

Ministry of Tourism & Aviation



Bahamian Residents General Public Survey November 1 - 22, 2008



New Providence

Table of Contents

I. INTRODUCTION	4
1.1 Research Objectives.....	4
II. METHODOLOGY	5
2.1 Development of Hypotheses and Questionnaire	5
2.1.1 Formulation of Null Hypotheses	5
2.1.2 The Questionnaire	5
2.1.3 Demographics.....	8
2.1.4 Phase 2: Quantitative Research, New Providence Report	9
III. RESULTS AND ANALYSIS	10
3.1 Demographics	10
3.2 Attitudes toward Employment in the Tourist Industry.....	11
3.3 Effects of Tourism	14
3.4 Reasons to Visit The Bahamas	16
3.5 Selected Other Measures of Attitude toward Tourism.....	17
3.6 Domestic Travel.....	18
3.7 General Attitude Statements	20
3.8 Media Usage	34
3.9 Associations.....	38
3.9.1 Associations by whether Job is in Tourism Industry.....	38
3.9.2 Associations by Sex.....	39
3.9.3 Associations by Age-Group.....	40
3.9.4 Associations by Education.....	40
3.9.5 Associations by Income.....	42
IV. CONCLUSIONS	43
V. APPENDIX	46
5.1 Percent (%) of Respondents – Responses to General Attitude Statements by Survey Year 1996-2008.....	47

Table of Contents cont'd

5.2 Average (Mean) Differences in Attitude Statements	53
5.2.1 Average (Mean) Differences in Attitude Statements:.....	53
Tourism Industry vs. Non-Tourism Industry Job	53
5.2.2 Average (Mean) Differences in Attitude Statements: Sex	53
5.2.3 Average (Mean) Differences in Attitude Statements: Age	54
5.2.4 Average (Mean) Differences in Attitude Statements: Education	54
5.2.5 Average (Mean) Differences in Attitude Statements: Income.....	55
5.3 Domestic Travel Average (Median Expenditure).....	56
5.4 Factor Analysis	57
5.5 Acknowledgements.....	60
5.6 Definition of Terms	62
VI. DETAILED TABLES	65

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, New Providence Report

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

The sampling plan involved the selection of persons based on **Quota and Convenience sampling**. The sex and age quota were based on frequency distributions from the 2000 Population Census.

III. RESULTS AND ANALYSIS

3.1 Demographics

- Gender distributions were virtually evenly split (47% male).
- The majority of respondents were 30-49 years (42%). Thirty-five percent were under 30 years, and the remaining 22% were 50 and older.
- Almost all (97%) the respondents completed at least high school. One out of five (21%) completed college/university and 16%, technical/vocational school.
- Looking at income levels, a little more than half (52%) had an annual salary of \$15,000 to under \$30,000. Around one fifth (19%, 18% respectively) made \$5,000 to under \$15,000 and \$30,000 to under \$50,000.
- A little more than half (52%) of the respondents worked in the tourism industry.
- The top three occupations of the respondents were: bus/ taxi driver (8%), "maid/ housekeeping" (6%) and sales/ store clerk (6%).

3.2 Attitudes toward Employment in the Tourist Industry

The proportion of residents that said they would choose to work in the tourism industry decreased to 70% in 2008 from 78% in 2006. Eighty-four percent (84%) of the persons employed in tourism declared that given a choice they would work in tourism. Amongst those that worked in non-tourism industries, there was a decline in the proportion – 68% in 2006 versus 55% in 2008.

Almost all (91%) of the bus driver/taxi drivers said that they would choose to work in the tourism industry. However, only 67% of the sale/ store clerks and 63% of the maids said the same thing.

For those who would choose to work in the tourism industry, the most popular reason by far (72%) was that they “enjoyed meeting people” (*Table 1*). At a distant second, 38% felt that a good salary can be earned in the tourism industry. Thirty-four percent (34%) thought working in the industry is a “good job”.

Table 1

Percent (%) of Respondents – Top Five Reasons Why Respondents Would Choose to Work in the Tourism Industry (n=210)

REASONS	2008	2006	2005	2003
Enjoy Meeting People /Interesting/Serving/Meet Interesting People/Nice People	72	52	64	56
Pay Is Good/Can Make Money/Good Living/Higher Salaries/Secure Jobs	38	19	20	12
I Like My Job/Fun/Good Job	34	13	11	6
Becoming An Ambassador For Your Country/Promoting The Bahamas	18	5	4	6
People's Person/Friendly Person	17	-	3	3

Among those who would choose *not* to work in the tourism industry (30%), the leading reason was the volatility of the industry and the perceived lack of job security (57%). This proportion was nearly five times that recorded in 2006 (12%). The other main reasons given were: liking their non-tourism job (38%) and the “low pay/no money” in the tourism industry (21%).

Table 2
Percent (%) of Respondents – Top Five Reasons Why Respondents Would Choose Not to Work in the Tourism Industry (n=90)

REASONS	2008	2006	2005	2003
Unstable/Volatile/Too Many Variables/Seasonal/ No Job Security	57	12	13	13
I Like My Job/Good Job/Prefer Another Industry	38	12	12	11
Low Pay/No Money	21	14	14	6
Not Interested/Not My Field/I Do Not Like Tourism Industry	16	17	11	10
I Like Having My Own Business	13	-	10	2

In 2008, nearly half (46%) of the persons questioned stated that they felt that tourism was *not* the first choice of high school and college graduates. That proportion is 10 percentage points higher than in 2006.

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, 45% responded that the tourism industry had “little job security/unstable”--five times the percentage that gave that answer in 2006 (9%). Forty-two percent (42%) felt that the graduates were “interested in another industry” and 34% felt the tourism jobs paid “low salaries/not enough money” (*Table 3*).

Table 3

Percent (%) of Respondents – Top Five Reasons Why Tourism Jobs Are Not the First Choice for High School and College Graduates (n=163)

REASONS	2008	2006	2005	2003
Little Job Security/Unstable	45	9	9	6
Interested In Another Industry/Many Other Jobs To Choose From	42	26	17	10
Low Salaries/Not Enough Money	34	23	33	9
Not Considered Prestigious/Bottom Jobs/Not Important Enough	25	-	16	21
Prefer Office Type Jobs	19	9	3	6

The persons surveyed were asked to suggest what could be done to attract the best and brightest to tourism. “Train/ educate in schools/ workshops/ seminars/school fairs” (34%); provide “more interesting benefits/ incentives/ make jobs/industry more exciting” (15%) and “pay high salaries/ more money/ upgrade salary “(15%) were the three top answers given.

Table 4

Percent (%) of Respondents – Top Five Suggestions to Attract Best and Brightest to the Tourism Industry (n=267)

SUGGESTIONS	2008	2006	2005	2003
Train/ Educate In Schools/ Workshops/ Seminars/ School Fairs	34	40	32	31
More Interesting Benefits/ Incentives/ Make Jobs/Industry More Exciting	15	7	15	10
Pay High Salaries/ More Money/ Upgrade Salary	15	21	22	27
Nothing	10	-	-	-
Advertise Market Properly/ Advertise More/ More Public Relations	6	8	12	7

3.3 Effects of Tourism

Nearly one-third (31%) of the respondents stated that “nothing” positive was happening in tourism. This is much higher than in 2006 when only 8% of New Providence residents felt the same way. A little more than one-fifth (22%) felt that “more jobs (had been) created” as a result of tourism. In 2006, 38% of the interviewees had declared that tourism had facilitated job creation.

Table 5

Percent (%) of Respondents – Top Five Positive Effects of Tourism In The Bahamas (n=295)

ITEMS MENTIONED	2008	2006	2005	2003
Nothing	31	8	12	11
More Jobs Created	22	38	40	41
Economy Booming / Economic Development/ Stable Economy/ Prosperity	8	19	19	11
Higher Standard Of Living/ Pleasant/ More Money/ Better Life	7	6	17	3
Cultural Exchange/ Exposure To Other Cultures	5	-	3	-

One-quarter of the respondents (26%) felt that there were *no* negative effects of tourism. In 2006, this proportion was 51% or about twice the 2008 statistic. The top negative things happening in tourism cited by the respondents were: crime (29%) and/or the declining economy (21%) (*Table 6*).

Table 6
Percent (%) of Respondents – Top Five Negative Effects of Tourism In The Bahamas (n=299)

ITEMS MENTIONED	2008	2006	2005	2003
Crime	29	26	29	18
None	26	51	38	43
Economy Is Declining/ Tourism Industry Is Down/ Recession	21	-	1	-
Drugs	8	3	6	9
Bad Attitude/ Attitude Change/ Bad Service	5	-	7	0

3.4 Reasons to Visit The Bahamas

The residents interviewed 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. Sixty-two percent (62%) said that they would tell the potential tourist about the friendliness and hospitality of the Bahamian people. More than half (53%) stated that they would brag about the Bahamian culture.

Table 7
Percent (%) of Respondents – Top Five Reasons (Other than “Sun, Sand and Sea”) for Visitors to Come to The Bahamas (n=299)

ITEMS MENTIONED	2008	2006	2005	2003
People/Friendly People/Warm People/Hospitality/ Beautiful People	62	52	46	49
Culture/Native Food And Drinks/Junkanoo/Festivals/Music	53	65	50	61
Beautiful Place/Best Place/Taste Of Paradise/ Better In The Bahamas	25	-	7	5
Atlantis/Beautiful Hotels/Nice Hotels/Great Accommodation	23	-	10	6
Family Islands/ Diverse/Tropical Island/700 Islands/Island Hopping	22	-	7	9

3.5 Selected Other Measures of Attitude toward Tourism

- Seven out of ten respondents (72 percent) did NOT feel that Bahamians are developing a negative attitude to the large number of visitors to our shores.
- Most (77%) 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.
- Sixty-one percent (61%) of the interviewees felt that the tourism industry does NOT use enough Bahamian food, music and other products or services.
- Most New Providence residents thought that all Bahamians should speak two languages, be it “English and Spanish” (84%) and/or “English and French” (60%).

3.6 Domestic Travel

A little more than half (52%) respondents had travelled to another Family Island in the past year; the mean was 2 (1.7) trips (range 0 to 40); averaging 2 (1.5) persons per trip (range 1 to 6 persons).

