

GRAND BAHAMA

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**

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EXECUTIVE SUMMARY

- ❖ For Grand Bahama, the report is based on responses from 275 persons that were surveyed in the consistencies: Lucaya, Eight Mile Rock, High Rock, West End, Marco City and Pineridge. The sample size had a \pm 5.9% precision (error) at the 95% confidence level.
- ❖ More than three-quarters of Grand Bahamians claimed that they would choose to work in the tourism industry. The reasons given were varied and included: “enjoy meeting people/ interacting/ serving”; “meet interesting people/ nice people”; “like to travel/ get to travel” and “becoming an ambassador for your country / promoting The Bahamas”.
- ❖ Those who would not choose to work in tourism industry stated “unstable/ volatile/ too many variables” and “low pay/ no money” as the top reasons for their answer.
- ❖ “Not enough money/ low salaries” was the main reason why Grand Bahamians felt that tourism was not the first choice for high school and college graduates.
- ❖ The individuals questioned in Grand Bahama 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”. However, in Grand Bahama the second most popular answer was “bringing more tourists to country/ returning tourists”.
- ❖ When asked for to give suggestions for convincing someone to come to The Bahamas, 46 percent of the Grand Bahamian interviewees said to talk about the people and one-fifth suggested talking about the culture.
- ❖ The majority (88 percent) of Grand Bahamian residents did NOT feel that Bahamians were developing a negative attitude toward the large number of tourists coming to The Bahamas. **Eleven percent** felt that Bahamians are developing a negative attitude.
- ❖ Seventy-five percent felt that the Government was NOT doing sufficient to ensure Bahamians are trained for positions held by foreigners in tourism industry.
- ❖ Sixty-eight 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” (76 percent) or “English and French” (29 percent).

- ❖ Two-thirds of the interviewees strongly disagreed or disagreed with the statement, “The only jobs Tourism has created for Bahamians are jobs at the bottom of the ladder”. This is up from the 57 percent recorded in 2003.
- ❖ The proportion of the interviewees that felt that their job was related to tourism was 9 percentage points higher than in 2003.
- ❖ The fraction of respondents that strongly disagreed or disagreed with the statement “tourism does not affect me personally” rose sharply to 78 percent from 67 percent in 2003.
- ❖ In 2005, the proportion of respondents that strongly disagreed or disagreed with the statement “tourism does not affect me personally” rose sharply to 78 percent from 67 percent in 2003.
- ❖ Between 2003 and 2005, the percentage of interviewees that did NOT feel that “only Bahamian art, straw and craft goods should be allowed to be sold to tourists” advanced from 47 to 65 percent.
- ❖ More than three-quarters (80 percent) of the interviewees strongly disagreed or disagreed with the statement, “just because tourism is the main industry, does not mean that Bahamians should be willing to go the extra mile to please tourists.” This represents an increase of 9 percentage points over from the 2003 figure.
- ❖ The portion of individuals questioned that did NOT feel that the 15% gratuity should be eliminated increased from 51 percent in 2003 to 60 percent in 2005.
- ❖ Between 2003 and 2005, there was a 9-percentage point advance in the portion of interviewees that revealed that the Islands of the Bahamas’ advertisements make them feel good about their country (74 versus 83 percent).
- ❖ More than half (54 percent) of the interviewees strongly disagreed or disagreed with the 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.” This represents an increase from the 2003 figure (46 percent).
- ❖ There was a gain of 11 percentage points over 2003 in the portion of interviewees that felt there WERE enough jobs in the tourism sector (41 percent versus 30 percent).

- ❖ In 2005, more Grand Bahamian residents felt that the jobs in Tourism are not considered very prestigious than in 2003 (50 percent versus 30 percent).
- ❖ The percentage of Grand Bahamians that strongly disagreed or disagreed with the statement “tourism has taken all our best beaches and land” leapt to 52 percent in 2005 from 36 percent in 2003.
- ❖ The portion of respondents that affirmed that the quality of the tourism product needed great improvement surged from 72 percent in 2003 to 89 percent in 2005.
- ❖ In 2005, the overwhelming majority (92 percent) of the respondents asserted that the standard of service in the Islands of The Bahamas needed improvement. This is a hefty increase over the 2003 figure (82 percent).
- ❖ Between 2003 (59 percent) and 2005 (71 percent), there was a surge in the percentage of Grand Bahamians that acknowledged that tourism will have to be the main industry in the Islands of The Bahamas for at least the next thirty years.

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.

Definitions

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

- **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)
- **Perception** This is a process through which individuals select, organize and interpret stimuli so that it is meaningful and coherent to them. (2)
- **Stratified Convenience Sample** This is a conveniently selected sample that allows for some stratification of the respondents based on demographic criteria such as age, sex. (3)
- **Questionnaire** This is the measuring tool used to collect relevant data and provides a frame of reference on which to build the analysis. (4)
- **Attitude Scale** This is the working set of definitions that have been developed in order to measure the construct "attitude". (5)
- **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. (5)

- 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 275 household dwellings were conducted in Grand Bahama. Bahamian residents between the ages of 15 and over were interviewed. The constituencies surveyed were: Lucaya, Eight Mile Rock, High Rock, West End, Marco City and Pineridge. The sample size had a \pm 5.9% 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?

In 2005, more than three-quarters (78 percent) of the respondents reported that they would choose to work in the tourism industry. This is 10 percentage points higher than in 2003. Eighty-eight percent of working in the tourism industry declared that given a choice they would work in the tourism industry. Although only two-thirds (67 percent) of the non-tourism workers said they would choose to work in the tourism industry, this represents an increase over 2003 (51 percent).

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. Thirty-five 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	2005	2003
Enjoy Meeting People/ Interacting/ Serving	35%	40%
Meet Interesting People/ Nice People	16%	10%
Like To Travel/ Get To Travel	11%	2%
Becoming An Ambassador For Your Country / Promoting The Bahamas	10%	9%
Pay Is Good/ Can Make Money/ Good Living	9%	7%
Learn More About Other Countries/ Culture	6%	4%
Industry Exciting / Prestigious/ Challenging/ Glamorous	4%	3%
I Could Make A Positive Difference	3%	1%
Worked In The Industry For Years	3%	-
Tourism No. 1 Industry/ Main Industry	3%	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 are shown in the following table. Twenty-three percent of the persons stated the industry being “unstable/ volatile/ too many variables” as the reason why they would not choose to work in tourism.

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

REASONS	2005	2003
Unstable/ Volatile/ Too Many Variables	23%	24%
Low Pay/ No Money	13%	16%
Not Interested/ Not My Field / Don't Like It	10%	9%
Prefer Another Industry	7%	7%
Don't Like Meeting/ Dealing With People/ Not People's Person	5%	3%
Have To Work Too Hard For Pay/ Too Taxing / Too Hectic/ Stressful	5%	3%
Don't Like Tourism Industry	5%	-
No Upward Mobility/ Not Rewarding	5%	2%
Quiet Person/ Don't Have Personality For It	3%	2%
Seasonal Job	3%	5%

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

In 2005, 56 percent of the persons questioned stated that they felt that tourism was not the first choice of high school and college graduates. This is slightly higher than in 2003 when 52 percent had matching views.

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

REASONS	2005	2003
Not Enough Money/ Low Salaries	38%	35%
Lack Of Knowledge/ Exposure	16%	10%
Not Considered Prestigious/ Bottom Jobs/ Not Important Enough	14%	16%
Interested In Another Industry	7%	11%
Little Job Security/ Unstable/ Seasonal	6%	9%
Not Attractive Enough	5%	2%
Prefer Office Type Jobs	4%	4%
Parental Expectations/ Peer Pressure	4%	1%
Educational System Is Not Geared Toward Tourism	3%	-
No Upward Mobility/ Future	3%	3%
They Don't Want To Work Hard/ Want Easy Jobs	2%	-
Other Professions Are Not Promoted More	2%	-

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 above. The top three reasons given were: “not enough money / low salaries” (38 percent); “lack of knowledge/ exposure” (16 percent) and “not considered prestigious/ bottom jobs/not important enough” (14 percent). Table 5 in the Detailed Tables outlines the different reasons given by the respondents. 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, almost half (47 percent) of the interviewees said “train/ educate in schools/ workshops/seminars” and 16 percent said, “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	2005	2003
Train/ Educate In Schools/ Workshops/ Seminars	47%	31%
Pay High Salaries/ More Money	16%	26%
More Interesting Benefits/ Incentives/Make Jobs/Industry More Attractive/ Exciting	13%	6%
More Promotions/ More Information/ More TV (radio programs	8%	11%
Advertise Market Properly	8%	7%
Offer More Scholarships	7%	4%
Not Stated	3%	4%
More Opportunities/ Better Jobs/ Higher Positions	2%	3%
On-The-Job Training/ More Training	2%	3%
Offer More Job Security/ Stability	2%	2%

POSITIVE THINGS HAPPENING THAT ARE A RESULT OF TOURISM

To the question of what positive things were happening as a result of tourism, 29 percent asserted, "more jobs created". Table 7 in the Detailed Tables outlines the many positive things that are happening as a result of tourism cited by the respondents. 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	2005	2003
More Jobs Created	29%	27%
Bringing More Tourists To Country/ Returning Tourists	19%	6%
None	15%	22%
Economy Booming / Economic Development/ Stable Economy/ Prosperity	14%	9%
Higher Standard Of Living/ Pleasant/ More Money/ Better Life	12%	5%
Promotes Country Internationally/ Improve Relations With Other Countries	4%	3%
Foreign Exchange/ Enhanced Finances	4%	5%
More Investment/ Foreign Investment	4%	4%
Global Awareness Is Promoted	3%	1%
More Hotels/ Hotels Upgraded/ Better Rooms/ Hotels Renovated	3%	0%

NEGATIVE THINGS HAPPENING THAT ARE A RESULT OF TOURISM

Almost half (45 percent) of the persons interviewed said that they could not identify any negative thing that was happening as a result of tourism. However, about 12 percent enumerated “drugs” as a negative thing that they felt was a result of tourism. Table 8 in the Detailed Tables shows that respondents cited numerous negative things that they thought were 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	2005	2003
None/ Nothing	45%	47%
Drugs	12%	6%
Crime	8%	10%
Some Properties/ Hotels Closed	5%	-
Bahamian Culture Watered Down/ Lost Of Culture	5%	2%
Foreigners Investors Who Do Not Care About The Country/ Bahamas	3%	-
Bad Attitude/ Attitude Change	3%	3%
Outside Negative Influences/ Bad Influence	3%	3%
Not Enough Diversification	2%	1%
Hassling Of Tourists	2%	4%

THINGS WOULD SAY TO CONVINCe SOMEONE TO VISIT THE BAHAMAS

The respondents were requested 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, however, the top 10 are listed in the table below. Nearly half (46 percent) said that they would tell the potential tourist about the “people/ friendly people/ warm people/ hospitality/ beautiful women”.

TOP TEN THINGS THAT WOULD SAY TO CONVINCe SOMEONE TO VISIT THE BAHAMAS

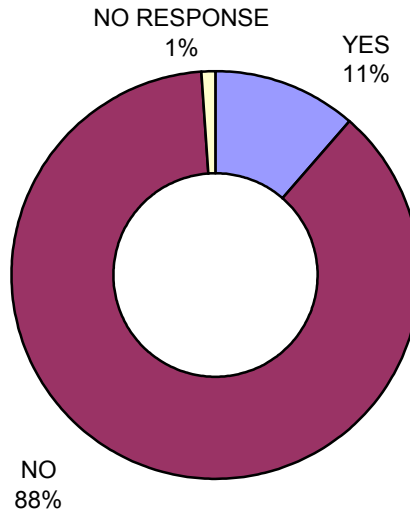
ITEMS MENTIONED	2005	2003
People/ Friendly People/ Warm People/ Hospitality/ Beautiful Women	46%	54%
Culture (Food)/ Native Food/ Drinks	21%	16%
Culture (Undefined)	20%	4%
Culture (Junkanoo)/ Festivals	16%	3%
Family Islands/ Diverse/ Tropical Islands/ 700 Islands/ Island Hopping	8%	9%
Culture (Music)	6%	16%
Water Sports/ Snorkeling/ Diving/ Scuba Diving/ Kayaking/ Regattas/ Sailing	5%	0%
Historical Sites/ Attractions/ Points Of Interest	4%	2%
Local Entertainment/ Nightlife/ Casinos	4%	4%
Very Good Dive Sites/ Fishing/ Marine Life/ Our Blue Holes/ Sportfishing/ Coral Reefs	4%	1%

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

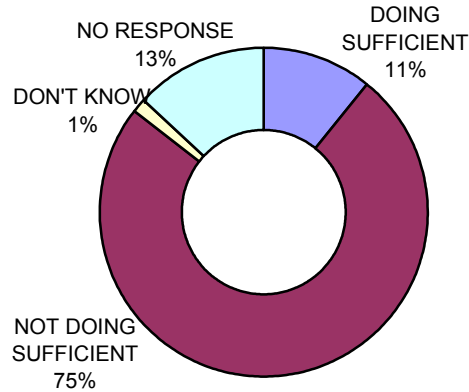
WHETHER BAHAMIANS DEVELOPING NEGATIVE ATTITUDE TOWARD THE LARGE NUMBER OF TOURISTS



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

Three-quarters of the Grand Bahama 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.

