MORI Caribbean

Opinion Leaders' Panel 2010

Wave 16 Report

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

Fieldwork: 20th June – 25th July 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 16 of the Opinion Leaders' Panel. The survey was conducted by MORI Caribbean (with HHB & Associates conducting the fieldwork) on behalf of the Government of the Republic of Trinidad & Tobago.

1.2. Methodology

In total 764 adults living in Trinidad and Tobago were interviewed for Wave 16, all having agreed to become members of the new Opinion Leaders' Panel when interviewed and recruited in Wave 15 at the beginning of 2010.

A total of 879 Panel members were randomly sampled to be interviewed in Wave 16, giving a response rate of 87%.

A booster of respondents was interviewed in Tobago to allow for greater comparison of results between people living in Tobago and those in Trinidad. For this Wave, 97 persons living in Tobago were 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 and in-home between 20th June and 25th July 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 reported in this document, a series of focus groups were recruited and moderated by Caribbean Market Research under the direction of MORI Caribbean. Six focus groups were conducted in Trinidad in April 2010, focusing specifically on people's attitudes to their local area and the proposed local government reforms to help inform the activities of the Ministry of Local Government. In May 2010, two additional focus groups were conducted immediately after the General Election of 24th May to provide the new Government with initial reactions and expectations following the outcome of the election. In June 2010, two more focus groups were conducted in Tobago to consider issues relevant to this island. All three sets of focus groups have been reported on separately and are included in the appendices 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)

Wave 15, 10 December 2009 – 9 February 2010 (base size 2,987)

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 ±3 percentage points. A guide to statistical reliability is appended.

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 15 and 16 there has been a swing of +43 towards satisfaction with the Government's performance. This is because in Wave 15 net satisfaction was -52 and in Wave 16 is +34. Half the difference between these two net scores is +43.

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 Senator the Honourable Rudrawatee Nan Ramgoolam, Minister of Public Administration; Ms Arlene McComie, Permanent Secretary at the Ministry of Public Administration and their colleagues Mr Claudelle McKellar, Ms Coreen Joseph and the team from the Public Service Transformation Division; the Central Statistical Office; Ms. Kim Bayley at Caribbean Market Research and Mr. Louis Bertrand and the team at HHB & Associates for their help in executing this project. In particular, we would like to thank all the 764 citizens of Trinidad & Tobago who gave of their time to take part in this survey.

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

The Government

- In this, the first survey conducted after the election of the new Government, just a month after the May 2010 General Election, half of the public (51%) say they are satisfied with the performance of the Government. Only one person in six, 17%, say they are dissatisfied. **This is the highest level of satisfaction and the lowest level of dissatisfaction ever recorded by MORI Caribbean since the OLP was established in 2002.**

- This represents a 43% swing from net negative to net positive attitudes to the Government; 43 people in 100 have moved from being dissatisfied to satisfied with the Government's performance since the previous, January 2010 survey.

- More than half (56%) of the adult population of Trinidad & Tobago now believe the country is "going in the right direction". In January this year only a quarter felt this way (24%).

- The public express very high levels of confidence that this Government will "deliver on the promises it made at the election" (65% confident) and that the new Government "will take the country in the right direction" (69% confident).

- Still, half of the public (50%) think that the system of governing the country can be improved "a lot" or "a great deal".

Manifesto Pledges

- There are mixed levels of prompted recall of the Government's key election pledges. When people are shown a list of the main pledges, most of the public remember those about *Laptops* (93% recall), *Senior Citizens Grants* (91%) and *Property Tax* (79%). Relatively few remember the pledges on *Constitutional Reform* (33%), the *Ministry of the People* (33%) and *Reforestation* (23%).

- The public say that the three pledges that will have the greatest impact on their lives are those on *Property Tax* (42% select this), the *Police* (40%) and the *Minimum Wage* (40%).

- More people are confident than not that each of the pledges will be implemented within the next 12 months. Confidence is highest about the pledge on the *Life Fund* (+69 "net confident"), *Senior Citizens Grant* (+60) and *Roads* (+54). The pledge on the *Minimum Wage* is perhaps the biggest area of concern, as it is perceived to be one of the pledges with the highest potential impact on the quality of life of the people but it is seen as the pledge that is least likely to be implemented in the next 12 months (61% confident).

Issues Facing the Country

- The three issues that most people are concerned about for the country as a whole are the same now as was the case at the start of 2010. These are *crime* (89% identify this as one of the most important issues), *health/hospitals* (44%) and *prices/inflation* (39%).

- Some of the top ten issues have become more salient since the start of the year, especially the level of public concern about floods (up from 5% in Wave 15 to 21% for current Wave) and about unemployment/jobs (up from 18% to 26%). Some of the other issues are now less “top of the mind”, especially concern about *Property Tax* and *Corruption in Government*.

Public Services and Complaints

- Many are optimistic about future improvements to the quality of public services generally (76% expect them to get better), as well as for both the Health Service (78%) and Police Service (65%).

- However, many people do not believe public services understand their customers (43%). The vast majority of the public are critical of how public services deal with complaints. Almost nine in ten people (88%) think that “you need a lot of determination to get something done about a complaint”.

National Development Agenda

- Most people (79%) expect this new Government will lead the country towards developed nation status. In addition, on average, people rate the level of development of the country now and their expectations for the future more favourably than under the previous administration.

NAPA

- There is a very high level of awareness of NAPA with 93% of the public having heard about it. More than half of the public (57%) also think that the country will benefit from NAPA and approximately a quarter (23%) think the country will not benefit.

The Sea and Air Service between Trinidad and Tobago

- Many more people are satisfied than dissatisfied with the Air Service (45% vs. 8%) and the Ferry Service (58% vs. 8%).

- Primary concerns for actual users of the Air Service are the ‘cost of travel’ (30% are dissatisfied) and the ‘reliability of the service’ (23% dissatisfied). For the Ferry Service, users main criticisms are around the customer waiting facilities (23% dissatisfied) and the options they have for purchasing tickets (20% dissatisfied).

- Tobagonians are more critical of the Air Service than Trinidadians. Overall, 39% of Tobagonians are dissatisfied with the Air Service and approximately three in ten (28%) are dissatisfied with “the reliability of the service”, “the cost of travel” and “the number of flights per day”. Similarly, more Tobagonians are dissatisfied with the Ferry Service – two in five (40%) are dissatisfied with the Ferry Service. Tobagonians are particularly critical of “the customer waiting facilities” (47% dissatisfied), “the reliability of the service” (38%) and “the number of sailings per day” (37%).

ICT Indicators

- Nearly all households in Trinidad and Tobago possess a television (97%) and there is almost universal ownership of radios (94%) and mobile phones (93%). In contrast less than half of households have a fixed line telephone (46%). Additionally, a minority of persons have Internet access (30%) or PCs (42%) in their households.

- A quarter of adults say they access the Internet "in my own home" (24%), which has more than doubled since 2002 when one in nine adults (11%) said they accessed the Internet in this way.

- There is a high level of interest in allowing a Government agency to text a customer when "an application or documents is ready for collection" where people use such a service. In total almost nine in ten people (88%) say that they would be interested in receiving these types of text messages.

- The same proportion of the public (88%) are also interested in receiving text messages from Government that keeps them "informed about new Government services and benefits".

Visiting Port of Spain

- Approximately one in ten Trinidadians who do not reside in Port of Spain travel to the capital city each weekday, with a further six percent (6%) travelling there on a Saturday, but just one percent (1%) on a Sunday.