The mean total expenditure spend per trip is \$788 (range \$140 to \$5,640). Below is a breakdown of the average spent per trip for the following:

- Transportation -- \$318 (range \$125 to \$1,340)
- Lodging -- \$214 (range \$0 to \$2,500)
- Food -- \$107 (range \$0 to \$750)
- Recreation and Entertainment -- \$51 (range \$0 to \$500)
- Shopping -- \$77 (range \$0 - \$1,200)

Table 8

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

	2008	2006
Transportation (\$)	318	158
Lodging (\$)	214	160
Food (\$)	107	103
Recreation and Entertainment (\$)	51	58
Shopping (\$)	77	44
Total Expenditure (\$)	788	525

Demographics, such as age, sex, and tourism industry job, education and income were tested with expenditure categories to see if there were differences in average expenditure by these groups. There were no significant differences in expenditure by age, sex, education or job. However, there were significant differences by income group in the expenditure for the expenditure categories: lodging, recreation and total expenditure. For the most part, as income increased, so did expenditure in those categories. (*Analysis of Variance $p <= 0.05$; Table 9*).

Table 9

Average (Mean) Difference in Expenditure (B\$) by Income levels (n=156)

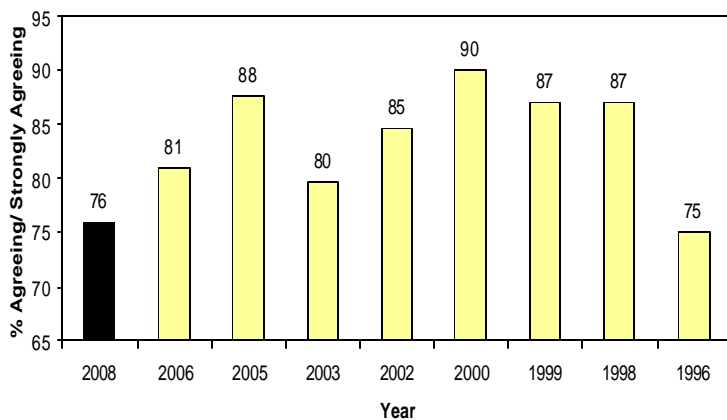
	Under \$5,000	5,000 - \$14,999	\$15,000 - \$29,999	\$30,000 - \$49,999	\$50,000 or over
Lodging (\$)	86	136	175	247	588
Recreation and Entertainment (\$)	46	23	64	31	115
Total Expenditure (\$)	677	676	742	704	1,520

3.7 General Attitude Statements

Following are the general attitude statements presented individually and compared with past surveys (Figures 1- 23). Discussed is the percent (%) that “Agreed/Strongly Agreed with each statement. Table 10 shows all response opinions for 2008.

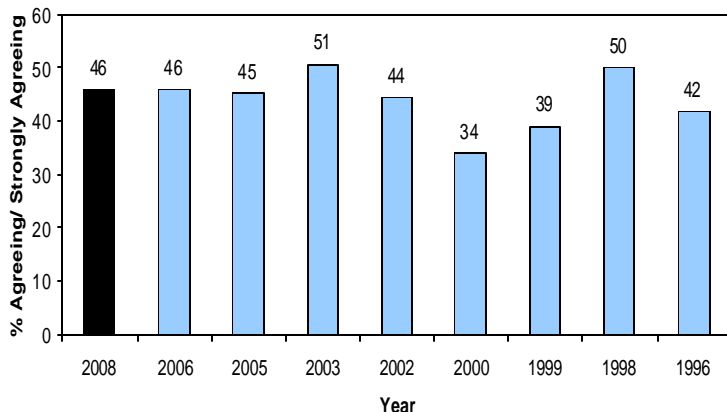
Figure 1-23

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



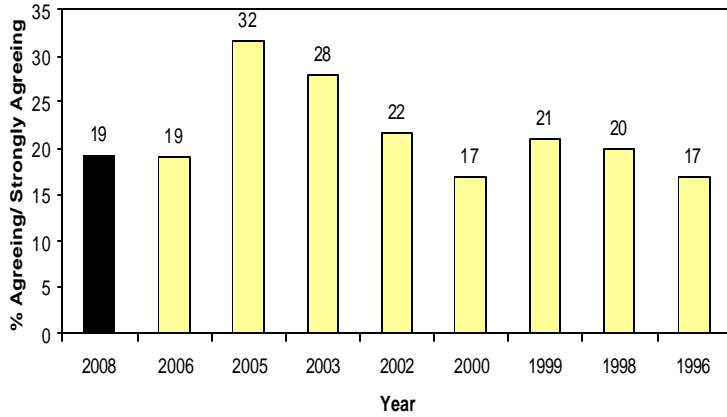
Seventy percent (76%) of the respondents agreed/strongly agreed that tourists were satisfied with their Bahamas experience. This is the lowest this proportion has been since 1998.

**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.**



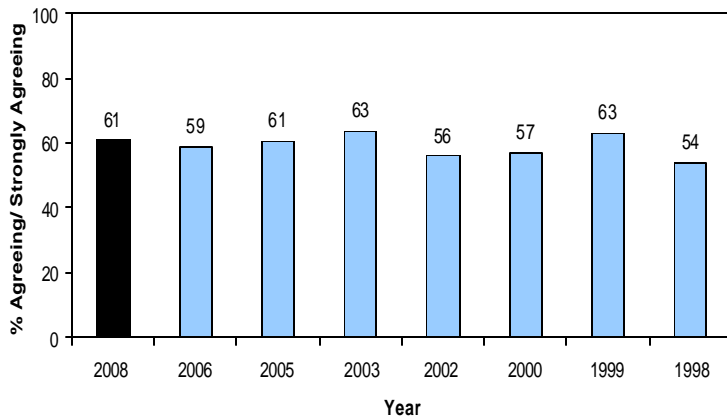
Less than half (46%) agreed that Bahamians serve as if they are doing the tourist a big favour. This trend was similar for other survey years, with the lowest point being in 2000 (34%).

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



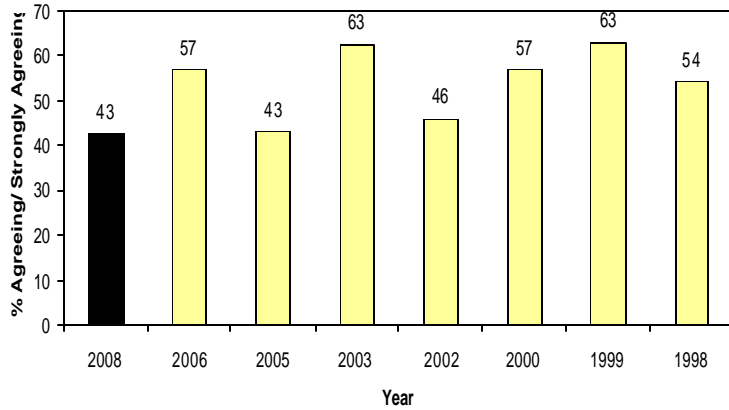
Around one out of five (19%) respondents, a minority, thought that tourism jobs are at the bottom of the ladder. This proportion was the same as recorded in 2006.

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



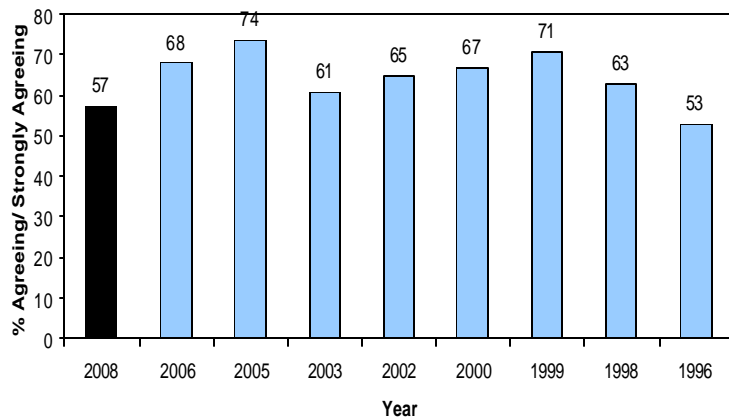
In 2008, 61% of the interviewees thought that their job was tourism related. More or less, this proportion has not changed in the last ten years.

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



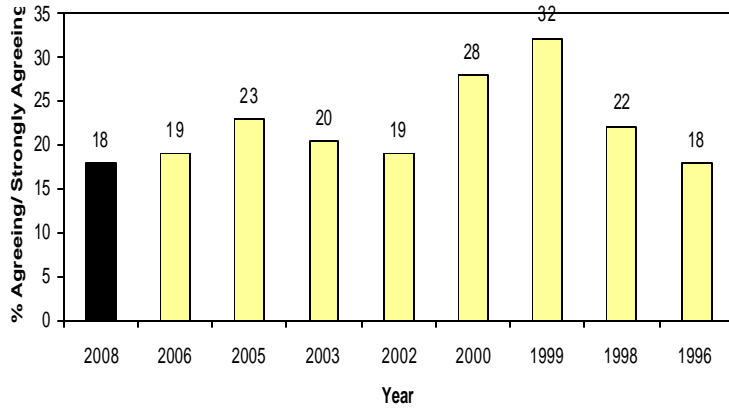
Forty-three percent (43%) of the respondents would like their child to work in the tourism industry. This was 14 percentage points lower than in 2006 (57%).

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



A little more than half (57%) of the interviewees thought that visitors get their money's worth when visiting The Bahamas. This is down from 68% that felt the same way in 2006.

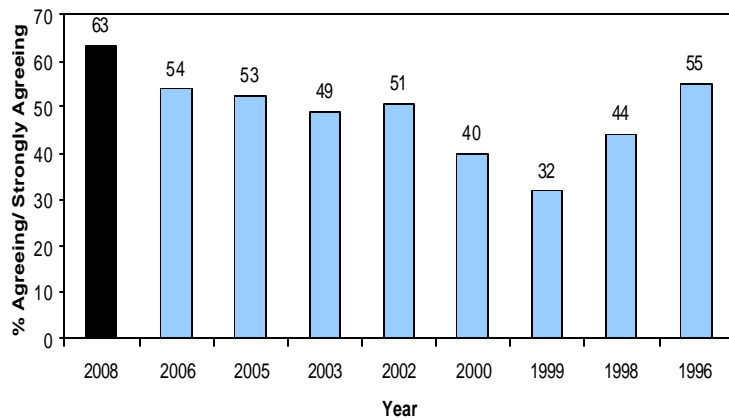
Survey Year Comparison Percent (%) of Respondents "Agreeing/Strongly Agreeing" – Tourism does not affect me personally.



A minority (18%) in 2008 believed that tourism does not affect them personally. This has changed relatively little in twelve years, reaching a peak at 32% in 1999.

