

Tourism in the Solomon Islands



A survey of community and operator attitudes

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The Solomon Islands Chamber of Commerce aims to represent the best interests of private sector organizations in the Solomon Islands. Through engagement with members, government and other stakeholders, the Chamber strives to achieve positive change for business and the people of the Solomon Islands.

This report was prepared from 6th July – 1st August, 2008. It attempts to present a snapshot of the tourism industry's standing with the community, and document the concerns of tourism operators. Although care has been taken to accurately record the opinions expressed to us, statements contained here are ultimately the responsibility of the authors.

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Cover photographs were taken by the author near Gizo.



1. EXECUTIVE SUMMARY

- Tourism has long been touted as having the potential to lead economic development in the Solomon Islands. On many occasions since independence, governments have proposed ambitious visitor number targets, and have always fallen short. There are fundamentals missing that political rhetoric can not influence.
- There are a number of proposed government investments that would significantly boost the tourism industry; however it is likely that only a small number will occur. Prioritizing and lobbying for the most valuable of these investments is an important task for the industry.
- Total visitor expenditure for 2007 was \$135 million. The Tourism industry provides 1200 jobs directly, and delivers the government over \$26 million in tax receipts (2004 data).
- The community's general opinion of tourism is quite high, with 52% of respondents claiming to be "very favorable." A similar number were prepared to accept "ten times more" tourists to their area.
- More developed areas (Honiara and Gizo) were more supportive of tourism than remote regions. This is shown both through the survey of community members and also reports from operators.
- Economic benefits of the tourism industry were strongly recognized by survey respondents, although less so in non-tourist areas. Crime and inflation were very slight concerns, environmental and other social impacts were dismissed as problems. There was some concern about the equality of the tourist industry. The community does not generally think that tourism delivers better services (roads, water, shops). There was no measurable difference along demographic lines.
- Employment in the tourism industry is considered highly desirable by the community, however, operators report that staff retention rates are low. The opportunity to gain new skills was the greatest drawing card. Operators feel the need for hospitality training to boost numbers of potential chefs, waiters, accountants, administrators and hotel managers. Many operators reported having to import skilled labor from Asia or Australia. There appears to be a mismatch between community members'

expectations and the reality of working in the industry. A substantial, practically orientated course will help rectify this.

- The performance of Solomon Airlines was the outstanding concern of almost all operators. Unreliable services are reported to be costing business heavily and preventing expansion. Travel agents internationally are allegedly refusing to recommend the Western Solomon Islands as a destination because of the poor flight reliability.
- Operators were generally dissatisfied with the performance of the Solomon Islands Visitors Bureau, and are unsure as to its activities. The SIVB website also was a source of operator frustration.
- Although the community has a fairly high opinion of tourism, these sentiments do not always translate in practice. Operators mentioned several cases of hostility between locals and tourists. Divers were chased off some island beaches, and the Kolombangara summit walk is no longer open due to land access disagreements.



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2. TOURISM: PAST AND PRESENT

“We will be subject to wave after wave of invasions by these 20th century barbarians... There is no escape from this scourge. It will descend on us but let us do what we can to protect this country and its people from it. Many shores of our islands are protected from the depredations of sharks by barrier reefs. Let us try to build out some form of defense to save us from those much more deadly predators... those predators that have the power to destroy the soul of a people... I hate tourism and I loath tourists.”

The legislative council of the Solomon Islands received this impassioned discourse from the Director of Education, Mr D. Hibbard, in 1970 (The Sunday Mirror, 1970). Today the tourist industry in the Solomon Islands receives a slightly more tempered treatment from the polity; however, it remains contented that the true value of the industry goes underappreciated in 2008. The ability for tourism to play a major role in the Solomon Islands’ future economy has been recognized in government and industry reports, the academic literature and in informal discussion with policy makers, however, the conditions required for this possibility to eventuate remain unmet.

In 1973 the Board of the Solomon Islands’ Tourist Authority issued a draft report containing a five year plan for the industry. It was considered feasible to build an industry of 12 500 tourist visitors in that time span, a ten fold increase. Despite the failure of this scenario to eventuate, the Authority did not become more circumspect in its forecasting. In 1990, the Authority predicted 70 000 tourist visits per year by 2000. Numbers instead hovered below 7000, before crashing with the onset of civil unrest in 1999 (Douglas, 2004). Today, the CNURA Government calls for an increase in tourism numbers to 30 000 by 2010, demonstrating that enthusiasm has not been muted by past failure.

2.1. Study Rationale

Thus the disparity between plans and reality remain large. It is the purpose of this report to begin reconciliation between ambition and actuality, provide an indication of community sentiment and present the results of a series of meetings between the Solomon Island’s Chamber of Commerce (SICCI) and tourist operators. It provides information to guide the establishment of better relationships between industry and community and identifies key impediments to expansion.

The attitudes of the community are important to canvas as they influence the institutional framework that the industry must operate in. In theory, the views held by the electorate should eventually be reflected in the legislature; however it may be too much to hope that

representation occurs effectively and transparently. By collecting these views the industry can attempt to push for positive reform, using the data as a point of influence on government. On the other hand, where the community is unimpressed, the tourist industry can attempt to amend its practices or, if these views are unfair, can argue its case through domestic promotion.

Systematic collation of industry opinion provides an opportunity to identify discrepancies in the thinking of community and industry. This will identify key misunderstandings that must be corrected, and will suggest ways in which this can be achieved.

The tourism industry is confident in its ability to generate positive economic activity, provided the right institutional framework is provided by government. It is one thing to recognize the importance of institutional framework, however, and quite another to specify how that framework can be changed. The tri-faceted approach of this study, focusing on community, operators and government makes progress towards this goal.

2.2. Government Position

The Coalition for National Unity and Rural Advancement Government has released a set of policy statements, followed by a ‘translation and implementation framework’ (CNURA, 2008a, 2008b). The proposals are far reaching and diverse, however little detail is provided as to the means of attaining this ambitious agenda. Of more fundamental importance, the Government makes no mention of a review strategy.

Some of the Government’s relevant policy goals include:

- Build a new domestic airport terminal at Henderson Airport, improve domestic terminals at rural airports and improve existing rural airstrips (3.v)
- Tar-seal rural airports like Gwaunaru’u, Sege, Nusatupe, Kirakira, Fera, Lata, Tingoa and Taro over the next two years (3.vi)
- Construct an international airport in Western Province (3.vii)
- Increase accommodation by 100 beds per year (5.d.i)
- Aggressively promote Solomon Islands with a view to increase the number of visitor arrivals to 30 000 by 2010 (5.d.ii)
- Review relevant Acts/Legislation to better support and facilitate the protection and development of this sector with maximum benefit to Solomon Islands (5.d.iii)

The Department of Infrastructure Development has responded with a set of proposals, including:

- Sealing of two existing airfield runways at a cost of \$2m

- Construction of a new Henderson Domestic terminal at a cost of \$25m
- Construction of an international airport in the Western Province at a cost of \$20m

The Ministry of Culture and Tourism has responded with a set of proposals, including:

- Provide “direct assistance” to the SIVB to increase and improve marketing activities, including joint SIVB-airline-private sector marketing
- Establish a tourism training institute at SICHE
- Introduce an accommodation classification scheme and minimum standard requirement
- Facilitate the redevelopment of Anuha island and other small scale island resorts
- Provide grant assistance to encourage the development of locally owned and operated eco and community based tourism products
- Construct major “tourism awareness programs”

Industry stakeholders need to be realistic in their expectations however, as the government budget is expected to enter a deficit as early as next year. Severe spending cuts will be required to make up for the loss of logging revenues (Ministry of Finance and Treasury, 2008). Unless the government can be convinced of the exceptional importance of the Tourism sector, a goal the Chamber wishes to pursue, it is likely that the majority of the CNURA ambitions fall by the wayside.

Also of note is the Solomon Island’s Tourism Sector Strategic Plan (Department of Culture and Tourism, 2006). This document provides a review and update of the previous ‘Solomon Islands Tourist Development Plan 1991 to 2000.’ It documents the key constraints facing the industry, the institutional framework and functioning of the SIVB and the Ministry of Culture and Tourism, and the business environment facing tourist operators. It then goes on to suggest a new strategic direction for tourism development and lists the fundamental changes required for implementation. The strategic plan is a much broader examination of the tourist industry’s situation, and provides vital context for the more specific attitudes research presented here.

The key constraints facing the industry were summarized as:

Lack of awareness: The main stakeholders – community, politicians, government officials and industry operators do not properly understand each other or interact as partners of tourism development.

Unskilled workforce: There remains a need to introduce on-going training programs in key tourism and hospitality industry skills.

Limited air service: Solomon Airlines is failing as an effective carrier and unreliable service on domestic routes is of particular concern. New carriers such as Virgin and SkyAirWorld will help alleviate the international side of this problem.

Inadequate infrastructure: Transport, communications and utilities are of poor standard. Despite the policy statements, government lacks the capacity to invest in serious capital works at present.