- During a weekday, the two main reasons that people travel into Port of Spain are for "business" (42%) and "work" (41%). Approximately one in eight persons also travel to Port of Spain for "shopping" (13%) during a weekday.

- The most popular mode of transport into Port of Spain is by "Maxi Taxi" (32%), followed by using one's "own car" (28%) and "Taxi (H Car)" (22%).

Tobago

- Tobagonians are amongst the most confident in the new Cabinet. For example, 74% of Tobagonians think the Cabinet will take the country in the right direction (compared with 69% of the public generally). However, there is some concern about how the new Ministry of Tobago Affairs and the Tobago House of Assembly will work together in the future.

- The three most important issues for Tobagonians are crime (81%), healthcare (46%) and unemployment/jobs (39%).

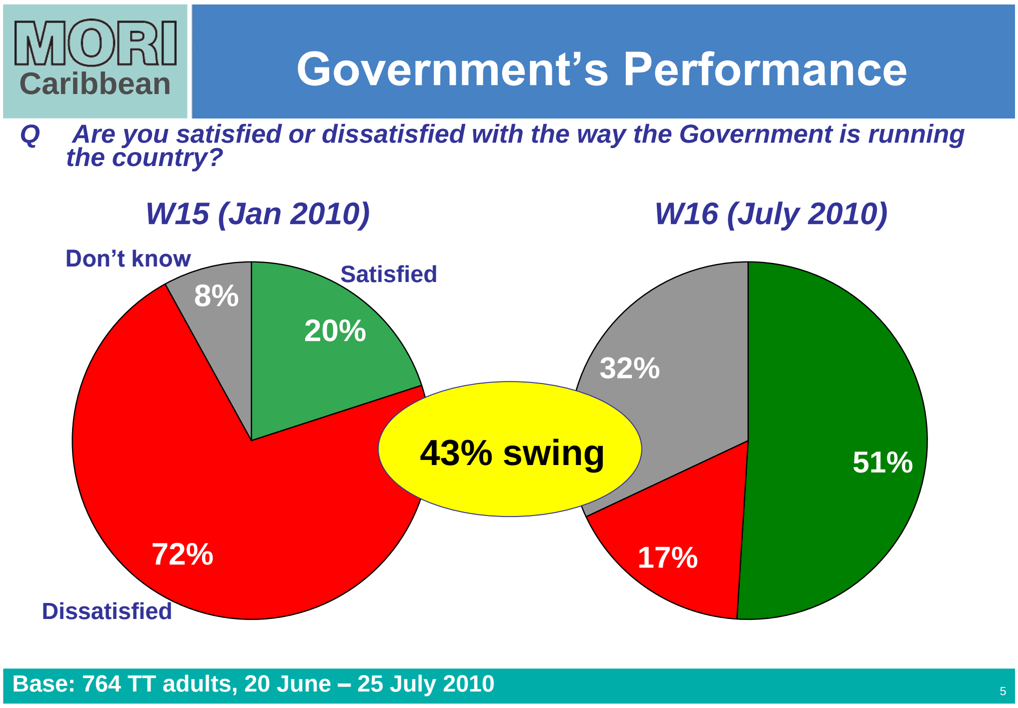
- Tobagonians make much more use of the Ferry Service (76% have used it in the past 12 months) and Air Service (64% used it) than people living in Trinidad. Also, fewer Tobagonians are satisfied with either service than the public generally. For example, net satisfaction with the Ferry Service is +51 for the public as a whole but only +9 among Tobagonians.

- Household ownership in Tobago is higher than the average for both islands with respect to fixed line telephones (63%), Internet (42%) and PCs (63%).

3. The Government

3.1. Satisfaction with the Performance of the Government

Half of the public (51%) are satisfied with the way the new Government is running the country and just seventeen percent are dissatisfied. This represents a significant shift in public attitudes since the beginning of 2010 when one in five people (20%) expressed satisfaction and more than seven in ten (72%) dissatisfaction. This means that between Dec 09/Feb 10 and Jun/Jul 2010 there has been a 43% swing towards satisfaction – in other words 43 people in 100 have moved from feeling "dissatisfied" to "satisfied" with the performance of the Government.



The General Election, held on May 24th, explains the difference in these results as a new Government was elected on this date. This also explains why approximately one third of people (32%) say they "don't know" how the Government is performing – this figure is likely to decrease over the following months as more people form a view on the performance of the Government. These movements in public satisfaction are likely to move in both directions, some to 'satisfied' and also some to 'dissatisfied', and it will be the balance between the two figures which will determine if the Government's first 100 days has been judged to be successful.

Slightly more women than men say they are satisfied with the Government's performance (53% vs. 48%) as do more working class people than middle class people (52% vs. 43%). There is little variation in levels of satisfaction by age bands: 18-34 year olds (52%), 35-54 year olds (51%) and people aged 55 years and over (47%); however the youngest age band is much more likely to express dissatisfaction (24% dissatisfied) than other age groups (12% dissatisfied).

By area of the country, people living in Central Trinidad are most likely to be satisfied with the performance of the Government (58% satisfied) while those living in South Trinidad (45% satisfied) are least likely.

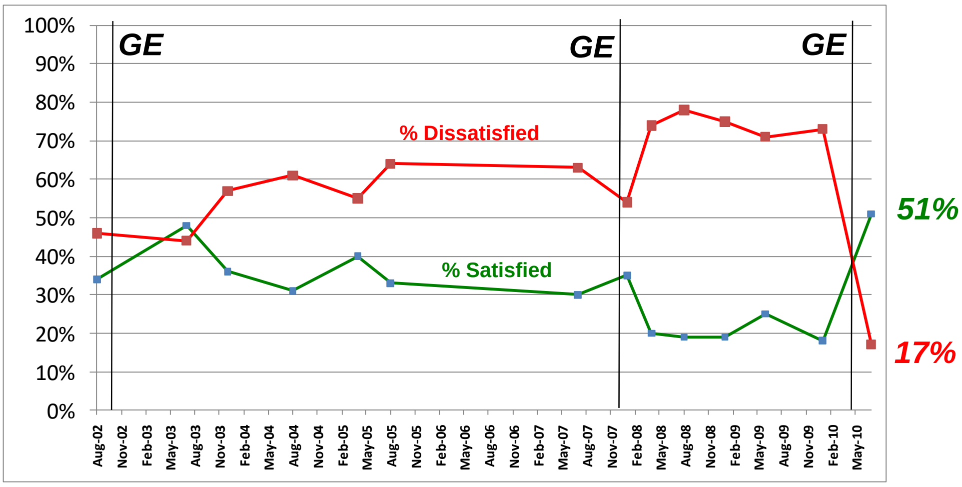
The main sub group difference is in terms of ethnicity, in that only a third of Afro-Trinidadians (33%) are satisfied with the Government, although fewer than three in ten are dissatisfied (27%). In contrast, twice as many Indo-Trinidadians are satisfied (66%) and a small proportion dissatisfied (7%). The majority of Other/Mixed Trinidadians are also satisfied with the Government (52%) and approximately one in five dissatisfied (21%).