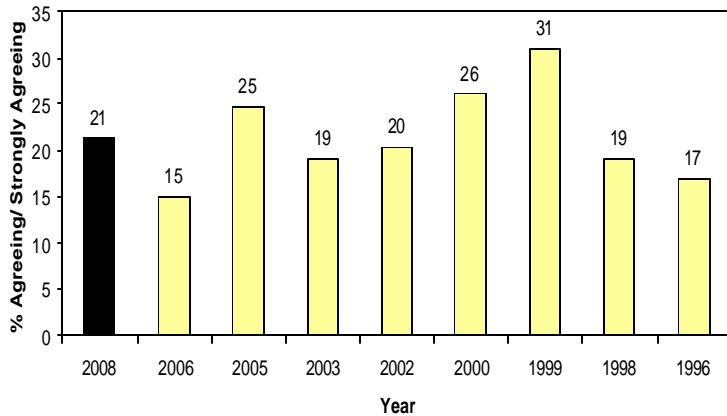
Thirteen percent (13%) of the bus/ taxi drivers, 11% of the maids and 6% of the sales/store clerks stated that tourism does not affect them personally.

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



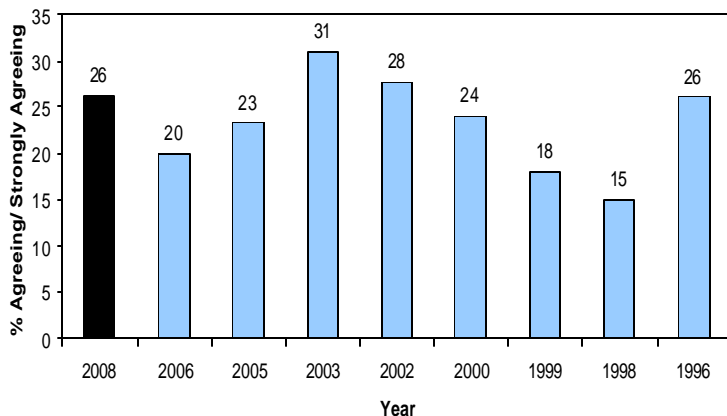
Almost two-thirds (63%) of New Providence residents felt that only Bahamian arts and crafts should be sold to tourists. This was a 9 percentage point increase since 2006 (54%).

**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.***



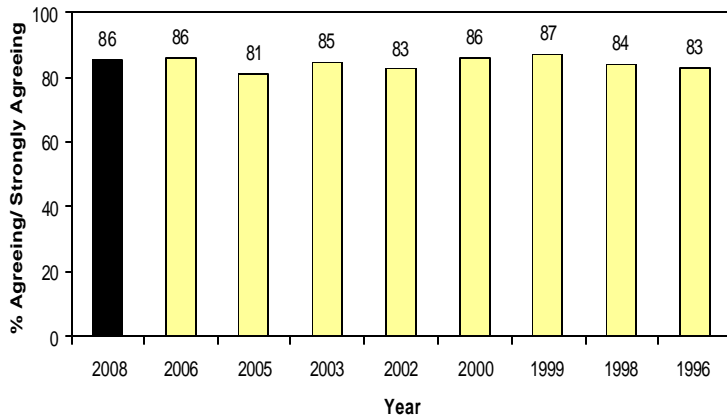
In 2008, 21% agreed that Bahamians should not go the extra mile to please tourists. This was 6 percentage points higher than the record low of 15% recorded in 2006.

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



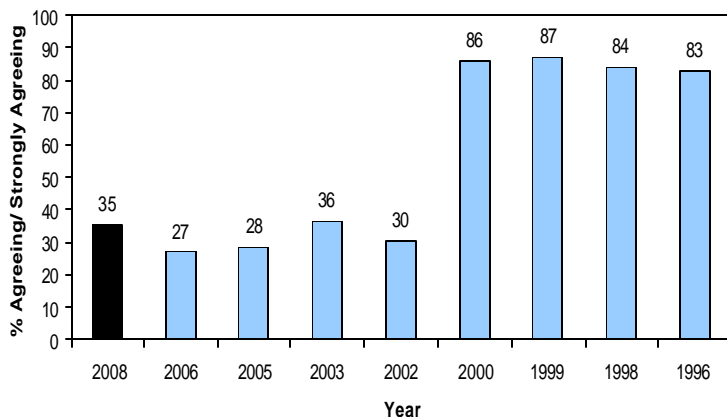
Twenty-six percent (26%) of New Providence residents thought that the 15% gratuity should be eliminated. This is the highest this figure has been since 2003 (31%).

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



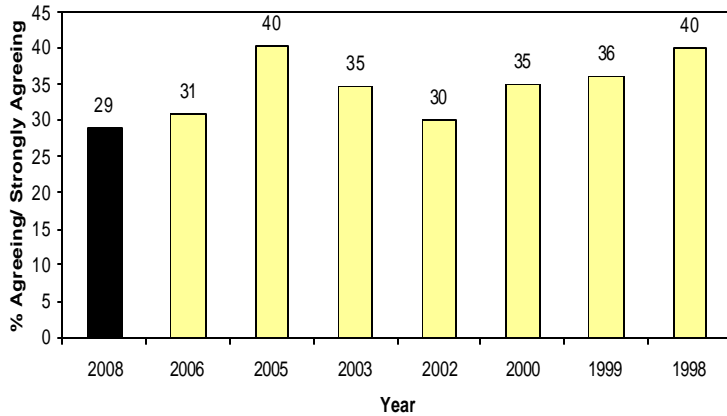
The overwhelming majority of respondents felt proud of The Bahamas when it comes to Islands of The Bahamas ad campaigns (86% in 2008), with negligible change in twelve years.

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.



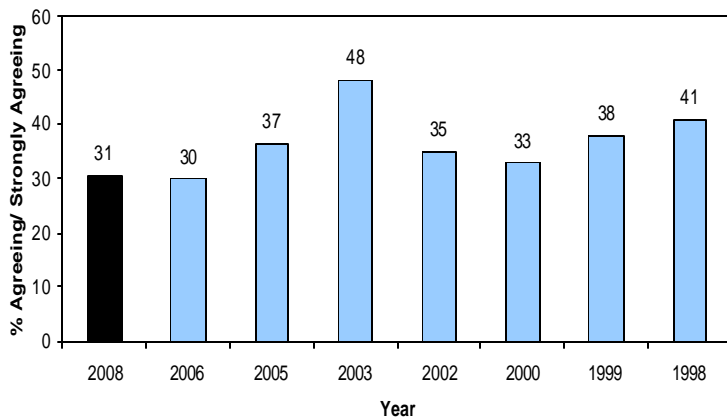
When it comes to tourist expectations, there was a complete turn around of opinion since 2000. From 1996 to 2000, the results were much less positive, with most respondents (83% to 86%) agreeing that tourists are usually disappointed when coming to The Bahamas. Since 2002, however, approximately one third (35% to 27%) felt this way, a much more favourable response.

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



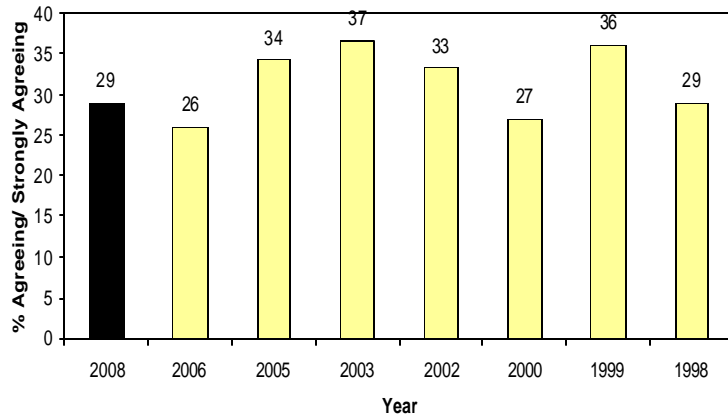
A minority (29%) agreed in 2008 that there are not enough jobs in the tourism sector. This is a record low and represents an all time high in favourability for this attitude.

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



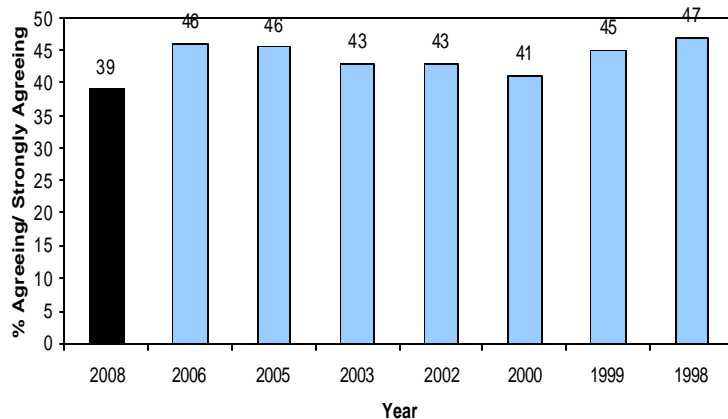
Less than one out of three residents (31%) felt that jobs in tourism are not prestigious in 2008. There were similar previous results; in 2003, however, almost half (48%) had this opinion.

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.



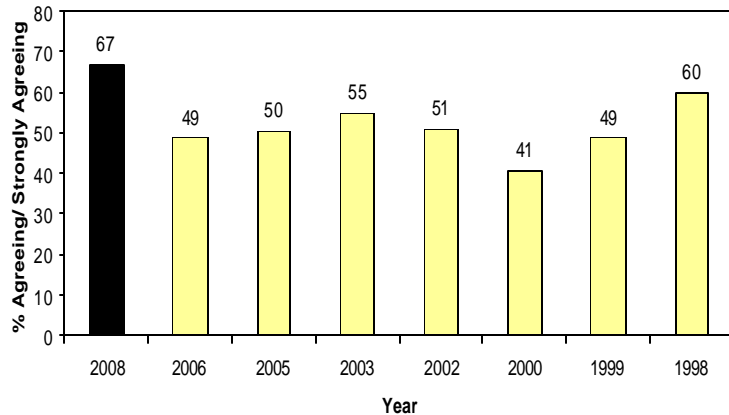
For the most part, there were moderate changes since 1998 when it comes to children pursuing careers in tourism. In 2008, only 29% agreed with this statement—a slight increase over 2006 (26%).

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.



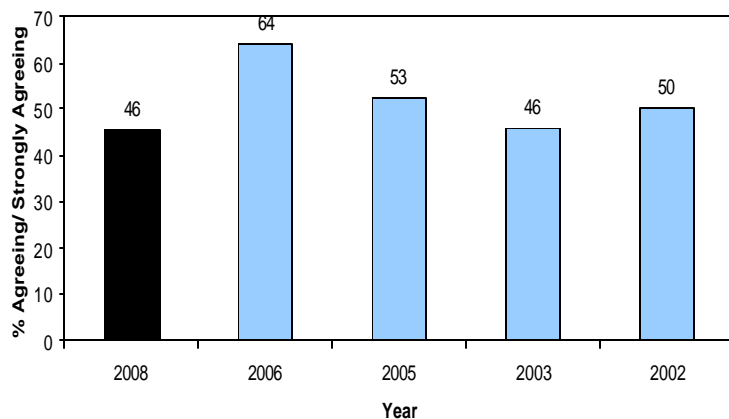
In 2008, 39% percent of the interviewees agreed that tourism salaries are not on par with similar salaries in the private sector. This was a record low for this attitude statement.