Access to capital: Financial support and services are expensive and difficult to obtain, a problem exacerbated by land tenure issues. Lease arrangements with customary landowners do not encourage long term investment.

The report also claims that private industry has been unable to organize itself into effective lobby organizations, capable of advocating for favorable and fair government treatment. This is claimed to be the product of geographic disparity, the small size of tourism businesses and rivalries. It is hoped that this independent SICCI study provides a coherent voice for the industry, and contributes to the goals of the recently formed National Tourism Association of the Solomon Islands.

2.3. Visitor Characteristics

The Ministry of Culture and Tourism and the SIVB have published details on the flow of visitors (Ministry of Culture and Tourism, 2007). Total expenditure by visitors is estimated at \$135m, and most visitors (65%) come for business purposes. Total visitor numbers from Nov 06-Nov 07 are 13 232, of which 2779 were ‘recreational’ tourists. Australia is the dominant market (43%). The Solomons’ share of the total South Pacific visitor numbers (1 173 620 in 2004) remains less than 1%.

Table 1: Total visitor numbers for the Solomon Islands, and percentage of total Pacific visitor numbers

1999	2000	2001	2002	2003	2004	2005*	2006	2007
17 395	10 134	3 418	4 508	6 000	6000	9400	11 482	13 232

Source: 1999-2004 - South Pacific Tourism Organization estimates in AusAID (2007); 2006 - National Statistics Office (2008) (*based on Apr-Dec only); 2007 – Ministry of Culture and Tourism (2007)

The bulk of visitor nights (68%) are spent In Honiara, due to the large numbers of business travelers. The median length of stay is just over 10 days, and repeat visits are common. 20% of recreational visitors had previously visited on business. Of importance for operators and government promotion, 37% of visitors feel they do not have enough

information to plan a ‘good trip.’ The internet is the primary means of information gathering, which will allow the industry to take advantage of the ‘long tail’ approach to marketing – small ventures can raise their profile at minimal cost (AusAID, 2006).

2.4. Economic Impact

Politicians have been increasingly ready to offer enthusiastic rhetoric about the importance of tourism, yet have not made the required legislative change and investment required to realize this potential. The Chamber would like to see greater dissemination and acknowledgement of the basic economic benefits of the industry, as understanding these will strengthen the case for reform.

Direct tourism employment is around 1200 jobs (Department of Culture and Tourism, 2006), however the indirect employment effects are estimated at up to 17 000 jobs (with lower certainty; SPTO, 2005).

The economic flow-on from tourism dollars is significant: from every \$1m of visitor expenditure, \$660 000 of wages and purchases flows to the South Pacific economies (although goods may be imports sourced from a local wholesaler) (SPTO, 2005).

Approximately 32% of costs are wages, and 80% of South Pacific firms have less than 10% expatriate employees (SPTO, 2005).

The SI Government raised an estimated \$26m via company taxes and \$240 000 through the departure tax in 2004, a figure expected to be much higher with 2008 visitor numbers. Further consideration must be paid to taxation on wages, tariffs on imports, sales taxes and taxes raised from flow-on economic activity (SPTO, 2005)

The GDP contribution of the industry in 2005 was 3.1%, and the wider economy wide contribution (including flow-on effects) was 9.7% (SPTO, 2005).

These economic benefits are provided by an industry far below its potential. The importance of growth here is recognized by a government looking for an alternative to logging. Extractable timber is expected to be exhausted by 2012 due to rates of extraction that are “*completely unsustainable*,” and only 7% of the industry is based on renewable plantation sources (CBSI, 2008). Logging currently makes up 18% of the Solomon Islands’ economy.

The tourism sector will need to be a part of the long term replacement, as recognized in the 'Medium Term Fiscal Strategy 2008-2013' (Ministry of Finance and Treasury, 2008). The Government is banking on the non-logging sector contributing an *additional* 1.5 percentage points of growth to prevent a decline in GDP per capita. However, to prevent a serious budget crisis, Government expenditure growth will have to cease, making investment difficult.

The Australian Government's Pacific 2020 study recognizes that tourism is an activity of strong comparative advantage for the Pacific. Its remoteness may contribute to expensive airfares, however it also provides the allure of the unknown. It is a labor intensive industry with a disperse distribution of wealth, and contributes to workforce training (AusAID, 2006a). Of particular note, social development, environmental and cultural considerations are positively aligned with the profit motive of a well managed tourism industry. Although it is recognized that there are pitfalls to tourism, the industry has the incentive to contribute to these greater public goods for the sake of its own return, in a way not seen in many other exports.

3. COMMUNITY ATTITUDES SURVEY

118 respondents were questioned between the 11th and the 18th July, 2008. Surveying took place in Ringgi (Kolembangara), Gizo and Honiara. The survey instrument is presented in appendix 1.

The survey featured three sections:

Externalities and impact: what kind of impact does the community think the tourism industry has on society, the environment and the economy?

Preferred tourism type: How much and what type of tourism industry would be most acceptable to the community?

Socio-demographic variables. Age, sex, education and employment for comparison across different social groupings.

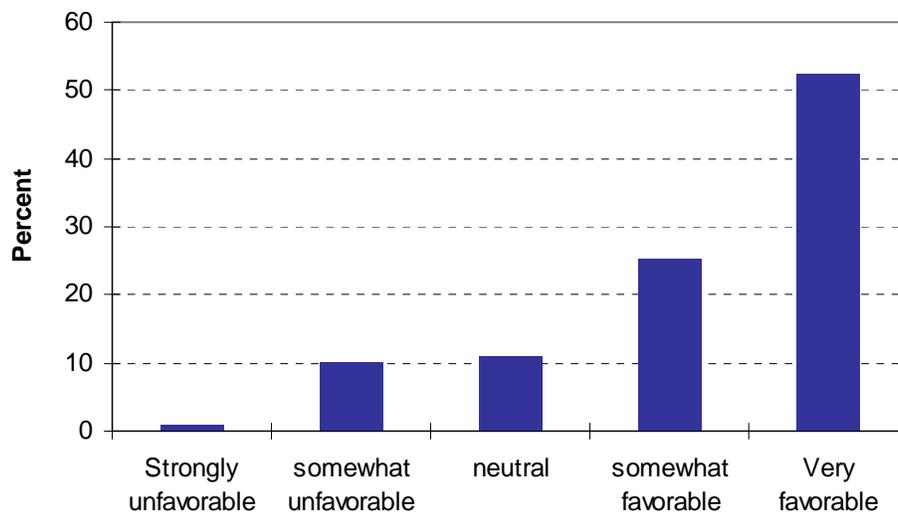
3.1. Aggregate measures of tourism support

Importantly, respondents were asked to comment (agree or disagree on a 1-5 scale) on a variety of potential tourism impacts (such as crime, employment and infrastructure)

before being asked to nominate an overall opinion on the industry, thus providing a more considered response.

It was noted that responses to the ‘overall opinion’ question were typically highly affirmative, with 52% of those surveyed claiming to be “very favorable” about the tourist industry (see Figure 1). The mean response was “somewhat favorable.”¹ Interestingly, the same question presented to a sample of Nadi residents, Fiji, in 1992 elicited very similar results (King, *et al.* 1993).

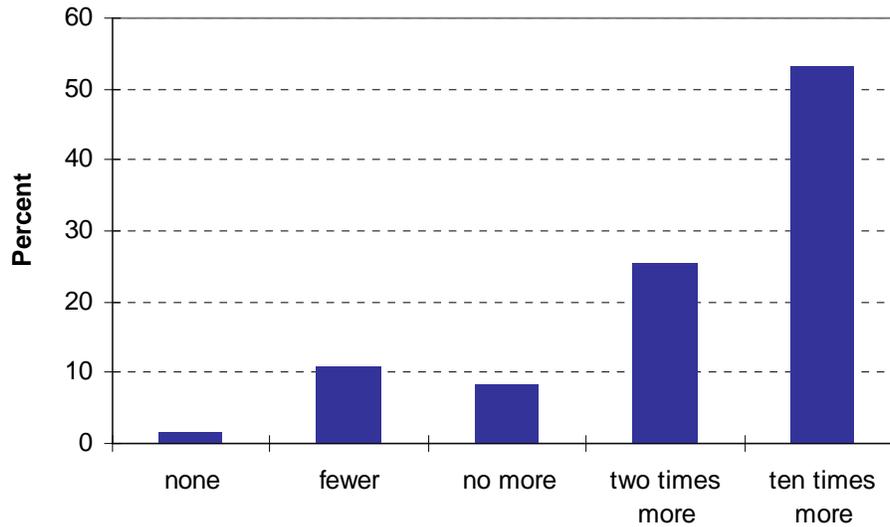
Figure 1: Proportion of each response to the question: “what is your overall opinion of tourism?”