3.2. Satisfaction Trends

The latest ratings of the Government's performance are impressive not only because of the sharp turnaround in public attitudes since the General Election, but also because **they currently represent the highest level of satisfaction ever recorded in the Opinion Leaders' Panel research** since its inception in 2002. The current level of dissatisfaction with the Government is also the lowest ever recorded, in fact the previous lowest recorded level of dissatisfaction was 44%, measured in June/July 2003, which is more than twice as high as the recent finding (17% dissatisfied).

MORI Caribbean **Government Performance (Trend)**

Q Are you satisfied or dissatisfied with the way the Government is running the country?



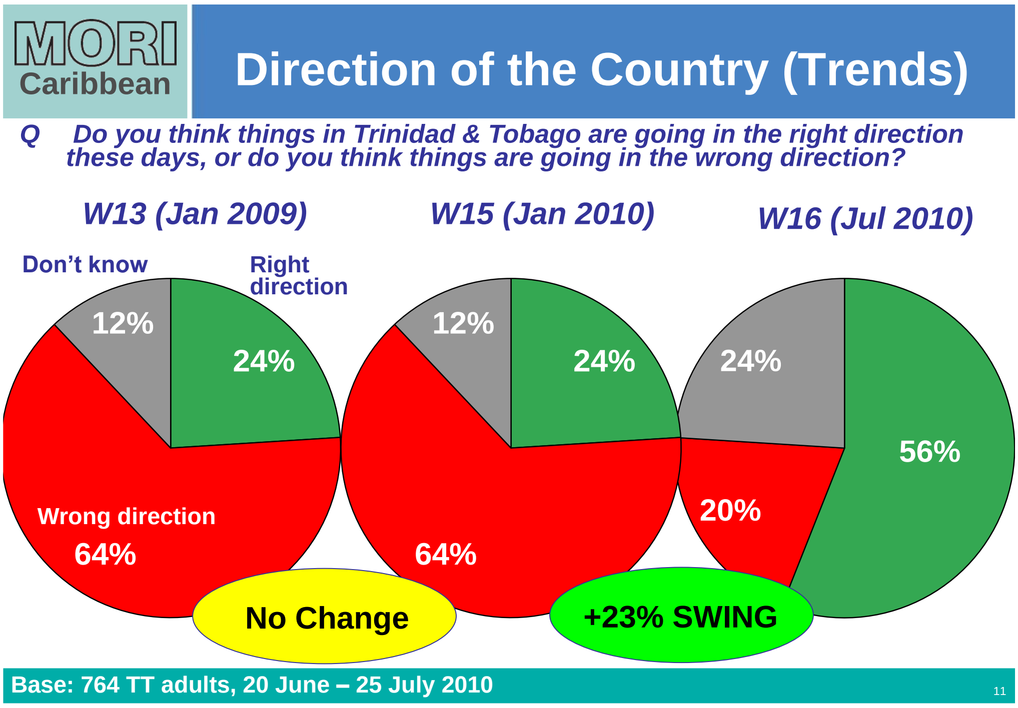
Source: Opinion Leaders' Panel 6

3.3. Direction of the Country

Reflecting the increase in public satisfaction with the performance of the Government, **there has also been a sharp improvement in people's attitudes towards the direction the country is moving in.** At the beginning of 2009 and 2010, only one in four people (24%) believed that the country was "moving in the right direction" and almost two in three (64%) felt it was "moving in the wrong direction". In the latest research, attitudes have almost reversed. Now more than half of the public are optimistic about the direction of the country (56%) and just one in five people pessimistic (20%).

This change in attitudes represents a swing of 38 points – in other words since the start of this year 38 people in one hundred have moved from describing the country as "moving in the wrong direction" to "moving in the right direction".

With the exception of just over a third (36%) of Afro-Trinidadians believing the country is going in the right direction, all other sub groups of the public are broadly optimistic.



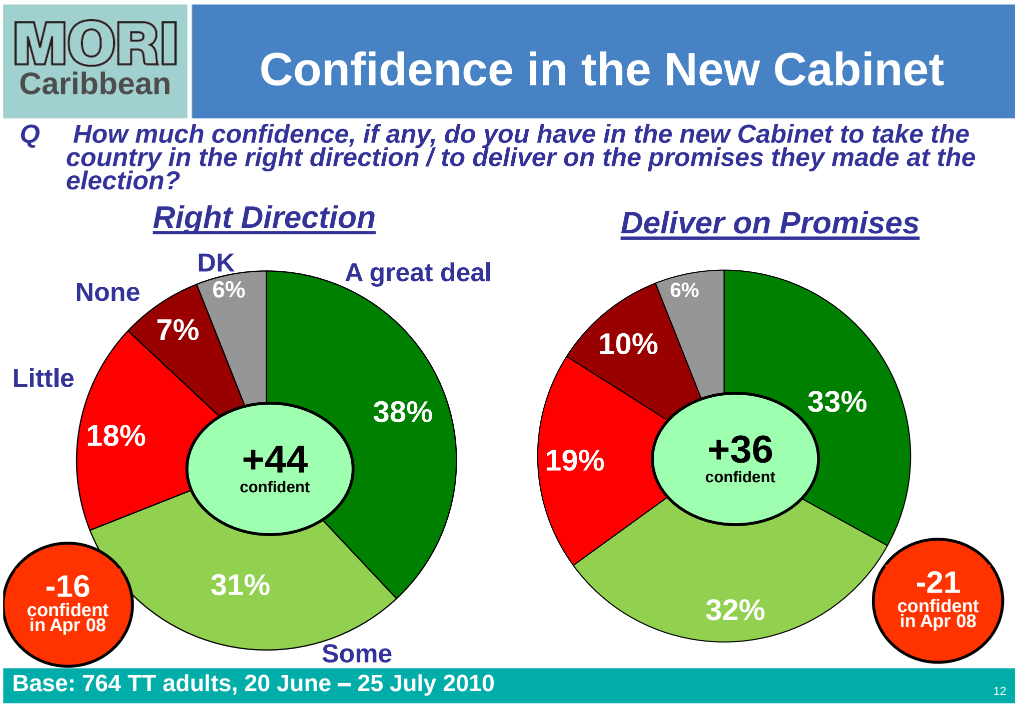
3.4. Confidence in the new Cabinet

In addition to high levels of satisfaction with performance of the new Government **most people are confident in the new Cabinet, both in terms of its ability to lead the country in the right direction and to deliver on the promises made at the election.**

Almost seven in ten people (69%) can be described as being confident that the new Cabinet will lead the country in the right direction – comprised of 38% who have a "great deal" of confidence and 31% who have "some" confidence. In contrast, a quarter of the public can be described as not being confident as they express either "little" (18%) confidence or "none" (7%).

The difference between those who are confident and those who are not is 44 points, that is +44 net confident. As such, many more people are currently confident in the new Cabinet than was the case in April 2008, after the 2007 General Election, when the net confident score was -16; that is, by a margin of 16 percentage points more people were *not* confident than confident in the then Cabinet's ability to lead the country in the right direction.

Public expectations about the new Cabinet's ability to deliver on its election promises are also high, with two in three people (65%) expressing confidence and three in ten (29%) expressing no confidence. Again, more people are confident now (+36 net confident) than was the case in April 2008 when asked about the then Cabinet (-21 net confident).