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



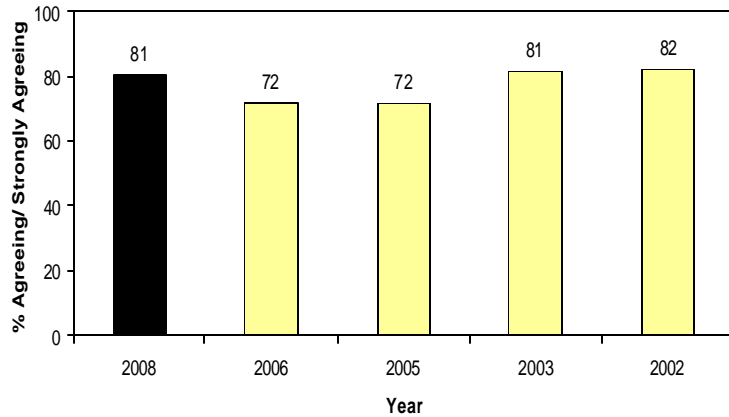
Two-thirds (67%) in 2008 agreed that there is little job security in the tourism sector. This represented a record high for this attitude statement and was 18 percentage points higher than in 2006 (49%).

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



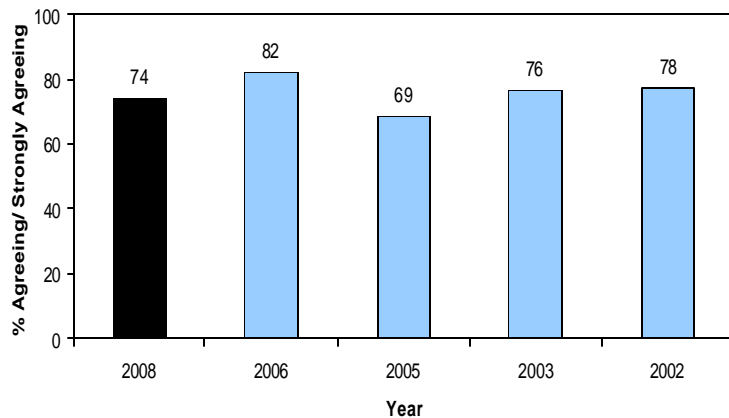
In 2008, less than half (46%) of the respondents thought that tourism has taken all our best beaches and land. This is 18 percentage points lower than in 2006 (64%) and represented an increase in favourability.

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



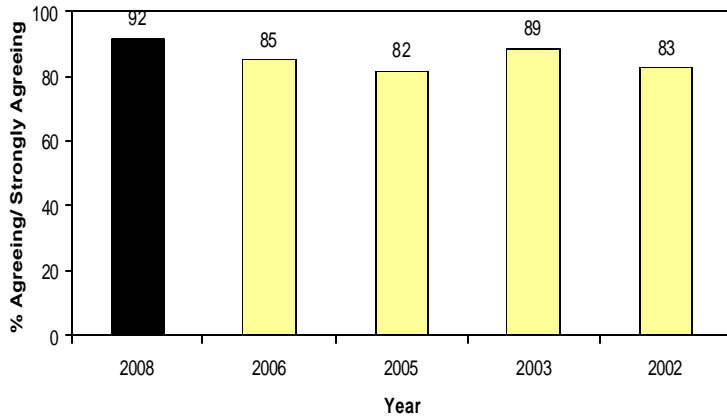
The proportion of those who agreed that the quality of tourism product needs great improvement increased from 72% in 2006 to 81% in 2008, which was the highest it has been since 2003.

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



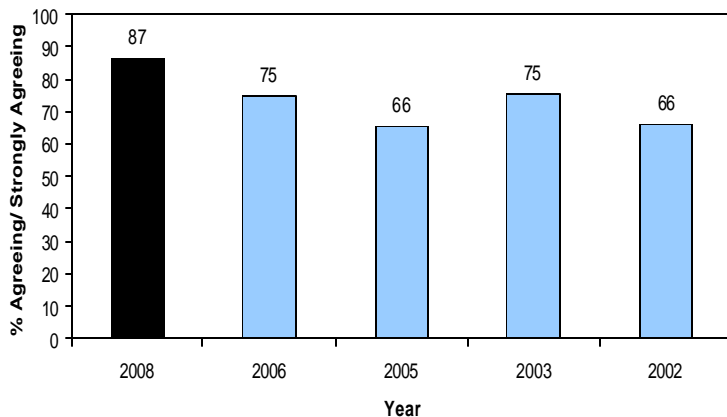
In 2008, three quarters (74%) of the respondents felt that Bahamians do not give other Bahamians good service or value for money. This was less than the 2006 figure (82%), which is an increase in favourability.

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



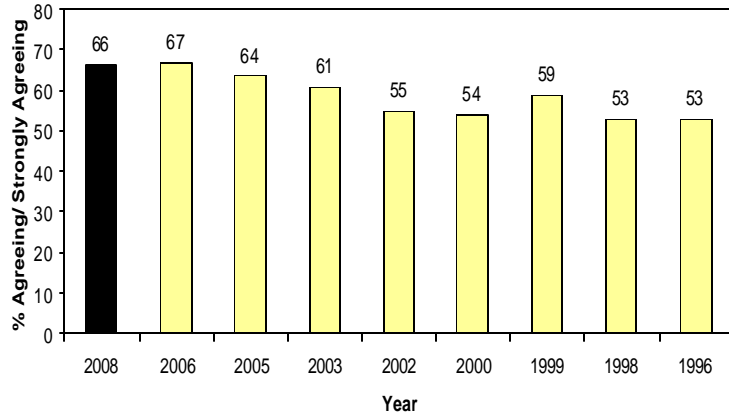
In 2008, almost all (92%) of the New Providence residents agreed that the service standards in The Bahamas needs improvement. This was a record high for this statement.

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.



Nearly 9 out of 10 respondents (87%) in 2008 felt that wage and utility costs were higher here when compared to the region. This was 12 percentage points higher than in 2006--a record high.

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.



Since 1996, proportionally more and more residents felt that tourism will have to be the main industry for the next thirty years—from 53% to 66% in 2008.

Table 10

**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.	18	58	10	11	2	2
Most Bahamians make the tourist feel like they are doing the tourist a big favour when serving or helping the tourist.	12	34	11	32	9	2
The only jobs tourism has created for Bahamians are jobs at the bottom of the ladder.	8	11	13	50	15	3
My job is related to tourism.	33	28	8	20	8	3
I would like my child, if I have one, to work in the tourism industry.	10	32	20	22	9	7
Tourists are given their money's worth while visiting the Islands of The Bahamas.	14	43	16	20	6	1
Tourism does not affect me personally.	7	11	8	34	38	2
Only Bahamian art, straw and craft goods should be allowed to be sold to tourists.	30	33	9	22	4	2
Just because tourism is the main industry, does not mean that Bahamians are willing to go the extra mile to please tourists.	6	16	8	44	26	0
The 15% gratuity should be eliminated.	11	15	7	35	30	2
The Islands of the Bahamas' advertisements make me feel good about my country.	33	52	8	3	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.	4	31	17	34	12	1

Statement	Strongly Agree	Agree	Neither agree nor disagree	Disagree	Strongly Disagree	Don't know
There are not enough jobs in the tourism sector.	6	23	13	43	10	4
Jobs in tourism are not considered very prestigious.	6	25	15	42	7	5
Many parents do not think it is a good idea for their children to have a career in tourism.	5	24	22	35	3	11
The salaries and benefits in the tourism sector are not on par with similar positions in the private sector.	8	31	16	28	3	14
There is little job security in the tourism sector.	22	45	9	18	3	3
Tourism has taken all our best beaches and land.	16	29	14	32	5	3
The quality of the tourism product needs great improvement.	32	48	7	7	3	2
Bahamians do not give other Bahamians good service or value for money.	36	38	9	15	2	0
Standard of service in the Islands of The Bahamas needs improvement.	43	48	5	3	1	0
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.	45	42	3	3	1	6
Tourism will have to be the main industry in the Islands of The Bahamas for at least the next thirty years.	17	50	11	14	5	4

3.8 Media Usage

ZNS (News) is the most watched station “in the past month” (63%). Other popular television stations included CNN (38%), Lifetime (35%), FOX (24%) and TNT (24%). In 2008, the viewership of ZNS (News) remained the same as in 2006; however, there were significant advances in the viewership of CNN, Lifetime and Fox.

Table 11

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

Television Stations	2008	2006	2005	2003
ZNS (NEWS)	63	63	68	66
CNN	38	25	19	20
LIFETIME	35	23	30	33
FOX	24	14	14	11
TNT	24	20	16	17
USA	21	19	12	10
CBS	15	19	13	10
MSNBC	12	DK	1	1
LMN	12	DK	6	-
NBC	12	11	6	10

100 JAMZ is listened to by about half (48%) of respondents, followed by 104.5 FM (40%) and 101.9 JOY FM (36%). Between 2006 and 2008, the listenership of 100 JAMZ went down slightly and that of 104.5 FM and 101.9 JOY FM went up. However, these movements were not sufficient to move 100 JAMZ as the top radio station for New Providence residents.

Table 12

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

Radio Stations	2008	2006	2005	2003
100 JAMZ	48	50	42	49
104.5 FM	40	35	40	34
101.9 JOY FM	36	28	29	23
LOVE 97 (97.5)	40	23	18	22
MORE 94.9 FM	25	18	11	9
ZNS 1240 AM	13	10	17	18
ZNS 1540 AM	10	11	15	13
102.9 FM (ISLAND FM)	12	4	1	3
105 FM	4	DK	0	-
101.5 FM	3	DK	0	-

Almost three quarters of New Providence residents had read The Tribune (73%) and The Guardian (72%) in the past month. Six out of ten persons (59%) had read The Punch. In 2008, it appears that The Tribune was able to move up to the number one newspaper in New Providence.

Table 13

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

Newspapers	2008	2006	2005	2003
The Tribune	73	61	50	51
The Guardian	72	65	65	70
The Punch	59	48	38	42
Miami Herald	18	20	22	23
The Bahama Journal	8	8	4	3

Half of the respondents had not read a magazine in the past month (51%). Nonetheless, the more popular magazines were Ebony (16%), Oprah (15%) and People (13%).