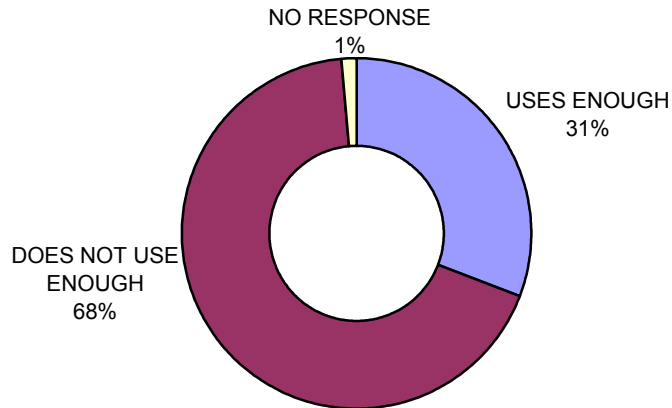
WHETHER GOVERNMENT DOING SUFFICIENT TO ENSURE BAHAMIANS TRAINED FOR POSITIONS HELD BY FOREIGNERS IN TOURISM INDUSTRY



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

Sixty-eight percent of the interviewees felt that the tourism industry does NOT use enough Bahamian food, music and other products or services. Forty-six percent of youngest respondents agreed with this statement, however only 17 percent of the most senior interviewees shared this sentiment.

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. Three-quarters (76 percent) said “English and Spanish” and 29 percent stated “English and French”.

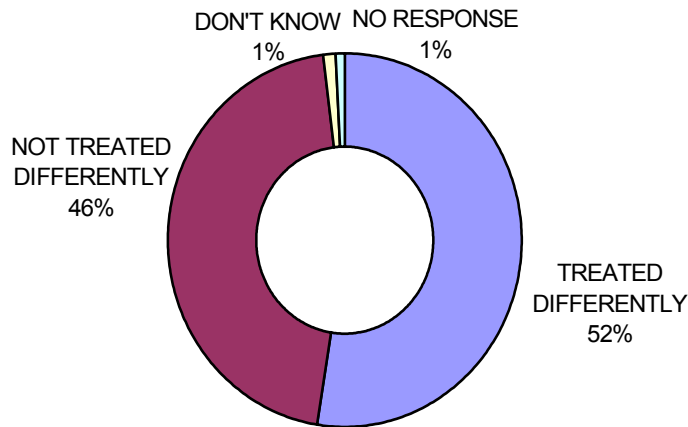
LANGUAGES ALL BAHAMIANS SHOULD SPEAK

LANGUAGES	2005	2003
English And Spanish	76%	74%
English And French	29%	32%
English And Italian	6%	3%
English And German	5%	3%
English And Chinese	3%	-
English And Creole	1%	3%
English And Japanese	1%	-
English And Dutch	1%	-

TREATMENT OF WHITE VISITORS VERSUS BLACK VISITORS

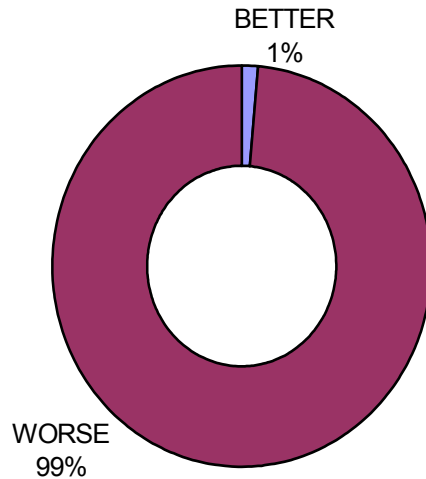
A little more than half (52 percent) of the Grand Bahama residents interviewed believed that black visitors are treated differently than white visitors. Sixty-two percent of the persons aged “30-49” asserted that black visitors are treated differently than white visitors. However, only 42 percent of those “15-29” years old shared similar beliefs.

WHETHER BLACK VISITORS TREATED DIFFERENTLY THAN WHITE VISITORS



Of the respondents that thought that black visitors are treated differently, almost all (99 percent) said that black visitors were treated WORSE than white visitors.

HOW BLACK VISITORS ARE TREATED DIFFERENTLY



The top ten reasons given why black visitors are treated WORSE than white visitors are shown below. One-quarter of these respondents listed “they have a chip on shoulder/ have an attitude/ rude/ complain more/ different attitude” and 23 percent said “blacks don’t spend at all/ as much as white/ whites tip more” as the reasons black visitors are treated worse.

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

REASONS	2005	2003
They Have A Chip On Shoulder/ Have An Attitude/ Rude/ Complain More/ Different Attitude	25%	18%
Blacks Don't Spend At All/ As Much As White/ Whites Tip More	23%	29%
Think That The Blacks Are Other Bahamians	14%	3%
Bahamians Feel That Only White Visitors Have Money To Spend	10%	2%
They Want More For Less	8%	1%
Blacks Inferior/ Feel That Whites Are Better	7%	-
Just Because They Are Black	5%	7%
Blacks Come Across As Negative To Bahamians (Bad Attitude)	4%	8%
Blacks Are Considered Low End/ Low Class Tourists	3%	2%
Slave Mentality/ Feel As If Should Treat White Better/ Feel White Superior	3%	5%

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.

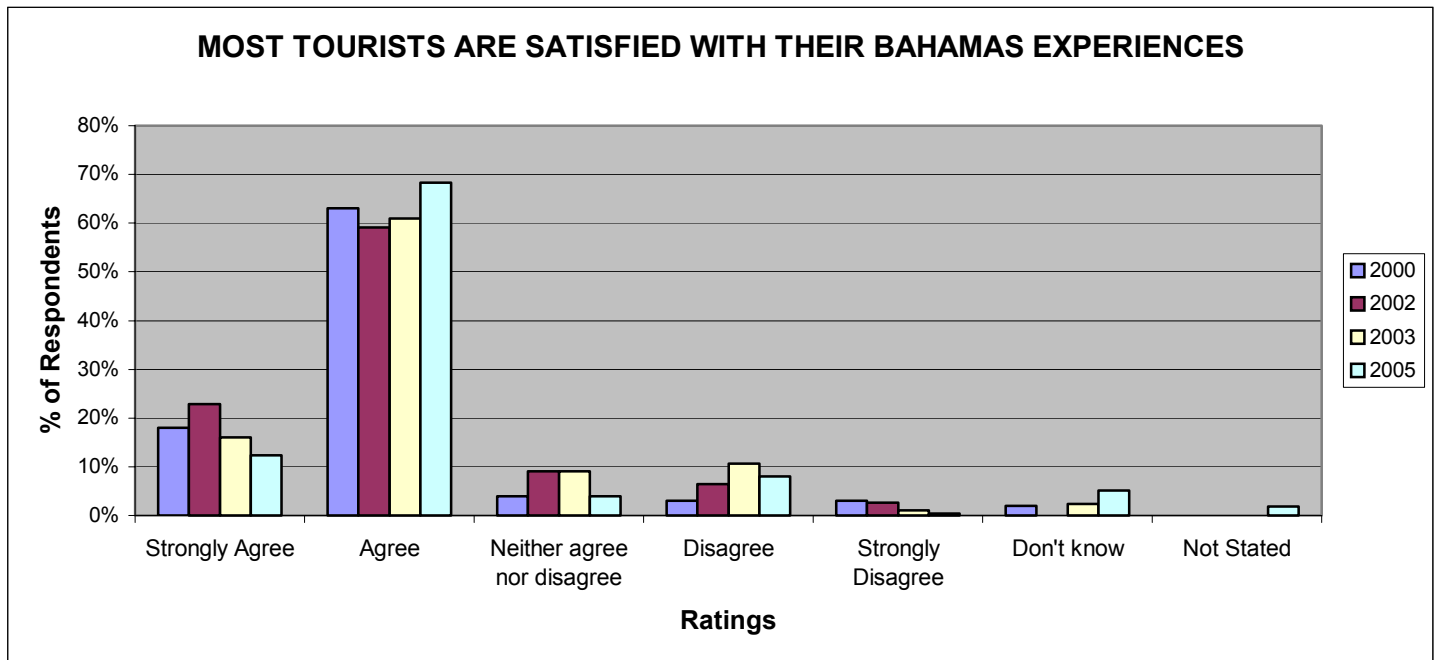
ATTITUDE RATINGS

ATTITUDE STATEMENT

MOST TOURISTS ARE SATISFIED WITH THEIR BAHAMAS EXPERIENCE				
	2000	2002	2003	2005
Strongly Agree	18%	23%	16%	12%
Agree	63%	59%	61%	68%
Neither agree nor disagree	4%	9%	9%	4%
Disagree	3%	6%	11%	8%
Strongly Disagree	3%	3%	1%	0%
Don't know	2%	0%	2%	5%
Not Stated	0%	0%	0%	2%

In 2005, 80 percent of the interviewees strongly agreed or agreed, – an advance from the 2003 figure (77 percent). More of the youngest respondents (85 percent) than the most senior (74 percent) maintained these opinions.

ATTITUDE STATEMENT – GRAPH

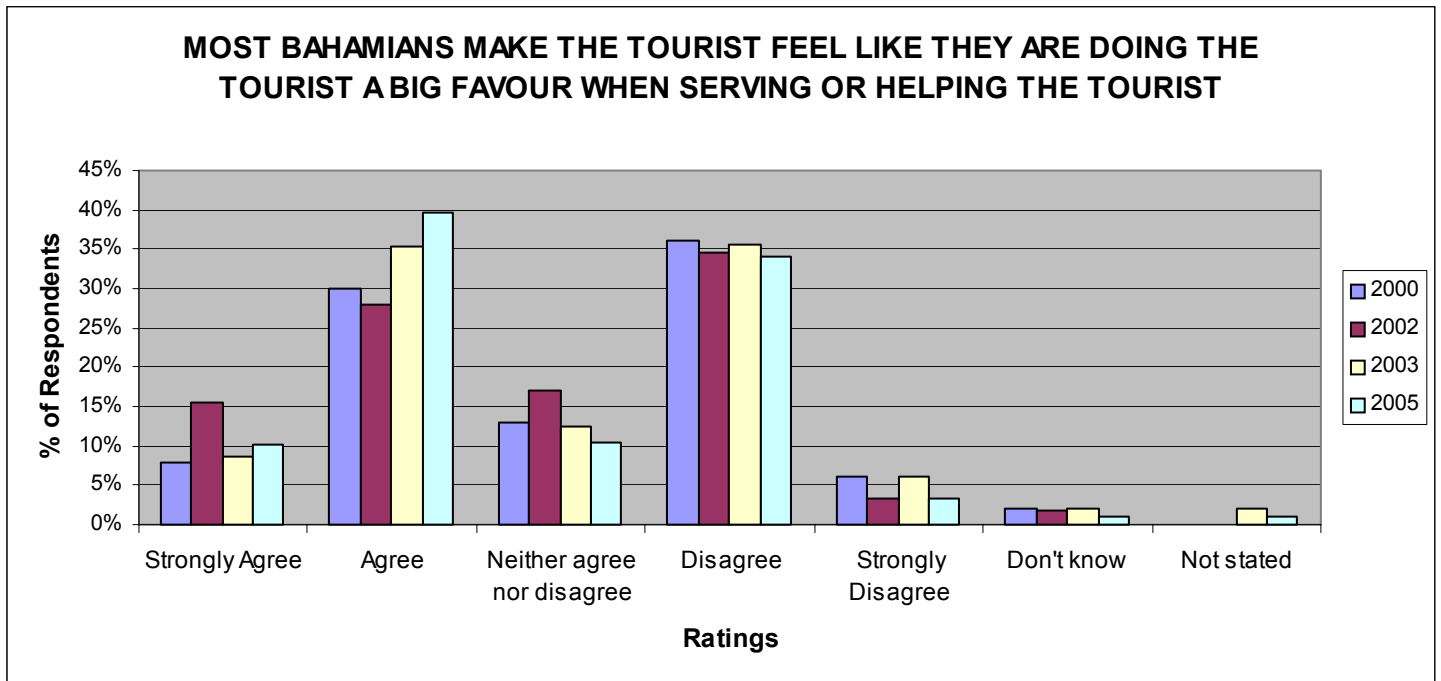


ATTITUDE STATEMENT

MOST BAHAMIANS MAKE THE TOURIST FEEL LIKE THEY ARE DOING THE TOURIST A BIG FAVOUR WHEN SERVING OR HELPING THE TOURIST				
	2000	2002	2003	2005
Strongly Agree	8%	15%	9%	10%
Agree	30%	28%	35%	40%
Neither agree nor disagree	13%	17%	12%	11%
Disagree	36%	35%	36%	34%
Strongly Disagree	6%	3%	6%	3%
Don't know	2%	2%	2%	1%
Not stated	0%	0%	2%	1%

In 2005, 50 percent of the interviewees strongly agreed or agreed – an increase from the 2003 figure (44 percent).