Respondents were also asked about what level of tourism they would be willing to support in “this area.” A non-linear spectrum of options was chosen in an attempt to reduce the assumed diminishing marginal impact (psychological or real) of tourism numbers. A slim majority of respondents nominated “ten times more” as the desired number of tourists in their area (see Figure 2). 37% of respondents nominated the most positive response in both questions. 70.5% of those “very favorable” towards tourism subsequently nominated “ten times more” as their preferred number of tourists.

¹ To address the propensity for highly favorable responses, an exponential dependent variable specification has been used in the modeling.

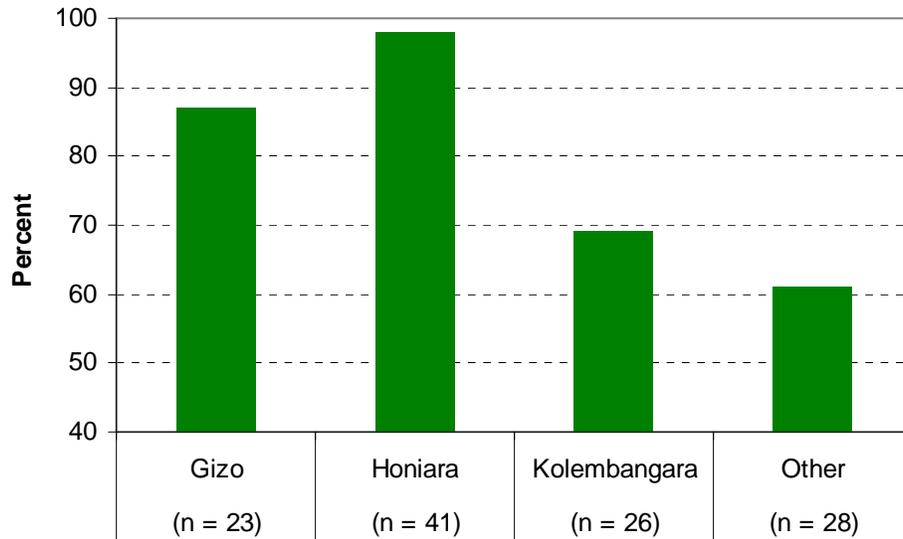
Figure 2: Proportion of each response to the question: “Would you like more tourists to come to this area?”



The region where a respondent resides was noted during the survey interview, and for the purpose of analysis, towns were grouped into four regions: Gizo, Honiara, Kolembangara and ‘Other’. Other includes Ranongga, Choisuel, Simbo and Vella la Vella, grouped together due to their lesser development status and limited tourism numbers. Support for tourism, based on the average response to the “overall opinion” is consistent across regions, except for a notable, statistically significant dip in the ‘other’ areas. Average support here is less than ‘somewhat favorable’, whilst the more developed districts feature support greater than ‘somewhat favorable’.

A third important general indicator question asked for respondents to pick between increasing tourism and increasing plantations for timber or agriculture. The use of a tradeoff tests whether the general optimism for tourism holds when presented against other potential industries for development. 81% of respondents nominated tourism, although support differed considerably by region (see Figure 3). Again, the more developed areas demonstrated increased acceptance of tourism as a superior economic alternative.

Figure 3: Proportion of respondents nominating tourism as their preferred industry for increased development in contrast with plantation for agriculture and timber. Sample size (n) at each location is indicated.



3.2. Perceptions of tourism – the costs and benefits

Understanding why people hold the opinions they do allows the tourism sector to act upon the findings here. Tourism is an industry with a diverse set of impacts, intimately affecting the social and natural environments, as well as the economy, both for better and worse. We consider the following tourism impacts in this study: employment, income, standard of living, services, exclusion of more damaging industries, environmental damage, crime, inflation, social values and privacy. There are several reasons for collecting this information:

- Impacts for which tourism receives praise provides the industry with the opportunity to exploit their advantage, promoting the industry’s virtues using that particular argument. Secondly, the positives may be used as a point of leverage for government support – the ‘selling points’.
- Impacts that cause community concern must be addressed – by improving standards and community relationships. It is ultimately in the industry’s best interests to maintain good grass-roots support, and as shown above this is currently being achieved. Where industry disagrees with the community’s assessment, public promotion to rectify the misunderstanding can be used, targeting the points of concern highlighted here.

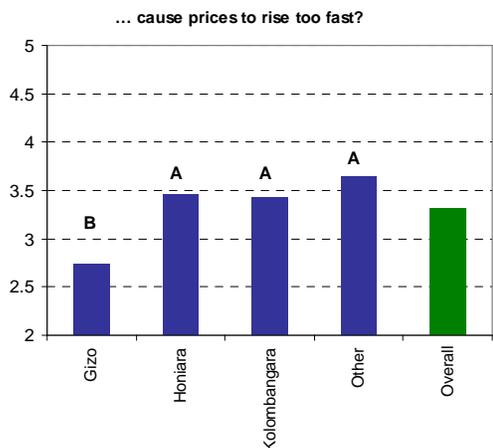
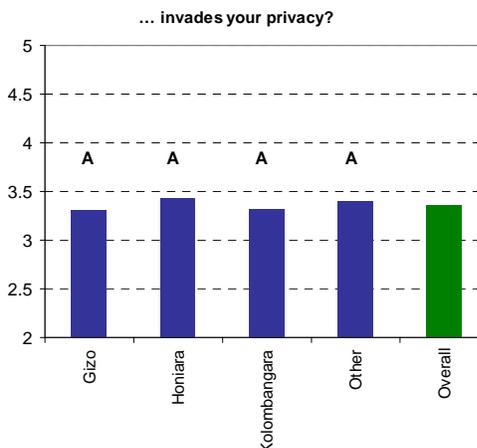
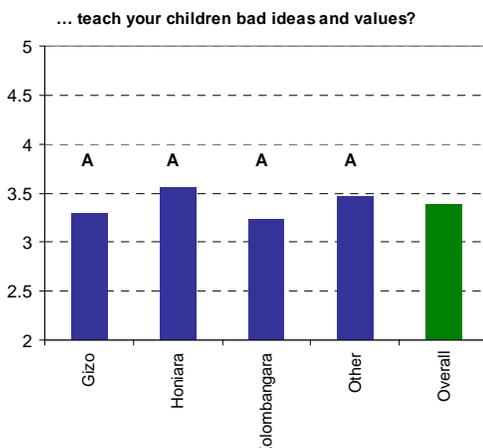
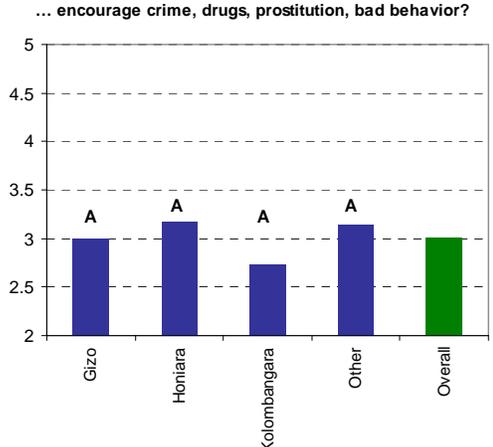
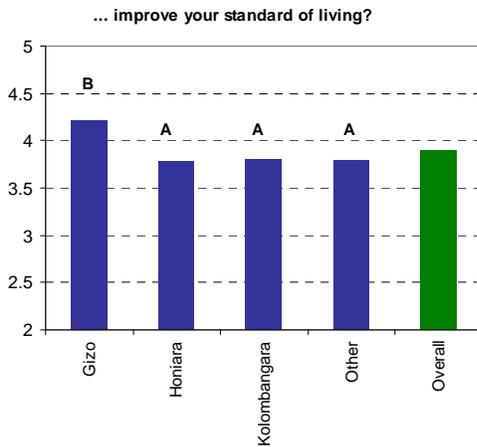
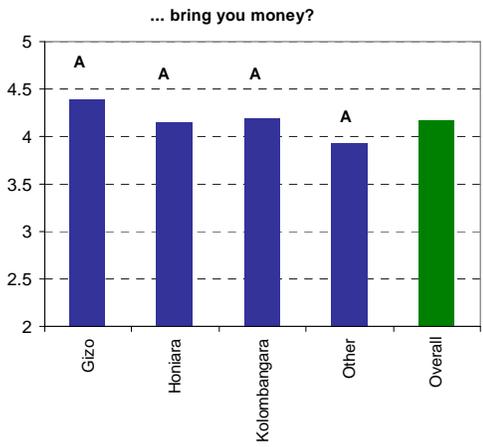
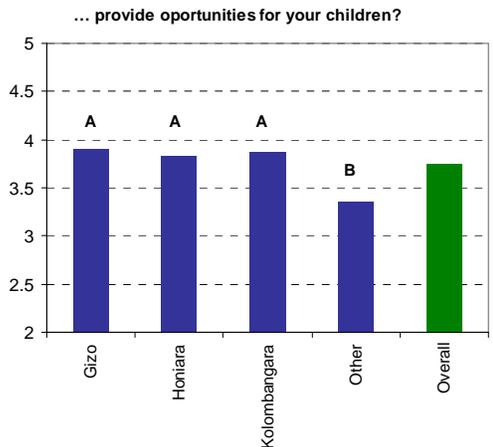
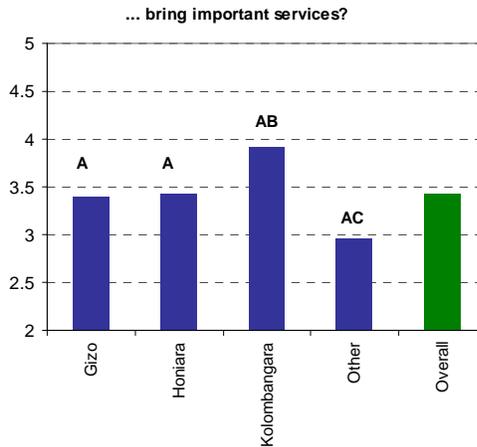
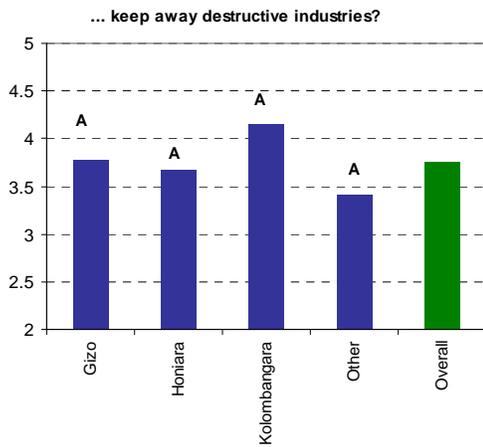
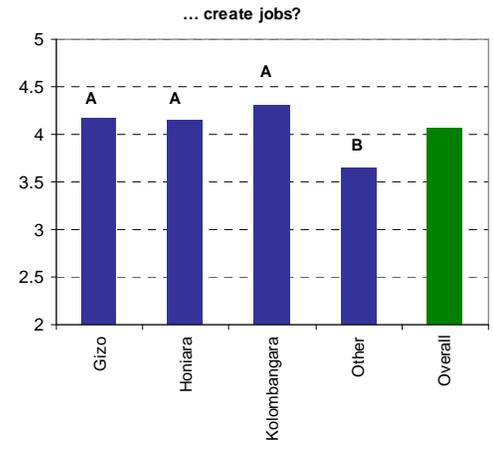
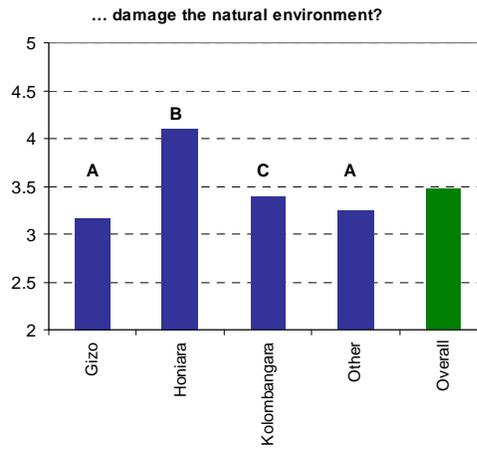
Analysis of these results is presented in two sub-sections. The first assesses the responses independently of each other, highlighting those that are unusually high and low. Secondly, regression analysis is used to determine which underlying concerns drive the samples overall propensity for or against tourism, and to what extent each contributes.