Table 14

Percent (%) of Respondents – Top Ten Local and International Magazines Read (n=298)

Magazines	2008	2006	2005	2003
NONE	51	65	61	61
EBONY	16	9	13	9
OPRAH	15	8	5	5
PEOPLE	13	3	3	3
TIME	8	2	4	4
MEN'S HEALTH	6	3	2	1
SPORTS ILLUSTRATED	6	5	2	3
JET	6	5	8	8
AUTO TRADER	5	DK	2	3
HOME & GARDEN	5	DK	2	1

3.9 Associations

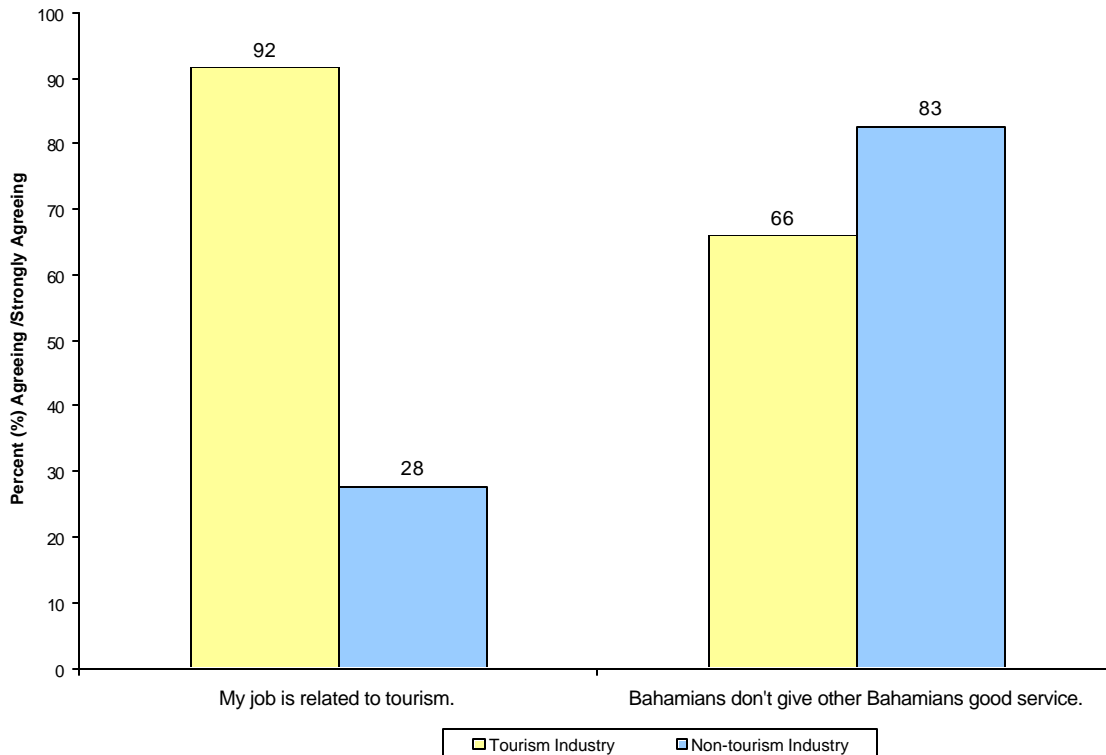
Demographics, such as age, sex, and tourism industry job, education level completed and income were tested with attitude items to test for differences in opinion by these groups.

3.9.1 Associations by whether Job is in Tourism Industry

Respondents who work in tourism seemed less likely to agree that Bahamians do not give other Bahamians good service or value for money. They appeared more likely to agree that their job was related to tourism (*Pearson chi-square*<0.05); *Figure 24*)

Figure 24

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

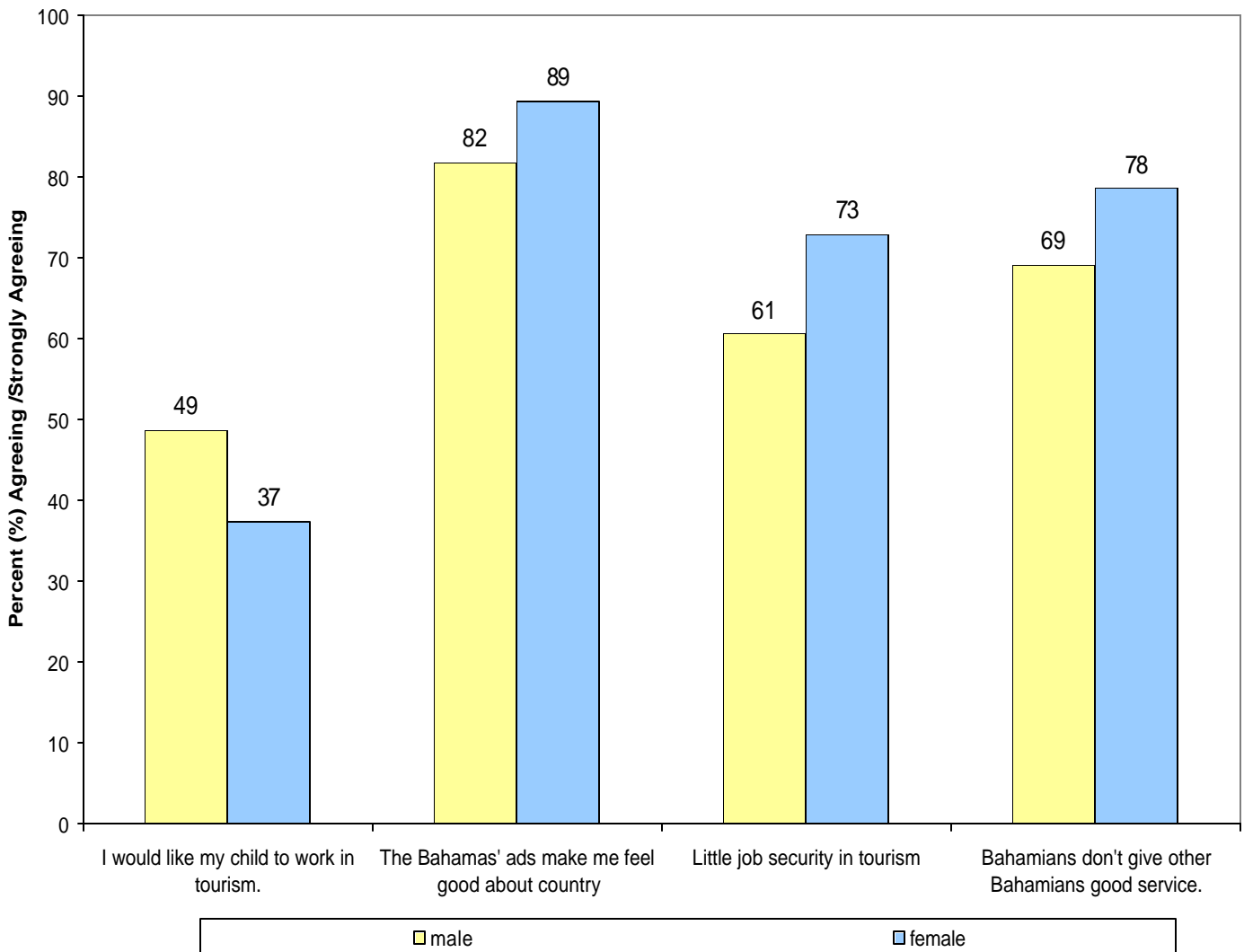


3.9.2 Associations by Sex

Female respondents tended to agree with certain statements: that the Islands of the Bahamas' advertisements make me feel good about my country; that there is little job security in the tourism sector; and that Bahamians do not give other Bahamians good service or value for money. More male respondents seemed to agree that they would like their child to work in the tourism industry (*Pearson chi-square* <0.05); *Figure 25*).

Figure 25

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

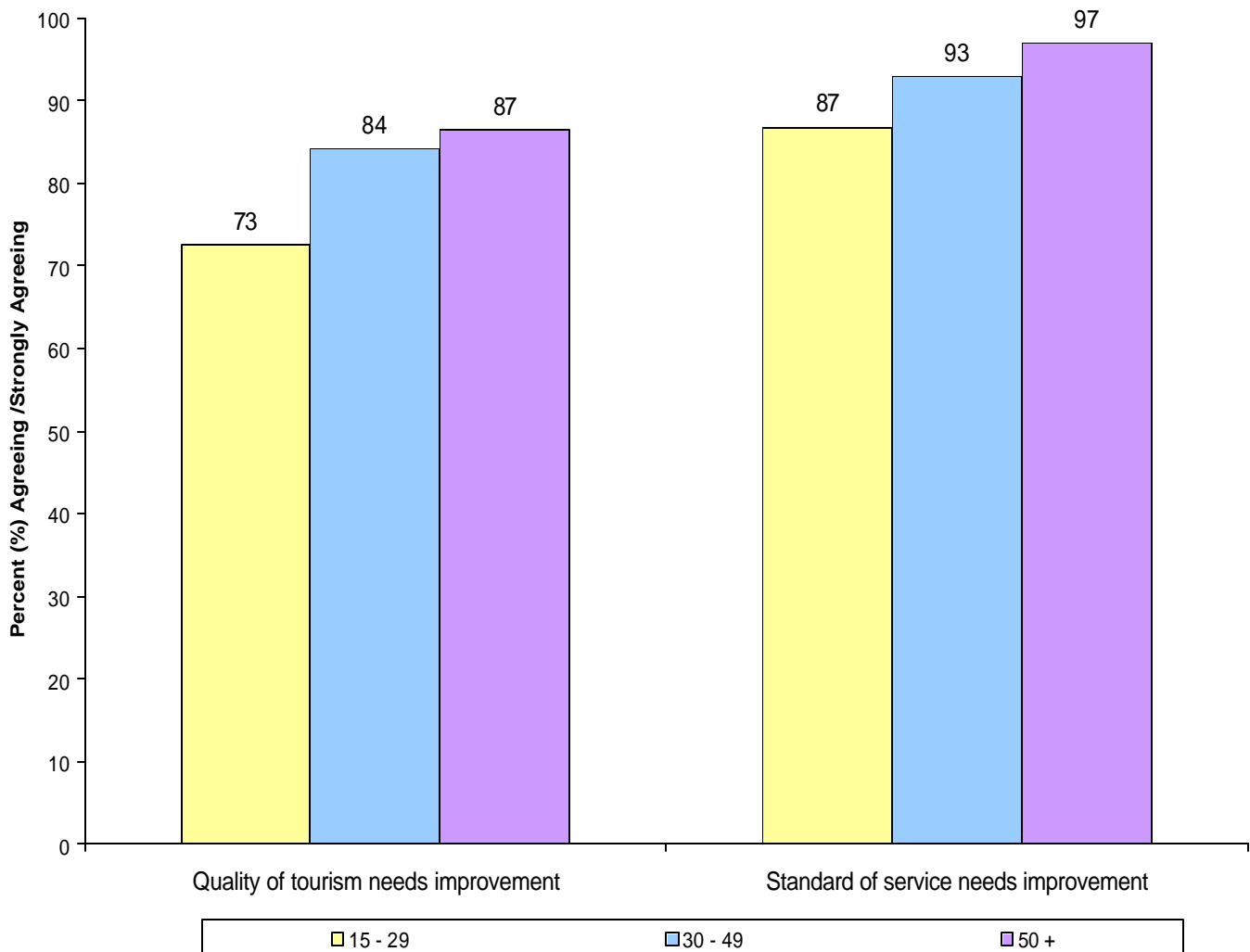


3.9.3 Associations by Age-Group

As the age of the respondent increased, they were more likely to respond positively to a couple of statements, namely, whether the quality of the tourism product needs great improvement; and that the standard of service in the Islands of The Bahamas needs improvement. (*positive low to moderate Kendall's tau-c, Figure 26*)