ATTITUDE STATEMENT – GRAPH

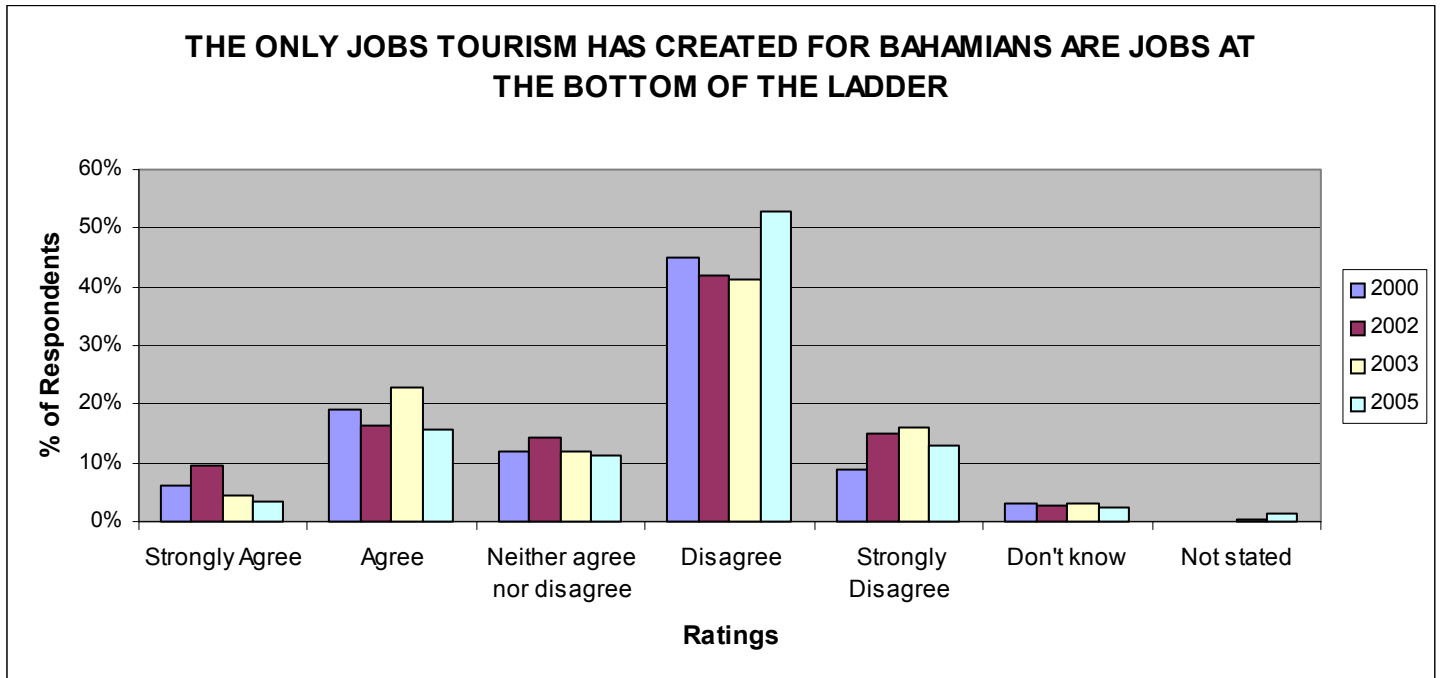


ATTITUDE STATEMENT

THE ONLY JOBS TOURISM HAS CREATED FOR BAHAMIANS ARE JOBS AT THE BOTTOM OF THE LADDER.				
	2000	2002	2003	2005
Strongly Agree	6%	9%	4%	3%
Agree	19%	16%	23%	16%
Neither agree nor disagree	12%	14%	12%	11%
Disagree	45%	42%	41%	53%
Strongly Disagree	9%	15%	16%	13%
Don't know	3%	3%	3%	3%
Not stated	0%	0%	0%	1%

In 2005, two-thirds of the interviewees strongly disagreed or disagreed, up from the 57 percent recorded in 2003. More of the females (72 percent) than the males (59 percent) felt that same way.

ATTITUDE STATEMENT – GRAPH

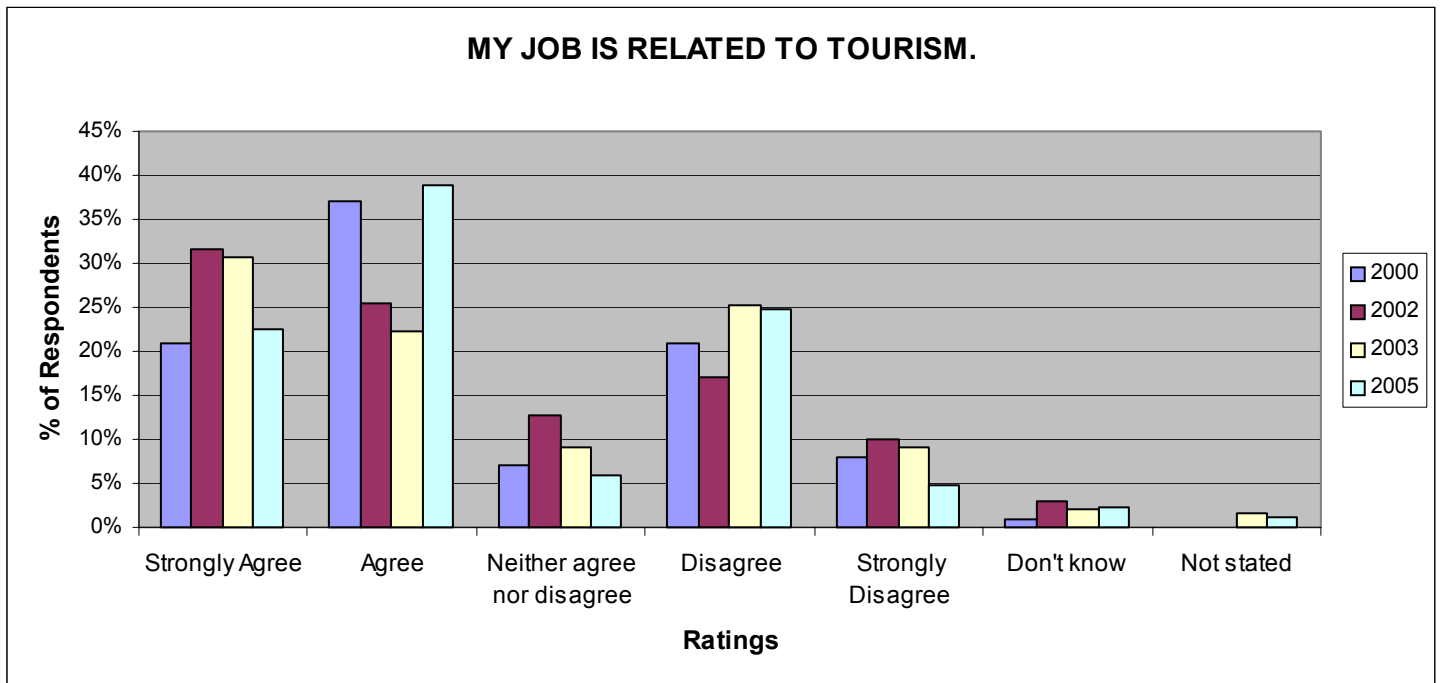


ATTITUDE STATEMENT

MY JOB IS RELATED TO TOURISM.				
	2000	2002	2003	2005
Strongly Agree	21%	32%	31%	23%
Agree	37%	26%	22%	39%
Neither agree nor disagree	7%	13%	9%	6%
Disagree	21%	17%	25%	25%
Strongly Disagree	8%	10%	9%	5%
Don't know	1%	3%	2%	2%
Not stated	0%	0%	2%	1%

Since 2003, the proportion of Grand Bahamian residents that strongly agreed or agreed with this statement grew from 53 percent to 62 percent in 2005. More of the tourism workers (87 percent) than the non-tourism workers (32 percent) strongly agreed or agreed held matching views.

ATTITUDE STATEMENT – GRAPH

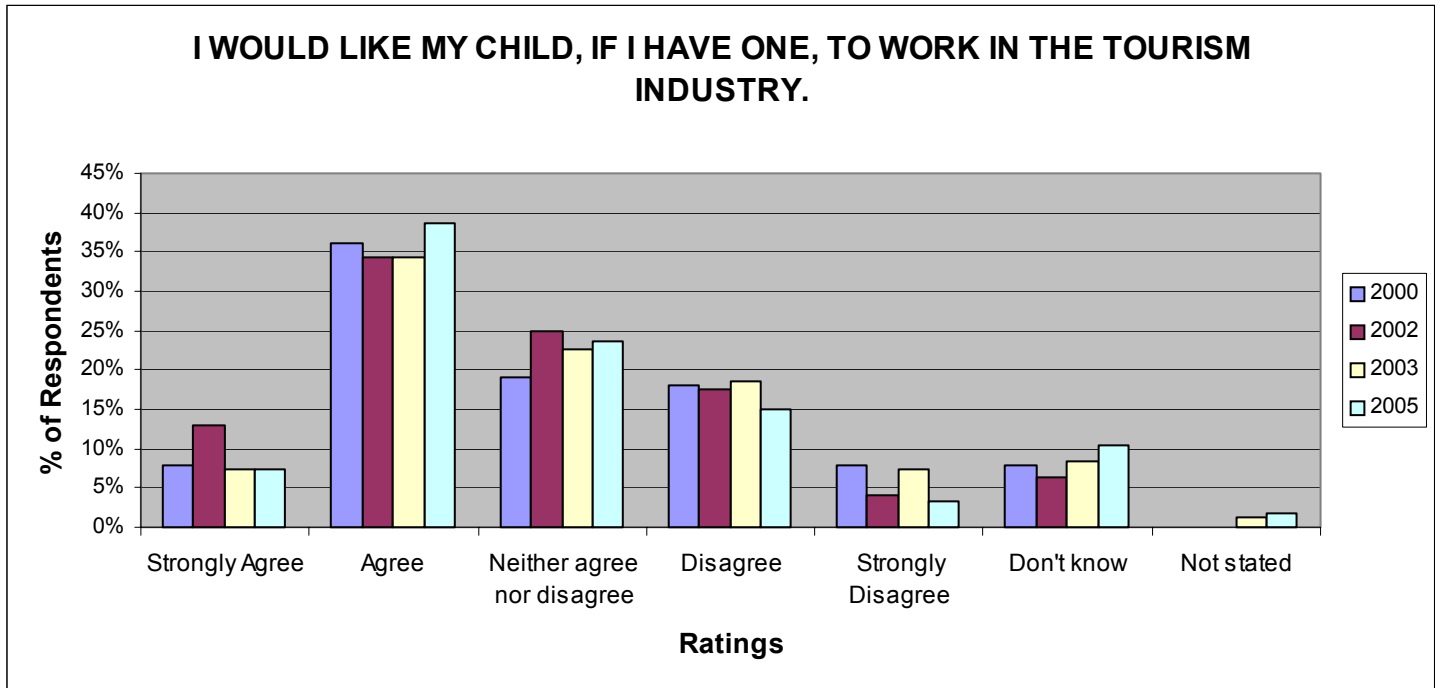


ATTITUDE STATEMENT

I WOULD LIKE MY CHILD, IF I HAVE ONE, TO WORK IN THE TOURISM INDUSTRY.				
	2000	2002	2003	2005
Strongly Agree	8%	13%	7%	7%
Agree	36%	34%	34%	39%
Neither agree nor disagree	19%	25%	23%	24%
Disagree	18%	17%	19%	15%
Strongly Disagree	8%	4%	7%	3%
Don't know	8%	6%	8%	11%
Not stated	0%	0%	1%	2%

The percentage of persons questioned that strongly agreed or agreed with this statement went up between 2003 (41 percent) and 2005 (46 percent). More of the '50+' year olds (62 percent) than those '30-49' (38 percent) shared these sentiments.

ATTITUDE STATEMENT – GRAPH

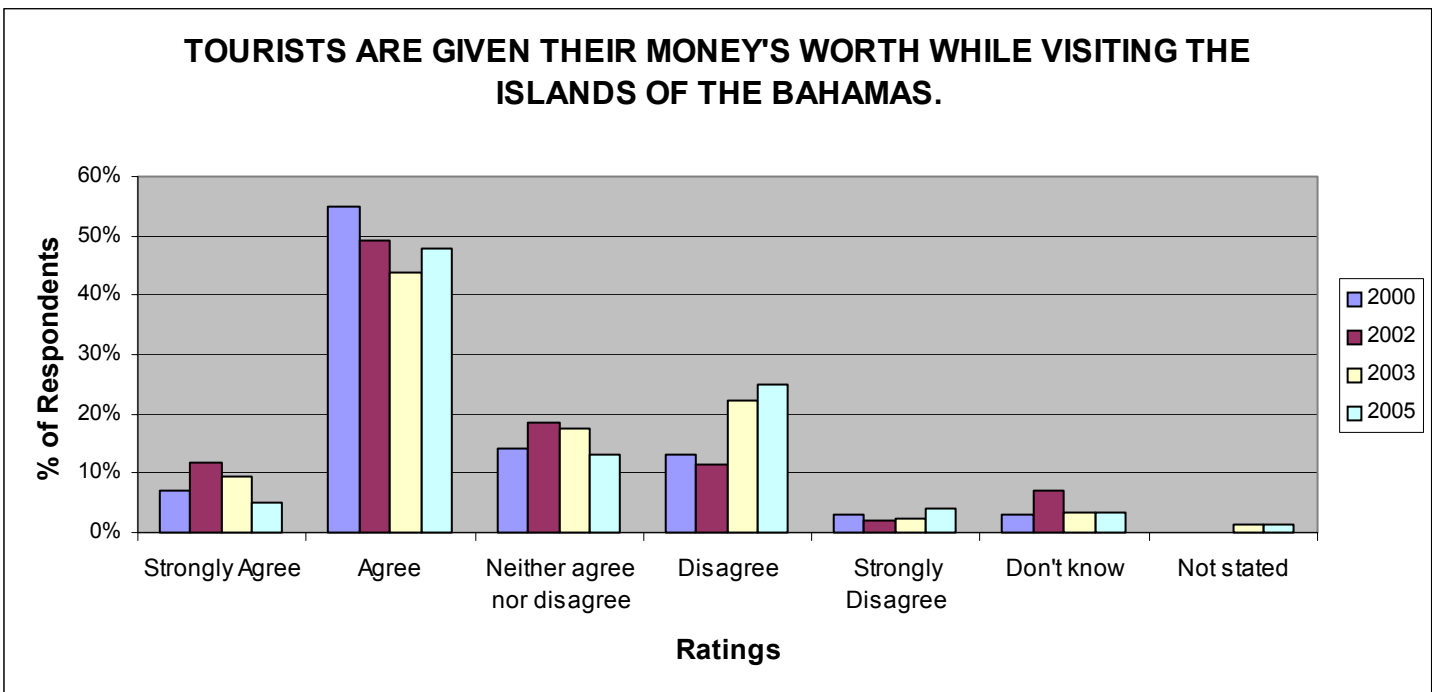


ATTITUDE STATEMENT

TOURISTS ARE GIVEN THEIR MONEY'S WORTH WHILE VISITING THE ISLANDS OF THE BAHAMAS.				
	2000	2002	2003	2005
Strongly Agree	7%	12%	9%	5%
Agree	55%	49%	44%	48%
Neither agree nor disagree	14%	18%	18%	13%
Disagree	13%	11%	22%	25%
Strongly Disagree	3%	2%	2%	4%
Don't know	3%	7%	3%	3%
Not stated	0%	0%	1%	1%

In 2005, the portion of interviewees that strongly agreed or agreed with this statement remained at the same level reported in 2003 (53 percent).