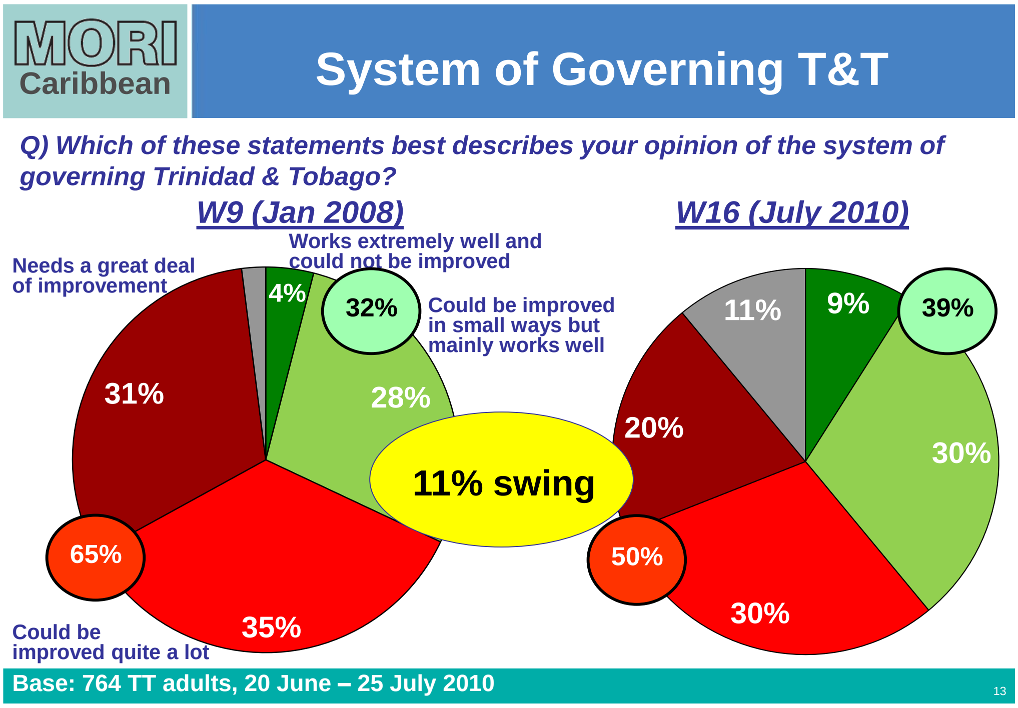


The youngest age group, those in the18-24 years age bracket, are the least likely to be confident that the Cabinet will deliver on its promises as 57% are confident that it will do so (compared with 65% on average). Nevertheless, more persons within that age cohort are confident than not confident (57% vs. 38%). Whilst more than half of respondents residing in North Trinidad are confident that Cabinet will deliver on its promises (54%), a sizeable proportion is not (44%). It is also worth noting that those in North Trinidad are also relatively less confident than people in other parts of the country. People living in Tobago are among the most confident in the new Cabinet: 74% believe it will take the country in the right direction and 71% think it will deliver on its promises.

The main sub group difference is by ethnicity with slightly more Afro-Trinidadians expressing lack of confidence (48%) than confidence (46%) that Cabinet will deliver on the promises made. In contrast, virtually all Indo-Trinidadians are confident (87%) as are approximately three in five Other/Mixed Trinidadians (58%)

3.5. The System of Governing Trinidad & Tobago

Since 2008 there has been a doubling in the proportion of people who say that the system of governing Trinidad & Tobago "works extremely well and could not be improved", but this is a doubling from a very low base of 4% to 9%. Half the public believes that there "could be quite a lot of improvement" (30%) or that the system "needs a great deal of improvement" (20%).



The main sub group differences are by social class and ethnicity. More working class people than middle class people think the system mainly works well or works extremely well (41% and 28%, respectively). Indo-Trinidadians (46%) are much more positive than Afro-Trinidadians (30%) and somewhat more so than Other/Mixed ethnicities (40%). By region, those people living in Central Trinidad are most likely to be positive about the present system of governing the country as half (50%) say "it works extremely well and could not be improved" or "could be improved in small ways but mainly works well". In contrast, just three in ten (30%) of adults in East Trinidad hold this view.

In the Tobago focus groups, conducted in June 2010, there was very low awareness of the new Ministry of Tobago Development. Several participants expressed concern that there may be problems with how well this Ministry and the Tobago House of Assembly (THA) will work together, but they felt it was important that they did work together for the improvement of Tobago. More generally, participants were of the view that success or failure of the working arrangements between the two institutions will depend largely on who is running each of them.

Overall, focus group participants were critical of the performance of the THA. In particular, they felt that it was too slow in performing its duties and did not do enough to inform citizens of the benefits and services it provides. People were especially critical of how they perceived THA was performing on healthcare issues.

4. Manifesto Pledges

4.1. Recall

Using a *showcard*, respondents were given a list of the key manifesto pledges and a short explanation of these pledges made at the time of the election; and then asked which, if any, of these promises they recall having been made. As such this question was an "aided recall" question rather than asking respondents to remember without prompting what the key manifesto pledges were. If no *showcard* had been used and respondents were asked to recall pledges without any prompting it is likely that fewer people would have remembered each of them.

The *showcard* contained the following information.

MORI Caribbean	Manifesto Pledges (Explanations)
	Accountability: initiate a detailed audit of Petrotrin and other state boards where there are suspicions of misuse of public funds
	Cameras: begin the introduction of camera technology at traffic lights and set into motion an efficient system of ticketing offenders
	Constitutional Reform: establish a timetable for constitution reform
	Laptops: every child going on to secondary schools from the SEA will be provided with a laptop to begin their secondary school education
	LIFE fund: establish a fund for life saving surgery for children ($100m)
	Minimum Wage: begin a review of the minimum wage
	Ministry of the People: begin the process of creating a Ministry of the People
	Police: deploy police on the streets, and on the beat and in communities and increase police presence everywhere
	Property Tax: abolish the Property Tax
	Reforestation: release money from the Green Fund to reforest areas that were burnt during the past dry season
	Roads: begin paving of existing access roads and construction of new ones
	Senior Citizens Grant: replace the Senior Citizens' grant with Old Age Pension and increase it to $3,000
	WASA: begin a programme to fix all leaks in WASA's pipelines and establish an emergency response unit

17

There are two pledges that are recalled by a very high proportion of the public when shown a list of manifesto promises. These are the pledges on ***Laptops*** (93% recall it) and ***Senior Citizens Grants*** (91%). These, along with *Property Tax* (79%) and *Minimum Wage* (66%), are among seven of the 13 pledges where at least half the public recall them being made.

Reforestation is the pledge which fewest people recall being made as just under a quarter of the public (23%) remember it. Several of the "process" or "institutional development" type pledges are also less likely to be remembered, for example those on *Constitutional Reform* and *Ministry of the People* (both 33%). In MORI's experience this is a typical pattern – **more people remember (and care about) promises about service or policy outcomes ahead of what they perceive to be about processes or institutional reform**.