Figure 26

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

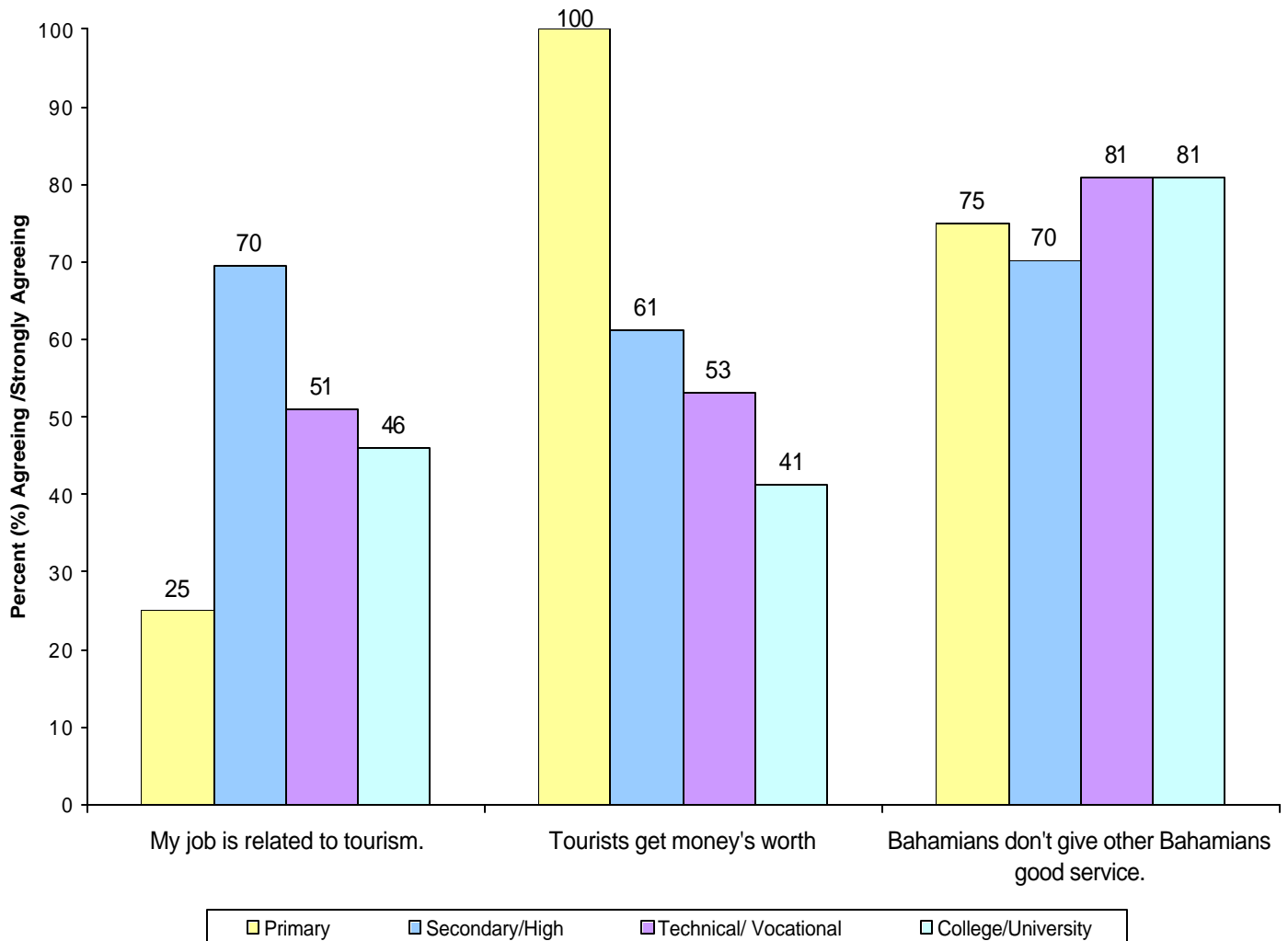


3.9.4 Associations by Education

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, namely, that their job is related to tourism; and whether tourists are given their money's worth while visiting the Islands of The Bahamas (*negative low to moderate Kendall's tau-c; Figure 27*). However, as the age of the respondent increased they were more likely to agree with the statement Bahamians do not give other Bahamians good service or value for money (*positive low to moderate Kendall's tau-c*).

Figure 27

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

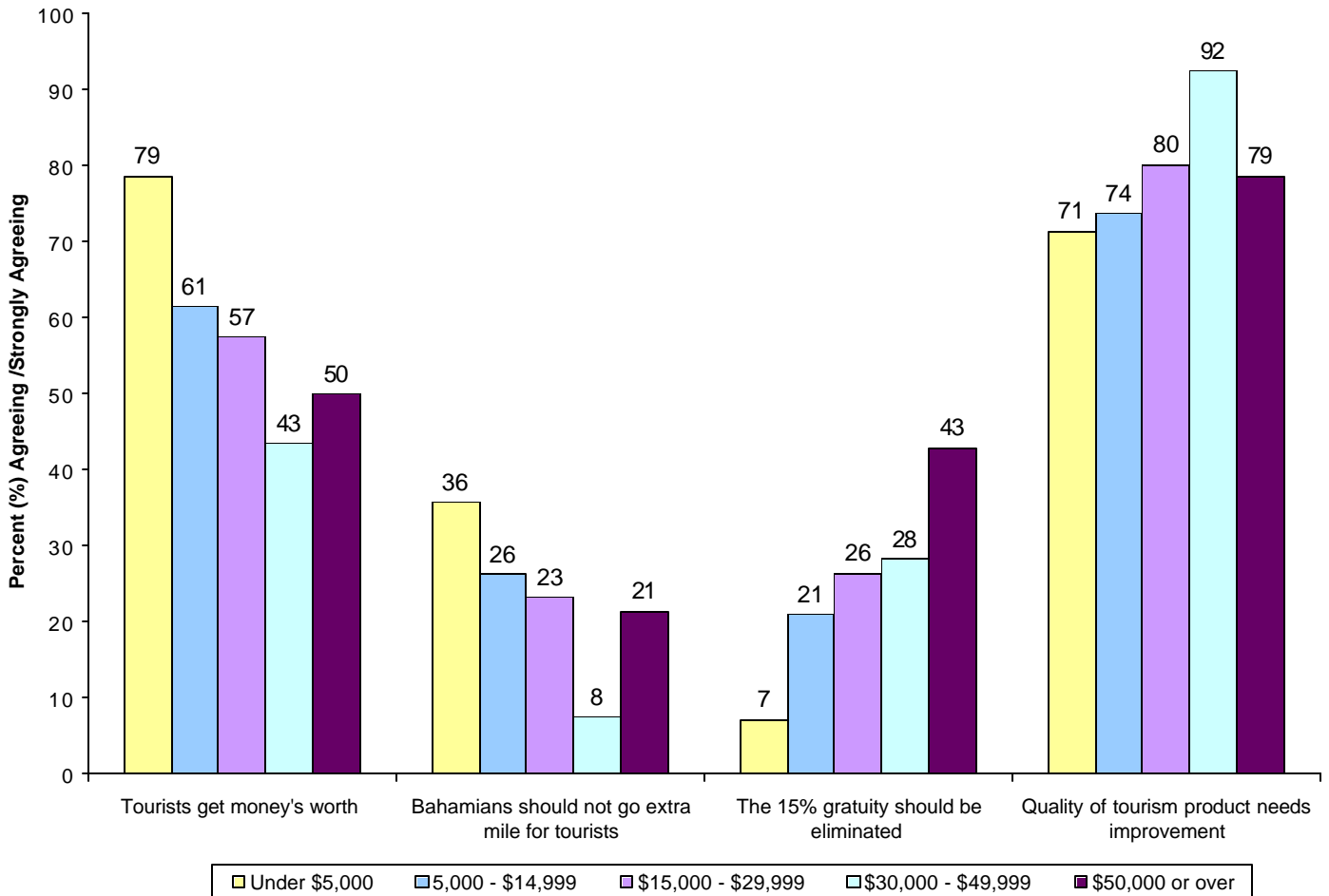


3.9.5 Associations by Income

For selected attitude items, those with higher incomes tended to answer less favourably (*low to moderate negative Kendalls' tau-c; Figure 29*): As income increased, the less likely respondents appeared to agree that tourists are given their money's worth while visiting the Islands of The Bahamas; and that just because tourism is the main industry, does not mean that Bahamians are willing to go the extra mile to please tourists. As income levels increase, respondents were more likely to agree that the 15% gratuity should be eliminated, and that the quality of the tourism product needs great improvement.

Figure 28

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



IV. Conclusions

- Since 2006, the New Providence residents seem to have developed a less favourable attitude towards the tourism industry.
 - Fewer respondents, particularly non-tourism workers, would choose to work in the tourism industry.
 - More respondents gave the reason the volatility of the industry as the reason for not wanting work in the tourism.
 - More respondents felt that tourism jobs are not the first choice for high school and college graduates.
 - More respondents gave the reason the lack of job security in tourism as the reason why they felt graduates are not drawn to tourism.
 - More respondents felt that nothing positive was happening in the tourism industry.
 - Fewer respondents felt the nothing negative was happening in the tourism industry.
 - Fewer people agreed the most tourists are satisfied with their Bahamian experience.
 - Fewer respondents stated that they would like their child to work in the tourism industry.
 - Fewer respondents thought that tourists are given their money's worth while visiting the Islands of The Bahamas.
 - More respondents agreed that tourists are usually disappointed when coming to The Bahamas.
 - More agreed that there is a little job security in the tourism sector.
 - More agreed that the quality of the tourism product needs great improvement.
 - More agreed that the standard of service in the Islands of The Bahamas needs improvement.