ATTITUDE STATEMENT – GRAPH

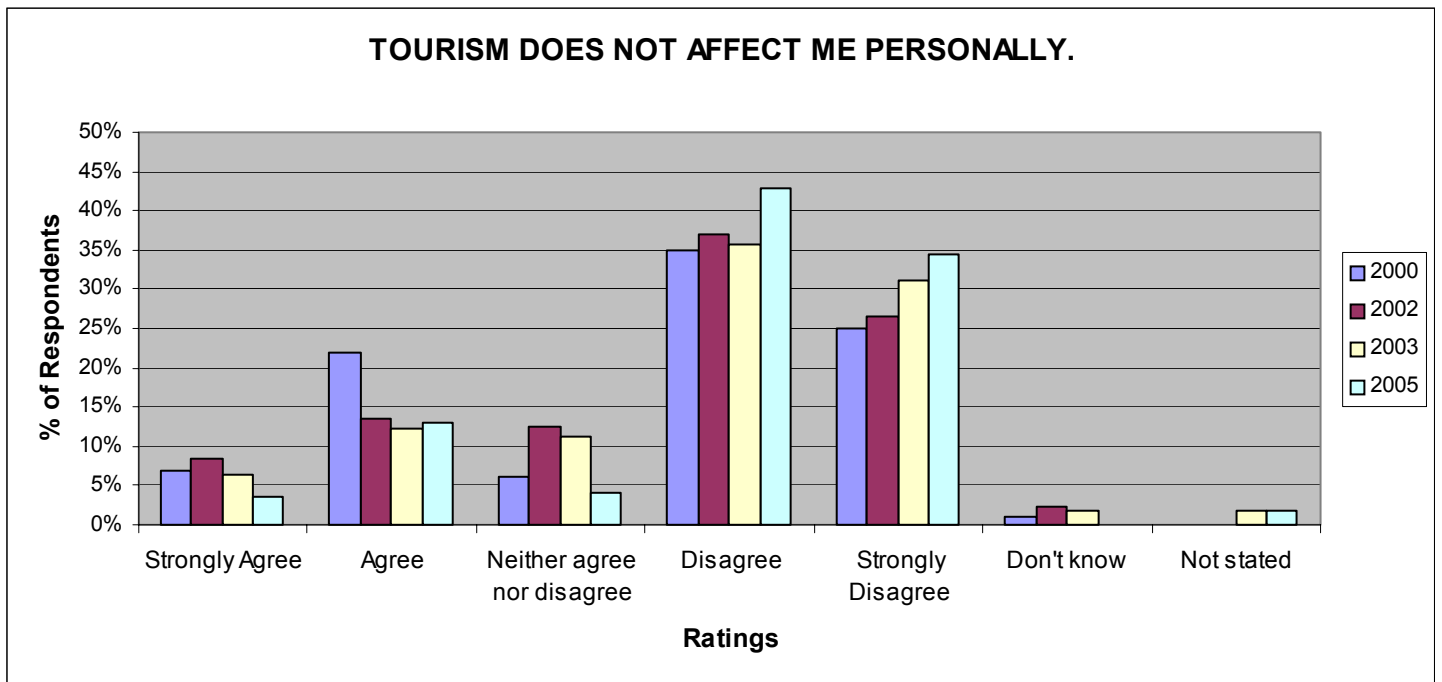


ATTITUDE STATEMENT

TOURISM DOES NOT AFFECT ME PERSONALLY.				
	2000	2002	2003	2005
Strongly Agree	7%	8%	6%	4%
Agree	22%	13%	12%	13%
Neither agree nor disagree	6%	12%	11%	4%
Disagree	35%	37%	36%	43%
Strongly Disagree	25%	27%	31%	35%
Don't know	1%	2%	2%	0%
Not stated	0%	0%	2%	2%

In 2005, the proportion of respondents that strongly disagreed or disagreed with the statement “tourism does not affect me personally” rose sharply to 78 percent from 67 percent in 2003. More of the tourism workers (84 percent) than the non-tourism workers (70 percent) strongly disagreed or disagreed with this statement. Also more of those aged '30-49' (85 percent) than any of the other age groups shared these sentiments.

ATTITUDE STATEMENT – GRAPH

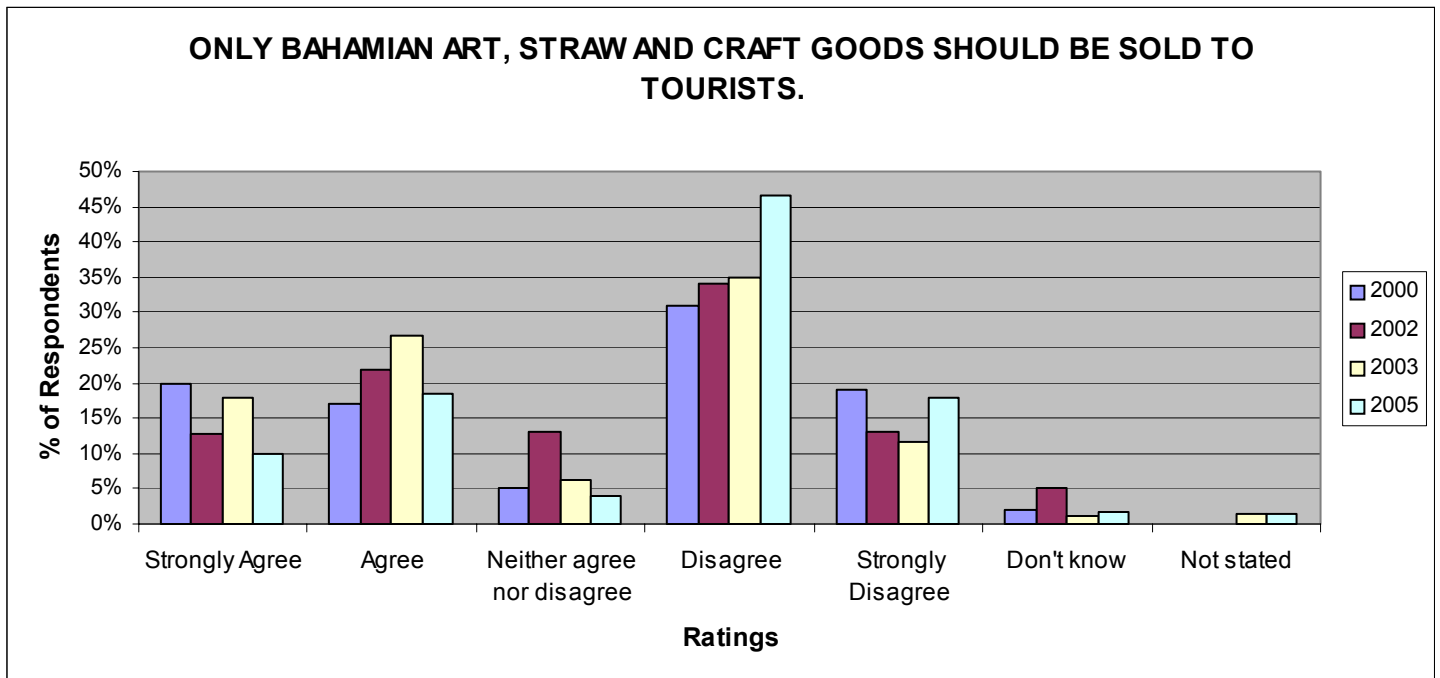


ATTITUDE STATEMENT

ONLY BAHAMIAN ART, STRAW AND CRAFT GOODS SHOULD BE SOLD TO TOURISTS.				
	2000	2002	2003	2005
Strongly Agree	20%	13%	18%	10%
Agree	17%	22%	27%	19%
Neither agree nor disagree	5%	13%	6%	4%
Disagree	31%	34%	35%	47%
Strongly Disagree	19%	13%	12%	18%
Don't know	2%	5%	1%	2%
Not stated	0%	0%	1%	1%

Between 2003 and 2005, the percentage of interviewees that strongly disagreed or disagreed with this statement advanced from 47 to 65 percent. Less of the most senior respondents (55 percent) than that of the youngest (79 percent) strongly disagreed or disagreed with this statement.

ATTITUDE STATEMENT – GRAPH

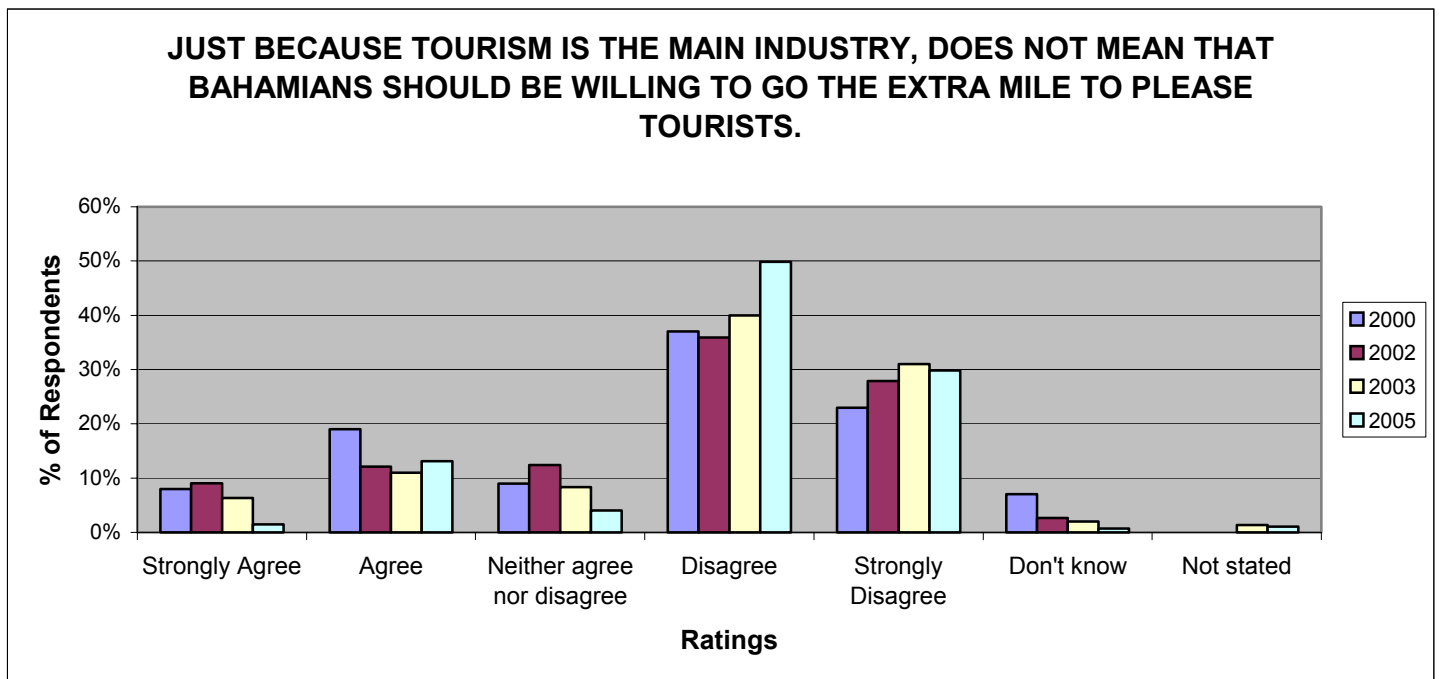


ATTITUDE STATEMENT

JUST BECAUSE TOURISM IS THE MAIN INDUSTRY, DOES NOT MEAN THAT BAHAMIANS SHOULD BE WILLING TO GO THE EXTRA MILE TO PLEASE TOURISTS.				
	2000	2002	2003	2005
Strongly Agree	8%	9%	6%	1%
Agree	19%	12%	11%	13%
Neither agree nor disagree	9%	12%	8%	4%
Disagree	37%	36%	40%	50%
Strongly Disagree	23%	28%	31%	30%
Don't know	7%	3%	2%	1%
Not stated	0%	0%	1%	1%

In 2005, more than three-quarters (80 percent) of the interviewees strongly disagreed or disagreed. This represents an increase of 9 percentage points over from the 2003 figure. More males (85 percent) than females (74 percent) felt the same way.