3.2.1. Univariate costs and benefits

Figure 4 presents the results to the impact questions, averaged by region. Strong positive consensus was found for the economic variables, with jobs, income and standard of living mattering most to people. These positives were stronger than the equivalent negatives on social and environmental impacts, however these did still feature. The propensity of tourism to encourage crime, drugs, prostitution and bad behavior is a point of cautious concern (with a median response of just under 'not sure' – 2.8). The perceived contribution of tourism to inflation has a similar value. Impact on social values, the natural environment and privacy were largely dismissed by interviewees.

Noteworthy results by region include a lesser environmental concern in Honiara, and a reduced appreciation of the economic benefits in the most distant 'other' regions. This is concordant with the general increase in support for tourism in more frequently visited and developed areas. Honiara shows highest support, followed by Gizo, Kolombangara and then other regions. Gizo respondents show a lesser concern for price inflation. Many of the results presented here should be a reassuring find for the industry, indicating that support in the community seems to build with increased exposure.

Figure 4: Community attitudes towards the impacts of tourism. “Do you feel that tourism... [creates jobs] (etc)” Responses supplied on a 1-5 scale (strongly disagree, disagree, not sure, agree, strongly agree). Note that responses to the negative impacts have been reversed to make comparable. Thus higher scores indicate a more positive attitude in all cases. Attitudes are broken down by region, with letters indicating statistically significant differences ($p < 0.1$).



3.2.2. Costs and benefits: which ones matter?

The purpose of the following regression analysis is to determine which of the above impacts are contributing to overall support for tourism. Whilst all impacts are commented upon by respondents, some are more important than others in driving the underlying attitudes. Box 1 discusses details of the modeling methodology, whilst results are presented in Table 3.

Box 1: Modeling methodology

Ordinary least squares (OLS) multivariate regression analysis was used to determine the strength of the relationships between the overall opinion indicators (the questions discussed in section 3.1) and opinions on specific impacts of tourism. Data collected was primarily in the form of ordinal categorical and binary variables. The highly affirmative responses to the ‘overall opinion’ questions give the distribution of the dependent variable a positive skew. For more quantitatively accurate modeling, a generalized linear model (GZLM) with a non-parametric discrete distribution would be preferable, however time and software constraints limit the analysis to an approximation with general linear modeling (GLM). This is not expected to be overly detrimental considering that the model is used for inferring relationships, not for making predictions, however, the coefficient magnitudes should be interpreted with this caution in mind.

The use of an exponential transformation on the dependent variable helps to balance the highly positive tendencies of respondents by creating higher separation between the higher options, thus providing a closer linear approximation. Results are presented for both linear-linear and quadratic-linear forms.

Variables used in the analysis were chosen based either on their statistical significance, or because of their noteworthy insignificance (see Table 2). Other data elicited by the survey will be discussed in subsequent sections of this study.

The 11 externality questions were assessed on a 1-5 scale. Half of these were asked so as to provoke a negative response, to ensure respondent was not simply agreeing with the questioner. These have been reversed for analysis, ensuring they are comparable to the other 1-5 scale questions.

Table 2: Variables used in regression analysis. All 1-5 scale questions based on ‘strongly disagree, disagree, not sure, agree, strongly agree’ response options.

Variable	Explanation
Location - Gizo	Binary variable, 1 if respondent lives in Gizo, 0 if otherwise. It was found that this best captures the location differentiation.
Family benefit	Does respondent benefit from tourism? (0=not at all, 1 = a little, 2 = very much)
Jobs	Does respondent feel that tourism creates jobs (1-5 scale)
Income	Does respondent feel that tourists bring him/her money? (1-5 scale)
Standard of living	Does respondent feel that tourists improve his/her standard of living?
Services	Does respondent feel that tourists bring services to his/her area? (1-5 scale)
Destructive industries	Does respondent feel that tourists keep away destructive logging or fishing industries? (1-5 scale)
Opportunities	Does respondent feel that tourists provide opportunities for his/her children? (1-5 scale)
Environmental damage	Does respondent feel that tourists damage the natural environment? (1-5 scale) (note: scale reversed for analysis)
Crime	Does respondent feel that tourists encourage crime, drugs, prostitution or bad behavior? (1-5 scale) (note: scale reversed for analysis)
Inflation	Does respondent feel that tourists cause prices to rise too fast? (1-5 scale) (note: scale reversed for analysis)
Bad values	Does respondent feel that tourists teach his/her children bad ideas and values? (1-5 scale) (note: scale reversed for analysis)
Invades privacy	Does respondent feel that tourists invade his/her privacy? (1-5 scale) (note: scale reversed for analysis)
Equality	Does respondent feel that some people benefit more than others from tourism? (1-5 scale)
Tourist vs. Plantation	Does the respondent wish to see greater development of the plantation timber and agricultural industries, or greater development of the tourism industry in the Solomon Islands? (0=plantation, 1=tourism)
Age	Age category of respondent (1= < 18, 2 = 18-30, 3 = 30-50, 4 = > 50)

Table 3: OLS linear regression results for community attitudes. Observations = 118. $p < 0.001 = *$, $p < 0.05 = **$, $p < 0.1 = *$.**

	Dep. Var.: "Overall opinion"		Dep. Var.: "Overall opinion" ²	
	Coefficients	Standard Error	Coefficients	Standard Error
Intercept	0.86	0.66	-6.73	4.75
Location - Gizo	0.29	0.20	2.21	1.41
Family benefit	0.24 **	0.12	1.98 **	0.83
Jobs	0.26 **	0.13	1.74 *	0.92
Income	-0.08	0.13	-0.38	0.91
Standard of living	0.32 ***	0.10	2.21 ***	0.74
Services	0.08	0.09	0.65	0.63
Destructive industries	-0.21 ***	0.08	-1.63 ***	0.55
Opportunities	0.11	0.11	1.06	0.77
Environmental damage	0.01	0.08	0.24	0.55
Crime	-0.07	0.09	-0.54	0.63
Inflation	0.01	0.08	0.00	0.57
Bad values	0.00	0.08	-0.02	0.61
Invades privacy	0.01	0.08	0.11	0.55
Equality	0.21 **	0.10	1.57 **	0.70
Tourist vs. Plantation	0.97 ***	0.21	6.42 ***	1.50
Age	0.07	0.11	0.69	0.82
		R ² 0.51		R ² 0.52
		Adjusted R ² 0.43		Adjusted R ² 0.45
		Significance F < 0.001		Significance F < 0.001

Both models find six significant variables that influence people's overall opinions. These are the factors that the industry must concentrate on if it wishes to effectively and efficiently win the support of the community.