- There were many associations with attitude statements by several demographics:
 - Respondents with **jobs in the tourism industry** were more likely to agree that:
 - Their job was related to tourism.
 And less likely to agree that:
 - Bahamians do not give other Bahamians good service or value for money.
 - **Female** respondents tended to agree with certain statements:
 - The Islands of the Bahamas' advertisements make me feel good about my country.
 - There is little job security in the tourism sector.
 - Bahamians do not give other Bahamians good service or value for money.
 - **Male** respondents seemed to agree with the statement:
 - They would like their child to work in tourism industry.
 - As the **age of respondents** increased, the more likely they seem to respond positively to:
 - The quality of the tourism product needs great improvement.
 - Standard of service in the Islands of The Bahamas needs improvement.

- The higher the **educational level of respondents**, the less likely they seem to respond positively to:
 - Their job was related to tourism.
 - Tourists get their money's worth while visiting the Islands of The Bahamas.

And more likely to agree that:

- Bahamians do not give other Bahamians good service or value for money.
- As **income** of the respondent increases, they were less likely to agree that:
 - 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.

And more likely to agree:

- The 15% gratuity should be eliminated.
- The quality of the tourism product needs great improvement.

- With regards to media usage:
 - In 2008, the viewership of ZNS (News) remained the same as in 2006; however, there were significant advances in the viewership of CNN, Lifetime and Fox.
 - Between 2006 and 2008, the listenership of 100 JAMZ went down slightly and that of 104.5 FM and 101.9 JOY FM went up. However, these movements were not sufficient to move 100 JAMZ as the top radio station for New Providence residents.
 - In 2008, it appears that The Tribune was able to move up to the number one newspaper in New Providence.

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	2000	1999	1998	1996
Most Tourists Are Satisfied With Their Bahamas Experience.									
Strongly Agree	18	24	19	14	22	21	28	20	12
Agree	58	57	69	65	63	69	59	67	63
Neither Agree Nor Disagree	10	9	4	7	10	3	6	7	8
Disagree	11	8	6	9	4	5	4	4	13
Strongly Disagree	2	0	1	2	0	1	1	1	1
Don't Know	2	1	1	2	1	1	1	1	3
Most Bahamians Make The Tourist Feel Like They Are Doing The Tourist A Big Favour When Serving Or Helping The Tourist.									
Strongly Agree	12	9	7	11	8	11	12	16	7
Agree	34	37	38	39	37	23	27	34	35
Neither Agree Nor Disagree	11	9	13	9	15	16	19	15	10
Disagree	32	39	34	35	34	42	33	25	43
Strongly Disagree	9	6	5	4	5	6	8	9	4
Don't Know	2	0	2	1	2	2	0	1	1
The Only Jobs Tourism Has Created For Bahamians Are Jobs At The Bottom Of The Ladder.									
Strongly Agree	8	5	7	12	6	8	6	7	4
Agree	11	15	24	16	15	9	15	13	13
Neither Agree Nor Disagree	13	11	11	11	9	13	8	10	9
Disagree	50	56	45	48	54	51	48	44	57
Strongly Disagree	15	11	9	12	13	15	22	24	14
Don't Know	3	2	2	1	2	2	2	2	4
My Job Is Related To Tourism.									
Strongly Agree	33	36	32	28	24	30	27	26	
Agree	28	23	29	36	32	27	36	28	
Neither Agree Nor Disagree	8	2	6	6	9	6	7	15	
Disagree	20	28	19	15	26	28	17	18	
Strongly Disagree	8	10	11	15	7	7	9	8	
Don't Know	3	1	3	0	2	2	2	2	

Table A-1 cont'd

STATEMENT	SURVEY YEAR								
	2008	2006	2005	2003	2002	2000	1999	1998	1996
I Would Like My Child, If I Have One, To Work In The Tourism Industry.									
Strongly Agree	10	11	6	14	10	30	27	26	
Agree	32	47	37	49	36	27	36	28	
Neither Agree Nor Disagree	20	17	26	15	25	6	7	15	
Disagree	22	14	15	10	17	28	17	18	
Strongly Disagree	9	7	7	7	6	7	9	8	
Don't Know	7	4	8	5	6	2	2	2	
Tourists Are Given Their Money's Worth While Visiting The Islands Of The Bahamas.									
Strongly Agree	14	20	14	7	9	14	18	13	5
Agree	43	49	60	53	56	53	53	50	48
Neither Agree Nor Disagree	16	13	13	16	14	14	16	17	19
Disagree	20	16	9	17	14	12	8	14	19
Strongly Disagree	6	2	2	4	4	3	3	2	2
Don't Know	1	1	2	2	3	3	2	3	5
Tourism Does Not Affect Me Personally.									
Strongly Agree	7	5	7	8	4	9	10	6	2
Agree	11	14	16	12	15	19	22	16	16
Neither Agree Nor Disagree	8	7	7	4	8	6	5	7	3
Disagree	34	40	34	39	44	39	40	38	52
Strongly Disagree	38	33	34	35	27	25	22	30	25
Don't Know	2	1	1	1	2	1	1	1	1
Only Bahamian Art, Straw And Craft Goods Should Be Sold To Tourists.									
Strongly Agree	30	22	16	23	14	19	11	21	16
Agree	33	32	37	26	36	21	21	23	39
Neither Agree Nor Disagree	9	9	5	11	9	8	9	11	6
Disagree	22	29	31	28	28	35	42	31	33
Strongly Disagree	4	9	8	11	9	15	15	11	3
Don't Know	2	0	2	1	4	1	1	2	2

Table A-1 cont'd

STATEMENT	SURVEY YEAR								
	2008	2006	2005	2003	2002	2000	1999	1998	1996
Just Because Tourism Is The Main Industry, Does Not Mean That Bahamians Should Be Willing To Go The Extra Mile To Please Tourists.									
Strongly Agree	6	5	5	8	6	9	12	6	2
Agree	16	9	20	11	15	17	19	13	15
Neither Agree Nor Disagree	8	5	4	5	6	9	6	6	3
Disagree	44	51	38	45	46	38	35	41	56
Strongly Disagree	26	29	32	29	24	27	26	34	22
Don't Know	0	0	1	1	3	0	2	1	1
The 15% Gratuity Should Be Eliminated.									
Strongly Agree	11	7	8	16	10	10	6	5	7
Agree	15	13	15	15	18	14	12	10	19
Neither Agree Nor Disagree	7	8	8	11	9	11	10	13	7
Disagree	35	33	30	30	36	35	39	40	48
Strongly Disagree	30	38	35	25	22	28	30	28	18
Don't Know	2	2	2	1	5	2	2	2	2
The Islands Of The Bahamas' Advertisements Make Me Feel Good About My Country.									
Strongly Agree	33	40	31	27	30	31	35	36	19
Agree	52	46	50	58	53	55	52	48	64
Neither Agree Nor Disagree	8	6	8	6	9	7	8	6	8
Disagree	3	3	3	3	4	3	3	4	5
Strongly Disagree	1	1	2	1	0	0	1	1	0
Don't Know	2	5	5	4	4	3	1	2	3
When Tourists Come To The Islands Of The Bahamas They Generally Do Not Find What They Were Led To Expect By Our Advertising And Promotions.									
Strongly Agree	4	4	5	6	6	31	35	36	19
Agree	31	23	23	30	25	55	52	48	64
Neither Agree Nor Disagree	17	11	14	20	17	7	8	6	8
Disagree	34	40	37	32	40	3	3	4	5
Strongly Disagree	12	16	13	7	11	0	1	1	0
Don't Know	1	6	6	5	2	3	1	2	3

Table A-1 cont'd

STATEMENT	SURVEY YEAR								
	2008	2006	2005	2003	2002	2000	1999	1998	1996
There Are Not Enough Jobs In The Tourism Sector.									
Strongly Agree	6	4	7	6	7	6	7	7	
Agree	23	27	33	28	23	29	29	33	
Neither Agree Nor Disagree	13	9	10	12	20	13	12	14	
Disagree	43	45	36	43	38	41	36	33	
Strongly Disagree	10	11	9	8	7	7	11	7	
Don't Know	4	5	4	2	5	3	4	5	
Jobs In Tourism Are Not Considered Very Prestigious.									
Strongly Agree	6	5	4	7	4	5	7	7	
Agree	25	25	32	41	31	28	31	34	
Neither Agree Nor Disagree	15	14	15	12	17	17	18	10	
Disagree	42	44	33	32	32	40	36	29	
Strongly Disagree	7	9	11	5	10	7	7	12	
Don't Know	5	3	3	2	6	2	1	2	
Many Parents Do Not Think It Is A Good Idea For Their Children To Have A Career In Tourism.									
Strongly Agree	5	4	4	9	4	4	6	3	
Agree	24	21	30	28	30	23	30	26	
Neither Agree Nor Disagree	22	17	19	17	19	24	23	23	
Disagree	35	40	29	30	32	36	30	25	
Strongly Disagree	3	10	7	5	6	8	5	9	
Don't Know	11	7	10	10	9	5	5	13	
The Salaries And Benefits In The Tourism Sector Are Not On Par With Similar Positions In The Private Sector.									
Strongly Agree	8	8	8	6	12	7	14	7	
Agree	31	39	38	37	31	34	31	40	
Neither Agree Nor Disagree	16	16	15	18	13	18	17	14	
Disagree	28	20	26	22	26	21	21	23	
Strongly Disagree	3	8	6	5	6	6	7	6	
Don't Know	14	10	7	11	11	14	9	10	

