Opinion Leaders’ Panel 2010

Wave 15 Report

Research Study Conducted for the Government of the Republic of Trinidad & Tobago

Fieldwork: 10th December 2009 – 9th February 2010

MORI Caribbean

Contents

1. Introduction

1.1. Background and objectives

The Opinion Leaders' Panel (OLP) was established as part of the Programme for Modernising Government in Trinidad & Tobago. The objective of this research is to provide evidence about the views of citizens of Trinidad & Tobago as a basis for citizen-informed decision making, policy formulation and implementation and to measure the public's view of the Government's service delivery.

This volume contains the report from Wave 15 of the Opinion Leaders' Panel. The survey was conducted by MORI Caribbean with HHB & Associates on behalf of the Government of the Republic of Trinidad & Tobago.

1.2. Methodology

In total 2,987 adults living in Trinidad and Tobago were interviewed for Wave 15 and also agreed to become members of the new Opinion Leaders' Panel.

Wave 15 constitutes a new "baseline" in the Opinion Leaders' Panel research series and constitutes an entirely fresh panel of members. The Panel was recruited by drawing a random sample of 3,594 persons aged 18 years an over from the national population of Trinidad and Tobago. A total of 2,987 of these persons agreed to be interviewed as part of the new Panel resulting in a response rate of 83%.

The survey utilised a three (3) stage sampling design. At the first stage, census Enumeration Districts (EDs) were selected with the number of EDs selected per Regional Corporation being proportional to the size of the relevant Corporation. At the second stage, households within each ED were selected. This was done in such a manner that the product of the probability of selecting an ED and the probability of selecting a household within that ED was constant for all EDs. At the third stage, individuals within each household were selected. This was done so that the probability of selecting an individual within the household was the same for all eligible respondents. The "last birthday" (instead of the Kish grid) method was used to ensure this. If selected participants were not at home at the time of the visit, interviewers were required to make three (3) call backs before substituting a new household.

This method results in all individuals having an equal probability of being selected, not only in all selected EDs and households, but throughout the country. It is also the technique most likely to yield a sample with demographic characteristics (age, education, gender, class etc.) representative of the population as a whole.

Selected respondents were asked to formally join the Panel by signing a form agreeing to be a Panel member. Respondents who did not wish to be Panel members were not interviewed and a new respondent was selected using the method outlined above.

A booster of respondents was recruited in Tobago to allow for greater comparison of results between people living in Tobago and those in Trinidad. For this Wave, 351 persons living in Tobago were recruited and interviewed with the final results being weighted to ensure the overall results are representative of all adults in Trinidad and Tobago.

All interviews were conducted face to face, in-home between 10th December 2009 and 9th February 2010.

The data has been weighted by age, ethnicity, gender and Regional Corporation to the 2000 census data. Weighting for work status was derived from an analysis of the most recent labour force survey data.

Prior to the quantitative survey, four (4) focus groups were completed in January 2010. The focus groups were recruited and moderated by Caribbean Market Research under the direction of MORI Caribbean. Findings from the focus groups have been included in relevant areas of this report.

1.3. Comparative data

Throughout this report, comparisons have been made with results from previous waves of the Panel. These were conducted on the following dates:

Wave 1, 15 July – 29 August 2002 (base size 2,747)

Wave 2, 28 June – 16 July 2003 (base size 693)

Wave 3, 6 – 22 December 2003 (base size 700)

Wave 4, 17 July – 6 August 2004 (base size 710)

Wave 5, 29 January – 1 April 2005 (base size 2,426)

Wave 6, 22 July – 8 August 2005 (base size 687)

Wave 7, 31 May – 15 July 2007 (base 2,540)

Wave 8, 23 – 27 August 2007 (base 948, by telephone)

Wave 9, 16 December 2007 – 21 January 2008 (base size 983)

Wave 10, 8 March – 22 April 2008 (base size 2,362)

Wave 11, 23 July – 13 August 2008 (base size 704)

Wave 12, 25 – 30 September 2008 (base size 704, by telephone)

Wave 13, 2 – 21 January 2009 (base size 689)

Wave 14, 25 April – 10 June 2009 (base size 712)

1.4. Area combinations

Reference is made in this report to different areas of the country, which have been classified as follows:

i. **North** (Port of Spain and Diego Martin);

ii. **South** (San Fernando, Point Fortin, Princes Town, Penal/Debe and Siparia);

iii. **East** (Arima, San Juan/Laventille, Tunapuna/Piarco, Rio Claro/Mayaro and Sangre Grande);

iv. **Central** (Chaguanas and Couva/Tabaquite/Talparo); and

v. **Tobago**.

1.5. Presentation and interpretation of the data

This study is based on interviews conducted on a representative sample of the adult population of Trinidad & Tobago. All results are therefore subject to sampling tolerances, which means that not all differences are statistically significant. In general, results based on the full sample are subject to a confidence interval of ± 2 percentage points. A guide to statistical reliability is appended.

Several of the questions in the survey were “split sampled” which means approximately half of respondents were asked some questions and half asked other questions. This technique allows us to ask more questions overall.

Where percentages do not sum to 100, this may be due to computer rounding, the exclusion of “don’t know” categories, or multiple answers. Throughout the volume, an asterisk (*) denotes any value less than half a per cent but greater than zero.

In the report, reference is made to “net” figures. This represents the balance of opinion on attitudinal questions, and provides a particularly useful means of comparing the results for a number of variables. In the case of a “net satisfaction” figure, this represents the percentage satisfied on a particular issue or service less the percentage dissatisfied. For example, if service records 40% satisfied and 25% dissatisfied, the “net satisfaction” figure is +15 points.

In some instances where identical questions were asked on previous surveys and repeated in this Wave, a calculation of ‘swing’ is offered to indicate the change over time. Swing is calculated by measuring the net positive (negative) response then and comparing it to the net positive (negative) score now, and taking the sum and dividing by two. This figure represents the number of people (in the aggregate) out of 100 who have changed their view over the two points in time. For instance, between Waves 14 and 15 there has been a swing of -3 towards satisfaction with the Government’s performance. This is because in Wave 14 net satisfaction was -46 and in Wave 15 is -52. Half the difference between these two net scores is -3.

It is also worth emphasising that the survey deals with citizens’ ***perceptions*** at the time the survey was conducted **rather than with ‘truth’,** and that these perceptions may not accurately reflect the level of services actually being delivered.

1.5. Acknowledgements

MORI Caribbean would like to thank Mr Kennedy Swaratsingh, the then Minister of Public Administration during the time of survey enumeration; Ms Arlene McComie, Permanent Secretary at the Ministry of Public Administration and their colleagues; Mr Claudelle McKellar, Mr David Bazil and Ms Coreen Joseph; the Central Statistical Office; Kim Bayley at Caribbean Market Research and Louis Bertrand and the team at HHB & Associates for their help in executing this project. In particular, we would like to thank all the 2,987 citizens of Trinidad & Tobago who gave of their time to take part in this survey and who also agreed to become members of the new Opinion Leaders' Panel.

1.6. Publication of data

As the Government of the Republic of Trinidad & Tobago has engaged MORI Caribbean to undertake an objective programme of research, it is important to protect the interests of both organisations by ensuring that the results are accurately reflected in press releases and the promised publication of findings. As part of our standard Terms and Conditions of Contract, the publication of the findings of this research is therefore subject to the advance approval of MORI Caribbean. Such approval will only be refused on the grounds of inaccuracy or misrepresentation.

Sir Robert Worcester and Mark Gill

2. Executive Summary

State of the Nation

- There has been **a significant increase in the number of people who now describe the state of the economy as "good"** (51%) than when it was last measured in June 2009, when 42% of the population held this view; this represents a nine point increase.

- More people now describe the state of the economy as "good" (51%) than "poor" (44%), a net +7 score, whereas in June 2009 the 'net' figure was –13, a 'swing' of plus 10.

- More people expect that their personal financial situation will "improve" (42%) than "get worse" (24%) over the next 12 months, giving a personal "Economic Optimism Index" (EOI) of plus 18. This EOI was minus 7 in June 2009.

- More people believe that the general economic condition of the country will "get worse" (40%) than "improve" (31%) over the next 12 months, giving a general EOI of minus 9. Nevertheless, this is a substantial improvement from the public's perception in June 2009 when general EOI was minus 31.

- Yet despite this growing economic optimism, **nearly two in three people** (64%) **think the country is going in the wrong direction**, which represents no change in attitudes from the previous year. Similarly, only one in five people (20%) are satisfied with government's performance and around seven in ten (72%) are dissatisfied, which is consistent with previous findings.

- **A majority (55%) of the public do not feel informed about Government services or benefits.** This is similar to results from 2008, though in 2005 fewer than half did not feel informed (45%).

- ***Education*** (73% say the government is doing a "good job"), ***transport*** (63%) and ***sport*** (60%) are the areas where the government is seen to be performing best. Of the 36 areas polled, there are nine areas where one in five or fewer say the government is doing a "good job". These include **roads** (20%), ***national security*** (19%), ***drainage*** (15%) and ***wages*** (14%).

- Compared with a year ago, the **largest positive shifts** in ratings on performance are on ***international relations*** **(+8),** ***agriculture*** **(+6),** ***HIV/Aids*** **(+5), and** ***food security*** **(+4**). The **largest decline in perceptions of performance are with** ***water*** **(-17),** ***housing*** **(-15),** ***wages*** **(-15) and** ***transportation*** **(-8) and** ***pensions*** **(-7).**

- **Almost eight in ten people (78%) are happy with their lives**, which is similar to the levels of happiness recorded in 2007, though down from 87% happiness level in 2005.

Vision 2020

- **Almost everyone has heard of Vision 2020** and more than three quarters feel they have heard either a great deal (38%) or a fair amount (40%). Over the past 12 months there has been a slight improvement in confidence that Vision 2020 will be achieved, but more persons are still pessimistic (55%) than optimistic (36%).

- The two key reasons given for pessimism are the belief that Vision 2020 is "**just political talk**" (41% of those not confident in Vision 2020 say this) and there are "**no signs of progress**" (26%). People recognise infrastructure developments as being part of developed nation status, but also want to see the Government delivering on basics, quality public services and "developing" the people.

Issues Facing the Country

- ***Crime* is seen as the most important issue facing the country** with 85% of the public saying it is "one of the most important issues", way ahead of *inflation/prices* (37%) and *health/hospitals* (34%). The proportion of the public identifying these three as key issues facing the nation has fallen since April 2009, partly because more people now identify *roads* (up from 9% in 2009 to 19% in the current survey), *water shortages* (8% in 2009, 15% now). *Property taxes* (13%) and *corruption in government* (12%) are also now seen as two of the top ten issues facing the country – neither were seen as significant in previous waves.

- ***Drainage* (28%)*, water supply* (25%) and *facilities for young people* (23%) are the three improvements in their local area that people would most like to see.** For the first two of these priorities many more people highlighted these than was the case in March 2008 (then 5% identified each as priorities).

Public Services

- The image of *Public* <u>*Services*</u> and *Public* <u>*Servants*</u> is almost identical with "poor service", "corrupt" and "slow" being the most popular words people would choose to describe them. The hypothesis that people were critical of the public services and thought well of public servants was therefore found empirically wrong.

- ***TTPost*** (82% satisfied)**, *Public Transport*** (66%) and several of the **education services** are the **services most positively regarded by the public. *Hospitals*** (65% dissatisfied), ***Police*** (57%), ***Passport Office*** (57%) and ***HDC*** (53%) **have highest public dissatisfaction ratings.**

- The biggest increases in public satisfaction since July 2008 are with *UTT* (+26), ***TTConnect Service Centres*** (+12), ***Social Welfare Services*** (+8) and ***Primary Schools*** (+7). **The biggest falls in satisfaction** are with ***Licensing Office*** (-21), ***T&TEC*** (-19), ***Local Government Body*** (-17), ***WASA*** (-15) **and Hospitals** (-16).

- For 20 services of the 28 services covered in the survey at least half of users are satisfied with that service; and for eight of these fewer than half are satisfied. The most popular services among users are *TTPost* (86%), *Libraries* (83%) and *UWI* (80%). The least popular are *Local Government Body* (26%), *Police* (25%) and *HDC* (24%).

Defence Forces & Protective Services

- The public feels familiar with a range of services within the defence force and protective services, in particular the *Police* (88% know at least a fair amount), and the *Fire Service* (81%). Relatively few people feel informed about *SAUTT* (28%), *Air Guard* (25%) and *Defence Reserves* (21%).

- The services with the **highest level of public favourability** are ***Fire Service*** (78% favourable), ***Coast Guard*** (65%) **and *Regiment/Army*** (63%). The services with the **lowest levels of favourability** are ***Police*** (35%), ***Immigration*** (23%) and ***Prison Service*** (20%).

- There is a high level of public awareness of the ODPM (85% aware), but relatively few people are aware of the Model Police Station Initiative (34% aware).

Central Bank

- The public does not believe that the Central Bank "really cares about keeping inflation low" (31% agrees it does and 43% disagree) or that it "gives people useful information about inflation" (30% agrees it does; nearly half, 48%, disagree).

CHOGM

- Virtually everyone (94%) is aware that Trinidad & Tobago hosted the Commonwealth Heads of Government Meeting (CHOGM) in November 2009, but **more than half the public (55%) thinks that the country "did not benefit at all" (32%) or "not very much" (23%).** When asked what groups had benefited the most, people are most likely to believe it is the *government* (52%), the *hospitality/tourism sector* (34%) or *large businesses* (24%).

Constitutional Reform

- Compared with January 2009 there has been a fall in the number of people who have heard "at least a fair amount" about plans for Constitutional reform (45% in 2009 vs. 35% in 2010). **Almost half the public (48%) are in favour of Constitutional change and one in five (19%) are opposed to it.**

- Between three in five and half of the public are aware of plans to form an *economic* (59% aware) and *political* (53%) union among several Caribbean nations. **More people support than oppose both the *economic* and *political* union** though a large proportion do not have an opinion either way.

Local Government Reform

- Compared with August 2008 **there has been a sharp fall in the number of people who say they have heard of plans to reform local government**, down from 83% "aware" to 68%. Among those who have heard of the plans, support remains consistent with **three in five (60%) supporting the government's plans, down marginally from the 65% recorded in 2008.**

Languages

- The most popular foreign language people would like to be able to speak is *Spanish* (52% would like to speak it), ahead of *French* (26%) and *Hindi* (12%). **The vast majority of the public believe it is a "very good"** (81%) **or "fairly good"** (13%) **idea to produce public signs, such as road signs and notices in public offices, in Spanish as well as English.**

Advertising Impact

- There is almost universal awareness of the government's plans to introduce a new level of Property Tax in 2010 (98% of the public are aware of this). Not only is there a high level of opposition – two to one - to the introduction of the tax (**53% "strongly oppose**" and 12% "tend to oppose"), a similarly high level do not believe the tax will be *calculated fairly* (61% think it will not) or be *affordable for ordinary people* (65% think it will not).

- Just over half the public (53%) are worried about becoming ill due to *dengue fever*, which is slightly more than those worried about becoming ill due to *swine flu* (49%).

- *Trinidad Newsday* (61%) and *Express* (58%) are the two most popular newspapers.

- In Television, TV6 continues to be the dominant broadcaster with 70% of the public regularly watching it – twice as many than those who watch CNC3 (36%) or CNMG (30%).

- There is no clear market leader in radio with several radio stations attracting around one in eight people as regular listeners, including WEFM 96.1FM (15%), Isaac 98.1FM (14%), Music Radio 97FM (12%) and 95.1FM – the Best Mix (12%).

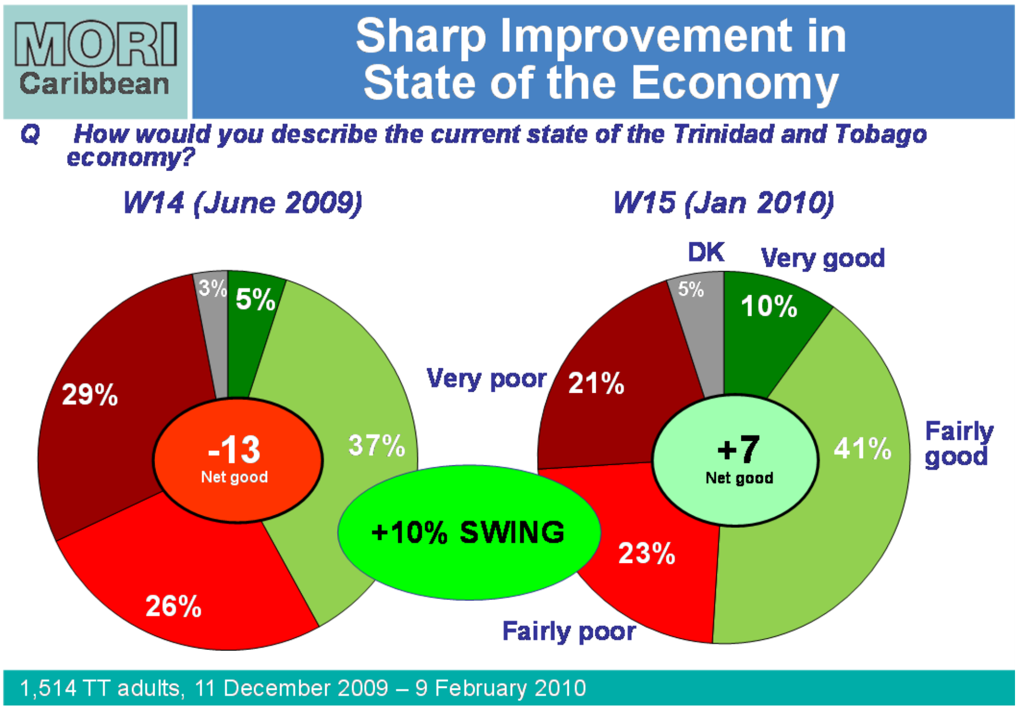
3. State of the Nation

3.1. The Economy

Half the public (51%) rate the current state of the economy as “good”, which is higher than the proportion who say it is “poor” (44%), giving a “net good” score of plus 7. However, twice as many people believe the current state of the economy is “very poor” (21%) than “very good” (10%).

There has been a substantial shift in how people rate the economy compared with when the same question was asked in the last Wave of the Opinion Leaders’ Panel in June 2009. In that survey 42% of the public rated the economy as “good” and 55% as “poor”, giving a “net good” score of minus 13. The change in people’s ratings since June 2009 can be shown as a “swing” change of plus 10 percentage points – in other words ten people in every 100 (net) have moved from describing the economy as “poor” to describing it as “good”.

In an earlier survey, conducted in July/August 2005, two thirds of the public (67%) rated the economy as “good” and three in ten (31%) as “poor”, representing a “net good” score of plus 36. Despite the change in attitudes towards the economy since mid 2009, fewer people are positive about it now than was the case five years ago.



There is no significant difference in attitudes towards the current state of the economy by gender or social class. By age however, 25-34 year olds are least likely to say the economy is “good” (45%) whereas persons aged 45-54 years are most likely to think it is good (58%). The more substantial differences are by ethnicity where it is observed that six in ten Afro-Trinidadians (61%) describe the economy as “good”, compared with 52% of other/mixed ethnicities and 42% of Indo-Trinidadians. There are also significant differences by region with fewer than half of those living in Central Trinidad (44%), Tobago (46%) and South Trinidad (47%) being positive about the economy, compared with more than half in East and North Trinidad (54% and 65% respectively).

The following two charts illustrate how participants in the focus groups talked about the economy.