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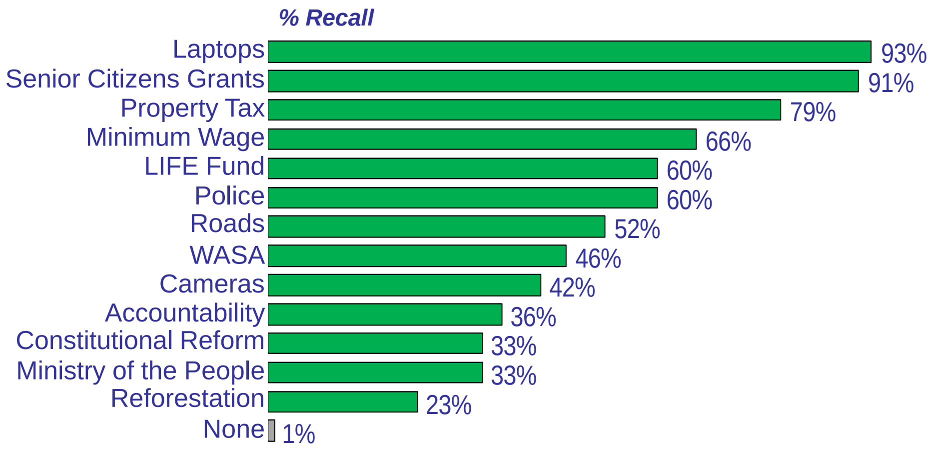
Manifesto Pledges: Recall (Prompted)

Q The new Government made several pledges during the election campaign. Please tell me which, if any, you can remember?



Base: 764 TT adults, 20 June – 25 July 2010 18

For four of these pledges, more men than women claim to recall them. These are *Accountability* (42% men vs. 31% women), *Cameras* (48% vs. 36%), *Minimum Wage* (70% vs. 62%) and *Police* (66% vs. 53%).

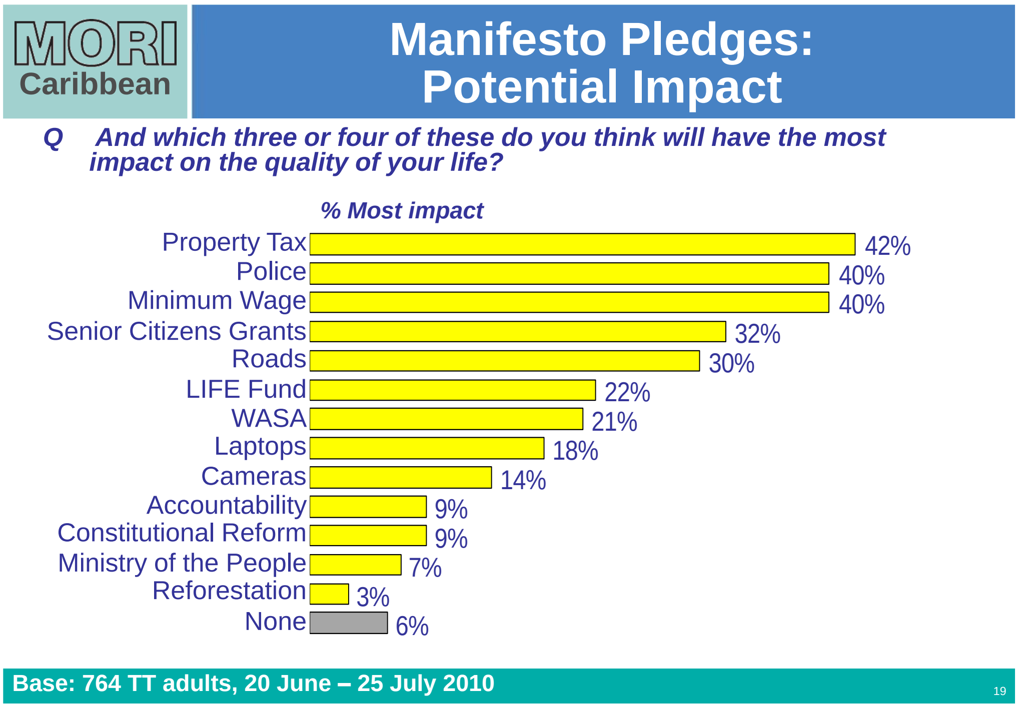
In terms of analysis by people's age for most of the pledges fewer of the youngest age group (18-34 age cohort) recall many of the pledges made. For example, only 23% of this age group recall the pledge on the *Ministry of the People* (compared with 33% of people on average). There are some exceptions to this pattern. For example, there is no difference by age on the level of recall on the *Laptops* pledge.

The only difference by social class is that more middle class people than working class people recall the pledge on *Accountability* (45% vs. 34%). For the most part, fewer Afro-Trinidadians recall each of the pledges than other ethnic groups. This is particularly true with the pledge on *Life Fund* where 46% of Afro-Trinidadians recall it compared with 70% of Indo-Trinidadians.

4.2. Impact

There are three pledges in particular that the public expect will have the most impact on the quality of their lives, these are ***Property Tax*** (42% select this), ***Police*** and ***Minimum Wage*** (both 40%). The next two pledges in terms of their perceived impact are *Senior Citizens Grants* (32%) and *Roads* (30%).

As with the level of recall for the different pledges, those that focus more on process and procedures, for example *Accountability* (9%) tend to be viewed by the general public as having less impact on people's lives.



4.3. Confidence

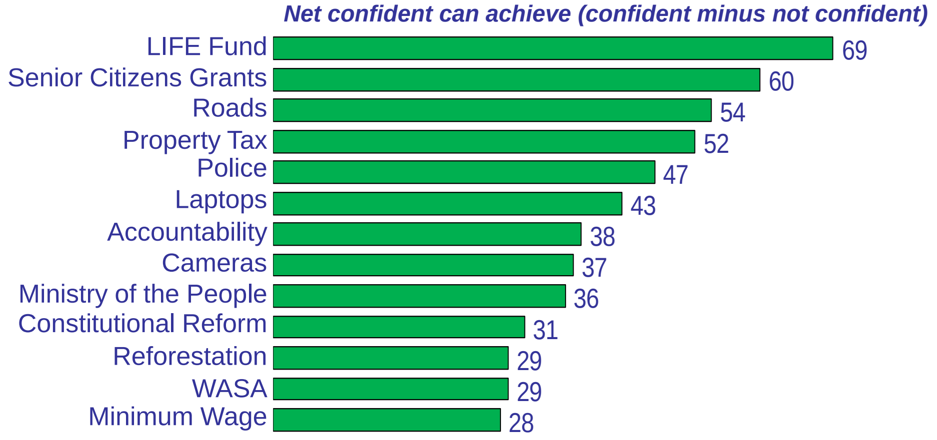
Respondents were also asked how confident they are that the new Government will be able to achieve each of the pledges in the next 12 months. Respondents could say that they are "confident" (either "very" or "fairly") or "not confident" (either "not very" or "not at all") or say they "don't know". The following chart shows the "net confident" scores for each of the pledges. This is the difference between the proportion of the public saying they are "confident" minus the proportion saying they are "not confident".

For all of the pledges the "net confident" score is positive. This means that **more people express confidence than lack of confidence that the new Government will be able to deliver on each of the pledges.** This is of course a potential danger for the new Government in the medium term as public expectations are now much higher than under the previous administration and therefore people will expect to see much better public services.

The pledge on the *Life Fund* has the highest level of "net confidence" (+69), followed by Senior Citizens Grant (+60), Roads (+54) and Property Tax (+52). There are four pledges where the "net confident" score is around +30 – these are the pledges where people are relatively less likely to be confident that they can be achieved. However, it is worth emphasising that even for these pledges still more people are optimistic than pessimistic.

Manifesto Pledges: Confidence in Achieving Them in Next 12 Months

Q For each one of these pledges how confident, if at all, are you that the new Government will be able to achieve them in the next 12 months?