Family benefit: If the respondent *perceives* a personal benefit to them and their family, their support increases. Note that it is not actual benefit that matters, it is the extent to which they recognize it, most likely via the following identified impacts.

Jobs: Employment is demonstrated not only as one of the most positive impacts as recognized by the sample, but also as a key driver of the overall attitude.

Standard of living: Recognizing the link, when and where it exists, between tourism development and improved standards of living is also shown here as a significant control on overall attitude. Thus reinforcing this connection through industry promotion represents an efficient means of boosting community support.

Destructive industries: Contrarily, people who considered tourism to actively exclude destructive industries such as logging, were less supportive of tourism. This may be due to a 'realism' factor: it is clear that tourism has had limited success at replacing extractive industries in the Solomon Islands. In the case of Marovo lagoon, tourism was simply

dismissed in the decision to continue logging, and in so doing forwent world heritage listing for the area. The cynicism this finding suggests should instead be made apparent to government.

Equality: People who recognized tourism as benefiting some people much more than others were less prepared to profess high overall support. Furthermore, this is the majority of respondents, with an average value of 4.3 (more than 'agree'. Note also the relative consensus on this point). Unequal spoils are thus a point of minor resentment. Some interviewees (n = 40) were also asked informally whether they considered high inequality to be "a problem." 68% claimed that it was, of which 6 volunteered that it was a "big problem." More positively, staged hierarchical regression indicates that the explanatory power of this concern is low; in other words, equality matters, but not very much.

Negative externalities: The lack of explanatory power in any of the negative externality questions is good news for the industry. Whilst some issues were raised as points of minor concern, such as price inflation and a rise in crime and 'bad behavior', these are not having a measurable impact on overall community attitudes. Put simply, people recognize some downsides to the industry, however, their appreciation of the positive economic impacts is the final decider in their attitude.

Location – Gizo: Although not found significant in the model variations shown here, other regressions indicate that Gizo demonstrates overall higher propensity to support tourism (as seen in section 3.1). Increased exposure to tourism appears to increase its esteem in the eyes of the community, a very positive finding for the industry.

Services: the extent to which tourism encourages services to an area (e.g. roads, shops, better utilities) received the lowest agreement of any positive tourism impact, slightly above 'not sure'. This would appear to mirror conditions in the Solomons' tourist areas: Gizo continues to suffer from poor roads, water utilities and access. However, modeling indicates that when services are considered to have improved due to tourism, it has a strong influence on overall attitude. Thus the attraction of services can be used as a potent selling point to the community, when it can be achieved. Where it cannot, government must be made aware of this convenient synergy – the mutually reinforcing benefit of tourism, services and the community attitude.

The emphasis on economic impacts found in this study are concordant with previous findings in the region. A survey of attitudes towards tourism in the Marovo lagoon area collected costs and benefits as nominated by a 102 inhabitants, and found that a positive

economic impact was strongly recognized (Burns, 1996). Social impacts in the form of adverse values was a strong negative in this 1992 study, however, we find only slight evidence of such a concern here. Respondents were similarly enthusiastic about an expanded tourism industry. What does become apparent here is the ability for community members to discern between positive and negative impacts of tourism. Even the ‘best friends’ of the industry are prepared to note certain social and environmental costs, however they remain positive overall. A similar conclusion was reached by King, *et al.* (1993) in their study in Nadi, Fiji. It is thus suggested that attempts by government and industry to whitewash tourism are unnecessary and unconstructive: the community does recognize some downsides already, yet will be prepared to give support if they are convinced by the economic argument – employment opportunities and standard of living.

Section 4.7, ‘Relationships with the community’ considers the these findings and compares them with the concerns of operators. Whilst tourism receives a good wrap from people on the street when asked, allegedly, not all actions mirror these sentiments. Suggestions for improving the community’s amicability towards tourism is further discussed here.

3.2.3. Demographic differences

Interestingly, few demographic differences could be found. Summary statistics showing the demographic characteristics of the sample are presented in Table 4. The sample features a disproportionate number of males, and has an age distribution older than the general population. However, the lack of any differences in support for tourism between groups ensures that this is not overly detrimental. The lack of change in support as a function of age is demonstrated in the regression modeling (Table 3), whilst the other variables were found to be inconsequential in single factor tests.

Table 4: Summary statistics of sample (n=118).

Variable	Mean
Sex	33.0% Female
Age	6% < 18; 27% 18-30; 57% 30-50; 9% >50 years
Education	83% - secondary or higher; 14% - primary; 3% no formal education
Employment	18% professional; 18% agricultural; 6% logging; 11% fishing; 47% other.

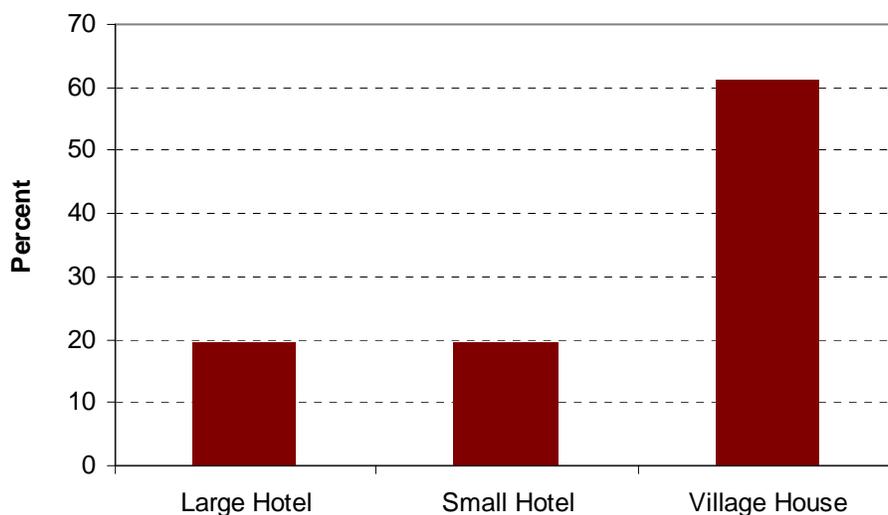
3.3. Community preferences for development

After being asked whether they would like to see an increase in tourism numbers (see section 3.1, Figure 2), respondents were asked to nominate their preferred form of tourist

accommodation for their region. 60% nominated ‘village house’, or a traditional type of building as part of a ‘real’, ‘cultural’ experience. 20% nominated ‘small hotels’ and 20% ‘large hotels’. This demonstrates a preference for ‘eco’ or ‘cultural’ tourism, characterized by community involvement, nature based low impact activities and small scale operations, which were also recommended by the *Solomon Islands Tourism Sector Strategic Plan, 2006* (Department of Culture and Tourism, 2006). It is also likely that the Solomon Islands appeals to travelers who are attracted by such principles, although the country’s poor environmental record does nothing to encourage its success in this lucrative market.

It is likely that the predilection for small scale accommodation is part of a desire for locally owned industry. This sentiment was freely offered to interviewers on several occasions without being prompted or asked about, suggesting that it is a point of some concern. It presents a dilemma for the tourist industry: there are few substantive locally owned tourist operations and few wealthy local businesses that could comprehensively invest in the tourism industry. Foreign investment is at present the only source of capital and expertise that could hope to undertake the Government’s tourism development agenda, and investment incentives are addressed in the operators section of this report. At this current stage, it is necessary to get the fundamentals right before actively pursuing a tourism market subsection. Long term however, local involvement will help ensure that the maximum possible economic and social benefit from tourism can be achieved.