Economy (Focus Groups)

- ✓ General consensus that the economy is improving
- ✓ Most don't think of economic events of the past 12 months or so as a crisis, perhaps with the exception of the Clico "fiasco"
- ✗ More concern about distribution of wealth, food prices and crime rate
- ✗ Government and citizens seen as mostly to blame for the problems affecting the economy– but no real problems identified
- ■ Mixed levels of awareness of government plans to help the local economy – Stabilisation Fund and National Financial Literacy Programme mentioned

Source: Opinion Leaders' Panel Wave 15 Focus Groups

Economy (Typical Comments)

'Money is floating around but it is not trickling down' (Woman, Group 1, North)

'We are relatively stable. We have oil and gas' (Popular response, Group 1, North)

'It may improve if the American economy booms. Ours will boom because we are linked to them' (Man, Group 1, North)

'To me, there was no financial crisis' (Popular response, Group 2, East/West)

'The Government is overspending' (Man, Group 1, North)

'Look at what happened in Haiti. It depends on what happens with nature' (Man, Group 1, North)

'It would get worse. They have no evidence of people getting money, food prices keep increasing and electricity went up' (Man, Group 3, Central)

'It will get worse. If the first world nations are having trouble managing, then how can we? (Woman, Group 4, South)

'I think they handled it badly, because initially, they were in denial and telling people that nothing was wrong' (Woman, Group 4, South)

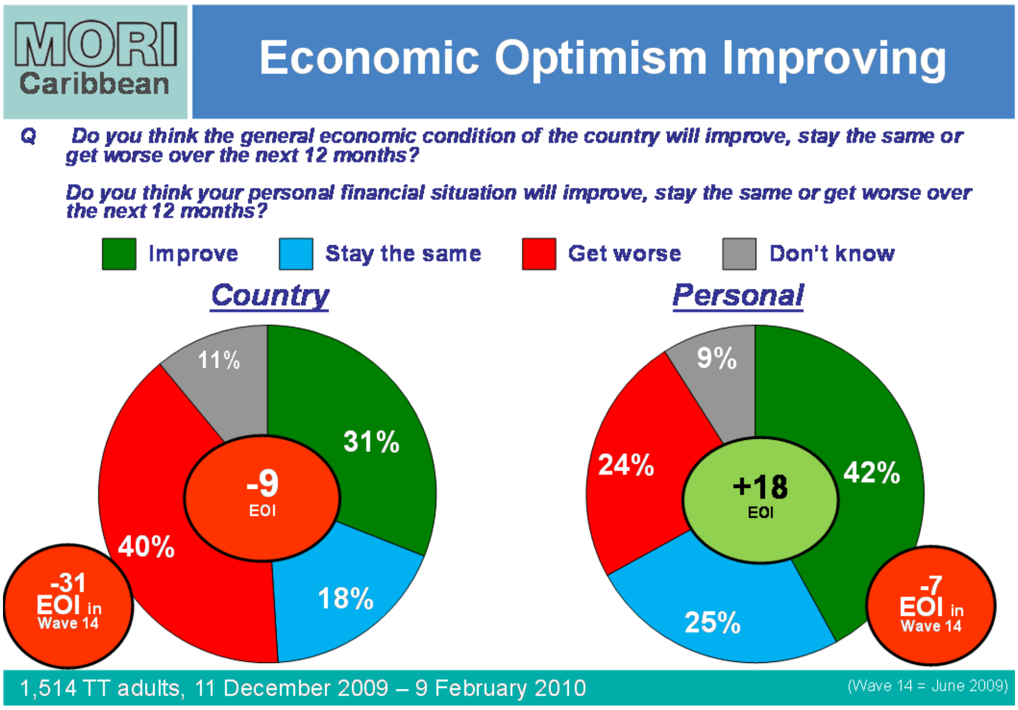
Source: Opinion Leaders' Panel Wave 15 Focus Groups

3.2. Economic Optimism

Reflecting the greater proportion of people describing the current state of the economy as “good”, there is also a higher level of optimism about the general economic condition of the country, and people’s future personal economic conditions, than was the case in June 2009.

More people expect that their personal financial situation will “improve” (42%) than “get worse” (24%) over the next 12 months, giving a personal “Economic Optimism Index” (EOI) of plus 18. This EOI was minus 7 in June 2009.

More people believe that the general economic condition of the country will “get worse” (40%) than “improve” (31%) over the next 12 months, giving a general EOI of minus 9. Nevertheless, this is a substantial improvement from the public’s perception in June 2009 when general EOI was minus 31.

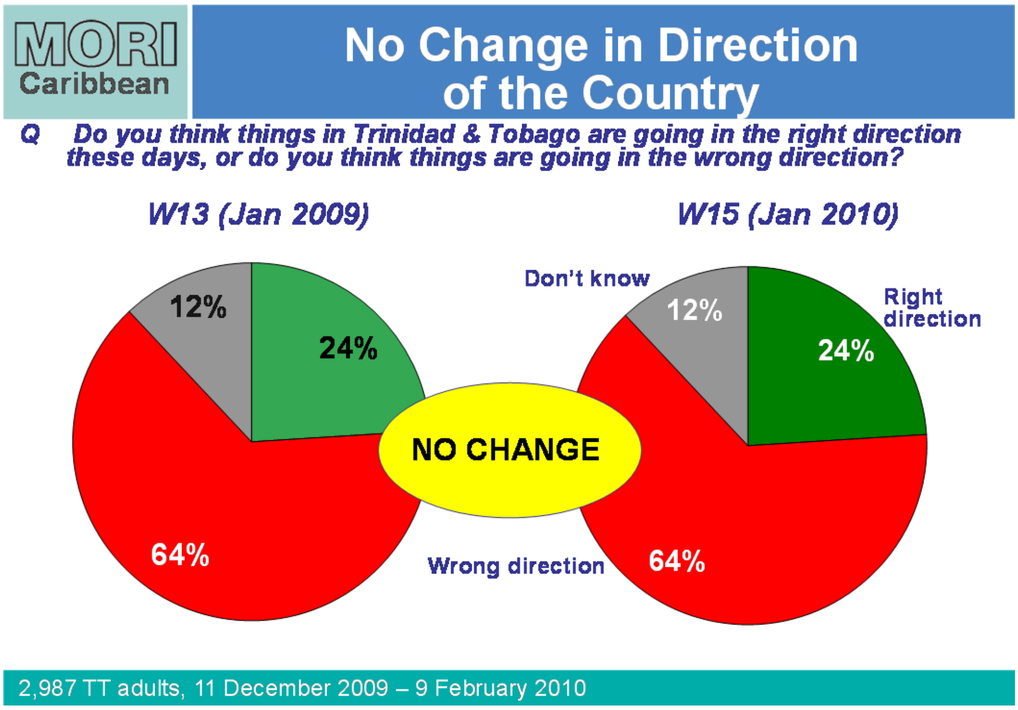


People living in North (+11 EOI) and Afro-Trinidadians (+4 EOI) are the only major sub groups of the public that are optimistic about the state of the economy in the next 12 months. People living in Tobago (-22 EOI), Indo-Trinidadians (-21 EOI), 18-34 years olds (-19 EOI) and those living in East Trinidad (-18 EOI) are most likely to be pessimistic about the economy’s prospects for the year ahead.

In terms of optimism about one’s own personal financial situation a very different picture emerges. More women are optimistic than men (+20 vs. +14), despite there being no significant differences in terms of general EOI; younger adults are considerably more optimistic than older people (+27 EOI for 18-34 year olds vs. -1 for persons 55 years and older), which is the reverse of general EOI. We also see that middle class people (+24 EOI) and people with a job (+23 EOI) tend to be among the most optimistic. In contrast, Tobagonians (+5 EOI) and Indo-Trinidadians (-2 EOI) are among the least positive.

3.3. Direction of the Country

Despite the increasing confidence in the state of the economy and more people being optimistic about their economic future, there has been no shift over the past year in how many believe the country is "going in the right direction" (24% both in Jan. 2009 and Jan. 2010). Further, the same proportion of the population as measured in Jan. 2009 and again in Jan. 2010 believe the country is "going in the wrong direction" (64%).



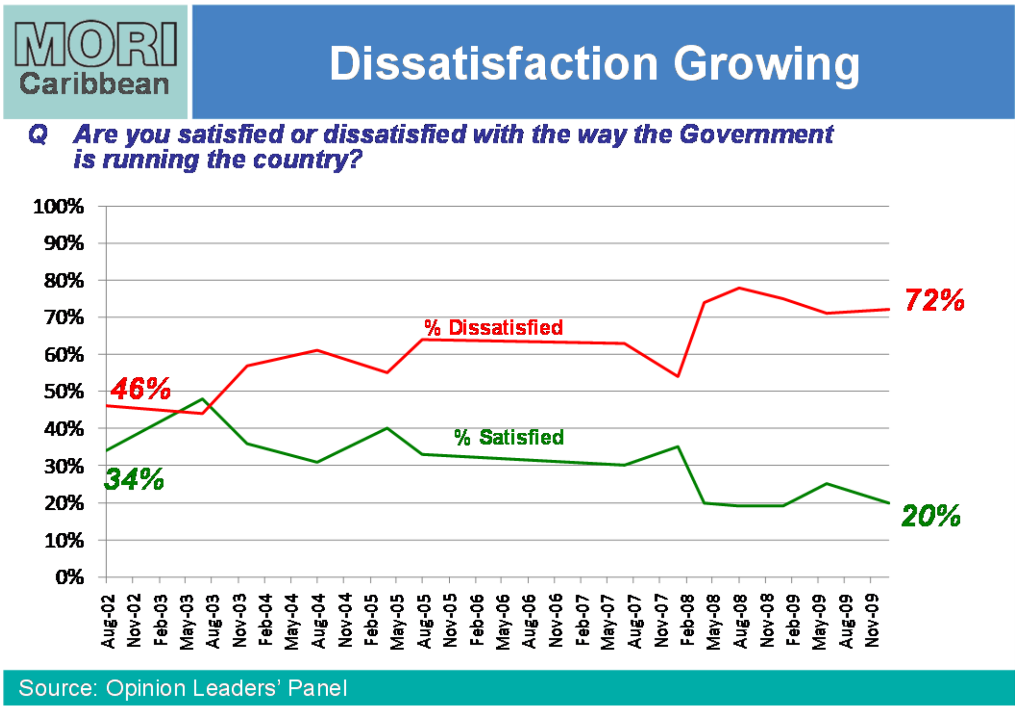
There is little difference by gender, age, work status or social status with respect to attitudes towards the direction of the country. The groups least likely to believe the country is going "in the right direction" are Indo-Trinidadians (19%) and people living in Tobago (15%). Residents in North Trinidad (35%) are more positive in their views than average across the country.

There is also a correlation between overall satisfaction with the Government and belief in the direction of the country. Seven in ten (69%) of those who are satisfied with the Government believe the country is going "in the right direction", compared with only 13% who believe this among those who are dissatisfied with the Government.

3.4. Performance of the Government (Overall)

The chart below shows the proportion of the public who have indicated their level of satisfaction with the way the 'Government is running the country' for each of the Waves since this question was asked in 2002.

In the latest survey one in five people (20%) is "satisfied" with the Government's performance and more than seven in ten (72%) are "dissatisfied". These findings are broadly consistent with approval ratings measured since early 2008. However the long term trend shows a clear increase in dissatisfaction with the Government, with two clear "jumps" in disapproval – the first in 2003 and the second in 2008, both after General Elections.



All major sub groups of the public are more likely to be dissatisfied than satisfied with the Government's performance, and there is little difference in views between people of different genders, social class or residential location [with the exception that satisfaction is particularly low in Tobago (11% satisfied)]. There is however some difference based on people's employment status, with the unemployed being slightly more likely to be satisfied with Government's performance than those in employment (22% vs. 18%); this finding is likely a reflection of persons in the older age cohorts as for example 29% of 65-74 year olds are satisfied as are 34% of over 75 year olds.

3.5. Reasons for Rating the Government's Performance

The main reasons given by people for being satisfied with the Government's performance are as follows:

- (27%) measures in education;
- (14%) no other party can do better / government is trying; and
- (12%) I have no complaints.[1]

Among the 72% of the population that are dissatisfied with the Government, the main reasons they give for this are:

- (38%) roads are bad;
- (9%) don't see representatives enough in the area; and
- (7%) poor health care/hospitals.[2]

Despite the above reasons for satisfaction / dissatisfaction with Government's performance, from MORI's experience it is known that what people say are the reasons for them holding an opinion are not necessarily the true "drivers" of why these views are held. To overcome this, sophisticated statistical techniques can determine the "covert drivers" of satisfaction. Using *Key Drivers Analysis* we are able

[1] These percentages are based on the 20% of the total sample that are satisfied with the Government's performance (base size = 624)
[2] These percentages are based on the 72% of the total sample that are dissatisfied with the Government's performance (base size = 2,096)

to determine which public attitudes are most strongly correlated with being satisfied with the Government's performance; the following have the highest levels of correlation:

- Belief that Trinidad & Tobago is going in the right direction (29% relative strength);
- Government performing well on themes, composite score (20%);
- Feeling happy with one's life (10%); and
- Describing the state of the economy as good (10%).

The composite score above is a calculation of how people view Government's performance on a range of 34 themes (i.e. questions 10-44 in the survey). These can be further broken down by looking at the relative correlation with overall satisfaction for each theme. This analysis shows that those people who are positive about the government's performance on the following themes have the strongest correlation with overall satisfaction with the government:

- Financial sector;
- Food security;
- Health;
- Public sector reform;
- Housing;
- Family life; and
- Local government reform.

3.6. Government Performance (By Theme)

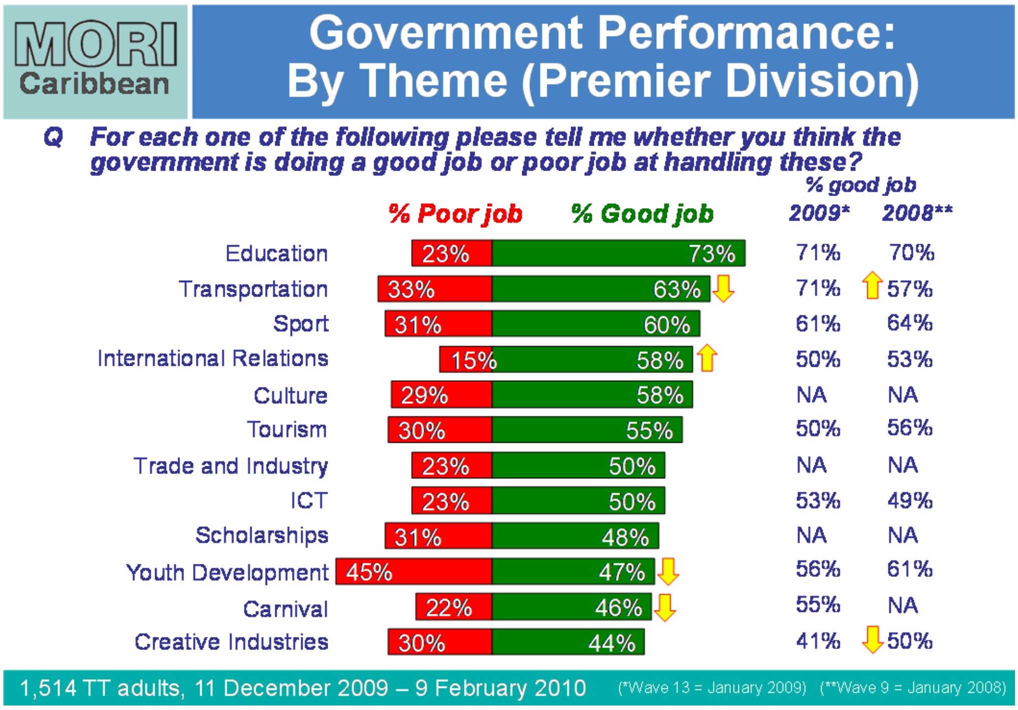
As well as measuring people's overall satisfaction with the Government, respondents were also asked to indicate whether they felt the Government was doing a "good job" or a "poor job" on 36 performance themes. The results are shown in the following three charts which rank the themes by the proportion of the public indicating that they believe the Government is doing a "good job".

When interpreting the results it is important to look at both the "good" and "poor" job scores; as few people may have an opinion on the Government's performance for some of the themes. For example in the first chart slightly more people rate the Government's performance as "good" in "Sport" (60%) than "International Relation" (58%), but twice as many people say the Government is doing a "poor" job in the former (31% vs. 15%). Therefore a higher proportion of the public do not have an opinion about the Government's performance regarding International Relations.

It is also worth highlighting that despite only 20% of the public being satisfied with the way the Government is running the country, there are only eight out of 36 themes where fewer than one in five say the Government is doing a "good job". For a larger majority of the themes (15 out of the 36) more respondents say that the Government is doing a "good job" than "poor job".

3.6.1. Government Performance (Premier Division)

The chart below shows the areas of Government performance that are most highly rated by the public, in terms of the percentage of people saying the Government is doing a "good job". The chart also shows the proportion of the public who said "good job" when asked about the same themes in January 2009 and January 2008.



The key highlights from this chart are that it shows *Education* is viewed as the highest performing area of Government activity with 73% of the public being positive about the Government's performance here, which is in line with views expressed in 2009 (71%) and 2008 (70%).

Transportation is the second highest rated area with just over three in five believing the Government is doing a "good job" (63%). While this is down from the rating given in 2009 (71%) it is still higher than in 2008 (57%). The big rise in public approval between 2008 and 2009 could have been as a result of the introduction of the Water Taxi Service and more PTSC buses during that time.

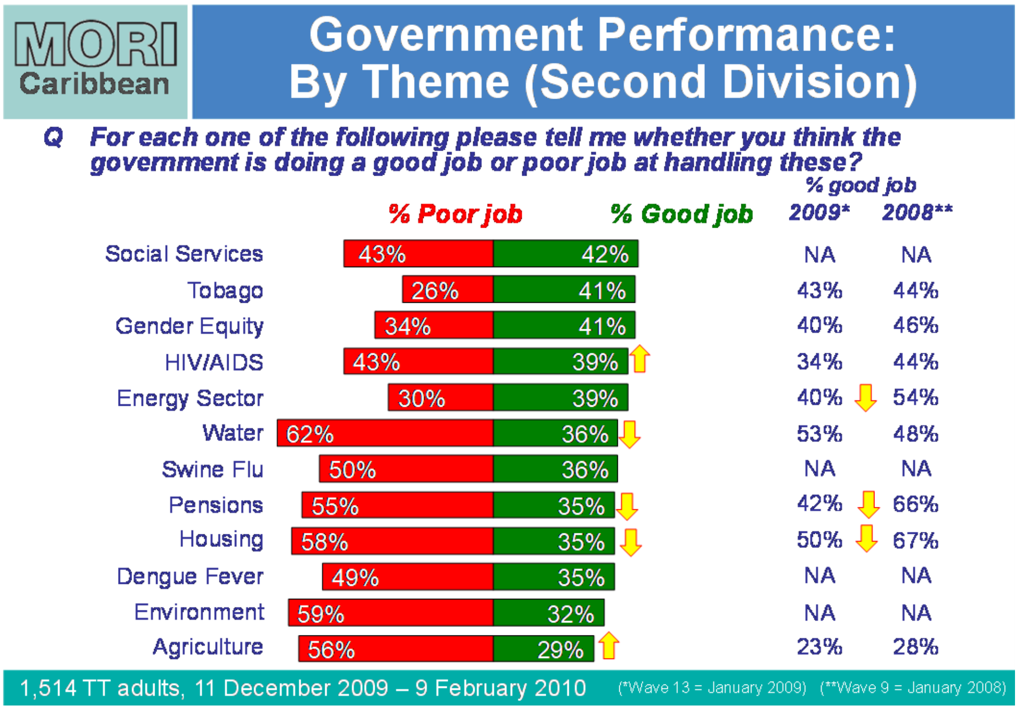
International Relations has seen a fairly large increase in the proportion of the public believing the Government is doing a "good job" (up from 50% in 2009 to 58% for the current wave); this is likely to be explained by the hosting of the two international summits in 2009.

In contrast, there has been a fall in how the Government is rated on *Youth Development* (down to 47% in 2010 from 61% in 2008 and 56% in 2009) and on *Carnival* (down to 46% from 55% in 2009).

3.6.2. Government Performance (Second Division)

The following chart shows the second tier of themes, again ranked by the proportion saying "good job". For all but three themes in this chart do more of the public say the Government is doing a "poor job" than a "good job".

Two themes have seen a rise in public approval since 2009: *HIV/AIDS* is up five points from 34% (but still lower than the score recorded in 2008) and *Agriculture* is up six points from 23% (statistically back to the rating it received in 2008).