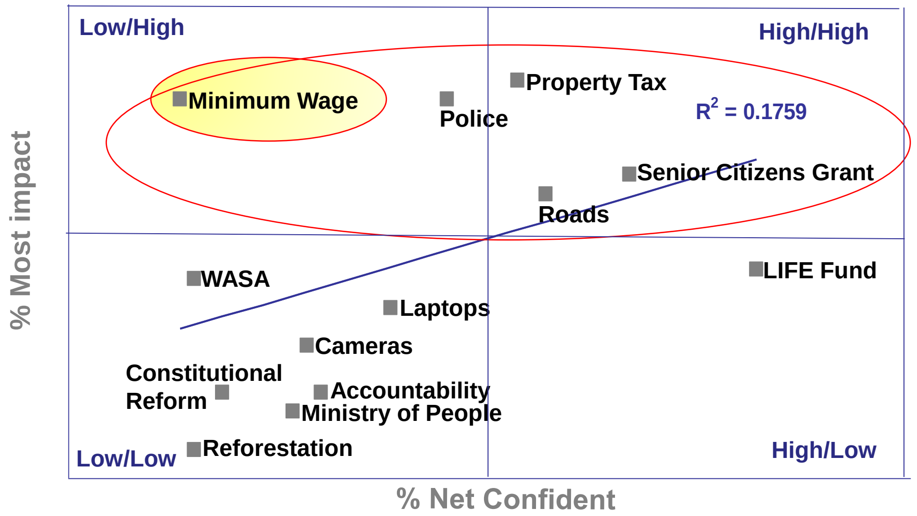


Base: 764 TT adults, 20 June – 25 July 2010 20

The following chart plots each of the pledges on a matrix with the position of the pledge determined by how confident people are that it will be achieved (horizontal axis) and the perceived level of impact it will have on people's lives (vertical axis).

This analysis helps to illustrate that there are three pledges in particular that stand out, as they are "high impact" and "high net confidence": *Property Tax, Senior Citizens Grant* and *Roads*. The pledge on the *Minimum Wage* is also worth highlighting as it scores highly on impact but relatively low on public confidence that it will be achieved.

Impact vs. Confidence



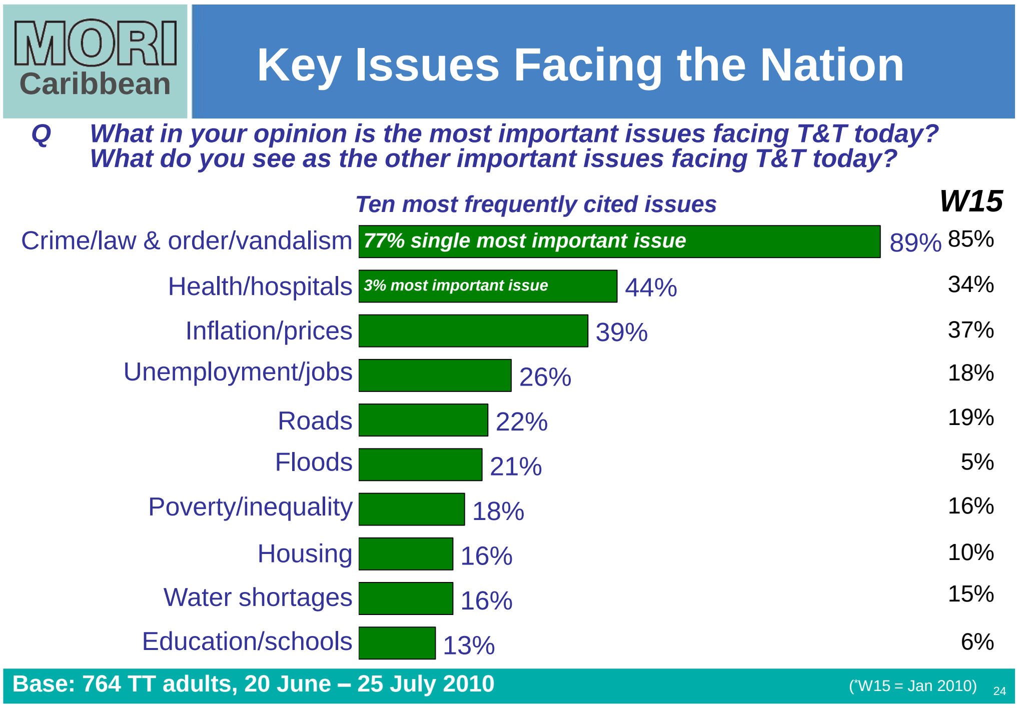
Base: 764 TT adults, 20 June – 25 July 2010 21

5. Issues Facing the Country

5.1. Most Important National Issues

Survey respondents were asked two questions to determine the issues they are most concerned about. Firstly they were asked to identify "the most important issue" facing the nation (one issue alone to be identified). Secondly they were asked to identify "the other important issues" they see facing the country, where an individual respondent can identify as many issues as they like; typically people select two or three other issues. The answers to these two questions are combined to provide the results as shown in the following chart.

This shows that ***"crime"* is seen as one of the most important issues facing the nation** by nine in ten people (89%), and **over three quarters identify *"crime"* as the <u>single</u> most important issue.** Twice as many people are concerned about *"crime"* than the next most important issue *"health/hospitals"* (44%), which is of slightly higher salience than *"inflation/prices"* (39%).



There are four issues where approximately 22% of the public (plus or minus four percentage points) consider important national issues, from *"unemployment/jobs"* (26%) to *"poverty/inequality"* (18%); followed by three more issues that make up the top ten national concerns. There are a number of other issues selected by less than 13% of the public – the full list is available on the topline results or computer tables.

The figures to the right side of the chart show the proportion of the public that identified each of the items as "one of the most important" in the previous wave of the Opinion Leaders' Panel at the start of this year. This shows that there have been a number of shifts in the levels of concern, in particular **a ten point increase in concern about *"health/hospitals"* (34% to 44%), an eight point increase in concern about *"unemployment/jobs"* (18% to 26%)** and, most significantly of all, a **sixteen point rise in concern about *"floods"* (5% to 21%),** which was expected, given the timing of the survey (fieldwork coincided with a great deal of flooding across Trinidad), although a four-fold increase is highly significant.

Analysis of the top three issues by sub groups shows that concern about "*crime"* is high among all categories of people. People living in East Trinidad (58%) and in Tobago (46%) are particularly concerned about "*health/hospitals"* and this issue is more salient among middle class than working class people (54% vs. 42%). Concern about "*prices/inflation"* is somewhat lower in Tobago (17%) than in the rest of the country (39%).

The focus groups conducted in Tobago in June 2010 explored participants perceptions of a number of issues (see appendix for more details). For example, the reason why people thought that 'prices' was a less important issue in Tobago than Trinidad was due to the greater use of "cheaper brands" and the difficulty of obtaining more luxurious brands. Nevertheless, participants did feel that many basic materials, for example construction goods, were more expensive and that Tobago generally had to factor in transit costs from Trinidad given the lack of local production.

On the issue of healthcare a major criticism was the continued delay in the building/opening of the new Scarborough hospital. Linked with this was the widespread criticism that for many health related procedures, Tobagonians must travel to Trinidad for care.

5.2. Issues Trends

Longer term trends analysis shows that for several years "*crime*" has been seen as the one of the most important issues facing the country by around nine in ten people, and that this has remained fairly constant since 2003. The only time when *crime* was challenged for being the most important issue was in early 2008 when as many people identified *"prices/inflation"* as one of the most important issues. Concern about *"prices/inflation"* peaked in 2008, but it is still much more of a concern since that time than before 2006.