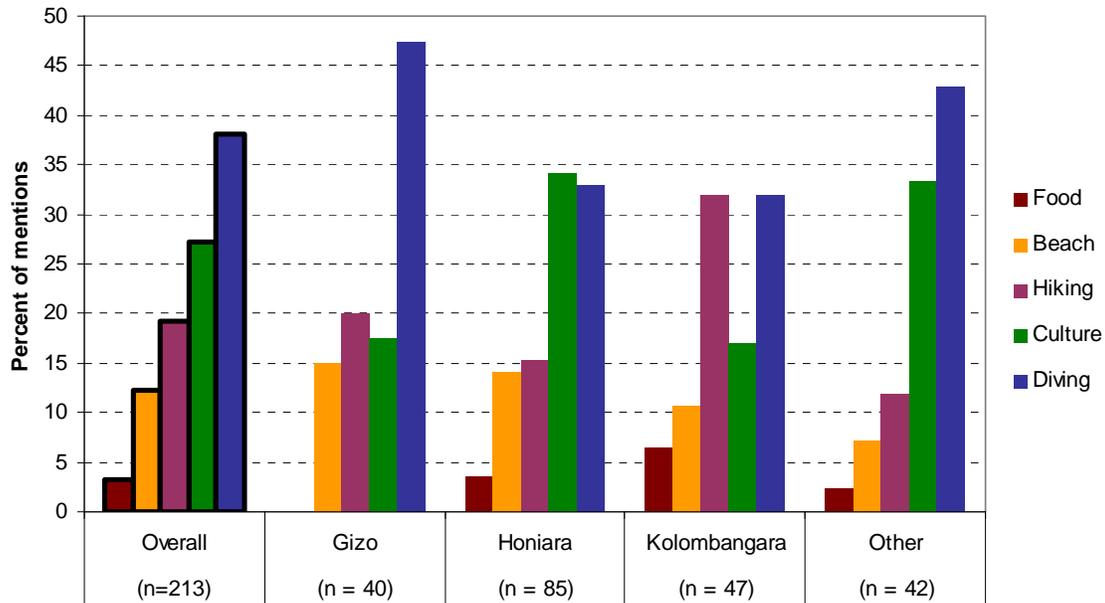
Figure 5: Preferred accommodation type for additional tourists to the Solomon Islands.



Simply for the interest of operators, we included the questions “what do you think is this area’s best tourist attraction?” It is not expected that the community should dictate the business decisions of private operators, however, some may find it interesting to see what

the local community is attracted by. This may explain the community’s attitudes towards certain activities, but we leave that to the speculation of operators. Both culture and hiking scored highly, and only in Gizo did the obvious response, diving, exhibit a clear majority.

Figure 6: Responses to the question “what do you think is this area’s best tourist attraction?” Note that respondents could nominate more than one answer, so the sample size is based on the total number of answers.



3.4. Employment and training

Regression modeling provides evidence that the generation of employment is a strong contributor to the positive community attitudes towards tourism. It is not surprising then that jobs in the tourism sector are considered to be highly desirable, with the chance to learn new skills as the major draw card. This finding, however, contrasts with the experience of operators, who often report difficulties in finding good staff. It is likely that the expectations of the industry do not match reality for many job seekers, and that the difficulties of hospitality work are underestimated. Whilst the problems faced by operators are addressed in detail in the next section, noted here are the attitudes towards work in the industry by the community, most of which did not work in tourism at the time of surveying.

- 8% of the sample claimed to work in the tourism industry,
- 56% claimed to know somebody who worked in the tourism industry

- 80% claimed that they would like to work in the tourism industry.

Of the people who thought a job in the tourism industry would be good:

- 67% nominated the chance to gain new skills as a reason,
- 37% thought that the work would be “interesting”,
- 18% thought that the work would pay well,
- 17% thought tourists are friendly.

Note that respondents could nominate more than one reason here.

Ensuring that people understand what employment in the industry actually involves is the first step to reducing the high turnover rates that operators report. Good quality, easily accessible training for hospitality staff is required long term, however, and would capitalize on people’s desire to work in tourism and their desire to gain skills.

4. OPERATOR ATTITUDES SURVEY

A survey of operator opinions was undertaken between the 10th and 24th July, in Gizo and Honiara. A wide variety of operators were contacted, however, the findings published here are based on the opinions of 17 operators who responded. Most information was gathered in structured interviews, although some was gathered by email. This sample represents approximately 750 beds, \$217 million in business market value and 618 staff, making it a serious representation of the industry’s opinions.

Of primary interest are the constraints to the sector’s development. We aim here to identify a small number of impediments that are most critical, and canvas suggestions as to their alleviation.

4.1. Summary of operators concerns

Despite the concerns detailed in the sections below, opinions regarding the prospects of the Solomon Islands’ tourism industry were fairly optimistic. Respondents were asked to rate their business confidence in the short (5 years) and long term (15 years), and on average chose “*somewhat favorable*” for both. 60% of businesses had made significant investments (expansion of capacity or services) in the past two years.

Figure 7 indicates surveyed businesses' preferences for investment/attention in the industry, covering both private and public investment. Air services and infrastructure was the clear priority, followed by public utilities (roads, electricity and water).

Figure 8 shows the most pertinent threats to long term success for the industry, in the opinion of operators. Political instability was mentioned by every single interviewed business. 'Lack of legislative reform' was also considered a problem, demonstrating that the industry is relying on the support of government to improve the business environment. Items of reform required included taxation (a simpler, more streamlined system that did not double tax), investment incentives (including a reduction on tax for imported investment items) and land tenure reform (more registered land).

Figure 7: Summary of results to the question “what area of the industry do you believe requires most urgent investment/attention?” Respondents chose their top three concerns.

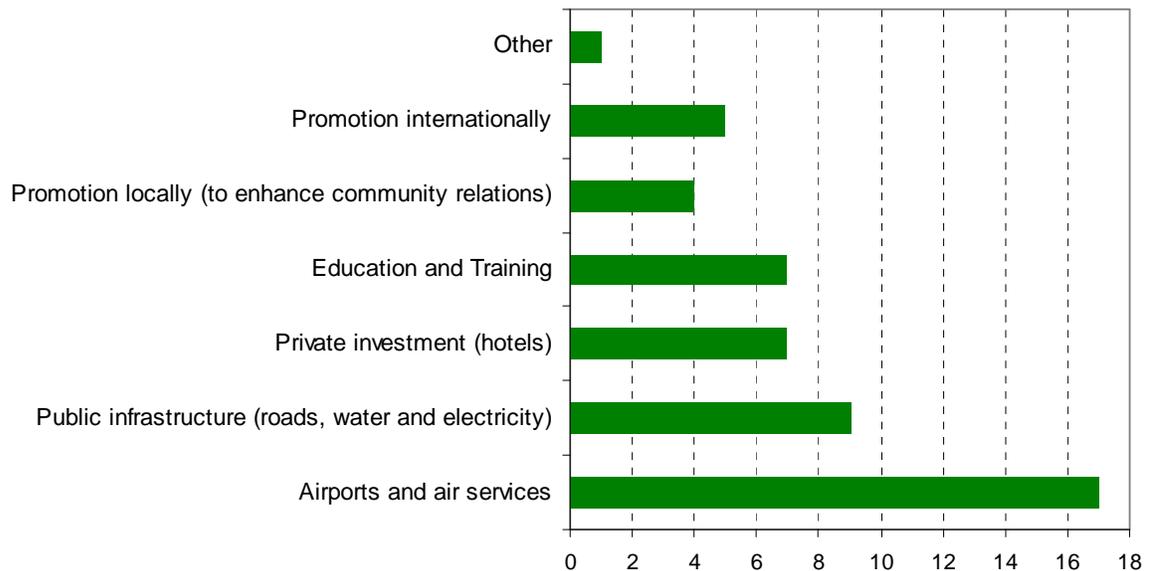
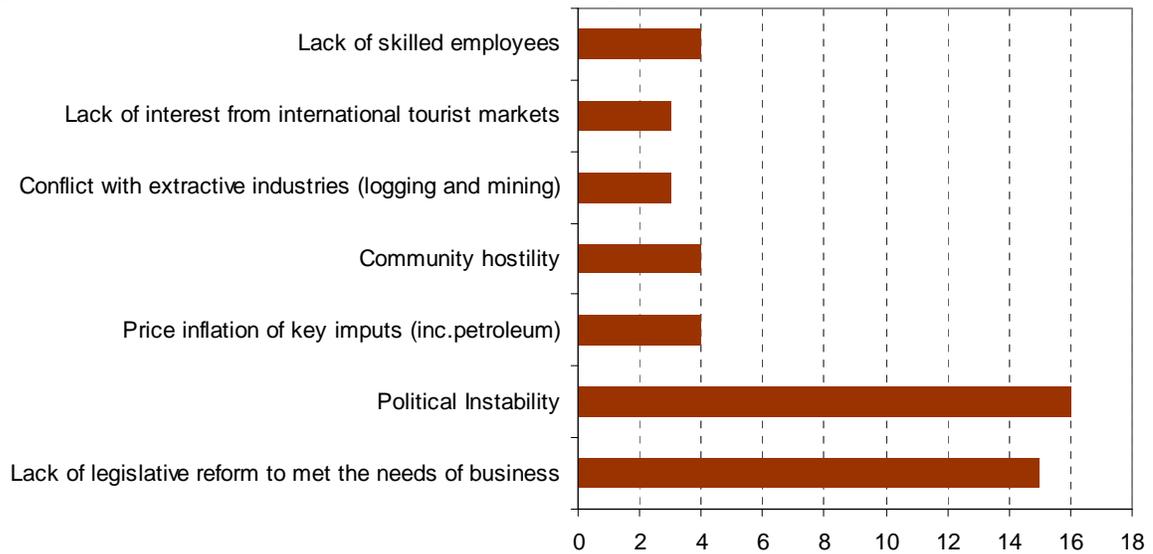


Figure 8: Summary of results to the question “what do you see as the greatest threats to a successful, long term tourism industry?” Respondents chose their top three concerns.