ATTITUDE STATEMENT – GRAPH

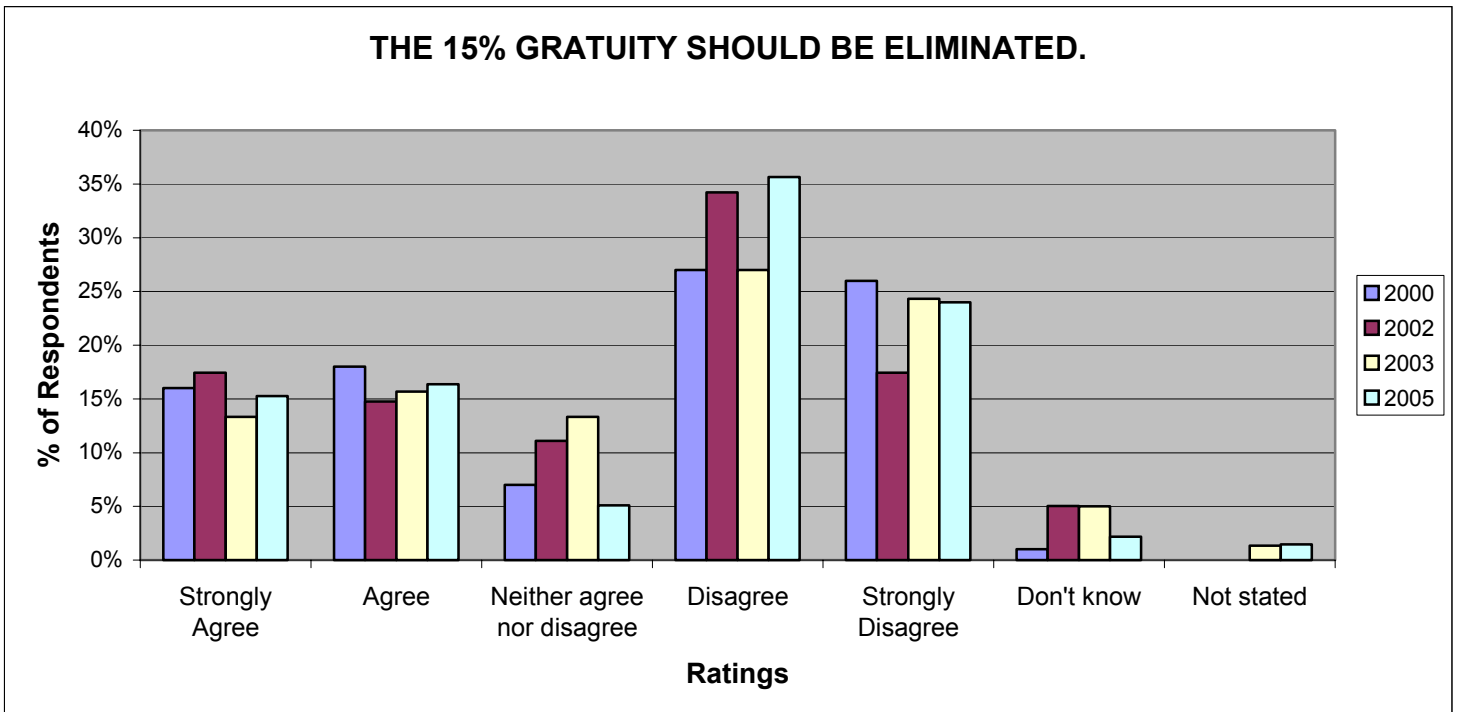


ATTITUDE STATEMENT

THE 15% GRATUITY SHOULD BE ELIMINATED.				
	2000	2002	2003	2005
Strongly Agree	16%	17%	13%	15%
Agree	18%	15%	16%	16%
Neither agree nor disagree	7%	11%	13%	5%
Disagree	27%	34%	27%	36%
Strongly Disagree	26%	17%	24%	24%
Don't know	1%	5%	5%	2%
Not stated	0%	0%	1%	1%

The portion of individuals questioned that strongly disagreed or disagreed that “the 15% gratuity should be eliminated”, rose from 51 percent in 2003 to 60 percent in 2005. More of the tourism workers (63 percent) than the non-tourism workers (56 percent) strongly disagreed or disagreed with this statement. A greater proportion of those ‘15-29’ (67 percent) than those ‘50+’ (36 percent) shared identical views.

ATTITUDE STATEMENT – GRAPH

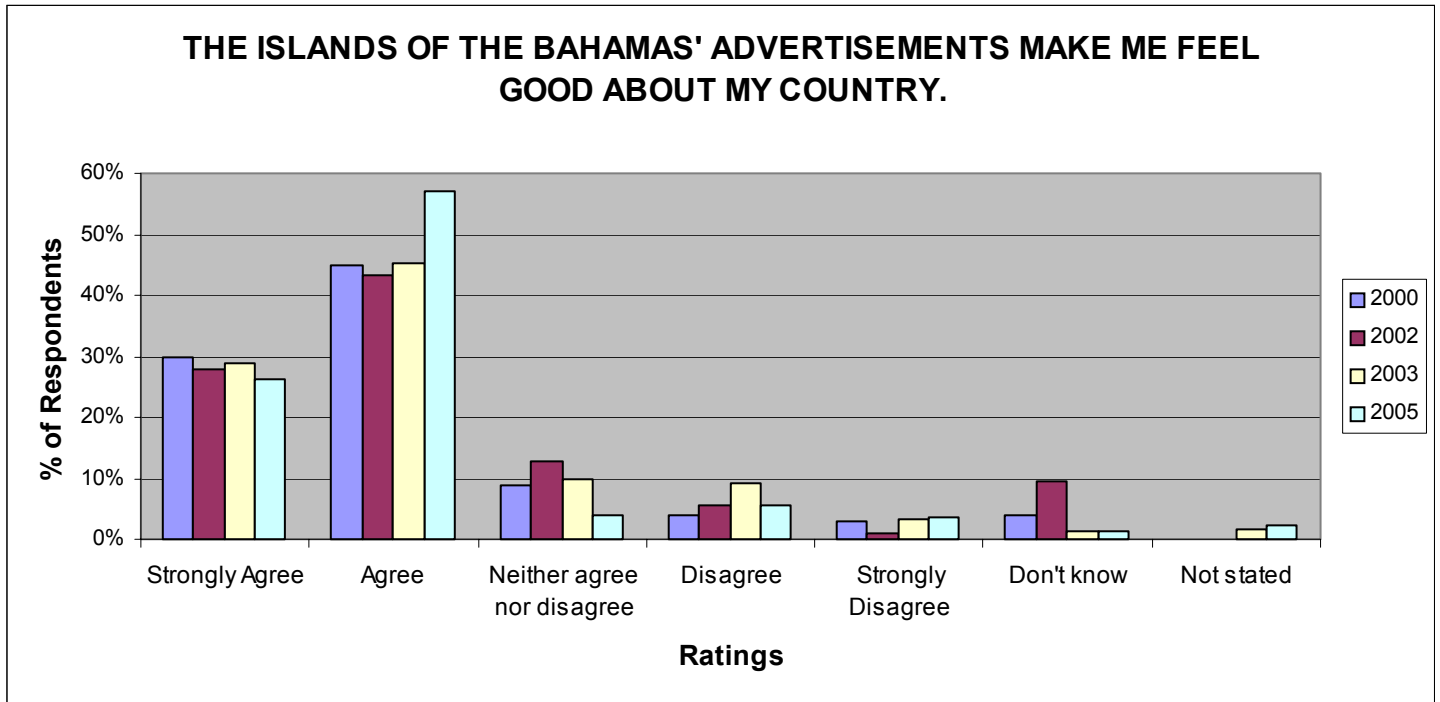


ATTITUDE STATEMENT

THE ISLANDS OF THE BAHAMAS' ADVERTISEMENTS MAKE ME FEEL GOOD ABOUT MY COUNTRY.				
	2000	2002	2003	2005
Strongly Agree	30%	28%	29%	26%
Agree	45%	43%	45%	57%
Neither agree nor disagree	9%	13%	10%	4%
Disagree	4%	6%	9%	5%
Strongly Disagree	3%	1%	3%	4%
Don't know	4%	9%	1%	1%
Not stated	0%	0%	2%	2%

Between 2003 and 2005, there was a 9-percentage point advance in the portion of interviewees that strongly agreed or agreed with this statement (74 versus 83 percent).

ATTITUDE STATEMENT – GRAPH



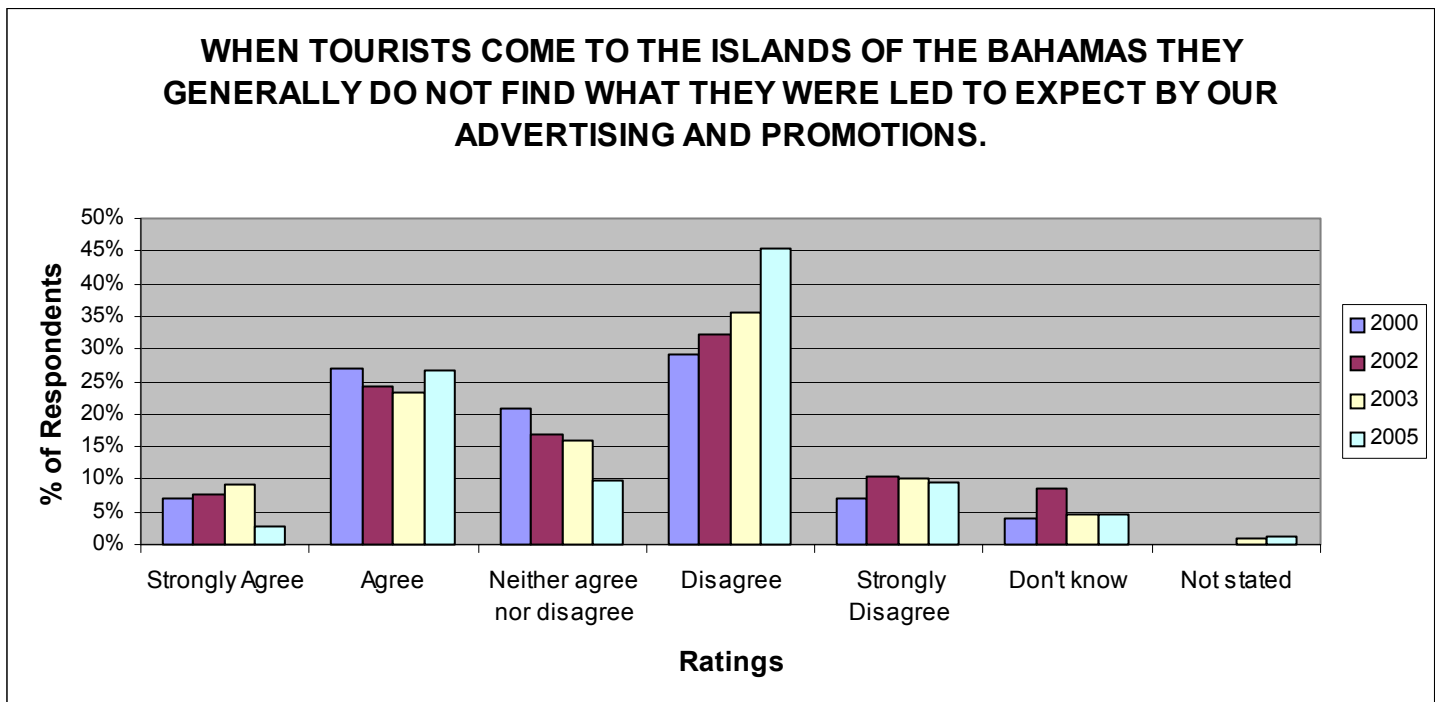
ATTITUDE STATEMENT

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.

	2000	2002	2003	2005
Strongly Agree	7%	8%	9%	3%
Agree	27%	24%	23%	27%
Neither agree nor disagree	21%	17%	16%	10%
Disagree	29%	32%	36%	45%
Strongly Disagree	7%	10%	10%	9%
Don't know	4%	9%	5%	5%
Not stated	0%	0%	1%	1%

In 2005, 54 percent of the interviewees strongly disagreed or disagreed – an increase from the 2003 figure (46 percent). Nearly two-thirds (64 percent) of the youngest respondents but only 48 percent those aged '30-49' had identical opinions.

ATTITUDE STATEMENT – GRAPH

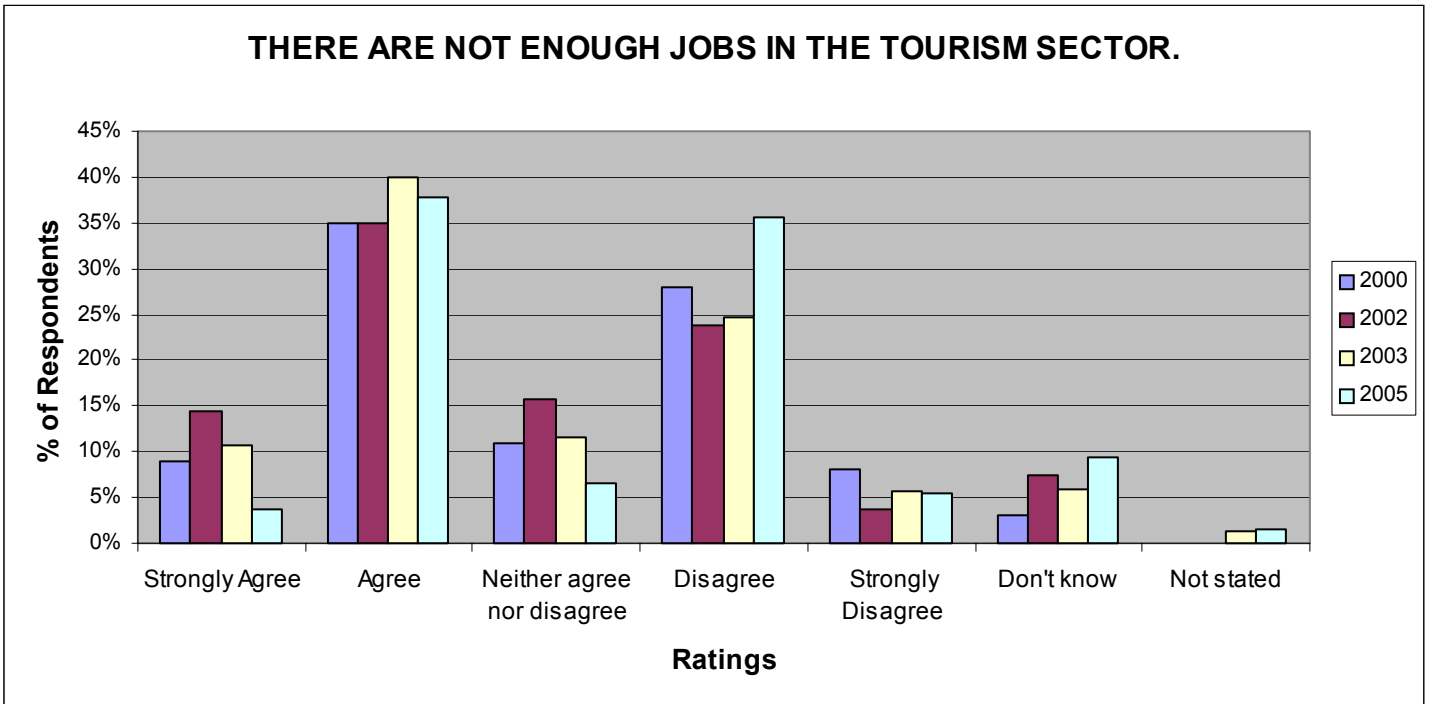


ATTITUDE STATEMENT

THERE ARE NOT ENOUGH JOBS IN THE TOURISM SECTOR.				
	2000	2002	2003	2005
Strongly Agree	9%	14%	11%	4%
Agree	35%	35%	40%	38%
Neither agree nor disagree	11%	16%	12%	7%
Disagree	28%	24%	25%	36%
Strongly Disagree	8%	4%	6%	5%
Don't know	3%	7%	6%	9%
Not stated	0%	0%	1%	1%

Forty-one percent of the interviewees strongly disagreed or disagreed that “there are not enough jobs in the tourism sector”. This is a gain of 11 percentage points over the 2003 figure (30 percent). More of the tourism workers (46 percent) than the non-tourism workers (35 percent) shared these corresponding views.