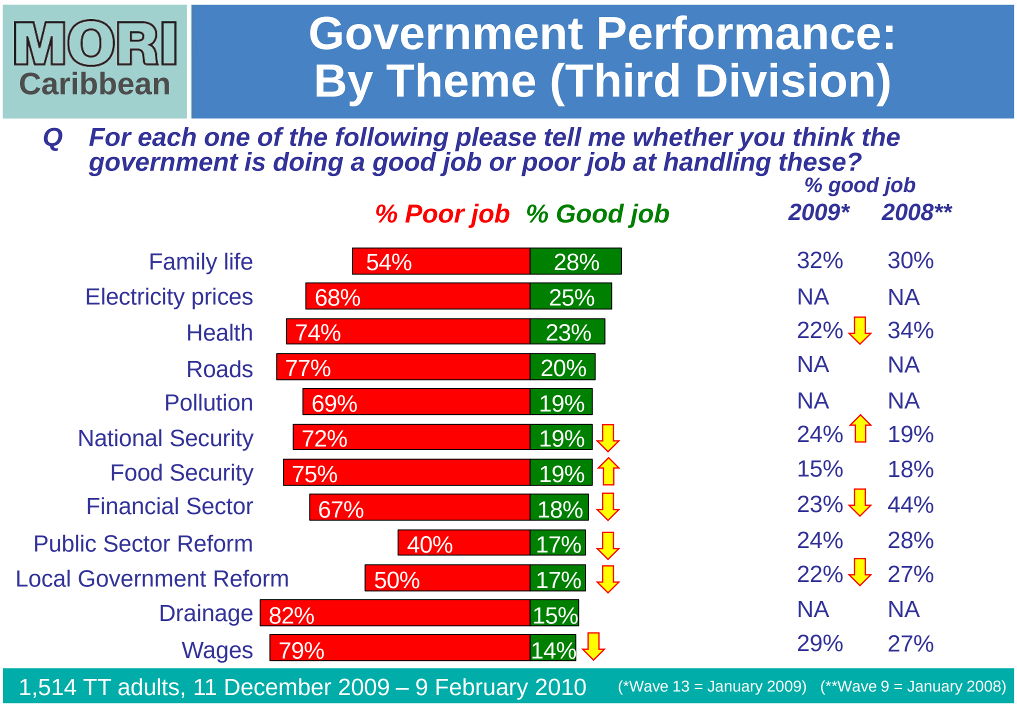
Three of the themes on this chart have seen a significant fall in public approval. There has been a 17 point fall in how many people say the Government is doing a "good job" on *Water* (53% in 2009 to 36% in 2010), which is the biggest change in attitude towards government performance since 2009.

The perceptions of Government performance on *Pensions* (down by 7 points from 2009 to 35% in 2010) and *Housing* (down 15 points to 35% in 2010) are also substantial, particularly when compared to the relatively high ratings both these received in 2008 (66% and 67%, respectively).

3.6.3. Government Performance (Third Division)

The third chart, below, on ratings of Government performance by theme shows those areas where only a minority of the public believe the Government is doing a "good job" and where for most themes a high proportion say the Government is doing a "poor job".

Public Sector Reform and Local Government Reform stand out as themes on this chart as they have half of the respondents or less saying the Government is doing a "poor job". Further a high proportion do not have an opinion, as both have seen a fall in the number of people who believe the Government is doing a "good job" (down 7 and 5 points respectively since 2009).



One in five people (19%) believe the Government is doing a "good job" on *National Security* which is down by five points since 2009, though it is back to the score recorded in 2008. Perceptions of performance on the *Financial Sector*, however, continue to fall, down five points from 23% in 2009 and down 26 points since 2008 (this is despite the growing economic confidence discussed earlier).

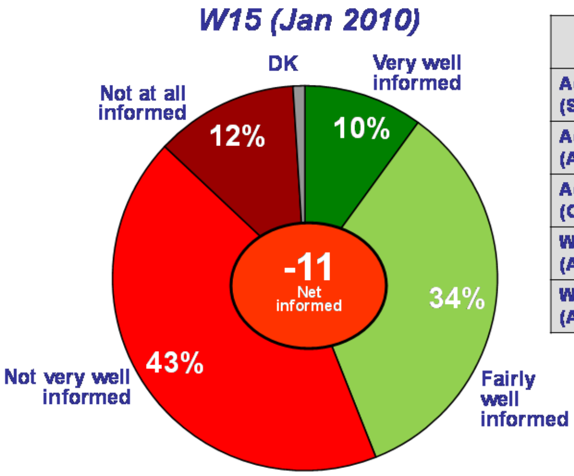
Wages (14%) is the area where Government performance received the lowest "good job" score; this has fallen by 15 points since 2009. *Wages* has also received the second highest "poor job" rating – behind *Drainage.*

3.7. Government Information

One in ten people (10%) feels "very well informed" about the services and benefits provided by the Government and another third (34%) of the population feel "fairly well informed". This means that fewer than half the public feel informed (44%) and more than half feel not informed (55%). These findings are similar to previous surveys conducted in 2008 and 2009 as part of MORI Caribbean's Advertising Impact research for GISL. The latest findings also represent a slight improvement in how many people feel informed compared to when the question was last asked on the Opinion Leaders' Panel in April 2008 (40% informed), but it is somewhat lower than an August 2005 survey (54% informed). This means that between August 2005 and January 2010 there has been a 10% swing from being informed to not informed – in other words 10 people in 100 have moved from feeling informed about Government services and benefits to not feeling informed.

Information on Government Lacking

Q How well informed do you feel the Government keeps you about the services and benefits it provides?



	% Informed	% Not informed	Net Informed
Ad Impact 3 (Sept 09)	45%	51%	-6
Ad Impact 2 (April 09)	46%	51%	-5
Ad Impact 1 (Oct 08)	46%	52%	-6
Wave 10 (April 08)	40%	58%	-18
Wave 6 (Aug 05)	54%	45%	+9

-10% SWING
From Wave 6

2,987 TT adults, 11 December 2009 – 9 February 2010

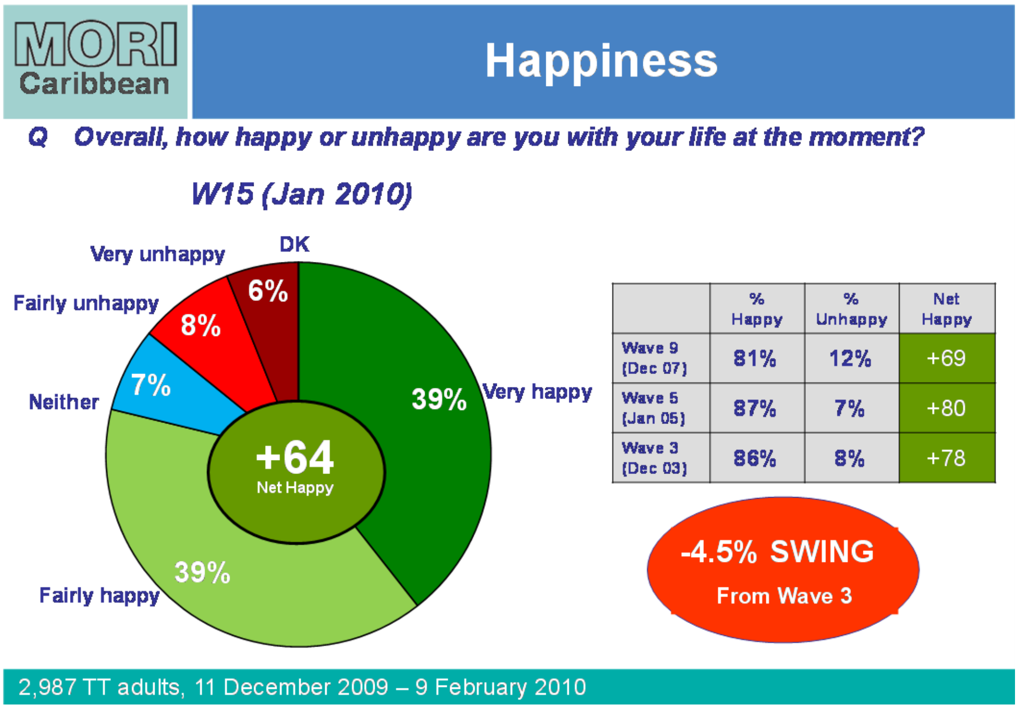
The sub group differences on how well informed people feel are not very big and typically much smaller than sub group differences on some of the other core questions in this survey, such as satisfaction with the Government's performance. For example while more Afro-Trinidadians (46%) feel informed than Indo-Trinidadians (41%) these differences are not substantial. However, more women than men feel informed (47% vs. 40%, respectively) even though there is no significant difference in how these two groups rate the Government's performance overall.

The correlation between keeping people informed and levels of satisfaction is clearly demonstrated when we observe that amongst those who are satisfied with the Government's performance as many as 71% feel informed about Government's services and benefits; but among those dissatisfied with Government only 35% feel informed (a two to one ratio).

3.8. Happiness

The vast majority of the public (78%) say they are "happy" with their lives with around two in five being either "very happy" (39%) or "fairly happy" (39%) and only 14% "unhappy". Levels of happiness are broadly consistent across the main sub groups of the public.

However, over the past five years there has been a small decline in the proportion of the public who say they are happy with their lives from 86% and 87% recorded in surveys in 2003 and 2005, respectively.



	% Happy	% Unhappy	Net Happy
Wave 9 (Dec 07)	81%	12%	+69
Wave 5 (Jan 05)	87%	7%	+80
Wave 3 (Dec 03)	86%	8%	+78

3.9. Living in Trinidad

Focus group participants were asked to discuss the experience of living in Trinidad; the following summarises their views and gives an illustration of the types of comments they made.

MORI Caribbean

Living in Trinidad (Focus Groups)

✓ Positive aspects of living in Trinidad are seen as one's family, having food, access to education and freedom

✗ The areas in which people are critical about living in the country focus on crime, poverty, debt and lack of opportunity

▪ **Mixed views on living in Trinidad** – Crime seen as the biggest concern/worst thing about living in Trinidad. Other mentions include high cost of living and food prices. Free education was seen as a good thing

✓ Participants **most proud of the diversity, culture and people in TT and the range of festivals** – natural resources also mentioned

✗ Participants **most ashamed of the high level of crime**/low level of prosecutions. Also ashamed of politics generally and **government expenditure**

Source: Opinion Leaders' Panel Wave 15 Focus Groups

MORI Caribbean

Living in Trinidad (Typical Comments)

'Financially, it is very difficult for the less fortunate' (Man, Group 2, East/West)

'It is risky because of the incidents of crime' (Man, Group 3, Central)

'I am proud of the unity that people show, especially with festivities' (Several, Group 3, Central)

'I am proud about the culture. We celebrate everything' (Woman, Group 2, East/West)

'I am ashamed of the fact that we have so many resources but we are still so very underdeveloped' (Man, Group 3, Central)

'We are feeding off the Jamaican culture too much' (Man, Group 2, East/West)

'When I can touch people's lives, when I can help somebody, it makes me happy' (Woman, Group 1, North)

'To have food on the table at home' (Man, Group 3, Central)

'To be able to get up and be able to worship in whatever religion' (Woman, Group 2, East/West)

'The treacherous crimes make me sad' (Woman, Group 2, East/West)

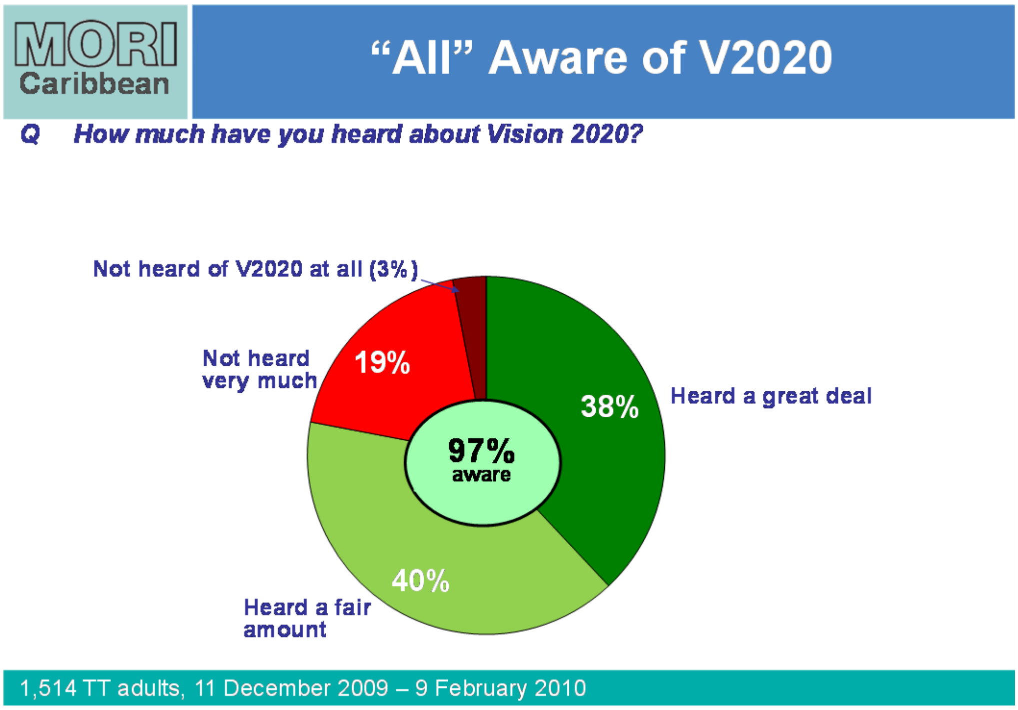
'I think given the resources we should have a better standard of living' (Woman, Group 4, South)

Source: Opinion Leaders' Panel Wave 15 Focus Groups

4. Vision 2020

4.1. Awareness

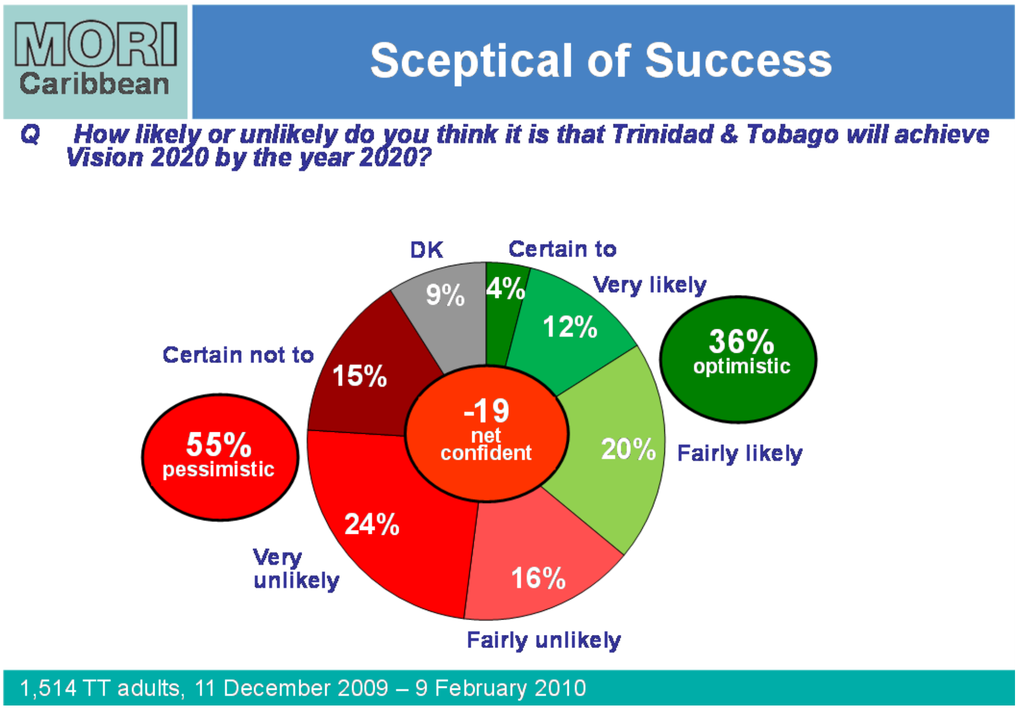
Virtually all adults in Trinidad & Tobago are aware of Vision 2020 (97% have heard of it) and a high proportion say they have heard "a great deal" (38%) or "a fair amount" (40%). Levels of awareness are high among all main sub groups of the public, although slightly fewer persons aged 65 years and over (67%) and people living in Tobago (64%) say they have heard at least "a fair amount".



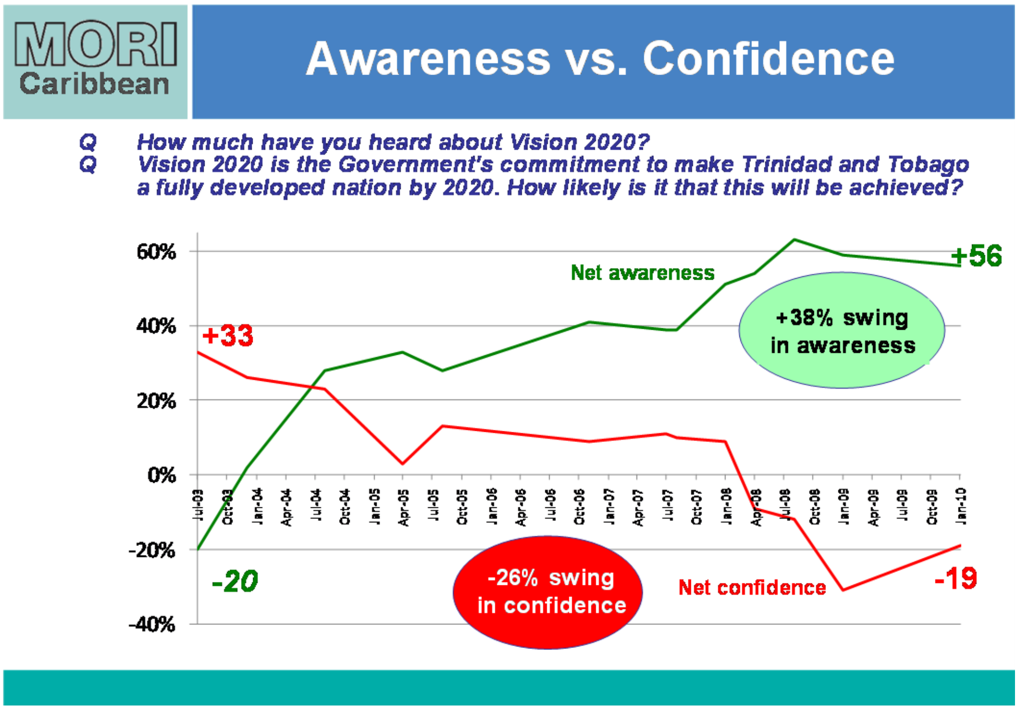
4.2. Confidence

More than half of adults (55%) are pessimistic about Vision 2020 being achieved and only just over a third (36%) are optimistic, giving a "net confident" score of -19. In addition, there are almost four times as many people who are "certain" that Vision 2020 will not be achieved than "certain" it will be (15% vs. 4%). The difference in confidence between sub groups of the public tend to be small with the exception that Afro-Trinidadians (43%) are among the most optimistic; and people who are satisfied with the Government's performance being twice as likely to be optimistic than those who are dissatisfied (61% vs. 30%, respectively).

As can be seen from the second chart on the following page, since 2003 there has been a considerable increase in the proportion of the public who feel they know about Vision 2020, from a "net aware" score of -20 in 2003 to +56 in the latest survey. This represents a 38% swing over this time period – that is, 38 people in 100 have moved from 'not feeling informed' to 'feeling informed.



Over the same time period there has been a fall in confidence that Vision 2020 will be achieved, down from a "net confidence" score of +33 in 2003 to -19 in the latest survey. This represents a swing of -26%, that is, 26 people in 100 have moved from being confident that Vision 2020 will be achieved by 2020 to not being confident.