4.2. Air Services

13 out of 17 operators stressed the reliability of the air service as one of the top priorities for encouraging industry development. Solomon Airlines has a reputation amongst operators for failing to adequately service the Western Province, and even operators in Honiara expressed frustration. Bookings are difficult to coordinate because flights are often cancelled, and several operators claimed that travel agents overseas were refusing to recommend the Western Solomons simply because the air service was inadequate. Tourists on short trips risk missing their expensive international flights due to cancelled domestic flights, an event that occurred at least once during this study’s brief duration. Several operators, mainly those focusing on the international market, claimed to be highly optimistic about the future of the industry in the Western Province providing the air service can be improved.

Suggestions as to the improvement of the air service focused on two aspects: the management of SolAir and the quality of airport infrastructure. The government carrier has been unable to run a profitable operation, although this is due in part to their need to service lesser utilized routes at subsidized prices, and high fuel costs. Ultimately, competition is required to improve the service, and the interest shown by SkyAirWorld is encouraging. A taxation arrangement that transfers a proportion of profits made by new carriers to help maintain unprofitable routes can be adopted if necessary, however management improvement should occur first. Changes to SolAir bookings operations would also help: for instance, insisting on payment to secure bookings would cut down

on the number of unfilled, booked, seats. The airline currently does not penalize passengers who do not make their flight. A long term arrangement with the fuel suppliers to provide fuel at regional airports (for instance at Gizo) would prevent the need to fly loads of fuel to a destination.

The government must place performance benchmarks on SolAir's activities, with financing dependent on the reaching of a minimum level of service. This may be based on the number of cancelled services or the timeliness of operations. The Government must be convinced of the importance of a decent air service. SolAir is not an end in itself; it provides transport that allows key sectors of the economy to function, such as the tourism industry.

Airport infrastructure also requires investment. The domestic terminal at Henderson is dilapidated and dysfunctional. Two proposals made by the Department of Infrastructure offer improvement in this area: a new domestic terminal at Henderson and a new international airport at Munda. The latter offers great potential to alleviate this most serious of impediments – flying jets straight to the Western Province by international carriers such as Virgin and SkyAirWorld would improve capacity, likely improve reliability and allow tourists to travel direct to their destination without having to stay overnight in Honiara. Planes would still land at Henderson to clear customs and security, but would then travel straight on, offering a highly cost effective solution. The need for a new domestic terminal would remain, however, could be delayed if the international airfield went ahead.

4.3. The Solomon Islands Visitors Bureau

The SIVB is a statutory authority whose role, as stated under the 1996 SIVB act, is to:

- Promote, encourage and develop tourist travel,
- To promote, encourage and develop adequate, efficient and attractive tourist services,
- To co-ordinate activities of persons providing tourist related services in the SI,
- To assist and promote understanding amongst the local population of the benefits that accrue from the development and promotion of tourism in the SI.

This broad field of objectives has contributed to the perceived failure of the SIVB to successfully develop the tourism industry. The theory by which the SIVB is justified is sound: a public tax collecting agency can promote a destination in a way that would not otherwise occur in a diffuse industry. However, the SIVB's current level of effectiveness

is uncertain. In 2007 the authority spent \$2 083 000 on marketing and promotion, or approximately 43% of its levy collection for the year. Based on the 2007 visitor survey, an estimated 2779 tourists (as distinct to business travelers) arrived in the Solomons Islands, giving an expenditure/tourist ratio of \$749 per tourist.

Survey participants were scathing in their opinion of the Bureau. To the question “*do you think the Solomon Islands Visitor’s Bureau adequately advertises the industry and informs your customers*”, the median response was “not generally.” The Bureau was perceived as wasting funds on poorly considered marketing and international travel, although this study can not comment on the veracity of these perceptions. It is likely that this disenchantment with the Visitors Bureau is affecting perceptions of government commitment to the industry. When asked how they perceive “*the attitude of the Solomon Island's government towards the industry overall*”, operators were only slightly more positive – between “neutral” and “a little unfavorable.” The Bureau collects a 10% bed levy from all operators, and its marketing is currently to international audiences. This was criticized by some smaller operators who cater exclusively for a domestic market and thus wondered what they were receiving for their taxes. This concern could be potentially alleviated by an increased focus on the fourth objective of the SIVB act: domestic promotion to enhance industry-community relations.

The SIVB website was a further topic of concern amongst operators, with some expressing frustration and even embarrassment at the neglected state of the site. The website should function as an advertising portal both for the Solomons as a destination and for all operators paying the bed levy. If the site is not kept updated as a matter of priority, it is a serious handicap to the industry. The 2006/07 International Visitor Survey found that the internet is the most commonly used information source for planning a holiday in the Solomons. Furthermore, the survey found that 47% of visitors had ‘just enough’ information to plan a ‘good trip’, and a further 30% did not have enough. The SIVB was utilized by only 3% of visitors for planning a trip in this time period. It is understood that a volunteer web design professional has recently been contracted to improve the website.

Operators were also asked (informally) if they were familiar with the work of the SIVB. Most could not nominate a single promotion activity, and had not received any correspondence from the Bureau outlining how it was spending the bed levy money. It does not appear that the SIVB works in collaboration with operators, despite the fact that the experience and expertise of industry could make a valuable contribution to the Bureau’s marketing decisions.

If it is to be effective and to win the support of those who fund it, the SIVB must:

- Play a role enhancing the community's attitude towards tourism via domestic promotion;
- Actively engage with the industry it is supposed to be serving. Take advice from key operators before embarking on international promotion campaigns, and understand that the private sector contains valuable knowledge that should be utilized;
- Manage an up-to-date, comprehensive website;
- Keep the tourism industry informed. This could take the form of a monthly or quarterly electronic memo, detailing what funds have been spend and what has been achieved. It can also be used to solicit advice for upcoming promotional activities.

The Department of Culture and Tourism's Strategic Study (2007) estimates that as many as 50% of operators do not pay the bed levy. Considering the Bureau's inability to properly enforce payment, it is recommended that a more collaborative approach with the private sector in its activities will enhance revenue collection simply by increasing goodwill. The SIVB has the potential to fulfill an important role, providing 'socialized marketing' and tourist assistance on the ground. However the 10% bed levy is a steep tax that falls on both customers and operators, and wholly or partially replacing this with funding from the Ministry of Culture and Tourism would be preferable.

4.4. Taxation, credit and investment incentives

Almost all interviewed operators mentioned either investment incentives or the taxation system as one of their major business concerns. The imposition of multiple compounding taxes, especially those that fall upon investment items is a source of frustration, hindering the speed at which the industry will grow. The SICCI is currently involved in trying to improve this situation.

Investment incentives are reported by some operators as favoring overseas investment, and failing to encourage local business initiatives. The extent to which the evidence supports these sentiments is unknown; however, the role played by foreign investment will be important in the industry's development. Some operators stated that high cost of credit made investment impossible, with commercial interest rates of 12-18%. It is understood that some public money, \$10m, is to be provided to small and medium enterprises at commercial rates of interest but lower collateral requirements.

4.5. Staff training

When asked about the effort required to find good employees for their tourism business, operators' sentiment suggested significant difficulty. This was concentrated in the hospitality (accommodation, bar and restaurant) businesses. Almost all operators nominated a lack of skills in the eligible workforce as the primary problem, followed by a lack of English in a few cases. Most operators undertook their own training, and in several occasions expressed the difficulty of maintaining the taught standards

Businesses in Honiara spoke positively about the training workshops run by the Ministry of Culture and Tourism, via Solomon Host. Operators considered these a highly worthwhile venture with results reflected in the performance of staff. It is likely that private business would be prepared to contribute to the cost of an extended program if benefits continue to materialize, and providing this service in the Western Province would also be an important boost to the industry.

The development of a training program at the Solomon Islands College of Higher Education (SICHE) would represent a much more substantial investment in human resources. A course of a semester or more would produce graduates far superior to the one and two day long training workshops, and would have the benefit of focusing students on their career – encouraging a higher level of application and reliability once in the industry. As noted in section 3.4 above, community members tend to express enthusiasm about a career in tourism, with 80% claiming to want to work in the industry. However, operators suggested that often this enthusiasm is coupled with unrealistic expectations about the effort and diligence required. A formal training course would create a pool of both enthusiastic and realistic students, hopefully with the potential for management roles. Respect of a management hierarchy is often a point of difficulty also, with operators stating that some resentment often occurs towards managers. It is expected that training outside the place of work would help alleviate this. Accountants, chefs and hotel managers are three positions that operators reported as most difficult to fill.