ATTITUDE STATEMENT – GRAPH

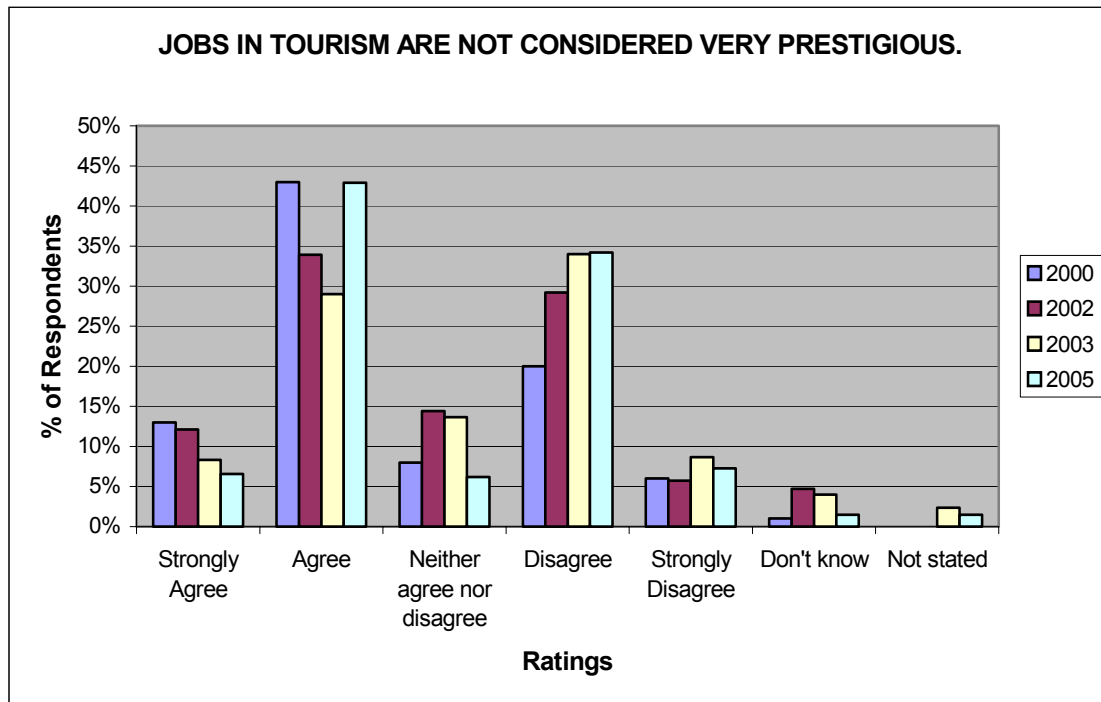


ATTITUDE STATEMENT

JOBS IN TOURISM ARE NOT CONSIDERED VERY PRESTIGIOUS.				
	2000	2002	2003	2005
Strongly Agree	13%	12%	8%	7%
Agree	43%	34%	29%	43%
Neither agree nor disagree	8%	14%	14%	6%
Disagree	20%	29%	34%	34%
Strongly Disagree	6%	6%	9%	7%
Don't know	1%	5%	4%	1%
Not stated	0%	0%	2%	1%

In 2005, the percentage of Grand Bahamian residents that strongly agreed or agreed that “jobs in tourism are not considered very prestigious” rose sharply to 50 percent from 37 percent in 2003. Fifty-five percent of males versus 44 percent of the females had the identical responses.

ATTITUDE STATEMENT – GRAPH

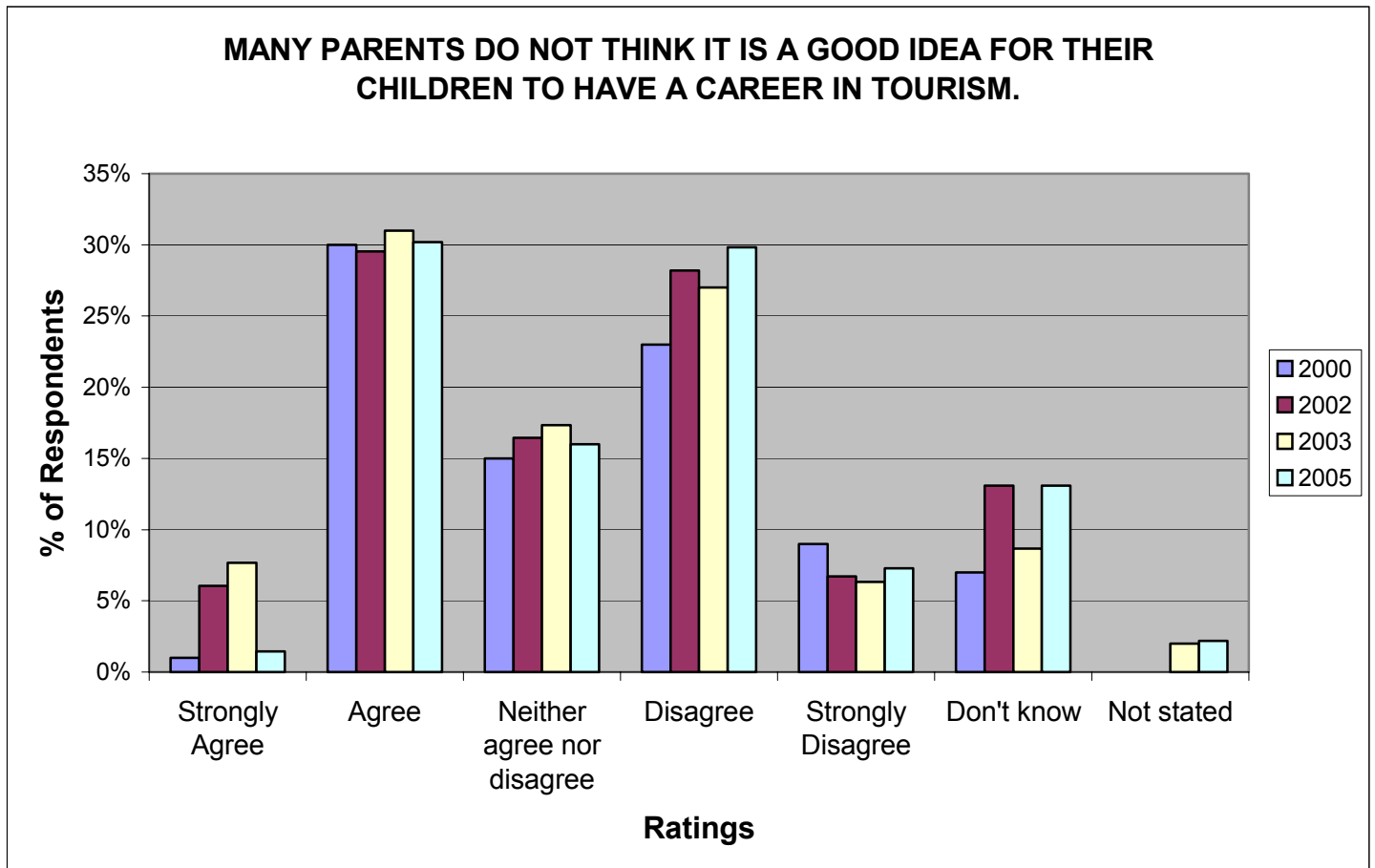


ATTITUDE STATEMENT

MANY PARENTS DO NOT THINK IT IS A GOOD IDEA FOR THEIR CHILDREN TO HAVE A CAREER IN TOURISM.				
	2000	2002	2003	2005
Strongly Agree	1%	6%	8%	1%
Agree	30%	30%	31%	30%
Neither agree nor disagree	15%	16%	17%	16%
Disagree	23%	28%	27%	30%
Strongly Disagree	9%	7%	6%	7%
Don't know	7%	13%	9%	13%
Not stated	0%	0%	2%	2%

In 2005, about one-third (31 percent) of the interviewees strongly agreed or agreed – a decline from the 2003 figure (39 percent). Similarly, 36 percent of those '15-29' versus 26 percent of those '50+' had matching opinions.

ATTITUDE STATEMENT – GRAPH

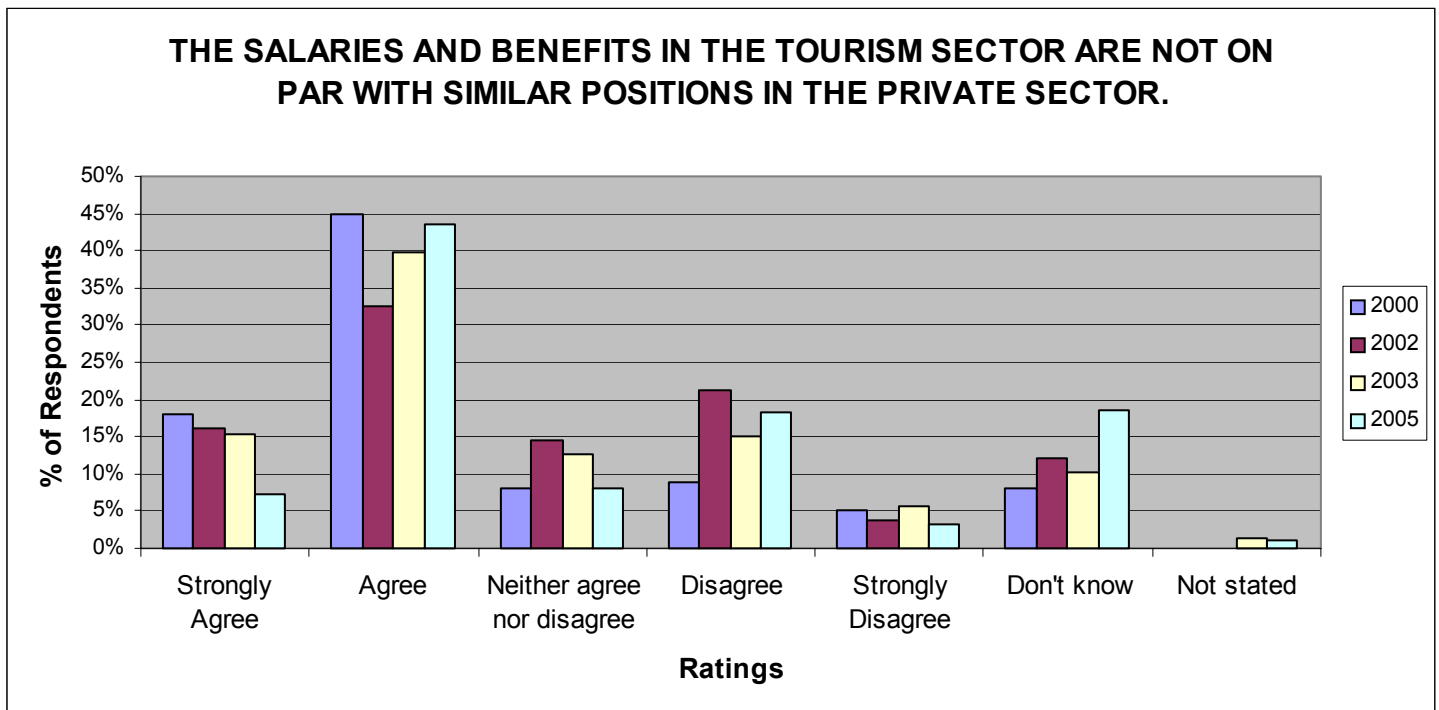


ATTITUDE STATEMENT

THE SALARIES AND BENEFITS IN THE TOURISM SECTOR ARE NOT ON PAR WITH SIMILAR POSITIONS IN THE PRIVATE SECTOR.				
	2000	2002	2003	2005
Strongly Agree	18%	16%	15%	7%
Agree	45%	33%	40%	44%
Neither agree nor disagree	8%	14%	13%	8%
Disagree	9%	21%	15%	18%
Strongly Disagree	5%	4%	6%	3%
Don't know	8%	12%	10%	19%
Not stated	0%	0%	1%	1%

In 2005, 51 percent of the interviewees strongly agreed or agreed – a slight decrease from the 2003 figure (55 percent). A larger proportion of the '15-29' year olds (61 percent) than the '50+' year olds (43 percent) gave identical responses.