Over time, concern about *"health/hospitals"* has gradually increased though the direction of travel has not been straightforward. This is likely to be explained by the fact that some health-related issues, such as dengue fever and swine flu, will be seasonal or "one-off" events that might impact on the public's overall level of concern.

While concern about *"jobs/unemployment"* has increased over the past couple of years it still remains lower than the level of concern recorded between 2003 and 2005/06.

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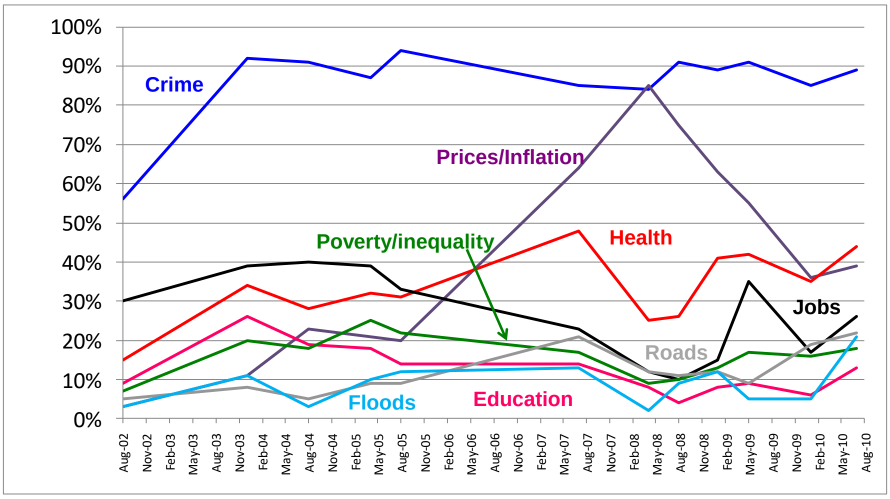
Key Issues Facing TT (Trend)

Q What would you say is the most/other important issue facing TT today?

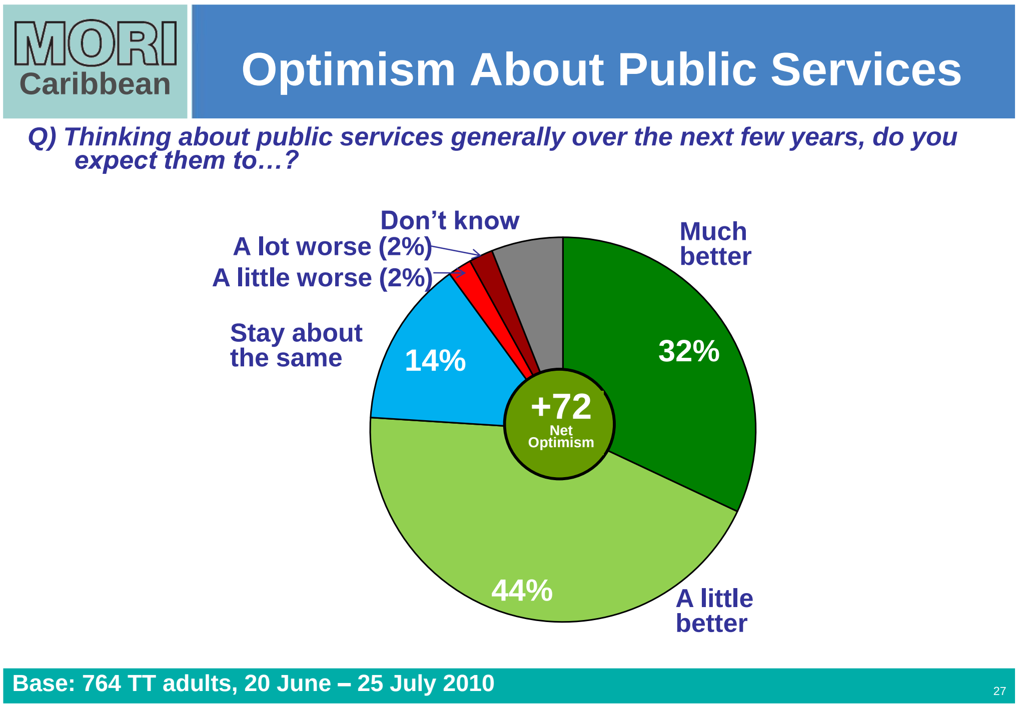


Source: Opinion Leaders' Panel (sample sizes range from c.700 to c.3,000 per wave) 25

6. Public Services and Complaints

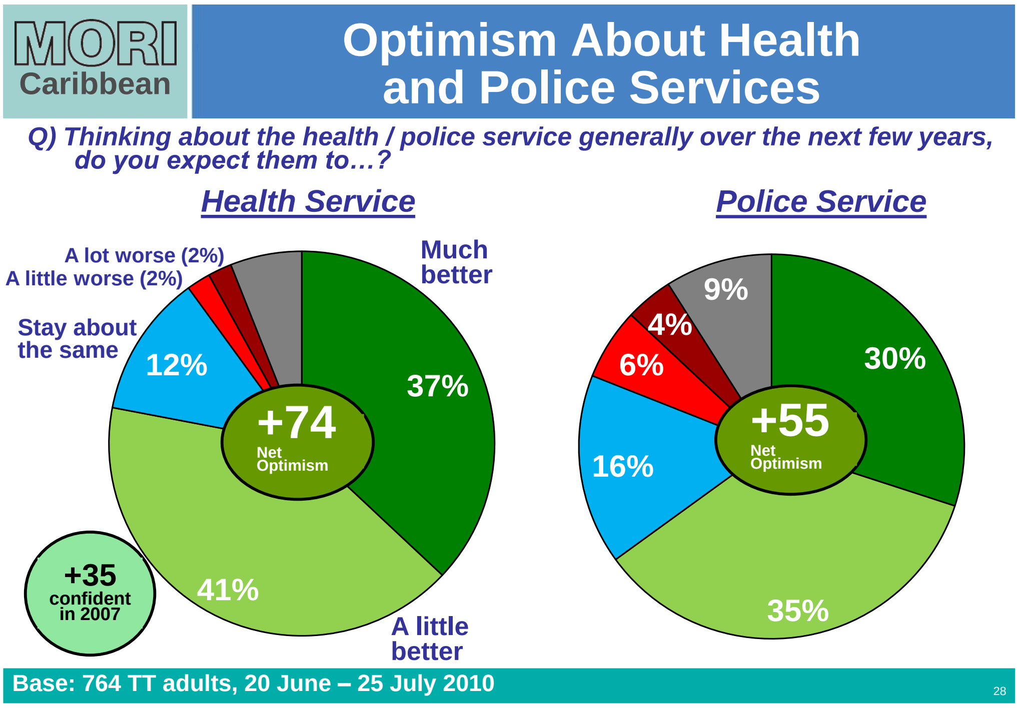
6.1. Public Service Improvements

There are very high levels of optimism about future improvements to public services generally, as a third of the public (32%) expect public services to be “much better” over the next few years and a higher proportion (44%) to get “a little better”. Only a small percentage of the public expect public services to get “a lot” (2%) or “a little” (2%) worse. This gives a “net optimism” score of +72 (that is the difference between those who expect services to “get better” minus those who think they will “get worse”).