4.6. Basic Infrastructure

Just under half of interviewed operators commented on the detrimental effect on business caused by poor infrastructure. Roads, electricity and water supplies were often mentioned, both by operators in Honiara and Gizo.

Water supply: Lack of a comprehensive water supply in Gizo causes some smaller operators to cancel bookings if their tanks run dry. However, rain is a double edged

sword: although it fills operators' tanks, it washes away poorly constructed roads. The lack of properly treated water in Honiara, unsuitable for drinking by people not used to it, also is a point of concern for business. It is unlikely that the water supply system in Gizo will be linked to non-connected dwellings and made more reliable anytime soon due the significant expense. Furthermore, problems of water supply can be solved by individual businesses through the use of rainwater, costly as this may be.

Roads: There were some calls for roads in Gizo to be tar-sealed. Again, this is not likely to be a government priority.

Electricity: The requirement for businesses to maintain their own power generating capacity for blackouts is another large cost imposition.

Communications: Poor internet connections were reported to have cost at least one resort a very large booking. High cost of telephone calls is a universal hindrance to growth in any industry.

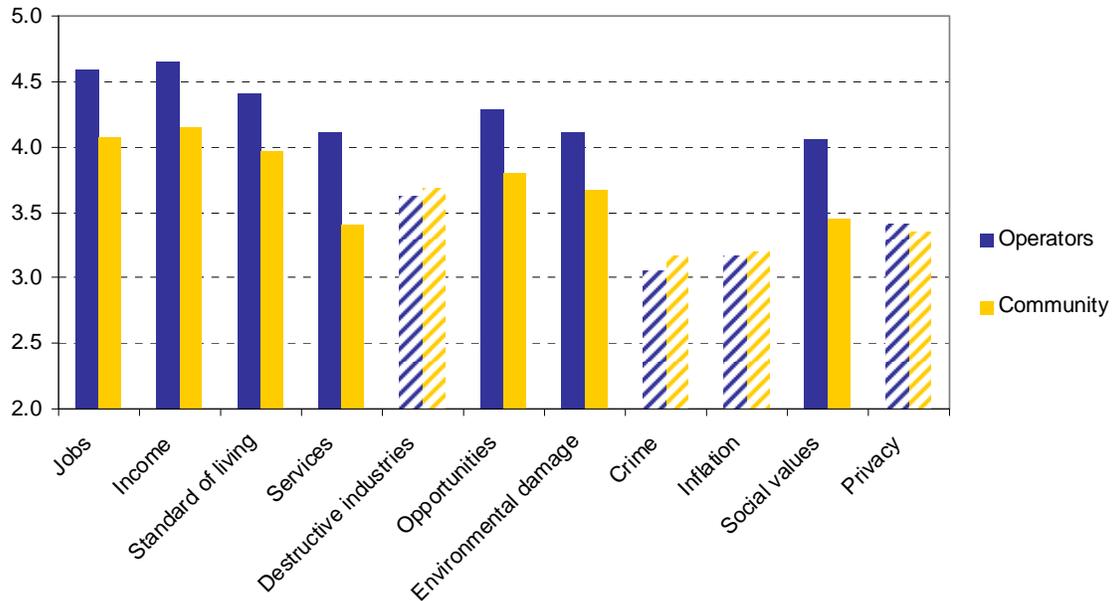
The issues concerning infrastructure are common to many economic sectors, and should be a fundamental priority for any government wishing to promote development. However, the very large cost of public works means that businesses will need to make their own arrangements for some time, probably many years.

4.7. Relationships with the community

Operators were asked for their view on the community's perception of different aspects of the tourism industry. Here we compare these to the community's responses, to investigate for any discrepancies and misunderstandings. Most operators believed that the attitude of community both towards their business and tourism overall was good – between '*somewhat favorable*' and '*very favorable*.'

Operators showed a tendency to overstate the benefits and understate the costs of tourism, when asked to comment on what they thought influenced the community. Operators thought that jobs, community income, standard of living and services were very important to the community (and indeed they are, see section 3.2.1), however, tended to rate them slightly higher on average (see Figure 9). Operators think the community is less concerned about environmental damage and adverse social values than they are. The differences described here are statistically real but fairly minor.

Figure 9: Operator and community attitudes towards the impacts of tourism. “Do you feel that tourism... [creates jobs] (etc)” Responses supplied on a 1-5 scale (strongly disagree, disagree, not sure, agree, strongly agree). Note that responses to the negative impacts have been reversed to make comparable, thus higher scores indicate a more positive attitude in all cases. Statistically significant differences ($p < 0.1$) indicated by solid bars.



The industry’s relationship with the community is a point of concern for many operators, and is a primary reason for the undertaking of this research. Despite the positive affirmation expressed when questioned, isolated incidences of conflict have occurred, and reducing these through public relations will enhance the industry’s future prospects. Operators recounted stories of their guests being chased off islands, and the hiking trail to the summit of Kolombangara has closed due to disagreement between land owners. Operators suggested that the community did not appreciate the indirect nature of economic benefits, for instance, the creation of jobs in the non-tourism sector due to increased tourism. One operator suggested that the problem needed to be addressed in both directions: by raising awareness of tourism’s benefits to the community, and also encouraging guests (via a flyer at check-in) to respect cultural sites and certain areas of private land.

The findings presented here suggest that the economic benefits of tourism are highly sought after; however, a large proportion of the community believes that they and their immediate family receive no benefits currently (42% claim to receive no benefit and a further 39% claim to receive only a small benefit). This is unlikely, given the important contribution the industry makes, particularly in Gizo, and so any public relations must focus on explaining the indirect link between tourism and the economic benefits that are

so highly sought after. This can simultaneously address the concerns about inequality: although some people benefit 'more than others', this is natural in any industry and does not mean that the community as a whole is missing out. Also, people may well benefit more than they realize, for instance, by receiving better prices at the market for their produce.

There is the foundation present for a prosperous, mutually beneficial relationship between the community and operators. The esteem for tourism is high and there are few environmental, social or economic problems that are troubling the community. Tourism is most popular in areas where it is most established, suggesting that people's experience has been positive in the past. However, also apparent is some misunderstanding of indirect economic benefits. Locals who exclude tourists from their area claiming not to receive compensation should be encouraged to consider these indirect benefits. Promotion, along with sensitive decisions by operators, will ensure the industry receives even stronger support in the future.

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6. APPENDIX 1: COMMUNITY ATTITUDES QUESTIONNAIRE

1. Do you and your family benefit from tourists?

- very much a little not at all

2. Please tell me if you agree or disagree with these statements:

Do you feel that tourists:

Create jobs?

- strongly agree agree don't know disagree strongly disagree

Bring you money?

- strongly agree agree don't know disagree strongly disagree

Improve your standard of living?

- strongly agree agree don't know disagree strongly disagree

Bring important services such as shops, roads and medical centres?

- strongly agree agree don't know disagree strongly disagree

Keep away destructive logging or fishing industries?

- strongly agree agree don't know disagree strongly disagree

Provides opportunities for our children?

- strongly agree agree don't know disagree strongly disagree

Damage the natural environment (forests, reefs, water quality, rubbish)?

- strongly agree agree don't know disagree strongly disagree

Encourage crime, drugs, prostitution or bad behaviour?

- strongly agree agree don't know disagree strongly disagree

Cause prices to rise to fast?

- strongly agree agree don't know disagree strongly disagree

Teach your children bad ideas and values?

- strongly agree agree don't know disagree strongly disagree

Invade your privacy?

- strongly agree agree don't know disagree strongly disagree

3. Do you think some people benefit more than others from tourism?

- strongly agree agree don't know disagree strongly disagree

4. What is your overall opinion of tourism?

- very favourable somewhat favourable neutral a little unfavourable strongly unfavourable

5. Would you like more tourists to come to this area?

- ten times more double no more fewer none

6. Would you like them to stay in:
 A large hotel a small hotel village houses
7. Would you prefer more tourism development or more plantation development for the Solomon Islands?
 Ten times more double no more fewer none
8. What do you think is this area's best tourist attraction?
 Diving Hiking Culture Beach Food Other....
9. Do you work in the tourism industry?
 yes no
10. Do you know someone who works in the tourism industry?
 yes no
11. Would you like to work in the tourism industry?
 yes no
- If yes (no)
 because it pays well (badly)?
 because it would be interesting (boring)?
 because you can (can't) learn new skills?
 because tourists are friendly (rude)?
12. Age
 Less than 18 18-30 30-50 older than 50
13. Sex
 male female
14. Education
 none primary secondary or higher
15. Work
 Agriculture Fishing Logging Professional Other