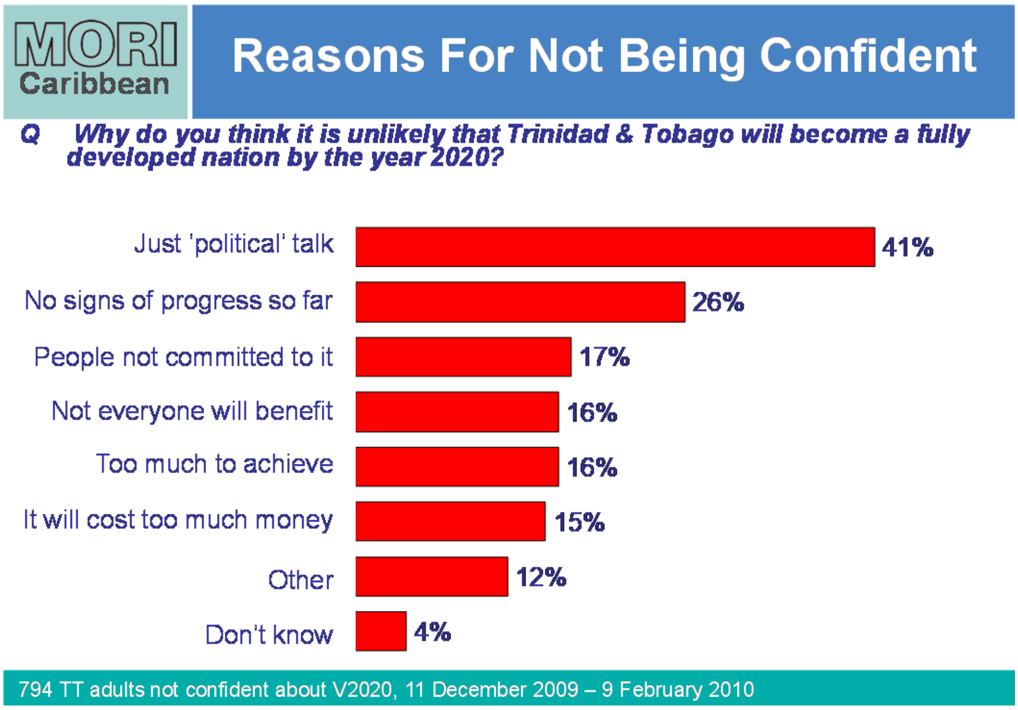


MORI Caribbean

4.2.1. Reasons for Not Being Confident

Respondents who said they thought it was unlikely that Vision 2020 would be achieved were asked to indicate their reasons. As the chart below illustrates the main reason provided by respondents was that they considered Vision 2020 to be “political talk” (41%).

The second reason given for lack of confidence is “no signs of progress so far”, which is mentioned by approximately a quarter of those who were sceptical. The four (4) additional reasons in which between 15% and 17% of people indicated their lack of confidence in achievement of the Vision are listed in the Chart below.



4.3. Focus Groups

The following are the types of comments made by focus group participants.

MORI Caribbean

Vision 2020 (Typical Comments)

"I think it could be achieved but it is all about the mentality of the people" (Man, East/West Corridor)

"They are not implementing things to make Vision 2020 happen" (Several, North)

"Their focus is only in infrastructure and not on developing the standard of living for the people. That is not a developed country" (Several, Central)

"I don't see anything that would make you feel this would be accomplished" (Several, Central)

''There is focus on infrastructure. Vision 2020 for me, means being able to feed yourselves and having water for all" (Woman, South)

Participants were also asked to identify examples of how Vision 2020 is being delivered in Trinidad and Tobago.

MORI Caribbean

Vision 2020 (Positives)

•Examples people gave of evidence from past 12 months of TnT moving towards Vision 2020:

- ✓ **Construction**
- ✓ **Large buildings in Port of Spain**
- ✓ **National Centre for Performing Arts**
- ✓ **The Waterfront**
- ✓ **The Hyatt Regency Hotel**
- ✓ **Introduction of the breathalyser**
- ✓ **Free tertiary education**
- ✓ **Overpass**

Respondents were also asked to identify what they would like to see happen in the next 12 months to indicate progression towards Vision 2020.

MORI Caribbean

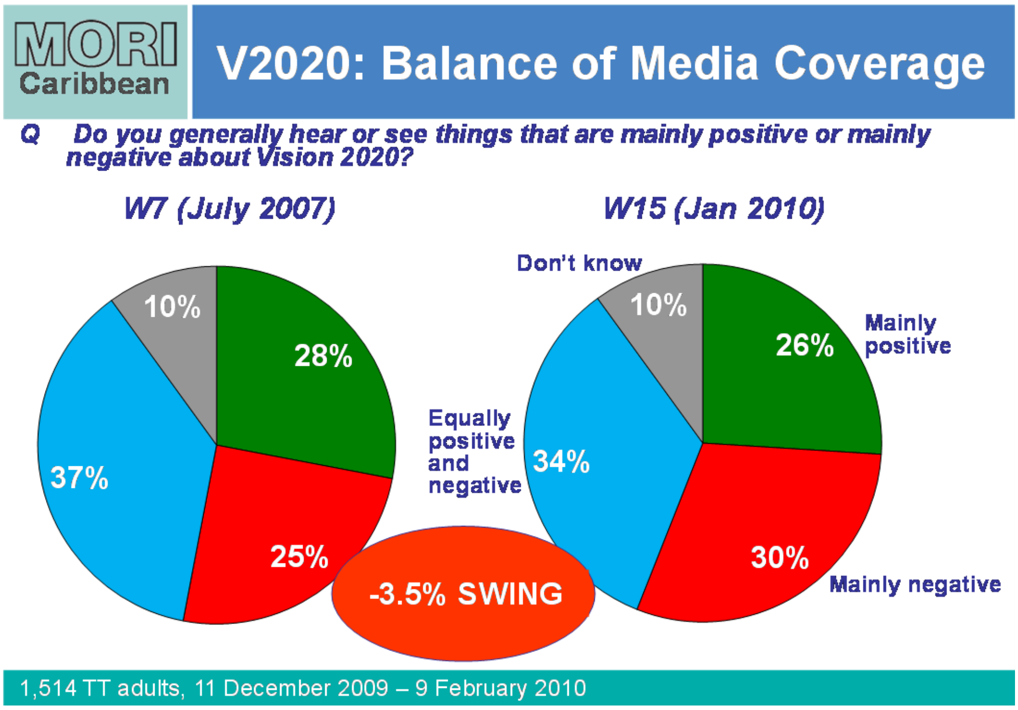
Vision 2020 (People's Hopes)

•Examples of what people would like to see happen over the next 12 months to show that TnT is moving towards Vision 2020:

- ✓ Growth in spirituality of people
- ✓ Change in the way people think
- ✓ More efficient Public Service
- ✓ More efficient legal and police services
- ✓ Reduction in crime
- ✓ Not see so many socially displaced people
- ✓ Motor Vehicle Tax dropped
- ✓ Lower food prices
- ✓ "Real" medication in CDAP, not generic
- ✓ More beds in hospitals
- ✓ Change in governance
- ✓ Time shifting so not everyone works 8am to 4pm
- ✓ Improved roads
- ✓ Tackling destitution and homelessness

4.4. Media Coverage

Slightly more people say they tend to hear mainly negative things (30%) than mainly positive things (26%) about Vision 2020; which is the reverse of what people said they heard when this question was last asked in July 2007. However, in both these surveys the largest proportions of the public said they heard equally positive and negative things about the Vision (37% in 2007 and 34% in 2010).



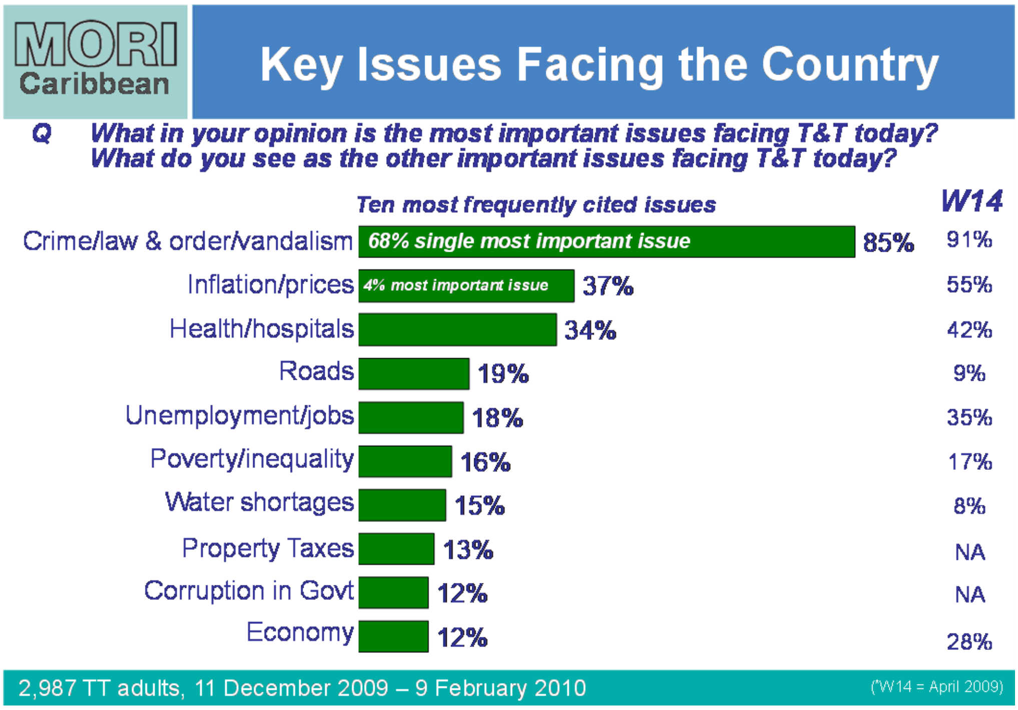
5. Issues Facing the Country

5.1. Most Important National Issues

Crime continues to be seen as the most important issue facing the country. Almost seven in ten people (68%) say that it is the "single most important" issue and 85% identify it as "one of the most important" issues. Overall, however, there has been a small decrease in how many people see *crime* as one of the key issues facing Trinidad & Tobago as this figure was 91% in the last survey conducted in April 2009.

The next two most salient issues, *inflation/prices(37%)* and *health/hospitals(34%),* have also seen a decline in the number of people who say they are "one of the most important" issues facing the nation (down by 18 points and 8 points, respectively). In addition, less than half as many people now see the *economy* as a key national issue than when last asked in April 2009 (down from 28% to 12%); and a similar halving in the number of people saying *unemployment/jobs* (35% to 18%).

There has however been a significant increase in concern about *roads* (up from 9% to 19%) such that it is the fourth highest issue of concern selected by the public. Increase in concerns about *water shortages* (doubled from 8% to 15%), *property taxes* (13%) and *corruption in government* (12%) have also been observed, however these latter two were not significant issues in the public's mind during the last survey.



In analysing the top three issues, we see that there are no major sub group differences in terms of the salience given to *crime* – the only key deviation from the average is that slightly fewer people in Tobago (74%) mention this (but it is still by far the biggest concern).

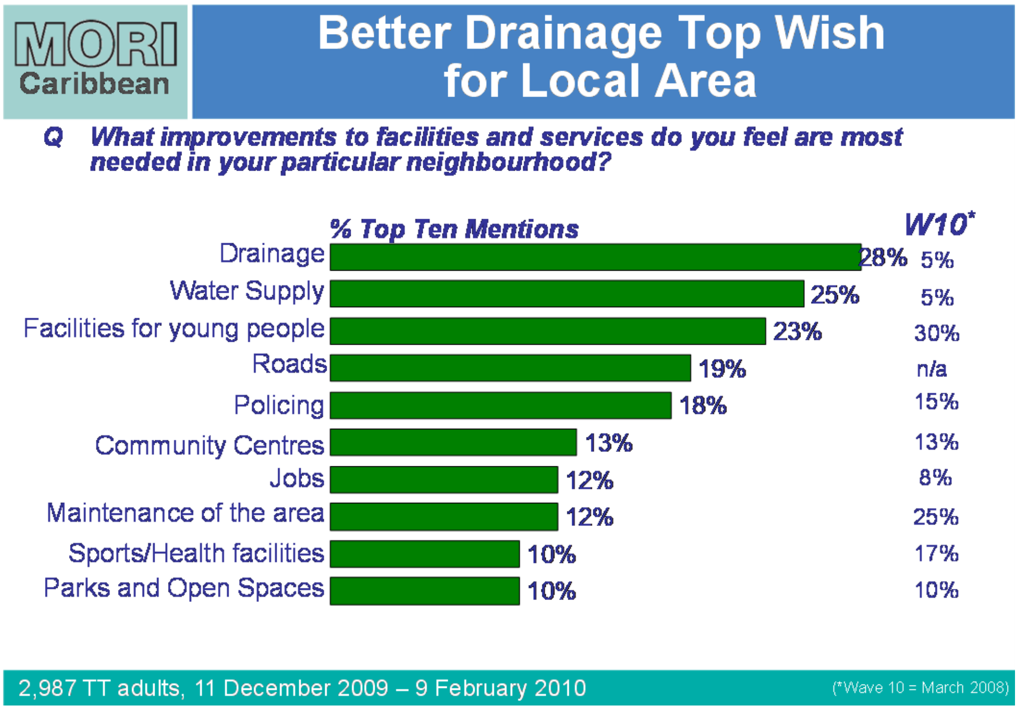
Inflation/prices is a particular concern for women (41%), persons in the 35-44 age range (43%), Indo-Trinidadians (44%) and people living in Central Trinidad (52%). Few persons living in Tobago (19%) and North Trinidad (24%) are concerned about *inflation/prices*.

The main sub group difference in concern about *health/hospitals* is by region; where it is seen that a lower than average proportion of people in North Trinidad (26%) and a higher than average proportion of people in Tobago (42%) are concerned about this issue.

5.2. Most Important Local Improvements

Drainage (28%), *water supply* (25%) and *facilities for young people* (23%) are the three local improvements people would most like to see in their area. Many more people highlight the first two of these priorities than was the case in March 2008 (then 5% identified each as priorities). In contrast, fewer people now say *facilities for young people (23%,* down 7 points) than in March 2008.

The two other key changes in attitudes since March 2008 has been a fall in the proportion of people saying *maintenance of the area* is a priority, down from 25% to 12%; and the emergence of *roads* as a priority for improvement (in 2008 this did not come up as a significant issue).



The tables below highlights the top five improvements people would like to see accomplished in their local area analysed by the local government body they live in. These show that while the same issues are seen as important across the range of Regional Corporations, the proportion of people who select each and the order of priority does vary by people's location. Port of Spain is also somewhat different from the rest of the country with more people in this city saying that "cleaner streets/environment" is the improvement most needed (28%) than any other issue; and in other parts of the country "cleaner streets/environment" is not one of the top five areas for improvement.

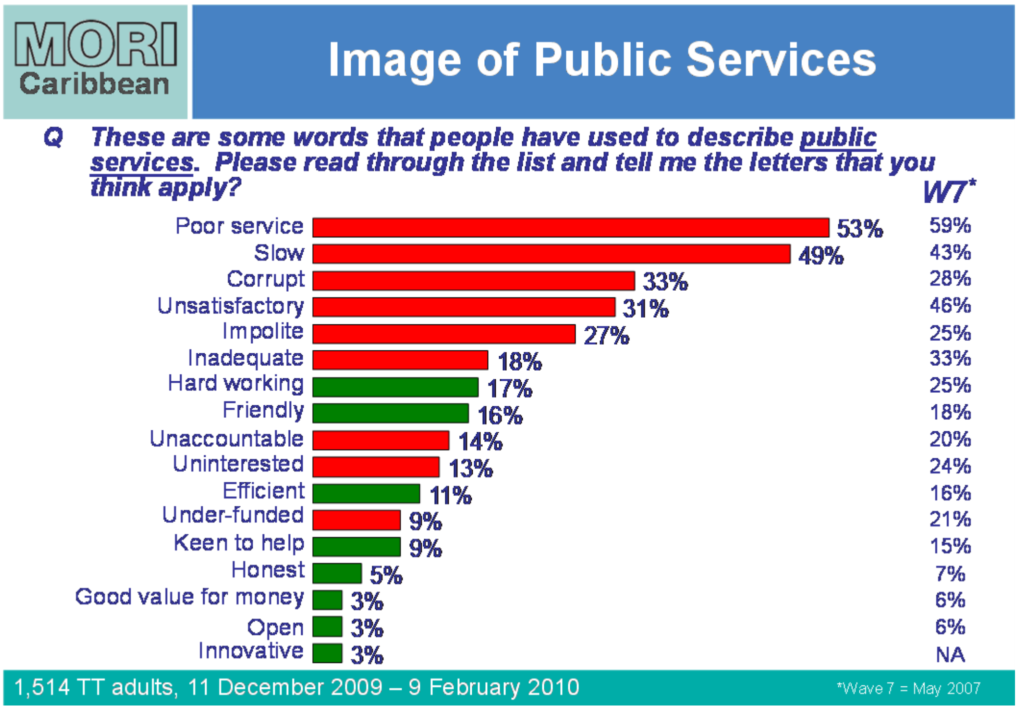
<table>
<tr><th colspan="2">Top Priorities for Improving Local Area
(Analysed by Local Government Body)</th></tr>
<tr><td><u>Port of Spain</u>
• 28% cleaner streets / environment
• 24% policing
• 23% drainage
• 19% water supply
• 17% facilities for young people</td><td><u>Diego Martin</u>
• 32% water supply
• 32% facilities for young people
• 27% drainage
• 25% roads
• 23% community centres/halls</td></tr>
<tr><td><u>San Fernando</u>
• 31% water supply
• 22% facilities for young people
• 15% drainage
• 15% jobs
• 13% policing</td><td><u>Princes Town</u>
• 37% roads
• 33% water supply
• 31% drainage
• 21% facilities for young people
• 18% community centres/halls</td></tr>
<tr><td><u>Penal /Debe</u>
• 37% drainage
• 35% water supply
• 19% facilities for young people
• 18% policing
• 18% roads</td><td><u>Siparia</u>
• 27% drainage
• 26% roads
• 24% community centres/halls
• 23% parks and open spaces
• 23% facilities for young people</td></tr>
<tr><td><u>Arima</u>
• 35% policing
• 22% parks and open spaces
• 20% health services
• 14% sports/health and fitness facilities
• 13% maintenance of the area</td><td><u>San Juan/Laventille</u>
• 33% water supply
• 32% drainage
• 24% facilities for young people
• 16% policing
• 13% jobs</td></tr>
<tr><td colspan="2" align="right">Source: Opinion Leaders' Panel wave 15</td></tr>
</table>

Top Priorities for Improving Local Area (Analysed by Local Government Body)	
Tunapuna / Piarco • 28% policing • 24% facilities for young people • 18% drainage • 13% jobs • 11% water supply	**Mayaro/Rio Claro** • 43% drainage • 32% water supply • 28% facilities for young people • 27% roads • 25% health services
Sangre Grande • 40% jobs • 25% drainage • 20% facilities for young people • 19% water supply • 16% health services	**Chaguanas** • 48% drainage • 31% maintenance of the area • 24% policing • 22% facilities for young people • 16% roads
Couva/Tabaquite/Talparo • 37% roads • 37% drainage • 33% water supply • 26% facilities for young people • 22% maintenance of the area	**Tobago** • 28% facilities for young people • 23% health services • 21% health/sports facilities • 18% jobs • 12% policing
	Source: Opinion Leaders' Panel wave 15

6. Public Services

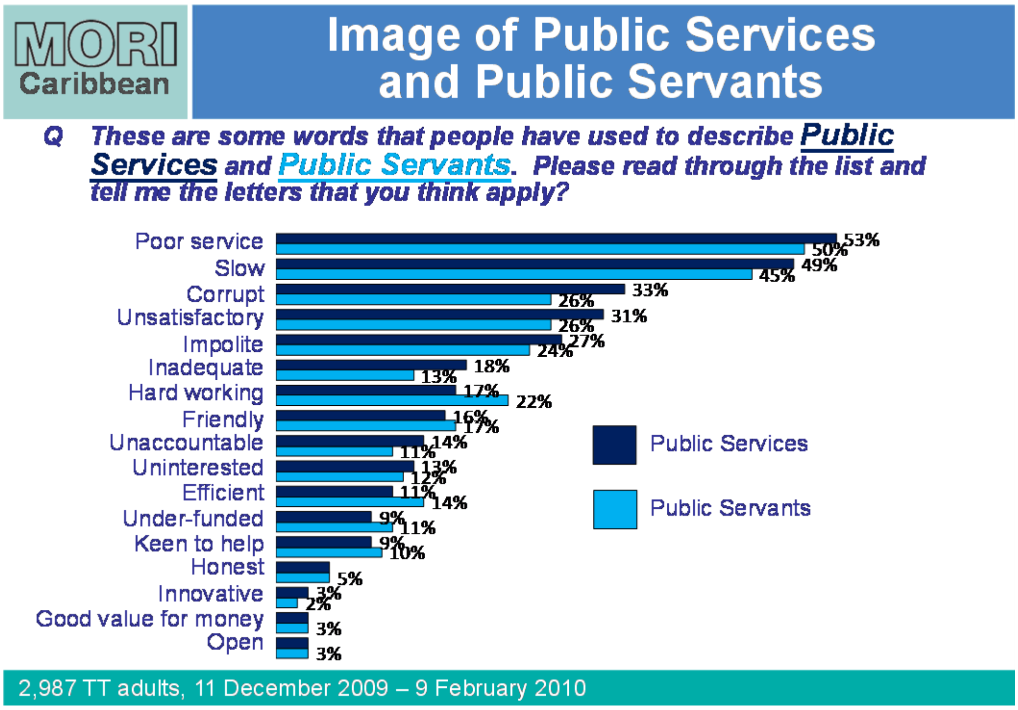
6.1. Image of Public Services and Public Servants

The image of the Public Service remains poor, with the attributes people are most likely to select about the Service being negative: *poor service* (53%), *slow* (49%), *corrupt* (33%) and *unsatisfactory* (31%). While there have been some changes in the proportion of people that select specific terms about the Public Service (for example *poor service* is selected by 53% now compared with 59% in May 2007) there is no consistent evidence that the image of the Public Service overall has improved.