ATTITUDE STATEMENT – GRAPH

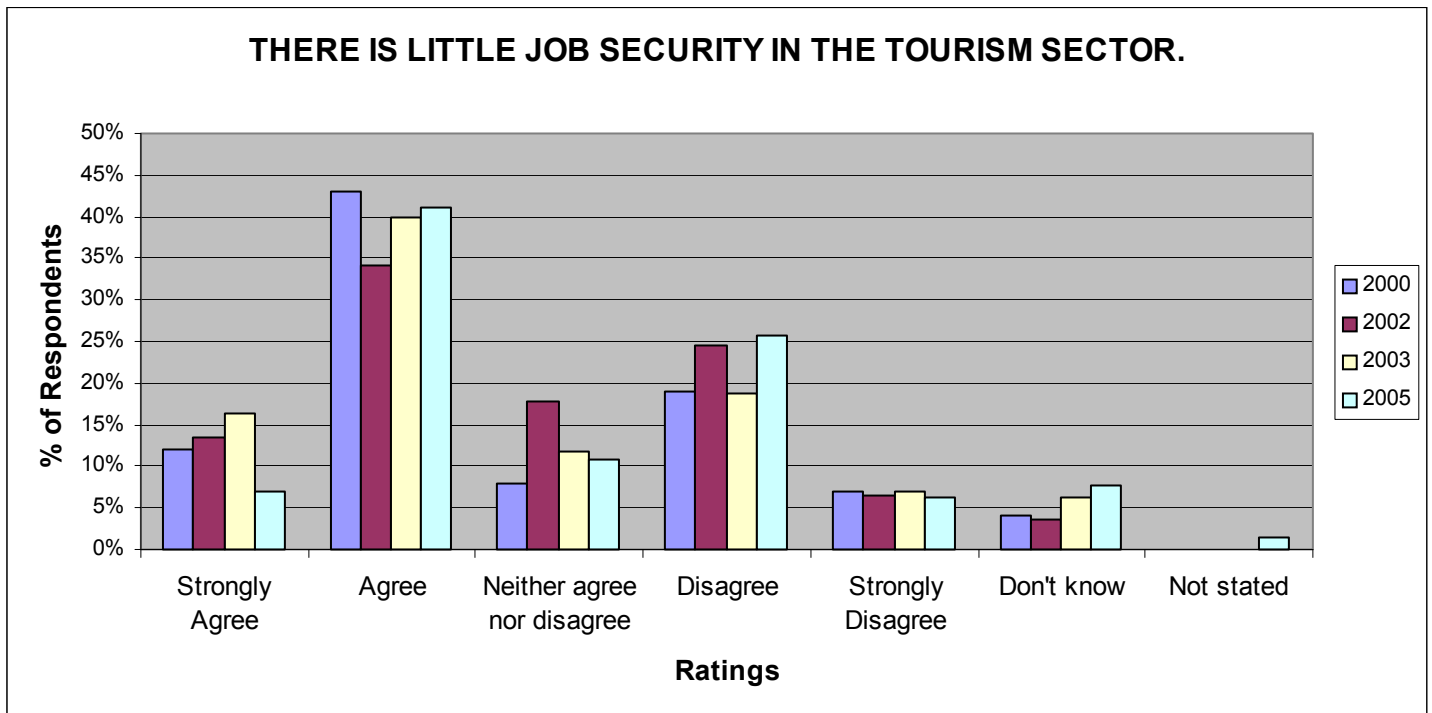


ATTITUDE STATEMENT

THERE IS LITTLE JOB SECURITY IN THE TOURISM SECTOR.				
	2000	2002	2003	2005
Strongly Agree	12%	13%	16%	7%
Agree	43%	34%	40%	41%
Neither agree nor disagree	8%	18%	12%	11%
Disagree	19%	24%	19%	26%
Strongly Disagree	7%	6%	7%	6%
Don't know	4%	4%	6%	8%
Not stated	0%	0%	0%	1%

In 2005, the proportion of respondents that strongly disagreed or disagreed that “there is little job security in the tourism sector” climbed to 32 percent from 26 percent in 2003. Forty percent of the tourism workers versus 23 percent of the non-tourism workers strongly disagreed or disagreed with this statement.

ATTITUDE STATEMENT – GRAPH

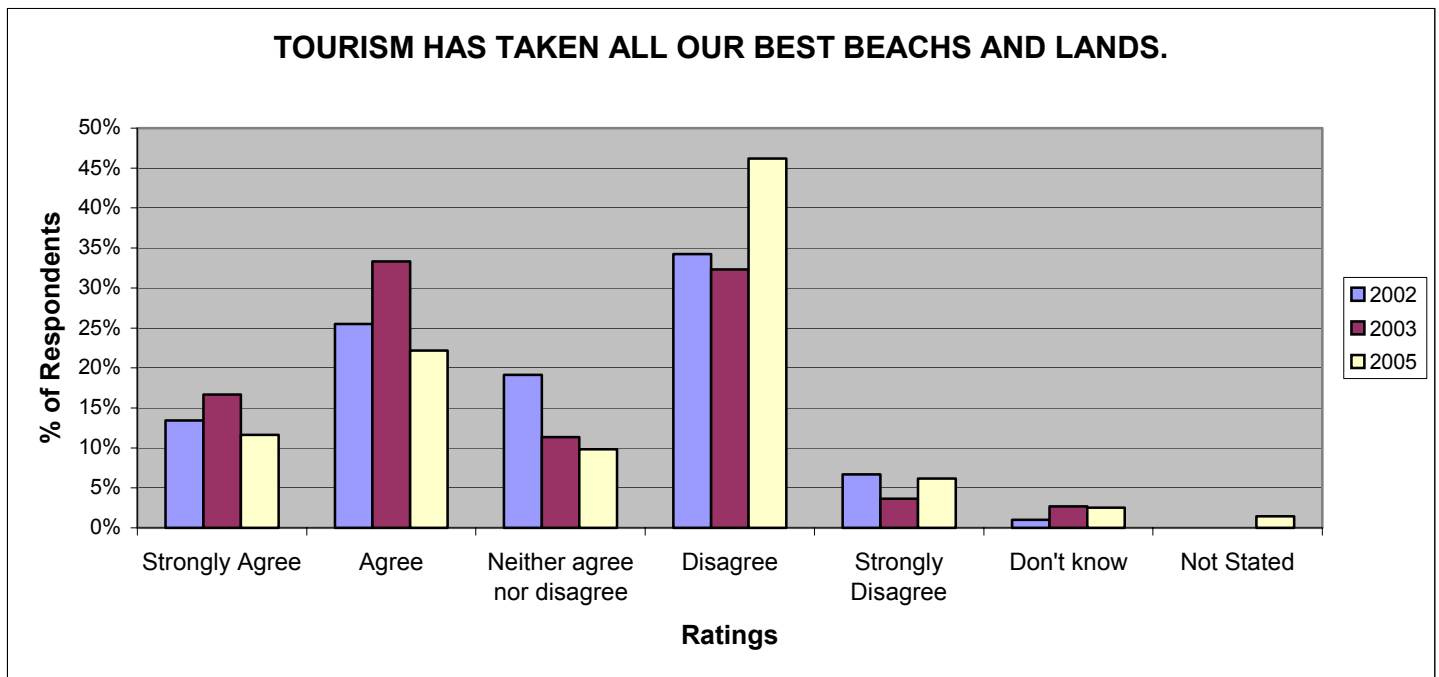


ATTITUDE STATEMENT

TOURISM HAS TAKEN ALL OUR BEST BEACHES AND LAND			
	2002	2003	2005
Strongly Agree	13%	17%	12%
Agree	26%	33%	22%
Neither agree nor disagree	19%	11%	10%
Disagree	34%	32%	46%
Strongly Disagree	7%	4%	6%
Don't know	1%	3%	3%
Not Stated	0%	0%	1%

The percentage of Grand Bahamians that strongly disagreed or disagreed with the statement “tourism has taken all our best beaches and land” leapt to 52 percent in 2005 from 36 percent in 2003. More of the tourism workers (57 percent) than the non-tourism workers (47 percent) had parallel opinions.

ATTITUDE STATEMENT – GRAPH

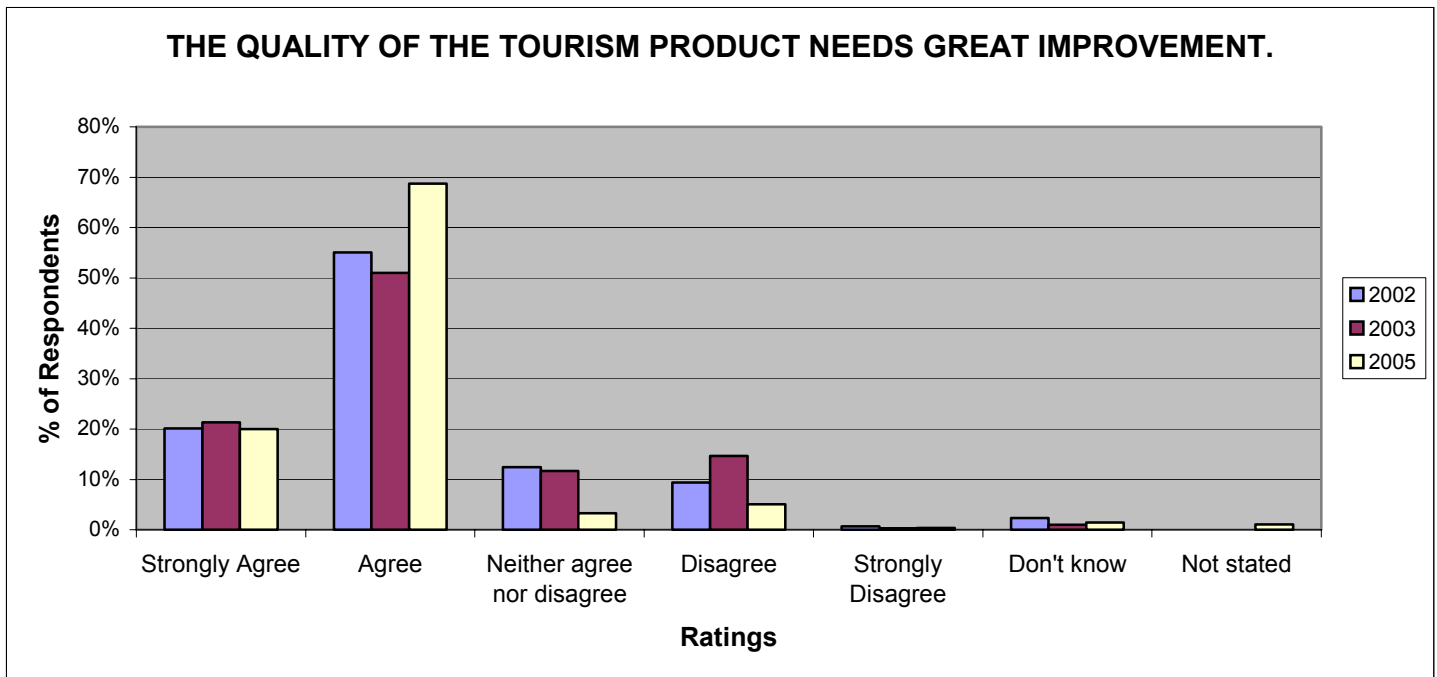


ATTITUDE STATEMENT

THE QUALITY OF THE TOURISM PRODUCT NEEDS GREAT IMPROVEMENT.			
	2002	2003	2005
Strongly Agree	20%	21%	20%
Agree	55%	51%	69%
Neither agree nor disagree	12%	12%	3%
Disagree	9%	15%	5%
Strongly Disagree	1%	0%	0%
Don't know	2%	1%	1%
Not stated	0%	0%	1%

The portion of respondents that strongly agreed or agreed with the statement “the quality of the tourism product needs great improvement” surged from 72 percent in 2003 to 89 percent in 2005.

ATTITUDE STATEMENT – GRAPH

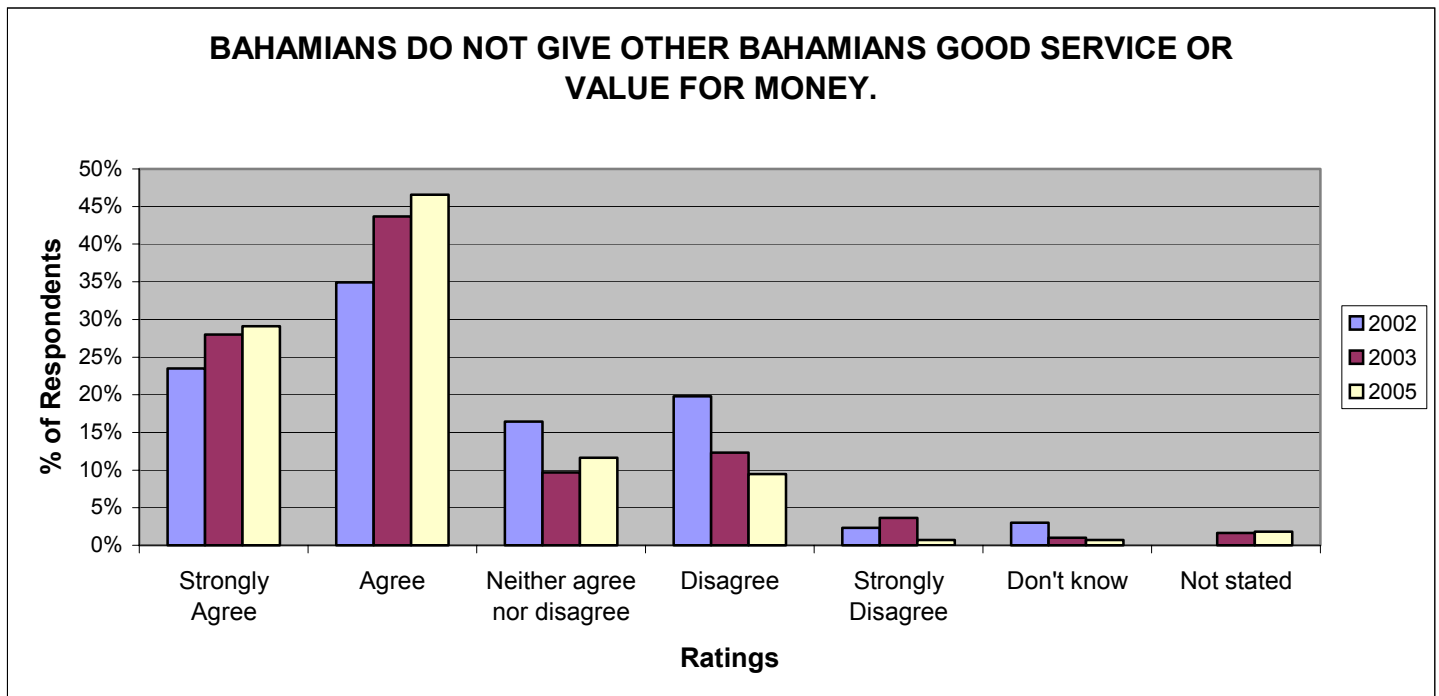


ATTITUDE STATEMENT

BAHAMIANS DO NOT GIVE OTHER BAHAMIANS GOOD SERVICE OR VALUE FOR MONEY.			
	2002	2003	2005
Strongly Agree	23%	28%	29%
Agree	35%	44%	47%
Neither agree nor disagree	16%	10%	12%
Disagree	20%	12%	9%
Strongly Disagree	2%	4%	1%
Don't know	3%	1%	1%
Not stated	0%	2%	2%

In 2005, 76 percent of the interviewees strongly agreed or agreed – an increase from the 2003 figure (72 percent). More of the oldest respondents (81 percent) than those aged '15-29' (72 percent) shared these same sentiments.