Table A-1 cont'd

STATEMENT	SURVEY YEAR								
	2008	2006	2005	2003	2002	2000	1999	1998	1996
There Is Little Job Security In The Tourism Sector.									
Strongly Agree	22	10	15	14	13	10	9	20	
Agree	45	39	35	41	38	31	40	40	
Neither Agree Nor Disagree	9	10	17	14	8	16	15	9	
Disagree	18	32	24	22	27	28	24	19	
Strongly Disagree	3	6	5	6	8	6	8	3	
Don't Know	3	3	3	3	7	9	4	8	
Tourism Has Taken All Our Best Beaches And Land.									
Strongly Agree	16	24	18	14	15				
Agree	29	40	35	32	35				
Neither Agree Nor Disagree	14	11	10	12	9				
Disagree	32	23	30	34	30				
Strongly Disagree	5	1	5	7	10				
Don't Know	3	2	2	1	1				
The Quality Of The Tourism Product Needs Great Improvement.									
Strongly Agree	32	20	17	21	20				
Agree	48	52	54	60	62				
Neither Agree Nor Disagree	7	8	11	5	10				
Disagree	7	15	13	10	5				
Strongly Disagree	3	2	3	1	2				
Don't Know	2	3	0	2	1				
Bahamians Do Not Give Other Bahamians Good Service Or Value For Money.									
Strongly Agree	36	40	26	28	32				
Agree	38	42	42	48	46				
Neither Agree Nor Disagree	9	8	9	12	9				
Disagree	15	9	20	9	10				
Strongly Disagree	2	1	1	1	0				
Don't Know	0	1	1	1	2				
Standard Of Service In The Islands Of The Bahamas Needs Improvement.									
Strongly Agree	43	29	28	29	27				
Agree	48	56	53	60	56				
Neither Agree Nor Disagree	5	4	7	4	10				
Disagree	3	7	9	4	3				
Strongly Disagree	1	0	0	1	1				
Don't Know	0	3	1	2	3				

Table A-1 cont'd

STATEMENT	SURVEY YEAR								
	2008	2006	2005	2003	2002	2000	1999	1998	1996
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	45	34	32	24	30				
Agree	42	41	34	51	36				
Neither Agree Nor Disagree	3	7	11	10	11				
Disagree	3	8	10	4	8				
Strongly Disagree	1	0	1	2	2				
Don't Know	6	10	12	9	13				
Tourism Will Have To Be The Main Industry In The Islands Of The Bahamas For At Least The Next Thirty Years.									
Strongly Agree	17	23	24	20	14	15	20	19	7
Agree	50	44	40	41	41	39	39	34	46
Neither Agree Nor Disagree	11	12	15	18	11	12	14	14	9
Disagree	14	14	12	12	21	22	17	16	29
Strongly Disagree	5	2	2	2	7	8	6	9	4
Don't Know	4	5	7	7	6	4	4	6	6

5.2 Average (Mean) Differences in Attitude Statements

The 23 general attitude statements were tested for differences in means (Strongly Agree – 5; Agree – 4; Neither Agree nor Disagree – 3; Disagree – 2; Strongly Disagree – 1) by several demographics). 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-group, education, and income.

Table A-2

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

STATEMENT	Tourism Industry	Non-Tourism Industry
My job is related to tourism.	4.50	2.59
Bahamians do not give other Bahamians good service or value for money.	3.78	4.07

Table A-3

5.2.2 Average (Mean) Differences in Attitude Statements: Sex

STATEMENT	Male	Female
I would like my child, if I have one, to work in the tourism industry.	3.22	3.08
The Islands of the Bahamas' advertisements make me feel good about my country.	4.09	4.23
There is little job security in the tourism sector.	3.55	3.76
Bahamians do not give other Bahamians good service or value for money.	3.84	3.98

Table A-4

5.2.3 Average (Mean) Differences in Attitude Statements: Age

STATEMENT	15 - 29 YEARS	30 - 49 YEARS	50 + YEARS
The quality of the tourism product needs great improvement.	3.82	4.15	4.11
Standard of service in the Islands of The Bahamas needs improvement.	4.14	4.35	4.49

Table A-5

5.2.4 Average (Mean) Differences in Attitude Statements: Education

STATEMENT	Primary	Secondary/ High	Technical/ Vocational	College/ University
My job is related to tourism.	2.25	3.81	3.43	3.15
Tourists are given their money's worth while visiting the Islands of The Bahamas.	4.25	3.48	3.43	3.00
Bahamians do not give other Bahamians good service or value for money.	3.75	3.79	4.19	4.11

Table A-6

5.2.5 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
Tourists are given their money's worth while visiting the Islands of The Bahamas.	3.71	3.49	3.45	3.04	3.08
Just because tourism is the main industry, does not mean that Bahamians are willing to go the extra mile to please tourists.	2.71	2.37	2.32	2.04	2.29
The 15% gratuity should be eliminated.	2.00	2.45	2.29	2.50	3.29
The quality of the tourism product needs great improvement.	3.71	3.85	4.03	4.30	4.08

5.3 Domestic Travel Average (Median Expenditure)

A little more than half (52%) of the respondents had travelled to another Family Island in the past year; the median was 1 trip (range 0 to 40), with a median of 1 person per trip (range 1 to 6 persons).

The median total expenditure spent per trip is \$510 (range \$140 to \$5,640).

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

- Transportation – \$240 (range \$125 to \$1,340)
- Lodging - \$0 (range \$0 to \$2,500)
- Food - \$80 (range \$0 to \$750)
- Recreation and entertainment - \$0 (range \$0 to \$500)
- Shopping - \$0 (range \$0 to \$1,200)

Table A-7

5.3.1 Expenditure on Domestic Travel by Expenditure Category

	Minimum	Maximum	Mean	Median
Transportation (\$)	125	1,340	318	240
Lodging (\$)	0	2,500	214	0
Food (\$)	0	750	107	80
Recreation and Entertainment (\$)	0	500	51	0
Shopping (\$)	0	1,200	77	0
Total Expenditure (\$)	140	5,640	788	510

5.4 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 critics, tourism advocates, tourism job supporters, authentic tourism owners and support of non-tourism workers. When compared with 2006¹, there seemed to be stronger correlations between the statements and the factor “tourism critics”. Conversely, the correlations between the statements and the factors “tourism advocates” and “tourism job supporters” have gotten weaker.

Table A-8

Factor Analysis - Attitude Statements

STATEMENT	Group 1 Tourism Critics	Group 2 Tourism Advocates	Group 3 Tourism Job Supporters	Group 4 Authentic Tourism Owners	Group 5 Support of Non-Tourism Workers
Most tourists are satisfied with their Bahamas experience.		Group 2 Tourism Advocates 0.612			
Most Bahamians make the tourist feel like they are doing the tourist a big favour when serving or helping the tourist.	Group 1 Tourism Critics 0.573				
The only jobs tourism has created for Bahamians are jobs at the bottom of the ladder.	Group 1 Tourism Critics 0.474				
My job is related to tourism.					Group 5 Support of Non-Tourism Workers -0.395
I would like my child, if I have one, to work in the tourism industry.			Group 3 Tourism Job Supporters 0.507		
Tourists are given their money's worth while visiting the Islands of The Bahamas.	Group 1 Tourism Critics -0.442	Group 2 Tourism Advocates 0.591			

¹ Bahamian Residents Survey Report, New Providence, 2006
Ministry of Tourism & Aviation

Table A-8 cont'd

Factor Analysis - Attitude Statements

STATEMENT	Group 1 Tourism Critics	Group 2 Tourism Advocates	Group 3 Tourism Job Supporters	Group 4 Authentic Tourism Owners	Group 5 Support of Non-Tourism Workers
Tourism does not affect me personally.				Group 4 Authentic Tourism Owners -0.36	
Only Bahamian art, straw and craft goods should be allowed to be sold to tourists.				Group 4 Authentic Tourism Owners 0.312	
Just because tourism is the main industry, does not mean that Bahamians are willing to go the extra mile to please tourists.			Group 3 Tourism Job Supporters 0.493		
The 15% gratuity should be eliminated.	Group 1 Tourism Critics 0.461				
The Islands of the Bahamas' advertisements make me feel good about my country.					Group 5 Support of Non-Tourism Workers 0.358
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 Critics 0.411				
There are not enough jobs in the tourism sector.	Group 1 Tourism Critics 0.486				
Jobs in tourism are not considered very prestigious.	Group 1 Tourism Critics 0.427				
Many parents do not think it is a good idea for their children to have a career in tourism.	Group 1 Tourism Critics 0.364				
The salaries and benefits in the tourism sector are not on par with similar positions in the private sector.					Group 5 Support of Non-Tourism Workers -0.432

Table A-8 cont'd

Factor Analysis - Attitude Statements

STATEMENT	Group 1 Tourism Critics	Group 2 Tourism Advocates	Group 3 Tourism Job Supporters	Group 4 Authentic Tourism Owners	Group 5 Support of Non-Tourism Workers
There is little job security in the tourism sector.			Group 3 Tourism Job Supporters -0.541		
Tourism has taken all our best beaches and land.	Group 1 Tourism Critics 0.444				
The quality of the tourism product needs great improvement,	Group 1 Tourism Critics 0.601				
Bahamians do not give other Bahamians good service or value for money.	Group 1 Tourism Critics 0.478				Group 5 Support of Non-Tourism Workers 0.532
Standard of service in the Islands of The Bahamas needs improvement.	Group 1 Tourism Critics 0.551				
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 2 Tourism Advocates 0.277			
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 0.547			

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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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Interviewers – Grand Bahama

Ayanna Archer
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Interviewers – Exuma

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Princess McKenzie
Jackie Taylor-Smith
Alexandria Taylor-Turtle

5.6 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)

- **Mean** The arithmetic mean is the "standard" average, often simply called the "mean". The mean may often be confused with the median or mode. The mean is the arithmetic average of a set of values, or distribution. (2)
- **Median** A median is a number dividing the higher half of a sample, a population, or a probability distribution from the lower half. The median of a finite list of numbers can be found by arranging all the observations from lowest value to highest value and picking the middle one. (2)
- **Perception** This is a process through which individuals select, organize and interpret stimuli so that it is meaningful and coherent to them. (1)
- **Questionnaire** This is the measuring tool used to collect relevant data and provides a frame of reference on which to build the analysis. (1)
- **Stratified Convenience Sample** This is a conveniently selected sample that allows for some stratification of the respondents based on demographic criteria such as age, sex. (1)
- **T-test** A test of the null hypothesis that the means of two normally distributed populations are equal. Given two data sets, each characterized by its mean, standard deviation and number of data points, we can use some kind of t test to determine whether the means are distinct, provided that the underlying distributions can be assumed to be normal. (2)

- Workers Directly employed in the Tourism Industry**

This categorization refers to all those persons who are directly involved in the Tourism industry. For example, taxi drivers, tour operators, straw vendors, hair braiders, surrey drivers, hotel employees, jitney drivers, restaurateurs, jet ski operators, etc. Persons in this category may or may not have direct “contact” with the tourists but receive their weekly or monthly salaries as a direct result of tourist activity. For example, some persons within the Ministry of Tourism, Promotion Boards, or Hotel Corporation do not have contact with tourists on a daily basis but receive their salaries as a direct result of tourist activities in our country. (1)
- Workers not directly employed in the Tourism Industry**

This refers to those workers who are not directly working in the Tourism industry but may have contact with tourists. For example, bank employees, medical 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>