The most positive attributes people select to describe the Public Services are *hard working* (17% - though down from 25% in May 2007) and *friendly* (16% - consistent with 2007). The five least likely attributes people would use to describe the Public Service are positive ones, among them are *good value for money*, *open* and *innovative,* each selected by three percent of the public.

Half of the respondents in the survey were asked about the image of Public ***Services*** and the other half were asked about the image of Public ***Servants***, using the same list of attributes to select from. The following chart compares public attitudes and it can be seen that there is very little difference between how the public rate Public Servants and Public Services. There are only one or two attributes where more/ less people would select them to describe Public Servants than Public Services (for example with *corrupt* there is a seven point difference) but the general image pattern is consistent between the two.

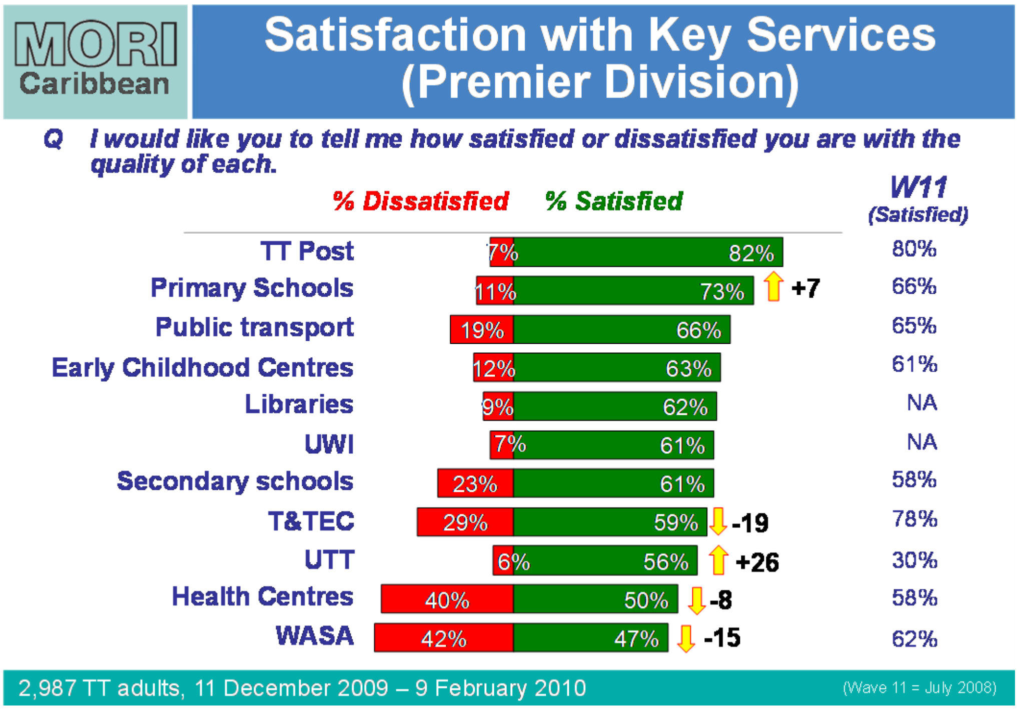


6.2. Satisfaction with Public Services

Respondents were asked how satisfied or dissatisfied they are with 29 specific public services. The following charts present the findings with the services split into three divisions ranked by the proportion of the public satisfied with each service.

6.2.1. Public Services (Premier Division)

The services with the highest levels of public satisfaction are shown in the following chart.



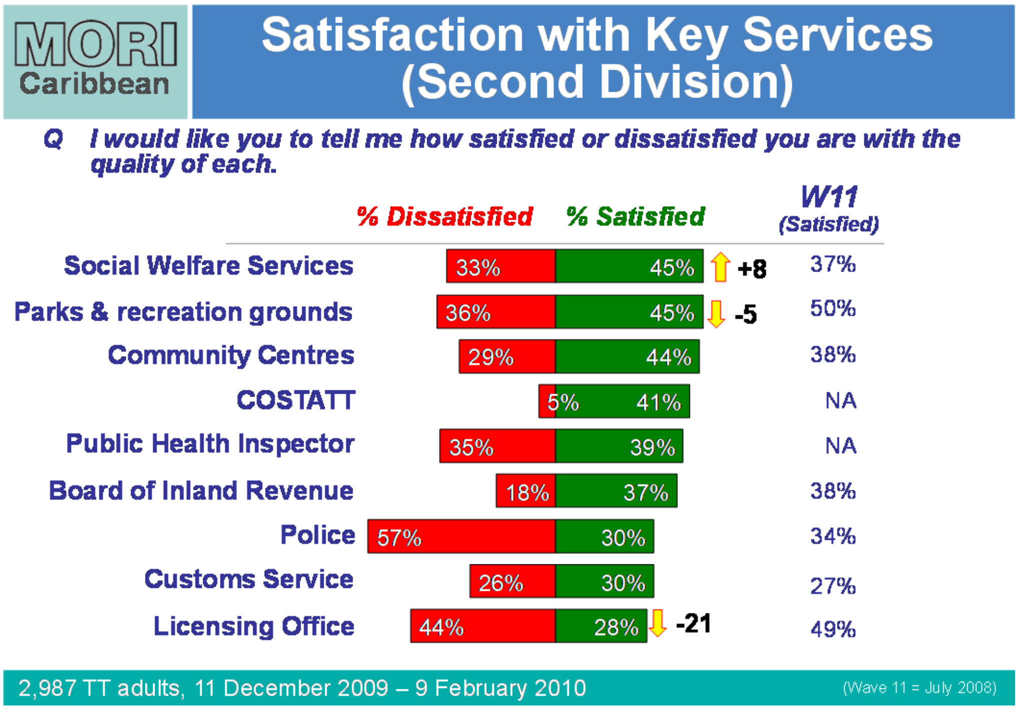
TT Post (82% satisfied) and *Primary Schools* (73% satisfied) are the most positively regarded services. These are followed by five other services where between three in five and two thirds of the public express satisfaction; all of these are education services with the exception of *Public Transport* (66% satisfied).

For each of the services in the first chart more people are satisfied than dissatisfied. It is important to consider the proportion of the public that are dissatisfied with a service as well as looking at levels of satisfaction, because for many services a relatively high proportion of the pubic say they “don’t know” or are “neither satisfied nor dissatisfied”. For example, 56% of the public are satisfied with *UTT* which is a little higher than *Health Centres* (50%), but **many more** people are dissatisfied with *Health Centres* (40%) than are with UTT *(6%)*.

UTT has seen the largest increase in public satisfaction since July 2008 with an increase of 26 points from 30% satisfied in July 2008 to 56% in the latest survey. There has also been an increase in public satisfaction with *Primary Schools* (+7 points). However, three of the top rated services have seen a decline in levels of satisfaction: *T&TEC* (down 19 points), *WASA* (down 15 points) and *Health Centres* (down eight points).

6.2.2. Public Services (Second Division)

The following chart shows those public services that received a lower satisfaction rating, each of these having fewer than half the public expressing satisfaction with their quality.



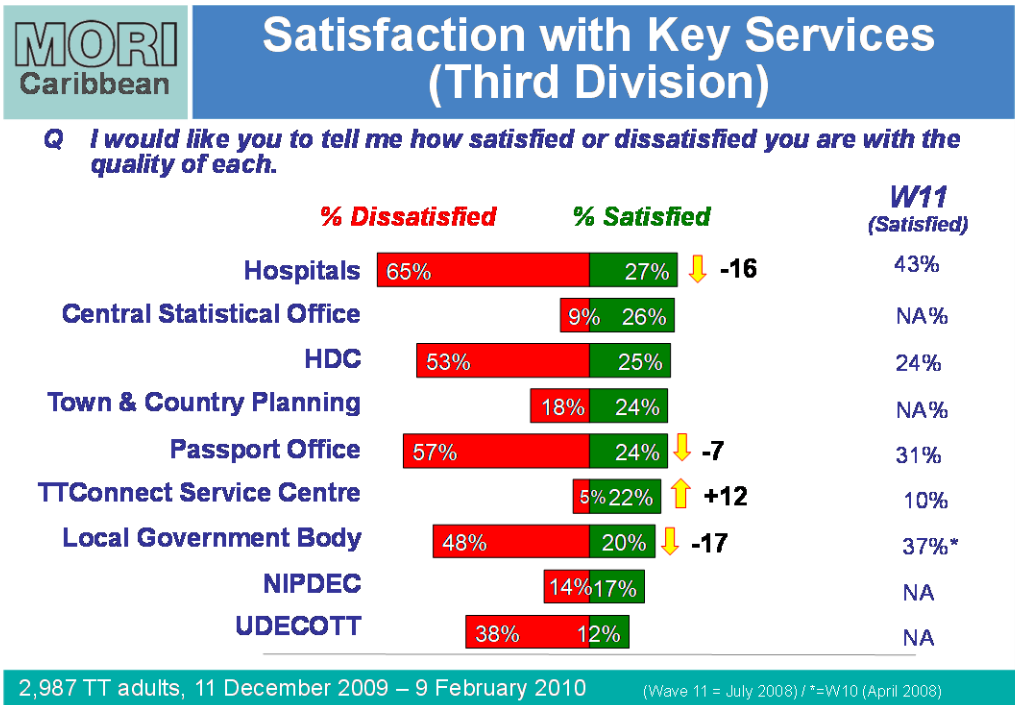
Only one of these services has seen a rise in public satisfaction since July 2008 – *Social Welfare Services* (up eight points to 45% satisfied). *Parks and Recreation Grounds* has seen a fall in satisfaction (down five points), but the largest decline in satisfaction of any public service covered in the survey is with *Licensing Office* (down 21 points to 28% satisfied).

It is also worth noting that in the above chart, *police* is the only service where more than half the public express dissatisfaction with the quality (57% dissatisfied).

6.2.3. Public Services (Third Division)

The chart below depicts those services with the lowest levels of public satisfaction. As explained above it is important to observe the levels of dissatisfaction as well as satisfaction, as several of these services have low levels of public satisfaction *and* dissatisfaction; this therefore reflects high proportions of respondents who did not express an opinion either way.

As such, while *NIPDEC* (17% satisfied) and *UDECOTT* (12% satisfied) are the lowest rated in terms of satisfaction there are several others service with much higher levels of *dissatisfaction*, in particular *HDC* (53% dissatisfied), *Passport Office* (57%) and *Hospitals* (65%).

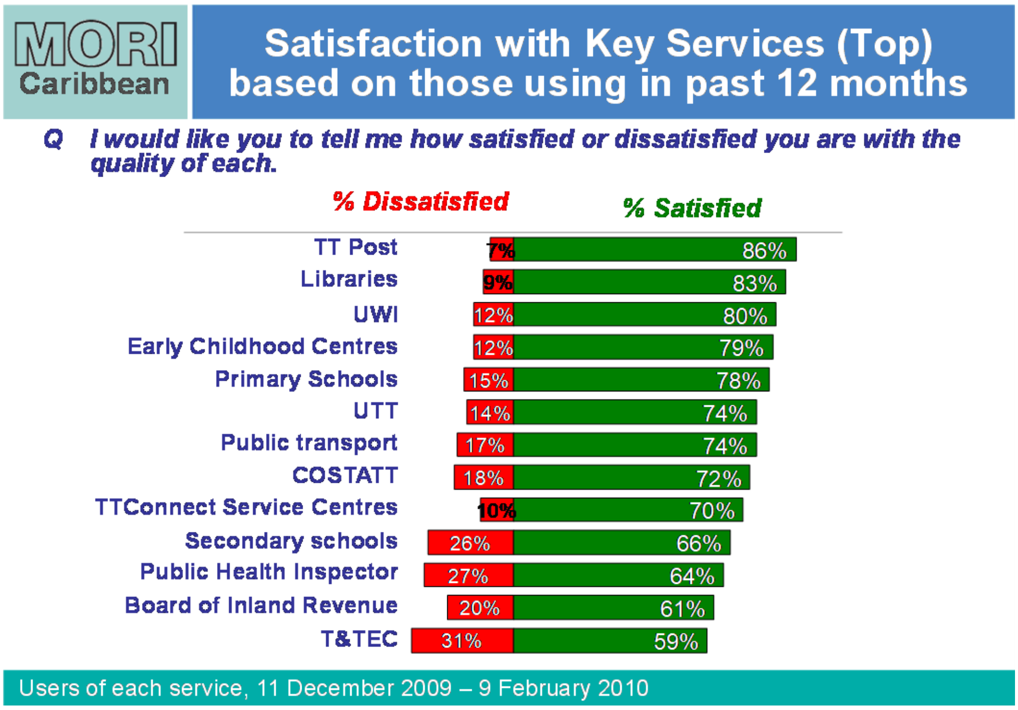


Three of these services have seen a significant drop in how many people are satisfied with them – *Passport Office* (down seven points from 31%), *Hospitals* (down 16 points from 43%) and *Local Government Body* (down 17 points from 37%). In contrast there has been a 12 point increase in public satisfaction with *TTConnect Service Centres* (up from 10% to 22% satisfied).

6.2.4. Public Services (Service Users: highest rated)

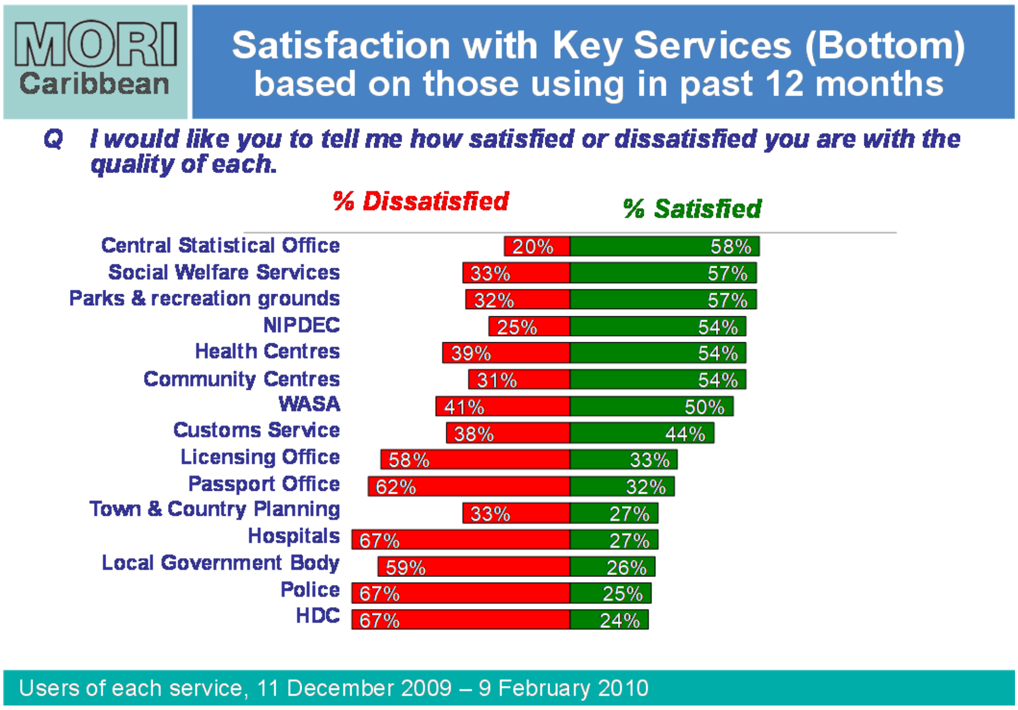
The above charts illustrated public satisfaction with a range of public services. Respondents were also asked if they or anyone in their household had used or contacted each service within the past 12 months. This allows us to look at the views of service users (rather than the general public) which are shown in the following two charts.

For 20 of the 28 services covered at least half of the users are satisfied with the quality of the respective services and several services have around three quarters or more users expressing satisfaction. As with the overall public ratings, *TT Post* (86% satisfied) and several of the education related services receive the highest levels of user satisfaction – for example, *UWI* (80%) and *Early Childhood Centres* (79%).



6.2.5. Public Services (Service Users: lowest rated)

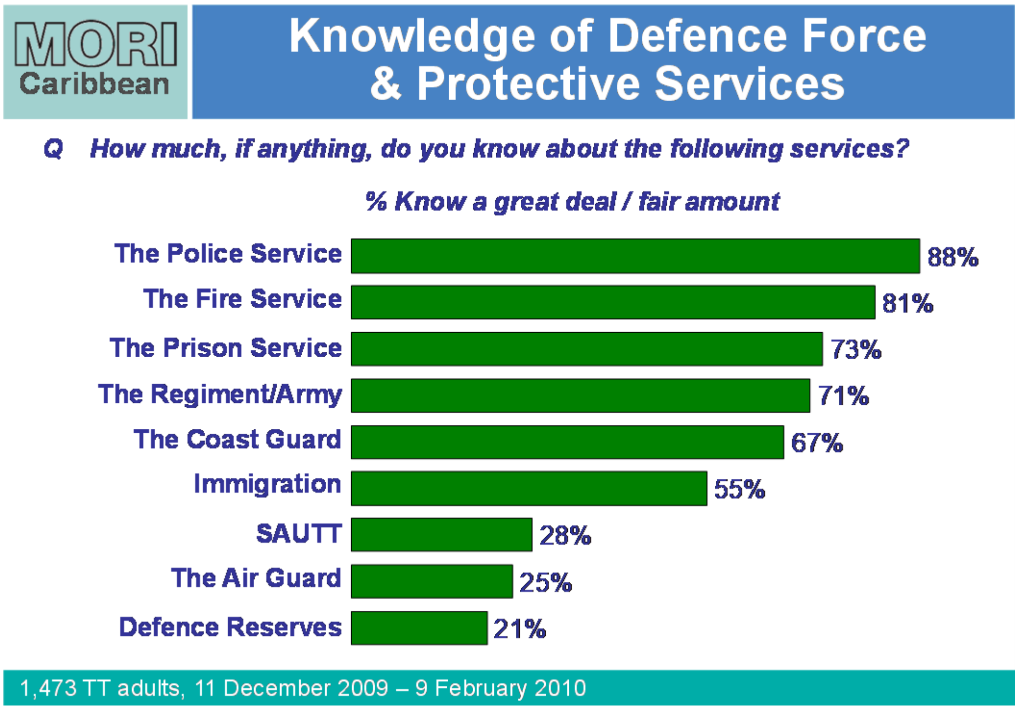
The services with lower levels of public satisfaction are shown below. Seven of these services have a third or fewer users being satisfied, with *HDC* (24% satisfied) and *Police* (25%) being the least popular. Six services also have more than half of users expressing dissatisfaction; and with three services in particular two thirds of users are dissatisfied, these are *Hospitals (67% dissatisfied, Police (67% dissatisfied)* and *HDC (67% dissatisfied).*



7. Defence Force & Protective Services

7.1. Familiarity

The public feel most familiar with the *Police Service* with almost nine in ten (88%) persons saying they feel they know a fair amount or a great deal about the service. Most people also feel they know about the *Fire Service* (81%), *Prison Service* (73%), *Regiment* (71%) and *Coast Guard* (67%). Just over half of the public (55%) feel they know at least a fair amount about *Immigration.*



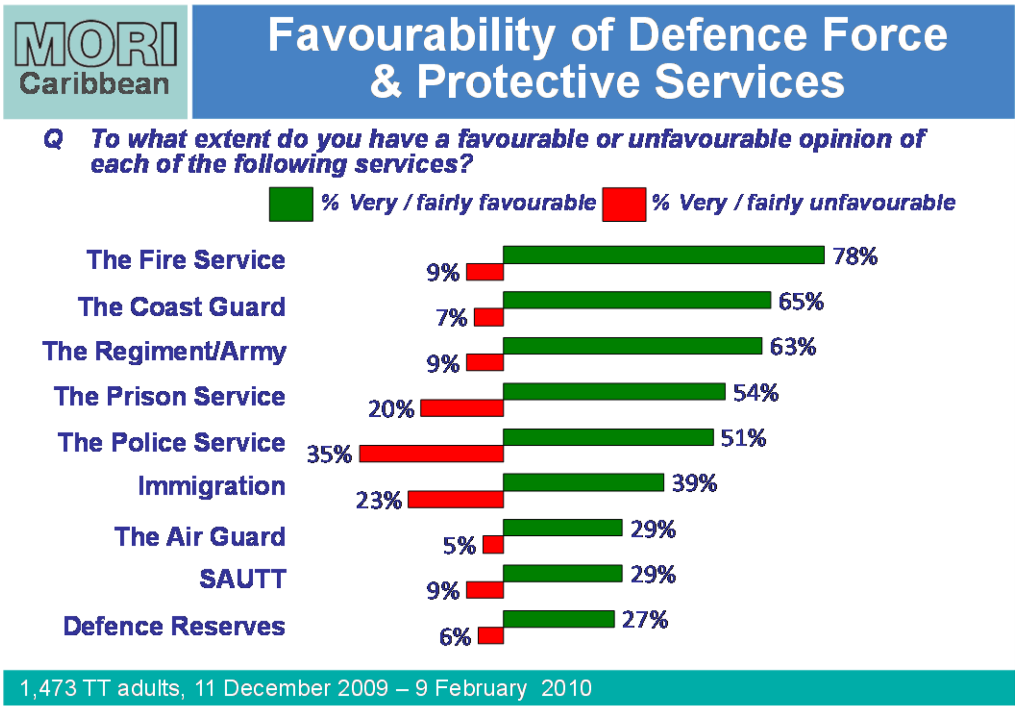
The three services where only a small proportion of the public feel they know at least a fair amount about are *SAUTT* (28%), the *Air Guard* (25%) and the *Defence Reserves* (21%).