ATTITUDE STATEMENT – GRAPH

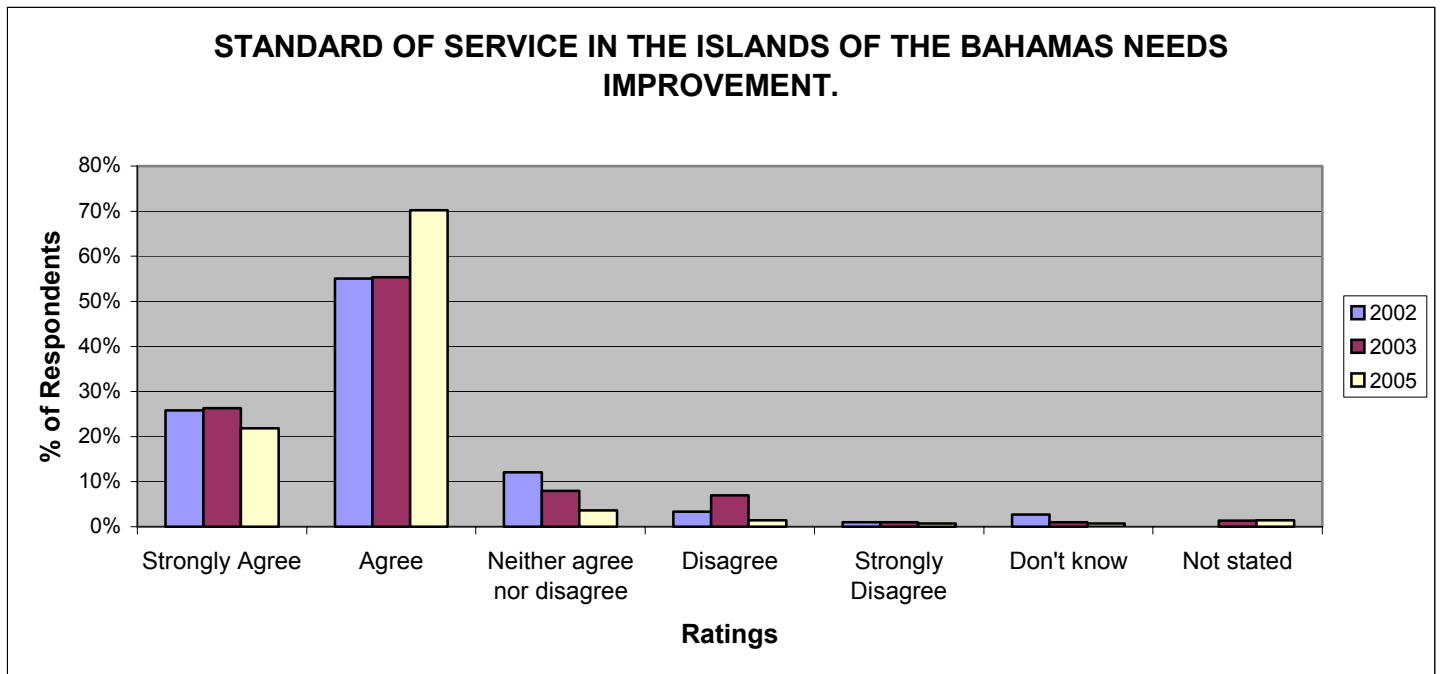


ATTITUDE STATEMENT

STANDARD OF SERVICE IN THE ISLANDS OF THE BAHAMAS NEEDS IMPROVEMENT.			
	2002	2003	2005
Strongly Agree	26%	26%	22%
Agree	55%	55%	70%
Neither agree nor disagree	12%	8%	4%
Disagree	3%	7%	1%
Strongly Disagree	1%	1%	1%
Don't know	3%	1%	1%
Not stated	0%	1%	1%

In 2005, the overwhelming majority (92 percent) of the respondents strongly agreed or agreed that the “standard of service in the Islands of The Bahamas needs improvement”. This is a hefty increase over the 2003 figure (81 percent).

ATTITUDE STATEMENT – GRAPH



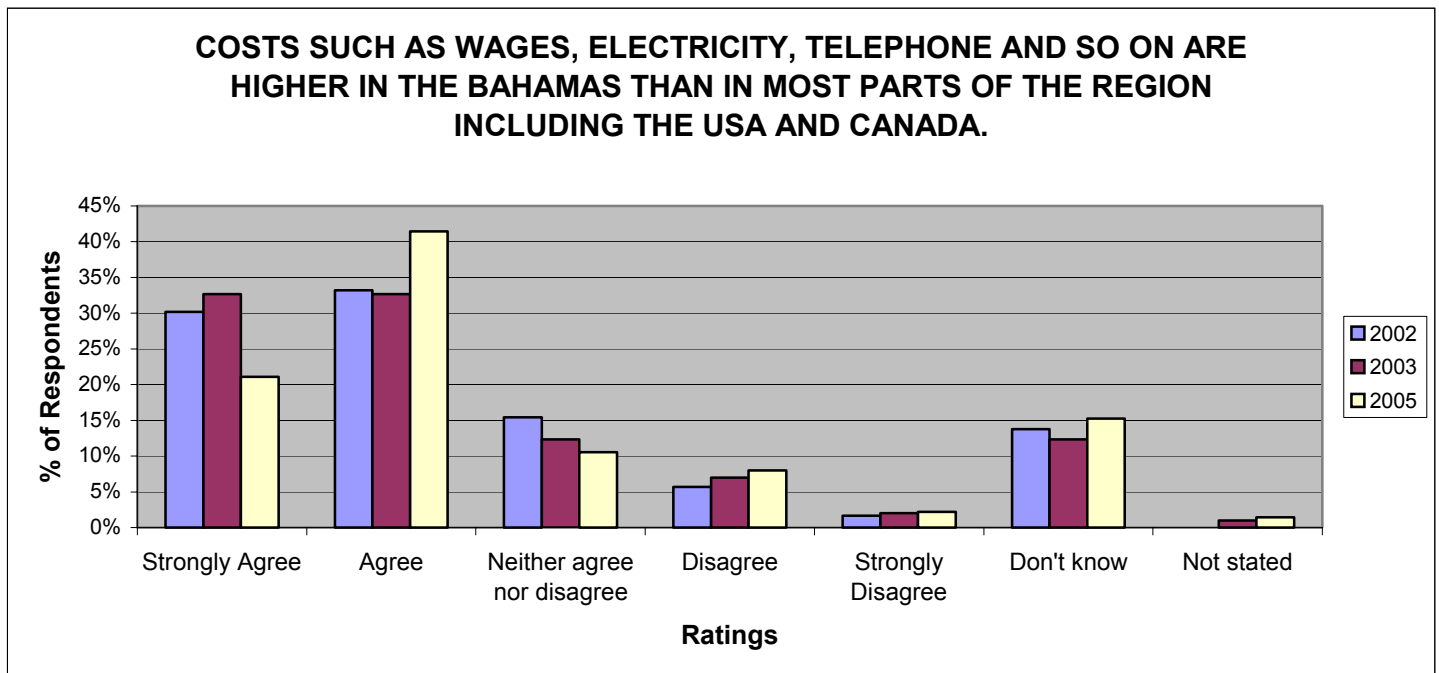
ATTITUDE STATEMENT

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%	33%	21%
Agree	33%	33%	41%
Neither agree nor disagree	15%	12%	11%
Disagree	6%	7%	8%
Strongly Disagree	2%	2%	2%
Don't know	14%	12%	15%
Not stated	0%	1%	1%

In 2005, 62 percent of the interviewees strongly agreed or agreed – a decline from the 2003 figure (66 percent). More of those aged '50+' (69 percent) than those '15-29' (53 percent) strongly agreed or agreed with this statement.

ATTITUDE STATEMENT – GRAPH

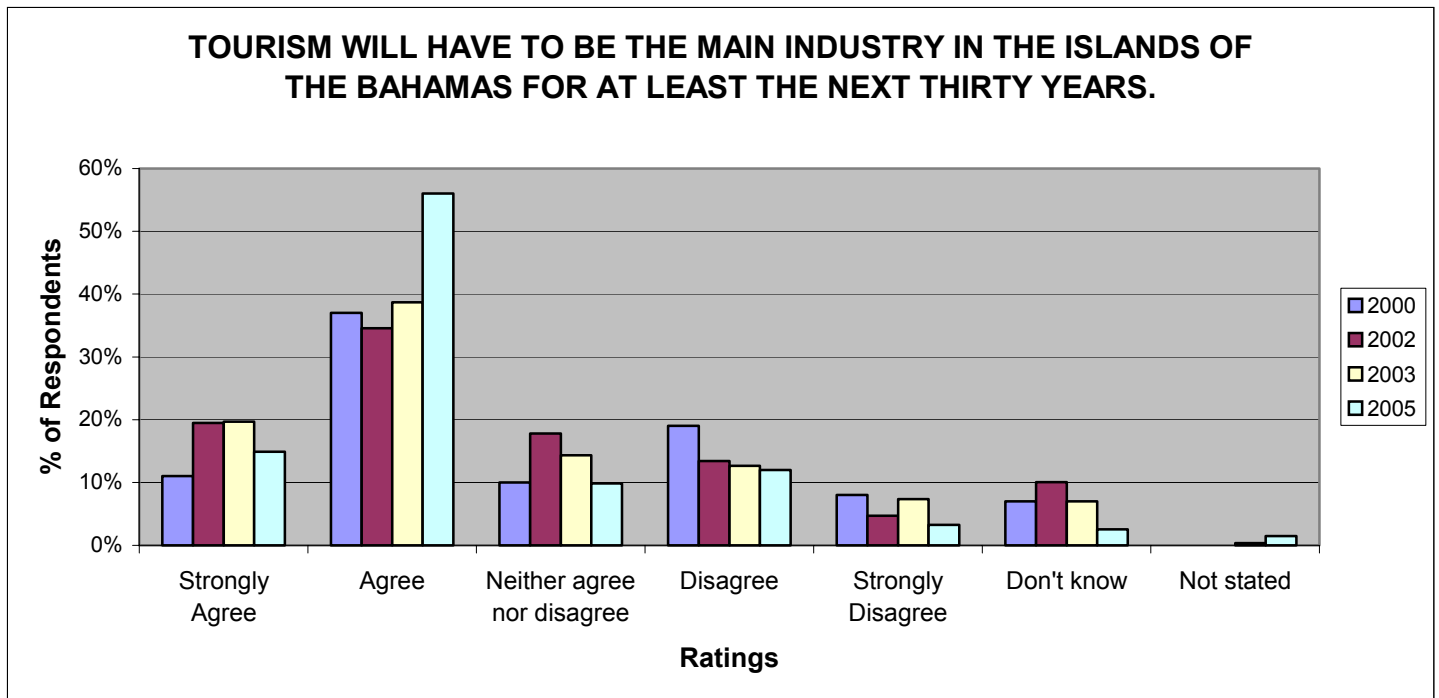


ATTITUDE STATEMENT

TOURISM WILL HAVE TO BE THE MAIN INDUSTRY IN THE ISLANDS OF THE BAHAMAS FOR AT LEAST THE NEXT THIRTY YEARS.				
	2000	2002	2003	2003
Strongly Agree	11%	19%	20%	15%
Agree	37%	35%	39%	56%
Neither agree nor disagree	10%	18%	14%	10%
Disagree	19%	13%	13%	12%
Strongly Disagree	8%	5%	7%	3%
Don't know	7%	10%	7%	3%
Not stated	0%	0%	0%	1%

Between 2003 (59 percent) and 2005 (71 percent), there was a surge in the percentage of Grand Bahamians that strongly agreed or agreed with the statement “tourism will have to be the main industry in the Islands of The Bahamas for at least the next thirty years”. Seventy-nine percent of the youngest respondents versus 62 percent of those aged '30-49' asserted identical opinions.

ATTITUDE STATEMENT – GRAPH



MEDIA USAGE

TOP TEN LOCAL AND INTERNATIONAL TELEVISION STATIONS WATCHED		
	2003	2005
ZNS (NEWS)	-	54%
ZNS 13	75%	25%
CBS	16%	25%
NBC	18%	24%
ABC	24%	21%
CNN	19%	20%
LIFETIME	11%	18%
TBN	10%	17%
FOX	19%	13%
TNT	5%	12%

TOP 5 LOCAL AND INTERNATIONAL RADIO STATIONS LISTENED TO		
	2003	2005
100 JAMZ	37%	39%
102.1	34%	37%
810	39%	32%
COOL 96	37%	32%
ZNS	26%	19%

TOP 5 LOCAL AND INTERNATIONAL NEWSPAPERS READ		
	2003	2005
FREEPORT NEWS	87%	88%
TRIBUNE	28%	38%
THE PUNCH	29%	37%
GUARDIAN	22%	27%
MIAMI HERALD	30%	25%

TOP 10 LOCAL AND INTERNATIONAL MAGAZINES READ		
	2003	2005
NONE	50%	51%
EBONY	7%	12%
JET	9%	10%
BUY AND SELL	11%	7%
OPRAH	3%	7%
TIME	4%	5%
PEOPLE	3%	3%
ENQUIRER	1%	3%
ESSENCE	1%	2%
WHAT-TO-DO	1%	2%