAST THE NEXT THIRTY YEARS.			
	2002	2003	2005
Strongly Agree	21%	25%	34%
Agree	32%	28%	34%
Neither agree nor disagree	16%	14%	13%
Disagree	20%	21%	10%
Strongly Disagree	5%	9%	4%
Don't know	7%	4%	4%
Not stated	0%	1%	1%

In 2005, a little more than two-thirds (68 percent) of the residents in the Family Islands strongly agreed or agreed “tourism will have to be the main industry in the Islands of The Bahamas for at least the next thirty years.” This represents a 15 percentage points hike over the 2003 figure. More of the tourism workers (75 percent) than the non-tourism workers (61 percent); and more of the females (74 percent) than the males (64 percent) had the identical views.

ATTITUDE STATEMENT – GRAPH



MEDIA USAGE

TOP TEN LOCAL AND INTERNATIONAL TELEVISION STATIONS WATCHED		
	2003	2005
ZNS (NEWS)	-	53%
CNN	42%	35%
ZNS 13	66%	21%
ZNS (OTHER PROGRAMMING)	-	19%
ABC	24%	18%
NBC	22%	15%
LIFETIME	14%	14%
TBN	19%	13%
FOX	12%	12%
CBS	20%	9%

TOP 5 LOCAL AND INTERNATIONAL RADIO STATIONS LISTENED TO		
	2003	2005
ZNS 1540 AM	36%	41%
93.5 (RADIO ABACO)	23%	20%
810	10%	18%
ZNS 1240 AM	15%	13%
100 JAMZ	13%	11%

TOP 5 LOCAL AND INTERNATIONAL NEWSPAPERS READ		
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	2003	2005
THE PUNCH	45%	49%
TRIBUNE	38%	42%
GUARDIAN	38%	40%
MIAMI HERALD	22%	20%
ABACOIAN	20%	17%

TOP 10 LOCAL AND INTERNATIONAL MAGAZINES READ		
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	2003	2005
NONE	56%	66%
EBONY	9%	6%
ISLAND SCENES	4%	5%
JET	7%	4%
OPRAH	4%	3%
TIME	6%	3%
PEOPLE	2%	2%
NOT STATED	2%	2%
SPORTS ILLUSTRATED	3%	2%
GOOD HOUSEKEEPING	1%	1%