For most of these services more men than women feel they know at least a fair amount about these services. For example, 72% of men feel they know at least a fair amount about the *Coast Guard* compared with 64% of women. There is also a consistent pattern where older people (aged 55+ years) tend to be less likely to feel informed about these services. In contrast, Afro Trinidadians (vs. Indo Trinidadians) and middle class (vs. working class) people are more likely to feel informed.

7.2. Favourability

The following chart illustrates how many people have either a favourable or unfavourable opinion of each of the services. The chart is ranked by those services with the highest levels of favourability at the top. The *fire service* has the highest proportion of the public being positive about them, with almost four in five (78%) being favourable.

The *air guard* (29%), *SAUTT* (29%) and *defence reserves* (27%) have the lowest proportions of the public expressing favourability. However, these three services also have a very low number of respondents who have an unfavourable opinion towards them. This is because a relatively high proportion does not express an opinion either way. The services with the highest levels of people having unfavourable opinions towards them are *police* (35% unfavourable), *immigration* (23%) and *prison service* (20%).

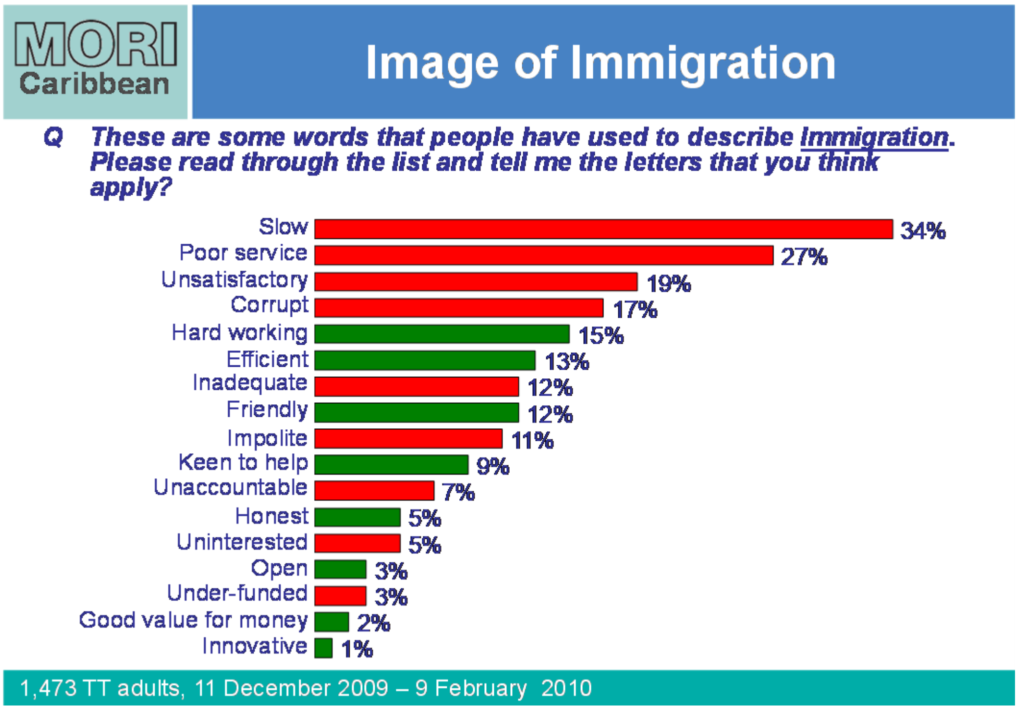


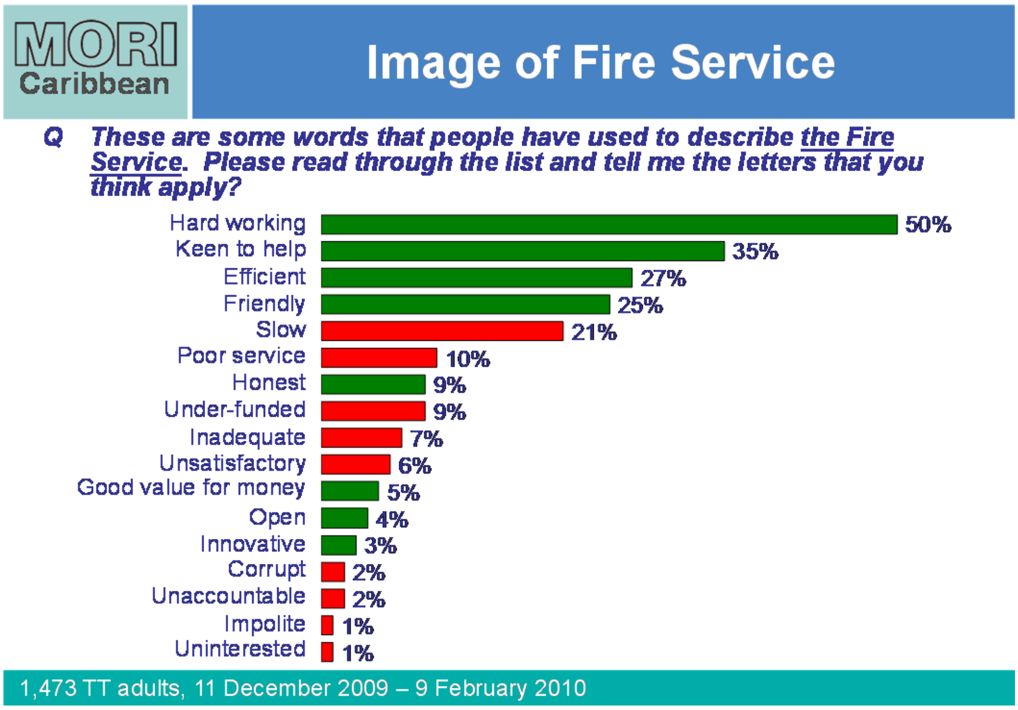
There are fewer sub group differences in terms of favourability than familiarity. For example in terms of gender the only significant differences are with *Regiment* (69% of men are favourable vs. 57% of women). There are no major differences by ethnicity or social class, with slightly more middle class than working class expressing favourability towards *Immigration* (46% vs. 37% favourable, respectively).

As with familiarity, generally more of the younger respondents tend to have a favourable opinion towards the Defence Force and Protective Services. The one exception is with *Police* (+26% net favourable among persons aged 55 years and older vs. +12% net favourable among persons under the age of 55 years).

7.3. Image of Immigration and Fire Service

The following two charts show the image of the *Immigration* and *Fire Service*. People are most likely to describe *Immigration* as "slow" (34%), "poor service" (27%), "unsatisfactory" (19%) and "corrupt" (17%). In contrast, the public's image of the *Fire Service* is positive with half the public describing them as "hard working" (50%), "keen to help" (35%), "efficient" (27%) and "friendly" (25%).



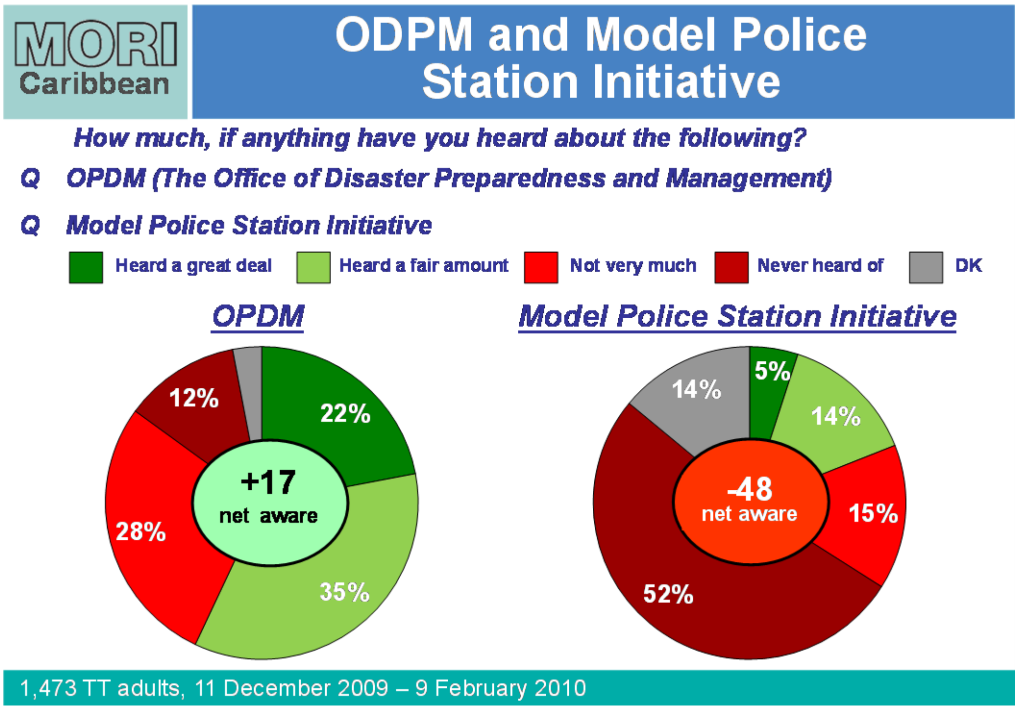


The overall "net image" of Immigration is -9 (one of the most negative image ratings for services asked about in any of the OLP waves) while it is +13 for the Fire Service (one of the most positive).

7.5. ODPM and the Model Police Station Initiative

Most people (85%) have heard of the Office of Disaster Preparedness and Management (ODPM) and more than half say they have heard "a great deal" (22%) or "a fair amount" (35%). The proportion of people who have heard at least "a fair amount" is somewhat lower among those living in South (49%) and persons aged 55 years and older (48%).

In contrast the Model Police Station Initiative is not very well known. Only a third of the public (34%) have heard of the Initiative and only one in twenty people (5%) have "heard a great deal". People living in Diego Martin (35%) and San Juan/Laventille (37%) are particularly likely to have heard "at least a fair amount"; in contrast only 6% of those living in South Trinidad express awareness of the Initiative.



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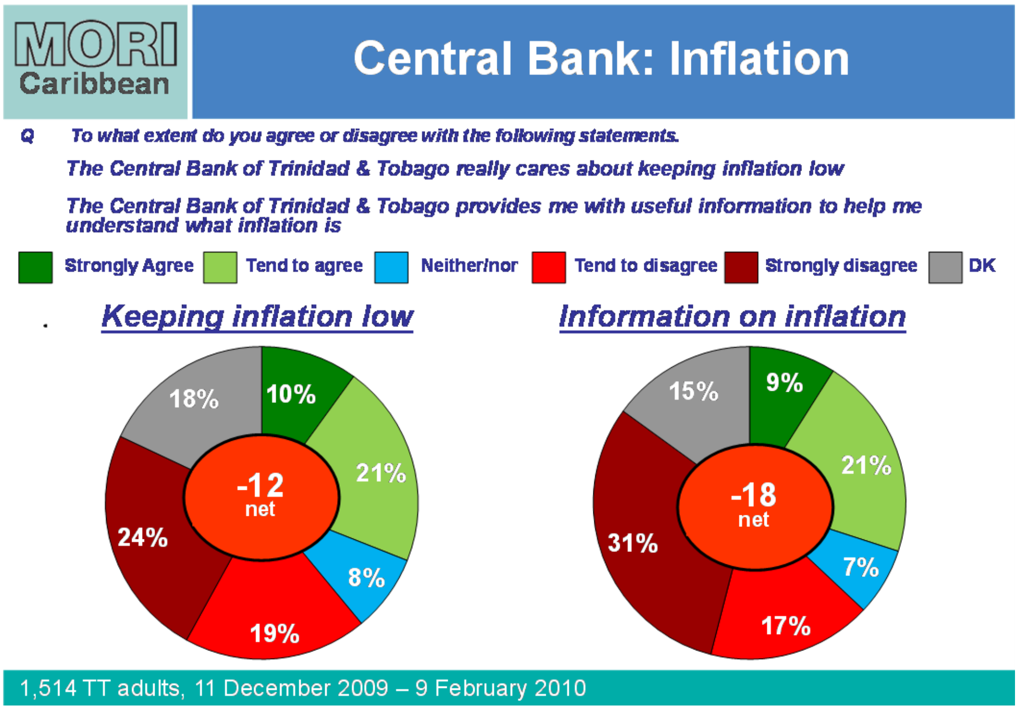
8. Central Bank

8.1. Central Bank and Inflation

More people disagree (43%) than agree (31%) that the Central Bank “really cares about keeping inflation low”. Men (38% agree), middle class (39%) and Afro Trinidadians (36%) are most likely to agree with this statement.

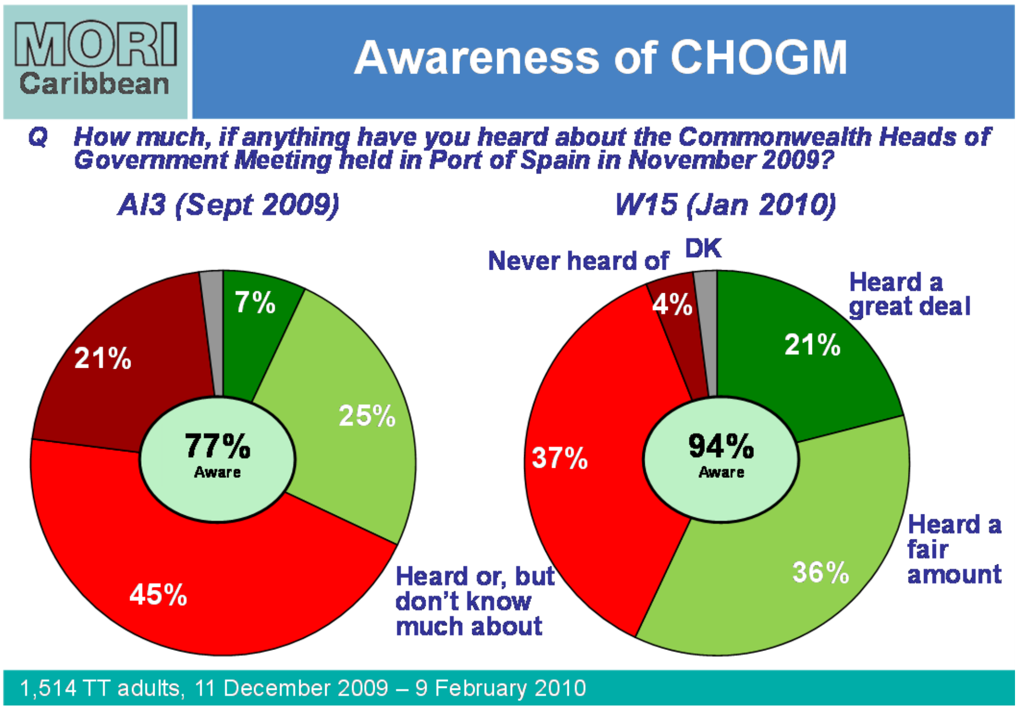


Similarly, almost half the public (48%) disagree that the Central Bank “provides me with useful information to help me understand what inflation is”, and just three in ten people (30%) agree that it does. Men (35% agree), middle class (34%) and Afro Trinidadians (35%) are most likely to agree with this statement. People aged over 55 years are less likely to agree with the statement (24% agree).

9. CHOGM

9.1. Awareness

A very high proportion of the public know about the Commonwealth Heads of Government Meeting which was held in Port of Spain in November 2009, with 94% of them being aware of it and almost three in five having “heard a fair amount” (36%) or a “great deal” (21%). This represents a significant increase in awareness from when the question was previously asked in September 2009.



9.2. Benefits

A slight majority of people (55%) feel the country has either “not benefitted at all” (32%) or “not very much” (23%) from hosting the CHOGM. Fewer than three in ten (28%) say the country has benefited “a great deal” (6%) or a “fair amount” (22%).

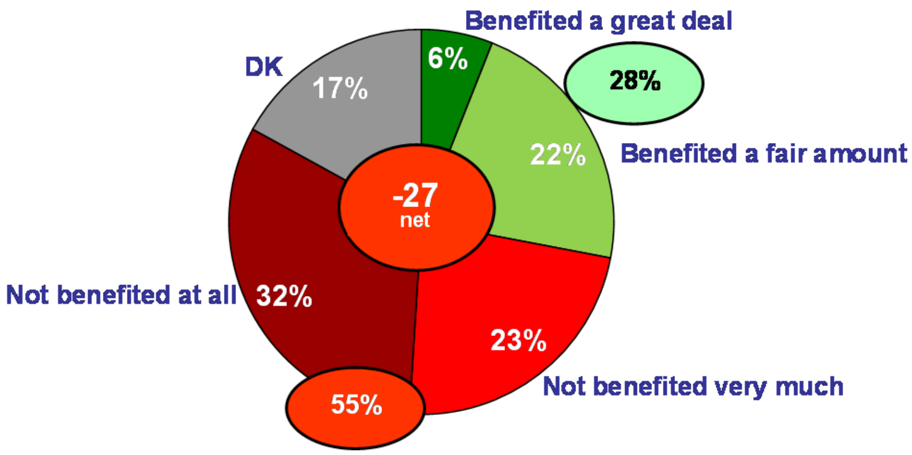
There is a broadly consistent attitude towards the benefits of CHOGM by sub groups of the public, with the exception that belief in the benefits was somewhat higher among Afro Trinidadians (32%) and lower among people in South Trinidad (23%) and Tobago (21%) believe this.

When asked specifically which groups had benefited the most from the country hosting the summit, people are most likely to believe it is the *government* (52%), the *hospitality/tourism sector* (34%) or *large businesses* (24%). Only 2% of respondents feel that *ordinary people* benefited.

MORI Caribbean

Benefits of CHOGM (1)

Q To what extent do you think Trinidad & Tobago has benefited from hosting the Commonwealth Heads of Government Meeting?

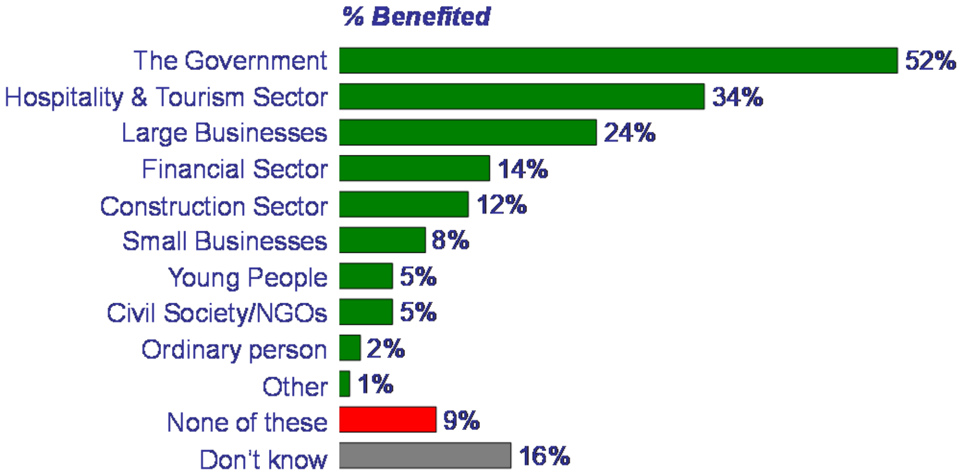


1,514 TT adults, 11 December 2009 – 9 February 2010

MORI Caribbean

Benefits of CHOGM (2)

Q Which, if any, of these groups in Trinidad & Tobago do you think benefited from the Commonwealth Heads of Government meeting?

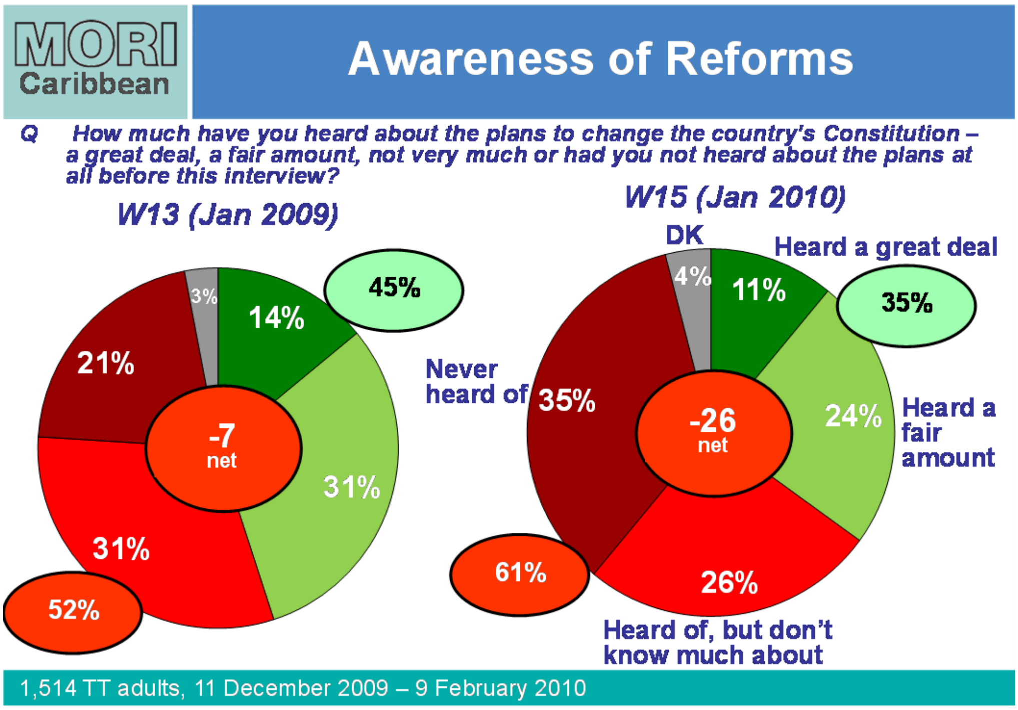


1,514 TT adults 11 December 2009 – 9 February 2010

10. Constitutional Reform

10.1. Awareness of Constitutional Reform

Compared to January 2009 there has been a fall in how many people have heard "at least a fair amount" about plans for Constitutional reform (45% in 2009 vs. 35% in 2010). In the latest findings just over a third of the public say they have heard "a great deal" or a "fair amount", but three in five (61%) claim to have "heard of but don't know much about" or have "not heard of the plans at all".



10.2. Support for Constitutional Reform

Almost half the public (48%) are in favour of constitutional change and one in five (19%) are opposed. These figures include 20% who say they are "strongly in favour" of changing the country's constitution compared with just 6% who say they are "strongly against" this. Twice as many people are also "generally in favour but could be persuaded against" constitutional reform (28%) than are "generally opposed but could be persuaded in favour" of it (13%).

The main sub group difference among the public is that relatively more people in South and East Trinidad are against Constitutional reform (27% and 23% respectively).

10.3. Information on Constitutional Reform

Among those people who are aware of the Constitutional Reform plans, television is by far the most important source of information with seven in ten (69%) saying they have found out about the plans from this medium. The next two most popular sources of information are newspapers (44%) and radio (41%).

10.4. Political and Economic Union in the Caribbean

Three in five people (59%) say they are aware of plans to form an economic union among several states in the Caribbean and slightly fewer (52%) are aware of plans to form an economic union.

Across the public as a whole more people support than oppose both an economic union (41% support vs. 17% oppose) and political union (32% support vs. 23% oppose). However, it is worth highlighting that net support is lower for a political union (+9 net support) than for an economic union (+24), and for both these a significant proportion of the public say they "don't know" or "neither support nor oppose" (42% for economic union and 45% for political union).

10.5. Focus Groups

Participants in the focus groups also discussed Constitutional Reform:

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Constitutional Reform (Focus Groups)

✓ Consensus that the Constitution needs to be changed

- For the benefit of the people,
- Because the government has too much power
- Because it is outdated/fit only or an underdeveloped country

✗ Low level of awareness of Government plans for Constitutional reform

- General belief that Mr Manning wants to create the position of Executive President, which few people say they support

- Most information on plans for Constitutional reform gathered from the television and newspapers

Source: Opinion Leaders' Panel Wave 15 Focus Groups

MORI Caribbean

Constitutional Reform (Typical Comments)

'The current Constitution should be cut up with scissors and they should start all over again' (Woman, Group 3, Central)

'Too much power is concentrated in the hands of one man' (Man, Group 1, North)

'If the Constitution is reassessed, it should be to the benefit of the people, not for the Government' (Man, Group 2, East/West)

'He (Mr Manning) wants to become the Executive President where the current President will be the Supreme Head of State' (Man, Group 3, Central)

'The people should be part of the plans' (Popular response, Group 1, North)

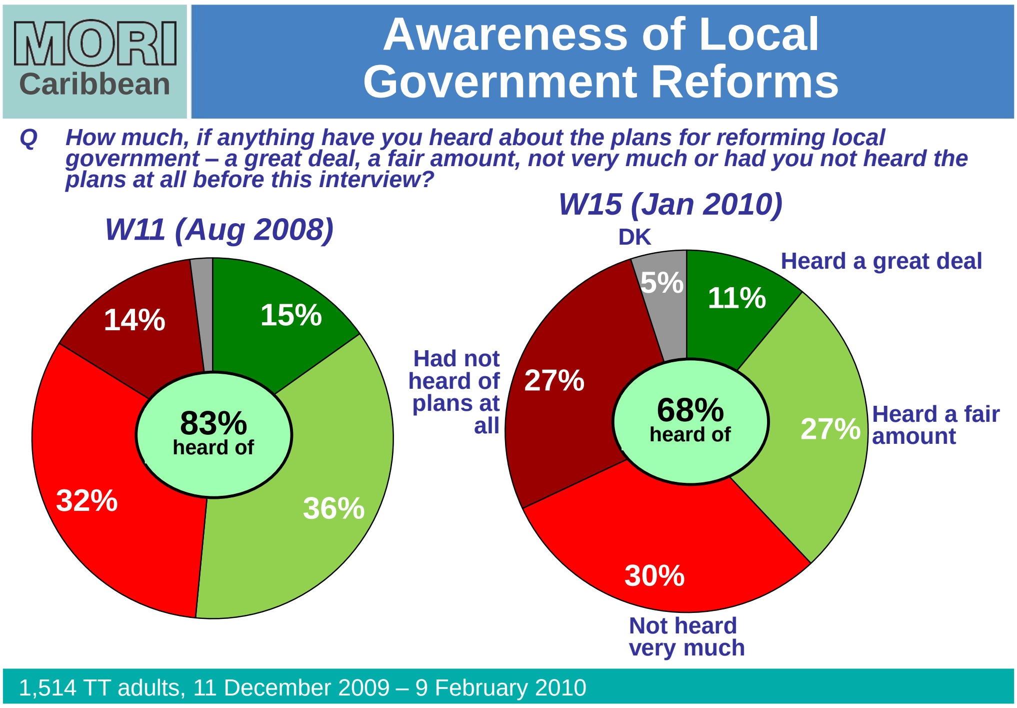
'To give all that power to one person and with a track record with a lack of responsibility (would not work)' (Woman, Group 1, North)

Source: Opinion Leaders' Panel Wave 15 Focus Groups

11. Local Government Reform

11.1. Awareness

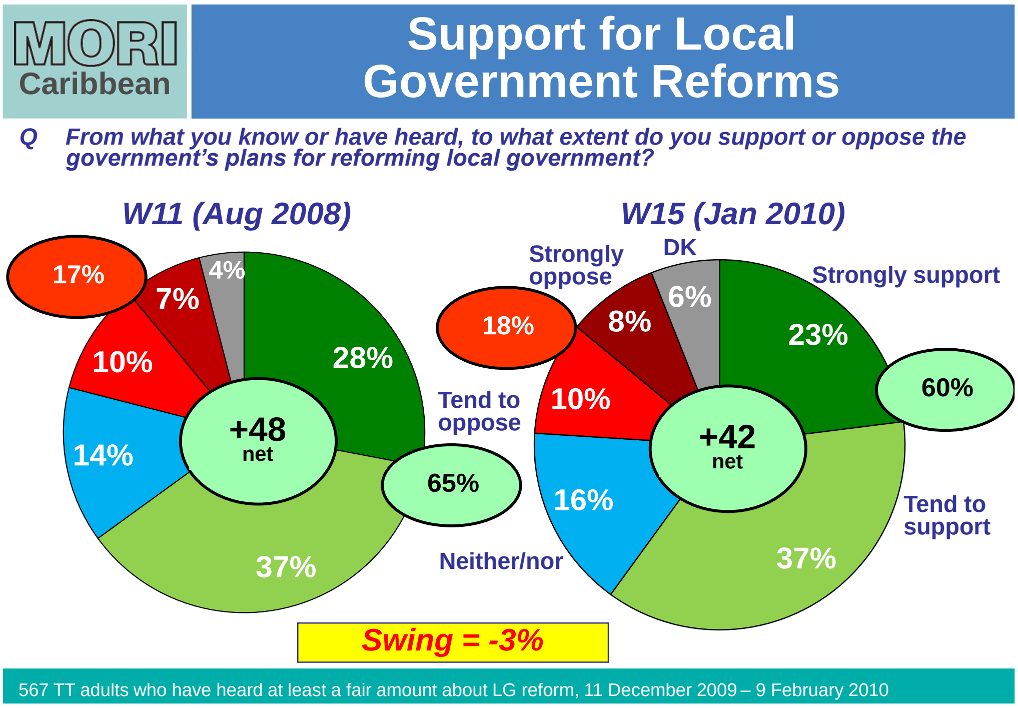
Compared to August 2008 there has been a sharp decline in how many people say they have heard of plans to reform local government; this is down from 83% aware to 68%. In the latest survey about four in ten (38%) people had heard "a fair amount" or "a great deal" about local reform plans, which is lower than the 51% who said the same in August 2008.



11.2. Support

Among those who have heard of the plans, support remains broadly consistent with three in five (60%) supporting the government's plans, down from 65% in 2008. There has been no significant rise in opposition (17% to 18%) instead slightly more people do not give an opinion now.

The change in attitudes between August 2008 and January 2010 represent a swing of minus 3 percent, in other words three people in every 100 have moved from supporting local government reform plans to opposing them.

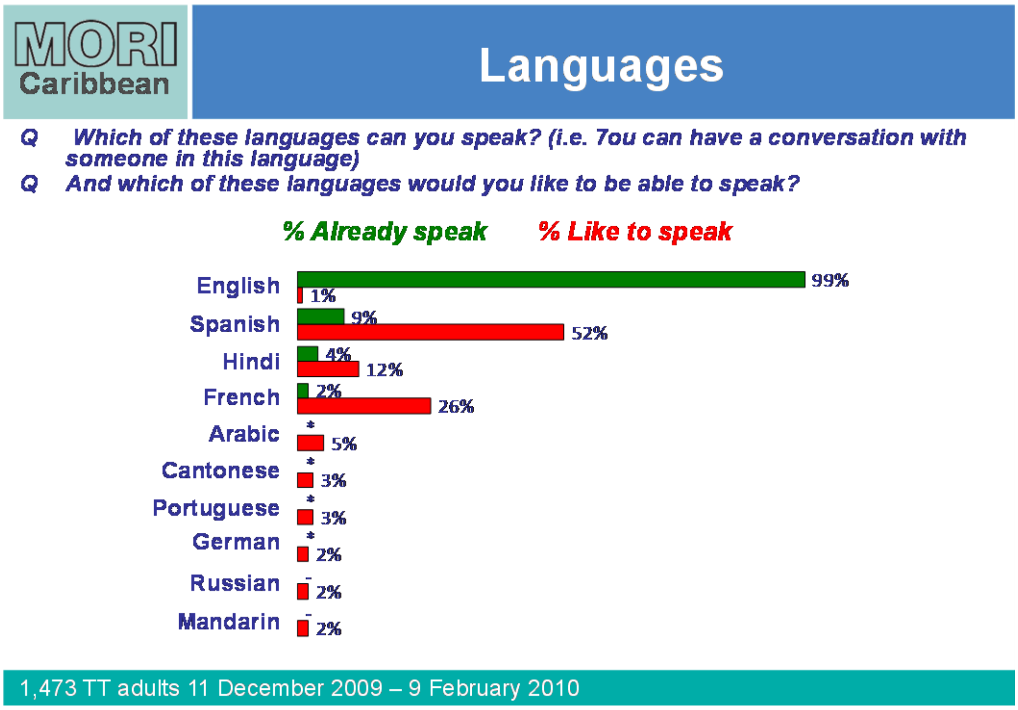


12. Languages

12.1. Currently vs. Would Like to Speak

The following chart shows how many people say they can speak each of ten languages and also what proportion would like to be able to speak each of them.

One in eleven adults (9%) say they can speak Spanish, defined as being able to have a conversation in this language. Only a small proportion can speak any other language, including one in twenty-five (4%) who speak Hindi and one in fifty (2%) who speak French.



More than half of the public (52%) would like to be conversant in Spanish, which is by far the most popular language people would like to learn, ahead of French (26%) and Hindi (12%).

Younger adults are much more likely to say they speak Spanish than any other sub group of the population with 16% of persons between the ages of 18 to 34 years speaking Spanish, which is almost treble the proportion of those aged 35-54 years that do (6%) and four times the proportion of Spanish speakers among the 55 years and over cohort (4%). This latter group is also the least likely to *want* to learn Spanish – only 35% say they do compared with 56% of persons between the ages of 18 to 54 years who would like to. The other main difference by sub group is that fewer Indo-Trinidadians would like to learn Spanish (45% say they would) than Afro-Trinidadians and those of Other/Mixed ethnicities (55% and 60% respectively).

12.2. Public Signs

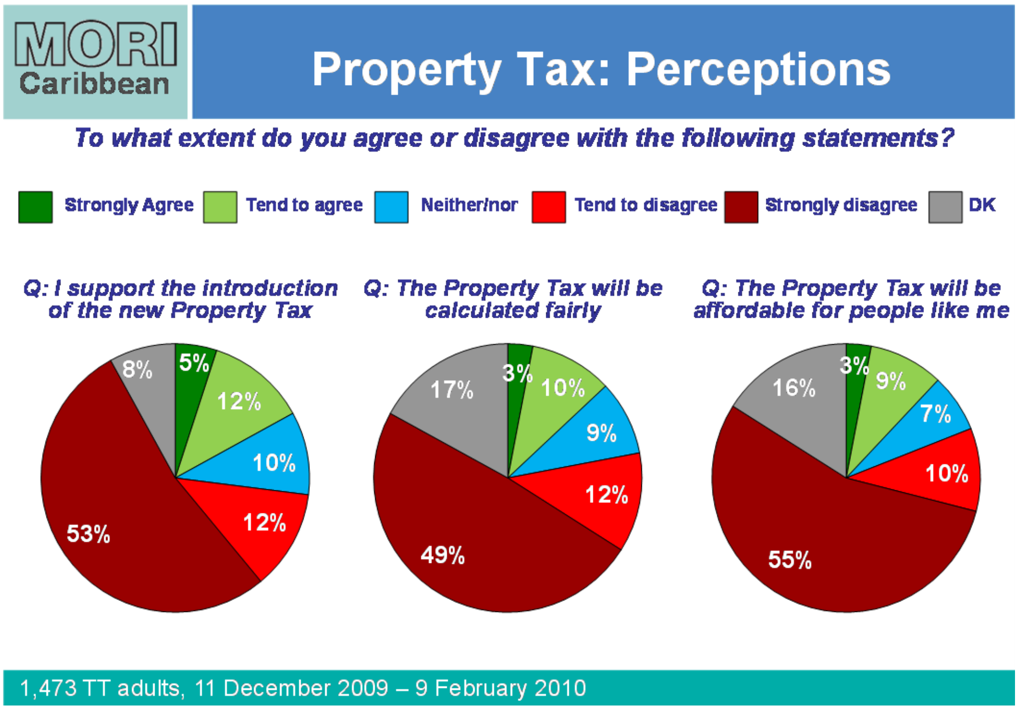
There is widespread support for the idea of producing public signs, such as road signs and notices in public offices, in Spanish as well as English. More than nine in ten people think this is a good idea (94%), including four in five (81%) saying it is a "very good idea".

13. Advertising Impact

13.1. Property Tax

There is a high level of awareness of the plans to introduce a new Property Tax in 2010, with virtually all respondents (98%) being at least aware of the plans. Approximately a third of people (34%) have heard a great deal about the plans and more than four in ten (43%) have heard a fair amount. Younger adults, aged 18-24 years (67%), and those residing in Tobago (65%) are least likely to have heard about the Property Tax.

There is a high level of opposition to the Property Tax with two thirds of the public (65%) saying they do not support it, including more than half (53%) who "*strongly disagree"* with its introduction. This high level of opposition is mirrored by the high levels of the public who disagree that *the property tax will be calculated fairly* (61%) and that *the property tax will be affordable for people like me* (65%).



These attitudes were also expressed in the focus group discussions as shown in the following chart

MORI Caribbean

Property Tax (Focus Groups)

- **Reasonably good awareness of the Tax generally, but not of exact bills**
- **Good recognition of information being provided about the tax and how it will be calculated**
- **Most realise that new tax is to be paid later this year, though one participant said her landlord has already raised her rent because of the new tax**
- **Attitudes are being driven by expectations of what will happen**
- **Strong expectation that Property Tax will be higher than previous tax and probably only affordable for the rich/upper classes**
- **Most believe it is being introduced because of the need to raise additional money**

> ***"They are trying to make back the money they spent on the summits" (Several, East/West Corridor)***
>
> ***"The new tax will be higher [than the previous one]" (Several, North)***

Source: Opinion Leaders' Panel Wave 15 Focus Groups

13.2. Swine Flu and Dengue Fever

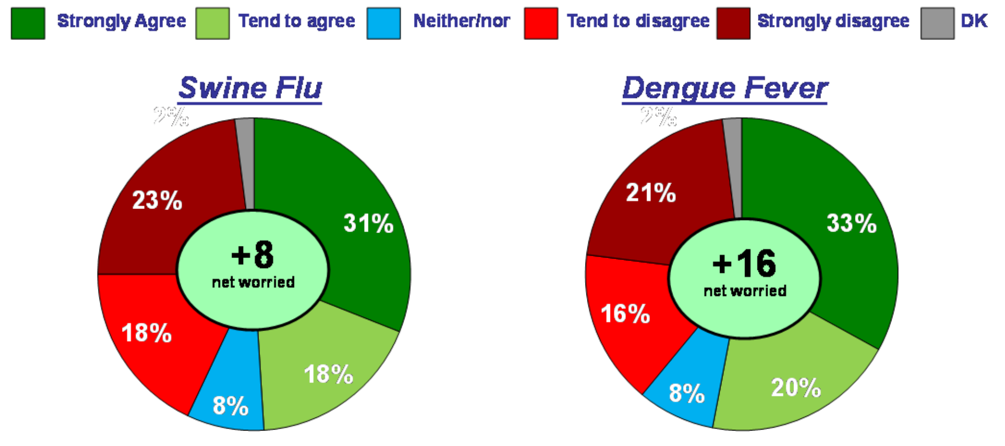
Just over half of the public (53%) are worried about becoming ill due to dengue fever, which is slightly more than those worried about becoming ill due to swine flu (49%).

Working class people (51%), Indo Trinidadians (56%) and people living in South Trinidad (60%) are most likely to be worried about becoming ill due to swine flu. Similarly, these groups are most likely to be worried about catching dengue fever, as are women (57%), persons under 34 years of age (58%), those from the working class (54%), Indo Trinidadians (60%) and persons residing in South Trinidad (63%).

MORI Caribbean

Swine Flu and Dengue Fever

To what extent, if at all, are you personally worried about becoming ill due to...

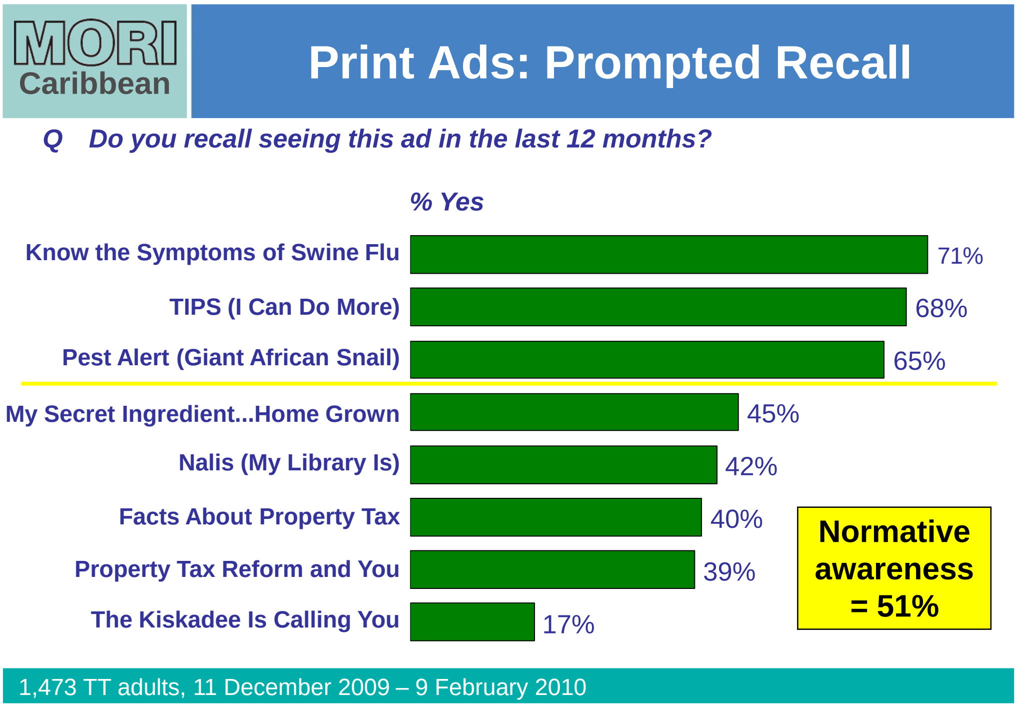


1,473 TT adults, 11 December 2009 – 9 February 2010

13.3. Evaluation of Print Ads

Respondents were shown eight print advertisements and for each of these were asked whether they recalled seeing the ad in the past 12 months. They were then invited to look at each ad and rate them in terms of being '*interesting*', '*easy to understand'* and '*useful'*.

The following chart depicts the number of people who recalled seeing each of the ads together with a "normative awareness" rating, which is the average level of recall for government advertisements tested by MORI Caribbean using this method either in OLP studies or advertising impact research. Therefore, in this survey three of the adverts were recalled by more than the normative recall score of 51%: '*know the symptoms of swine flu'* (71%), '*TIPS' (I can do more)* (68%) and '*pest alert (giant African snail)'* (65%). The ad with the lowest level of recall was '*the kiskadee is calling you'* (17%).



All eight ads were seen as **"interesting"** by at least four in five people, with the exception of '*facts about property tax'* (74% interesting). The "normative interesting" score is 82%, and the highest rated is '*know the symptoms of swine flu'* (94%).

Two ads were rated as "**easy to understand**" by fewer people than the "normative understand" score of 84%: *property tax reform and you* (77%) and *facts about property tax* (73%). Five of the eight adverts were seen as "easy to understand" by nine in ten people or more.

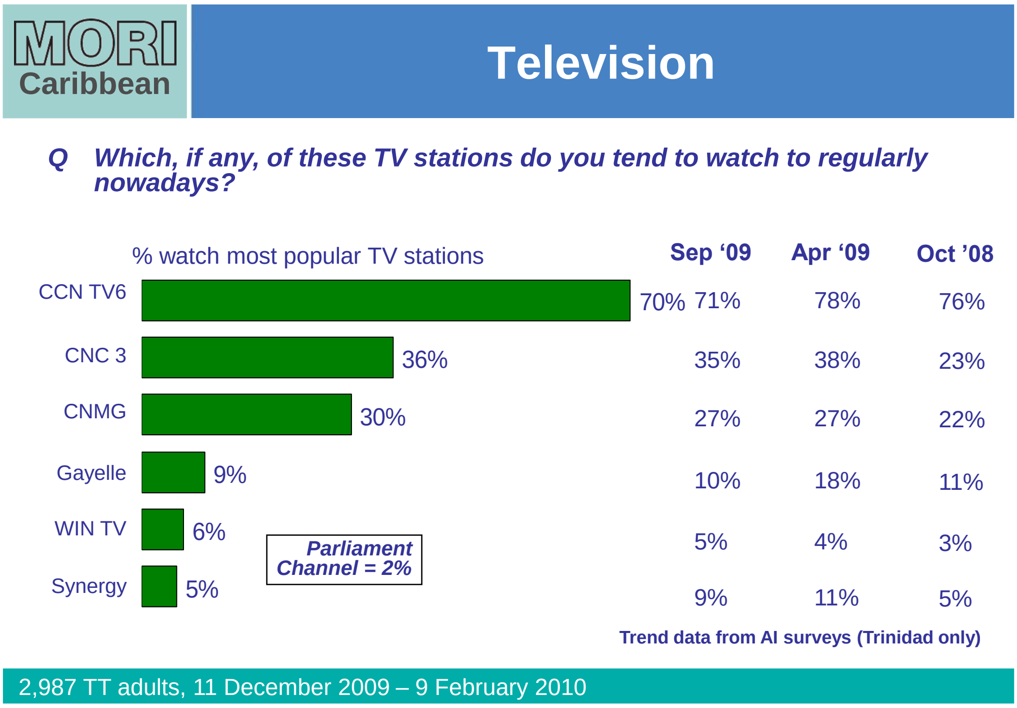
'Property tax reform and you' (79% useful) and '*facts about property tax'* (76%) were also the lowest rated adverts in terms of being "**useful**" and both are rated lower than the "normative useful" score of 81%. '*Know the symptoms of swine flu'* is again the highest rated ad with 93% of people saying it is "useful".

13.4. Media Consumption (Television)

'CCN TV6' continues to the most popular television station with seven in ten people (70%) saying they regularly watch it, though this is slightly down from viewing levels record in April 2009 (78%) and October 2008 (76%).

'CNC3' is the second most watched television station with 36% of the public regularly watching it – consistent with viewership levels recorded in September 2009 (35%) and April 2009 (38%), but higher than in October 2008 (23%).

'CNMG' is watched by around three in ten people (30%) and as with '*CNC3'* this is similar to levels recorded in two surveys in 2009 and an improvement from October 2008 (22%).



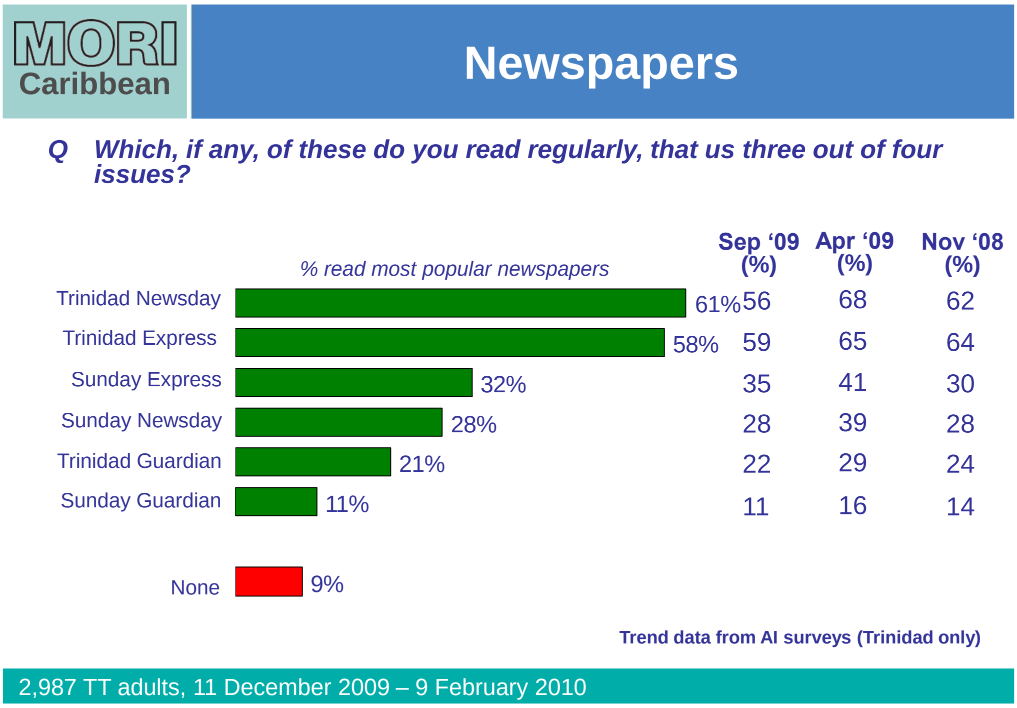
'TV6' is particularly highly watched in Tobago (77%) and there is some difference by age with 62% of persons between the ages of 18 to 24 years watching '*TV6'* regularly compared with 76% of those over the age of 55 years.

'CNC3' has the highest viewership in East and Central Trinidad (44% and 41% respectively) but less patronage in Tobago (23%). Other main subgroups, such as gender, age and ethnicity are fairly consistent.

Similarly the main sub group differences for '*CNMG'* are the particularly low viewership in Tobago (9%) and high viewership in South Trinidad (49%).

13.5. Media Consumption (Newspapers)

'Trinidad Newsday' (61%) and *'Trinidad Express'* (58%) are the two most popular newspapers in the country as has been the case in previous surveys. Roughly twice as many people read the daily version of these newspapers as read their Sunday equivalent; and almost three times as many read *'Newsday'* or *'Express'* as read the *'Trinidad Guardian'* (21%).

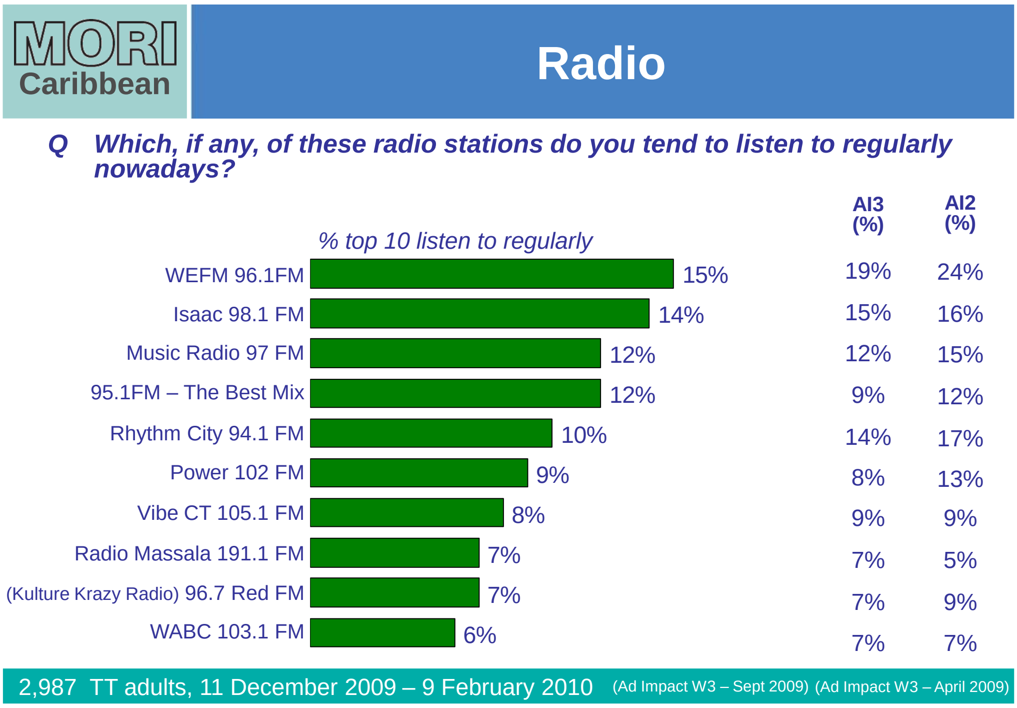


There is little difference in the proportion of men and women who read these main newspapers. The main differences by age are that fewer older people (aged 55 years and over) read the *'Newsday'* and *'Express'* newspapers than do younger adults; whereas readership of the *'Guardian'* increases with age.

'Trinidad Newsday' is more popular among working class (62%) than middle class people (55%); whereas middle class people are more likely than working class to read the *'Express'* (71% vs. 55%, respectively) and *'Guardian'* (27% vs. 19%, respectively).

13.5. Media Consumption (Radio)

Unlike television or newspapers there is no one or two dominant radio stations in Trinidad & Tobago, with six radio stations being listened to regularly by 12% of the public ±3 percentage points. In this survey '*WEFM 96.1FM'* is the most popular station as 15% of people say they regularly listen to it, though this is lower than the levels recorded in two Advertising Effectiveness surveys in 2009.



The two main gender differences in radio consumption are that '*WEFM 96.1'* is more popular among men (17%) than women (13%); and '*Isaac 98.1FM'* is more popular among women (18%) than men (11%).

There are few differences depending on people's social class, but there are several differences depending on ethnicity. For instance, one in five Afro-Trinidadians (20%) listen to '*WEFM 96.1'* and '*Isaac 98.1FM'* while only seven percent of Indo-Trinidadians do. In contrast, 16% of Indo-Trinidadians listen to '*Radio Massala 101.1FM'* and less than one percent of Afro-Trinidadians do.

There are also very substantial differences by age; a relatively high proportion of persons over the age of 55 years (21%) do not listen to any of these radio stations, more than double the proportion of those between the ages of 18 to 34 years who do not (9%). The most popular radio station among persons aged 55 years and over is '*Power 102FM'* (13%). The most popular radio station among the younger generation aged 18-24 years is '*WEFM 96.1FM'* (33%).

Appendices

I. Guide to Statistical Reliability

The sample tolerances that apply to the percentage results in this report are given in the table below. This table shows the possible variation that might be anticipated because a sample, rather than the entire population, was interviewed. As indicated, sampling tolerances vary with the size of the sample and the size of the percentage results. Strictly speaking, these sampling tolerances apply to only random probability sample, and thus these should be treated as broadly indicative.

Approximate sampling tolerances applicable to percentages at or near these levels

	10% or 90%	**30% or 70%**	**50%**
Size of sample on which Survey result is based	±	±	±
100 interviews	6	9	10
200 interviews	4	6	7
300 interviews	3	5	6
400 interviews	3	5	5
500 interviews	3	4	4
600 interviews	2	4	4
1,000 interviews	2	3	3
1,500 interviews	2	2	3
2,000 interviews	1.3	2	2
2,987 interviews	1.1	2	2

Source: MORI Caribbean

For example, on a question where 50% of the people in a sample of 2,987 respond with a particular answer, the chances are 95 in 100 that this result would not vary by more than two percentage points, plus or minus, from a complete coverage of the entire population using the same procedures.

Tolerances are also involved in the comparison of results from different parts of the sample, or when comparing results from different groups of residents. A difference, in other words, must be of at least a certain size to be considered statistically significant. The following table is a guide to the sampling tolerances applicable to comparisons.

Differences required for significance at or near these percentages

	10% or 90%	30% or 70%	50%
	±	±	±
Size of sample on which Survey result is based			
100 and 100	8	13	14
100 and 200	7	11	12
100 and 300	7	10	11
100 and 400	7	10	11
100 and 500	7	10	11
200 and 200	7	10	11
200 and 300	5	8	9
500 and 500	4	6	6
1,000 and 1,000	3	4	4
1,250 and 1,737 (Men v. Women, full sample)	2	3	4
633 and 811 (Men v. Women, split sample)	3	5	5
2,987 and 712 (Wave 15 and Wave 14)	3	4	4

Source: MORI Caribbean

II. Guide to Social Classification

The table below contains a brief list of social class definitions as used by the Institute of Practitioners in Advertising. These groups are standard on all surveys carried out by Market & Opinion Research International (MORI) Limited.

Social Grades

	Social Class	**Occupation of Chief Income Earner**
A	Upper Middle Class	Higher managerial, administrative or professional
B	Middle Class	Intermediate managerial, administrative or professional
C1	Lower Middle Class	Supervisor or clerical and junior managerial, administrative or professional
C2	Skilled Working Class	Skilled manual workers
D	Working Class	Semi and unskilled manual workers
E	Those at the lowest levels of subsistence	State pensioners, etc, with no other earnings

Source: MORI Caribbean

III. Sample Profile

	Unweighted		*Weighted*	
	N	***%***	***n***	***%***
Total	***2,987***	**100**	***2,987***	**100**
Gender				
Male	*1,250*	42	*1,494*	50
Female	*1,737*	58	*1,493*	50
Age				
18-34	*984*	32	*1,279*	43
35-54	*1,054*	35	*1,131*	38
55+	*943*	32	*571*	19
Work Status				
Full/Part-time/Self-employed	*1,617*	54	*1,843*	62
Not working	*1,356*	46	*1,130*	38
Ethnicity				
Afro-Trinidadian	*1,465*	49	*1,135*	38
Indo-Trinidadian	*989*	33	*1,248*	42
Other	*526*	18	*597*	20
Regional area				
North	*260*	9	*329*	11
South	*780*	26	*836*	28
Central	566	19	564	19
East	1,030	34	1,135	38
Tobago	351	12	123	4

Source: MORI Caribbean

IV. Detailed Information on Response Rates

In total 2,987 completed interviews were achieved out of a total of 3,594 panel members where attempts were made at contact. This gives a response rate of 83%.

The total number of non-respondents was 607, which can be broken down as follows:

- 376 – no contact after three visits; (Action taken- interviewer continued the random walk)

- 231 persons refused to be a part of the panel. Approximately 75% of these persons were willing to give the interview but declined to be a panel member that is they did not want HHB to make subsequent visits to them. (Action taken: these persons were not interviewed)

V. Validation Checks

HHB & Associates carried out a series of validation checks to monitor the quality of interviewing. Given that the panel was reconstituted, a larger than normal percentage (38% vs. the normal 15%) of respondents were contacted for validation. A summary of the validation process outcome is shown below.

Checks by supervisors and coordinator

In the field, 410 validation interviews by the Supervisors and the Co-ordinator:

- 23 people were incorrectly interviewed (action – all 23 questionnaires were rejected and the correct person within the household interviewed);
- In 120 cases the interviewer did not ask all the questions (action – the questionnaires were properly completed); and
- The rest were found to be good.

Additional Checks by Telephone

730 additional calls were made to respondents to verify:

- Household Composition
- That the correct person was interviewed, that is, the person within the household with the most recent birthday
- Address, gender, race and age of respondent
- That interviewees in fact agreed to be panel members
- That gifts were received

All necessary adjustments were made to the data.

VI. Topline Results