Public expectations about improvements in the *Health Service* and *Police Service* are also very high with 78% of the public expecting the *Health Service* to provide “better” services over the next few years and 65% expecting improvements from the *Police Service*. In 2007, the same question was asked about people’s expectations about the *Health Service* and at that time the level of “net optimism” was +35, meaning that on balance more people were optimistic than pessimistic, but much less so than we find in the latest research (+74 net optimism).

There is little variation in expectations about the future of *Public Services* generally, the *Health Service* or *Police Service* by sub groups of the public, with the exception that on all three questions fewer Afro-Trinidadians are optimistic (67% optimistic about *Public Services* generally, 68% optimistic about the *Health Service* and 55% optimistic about the *Police Service*). However, it is important to remember that still more Afro-Trinidadians are optimistic than pessimistic on each of these three indicators.



6.2. Understanding Customers

Four in ten people (40%) agree with the statement that "most public services understand what their customers want from them" but slightly more people disagree (43%) with this view, including a quarter of the public who "strongly disagree" (25%). This view is broadly consistent across sub groups of the public, although more than half of the people living in East Trinidad disagree with the statement (53%).

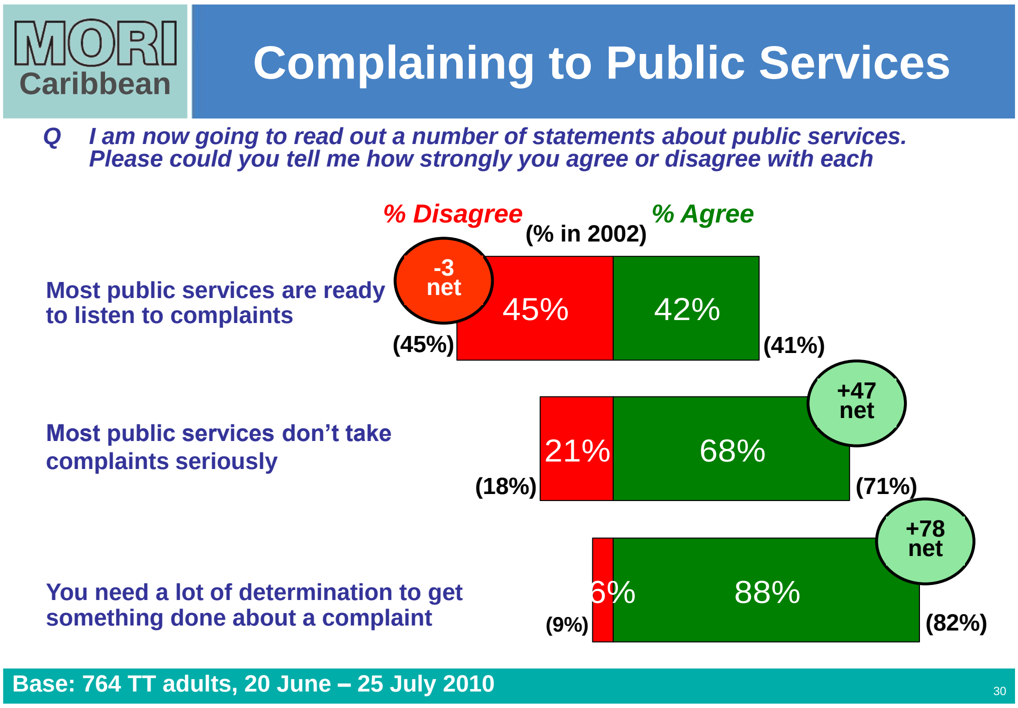
A similar question was also asked of public servants as part of the Public Service Employee Survey. Around half (51%) of public servants agree that "we understand what our customers want from us" and only 22% disagree. This suggests there is a mismatch between the views of those running public services and the users/customers of public services over the extent to which the services understand the needs of their customers.

6.3. Dealing with Complaints

The public is evenly divided about whether most public services are ready to listen to complaints, with about as many people agreeing (42%) that public services are ready than disagreeing (45%). Public attitudes about this have not changed since 2002.

In other areas, the public is much more critical of how public services deal with complaints. Almost seven in ten people (68%) agree that "most public services don't take complaints seriously" and just one in five disagree (21%). Public attitudes on this measure are also consistent with views held in 2002.

Almost nine in ten people (88%) believe that "you need a lot of determination to get something done about a complaint", which is higher than was the case in 2002 (then 82% of the public agreed with this statement).



7. National Development Agenda

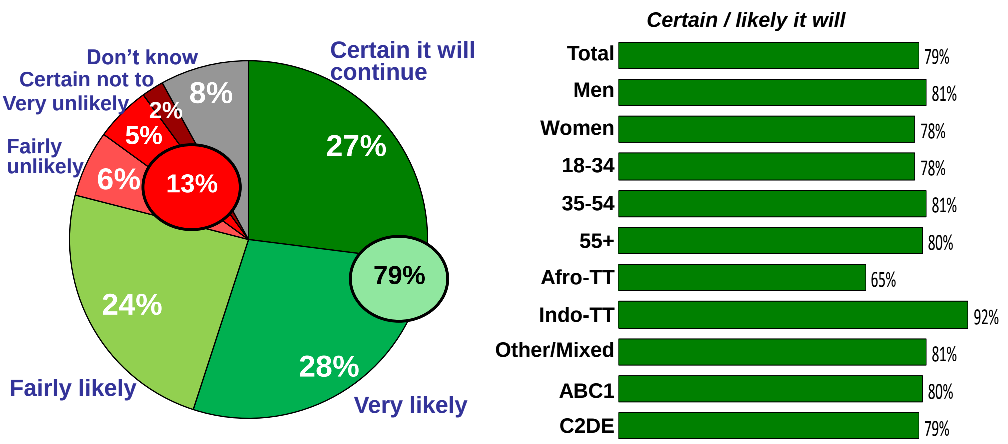
7.1. Confidence

Four in five people (79%) are confident that the new Government will continue to lead Trinidad & Tobago towards a developed country status, including over a quarter (27%) who believe it is "certain it will continue". Only a small proportion of adults overall (13%) are not confident this will happen.

Confidence about the country continuing on the path towards developed nation status is high across all the main sub groups of the public, as illustrated on the right side of the chart below. Confidence is somewhat lower among Afro-Trinidadians (65%), but this still represents a majority of this group.

MORI Caribbean **National Development Agenda**

Q How confident, if at all, are you that the new Government will continue to lead Trinidad & Tobago towards a developed country status?



Base: 764 TT adults, 20 June – 25 July 2010 33

Public attitudes towards developed country status should also be set in the context of their previous attitudes towards Vision 2020. When last surveyed in Wave 15 (fieldwork November 09 – February 10), just over a third of adults (36%) were then confident that Trinidad & Tobago would achieve developed nation status by the year 2020.

7.2 Perceived Level of Development

When asked how well developed they feel that the country is compared with other countries, the public view Trinidad & Tobago as an "averagely" developed nation. This is derived from the mean score of 5.2 when respondents answered the following question: *"On a scale of 1 to 10, where 1 represents the least developed country in the world and 10 represents the most developed where would you place Trinidad & Tobago today?"*. People expect the country to become more developed relative to other nations over the next decade with the mean score for expectation in 2015 at 6.7 and by 2020 at 8.0. In other words, the public expect Trinidad & Tobago to be among the 20% or so most developed nations by the year 2020.

8. NAPA

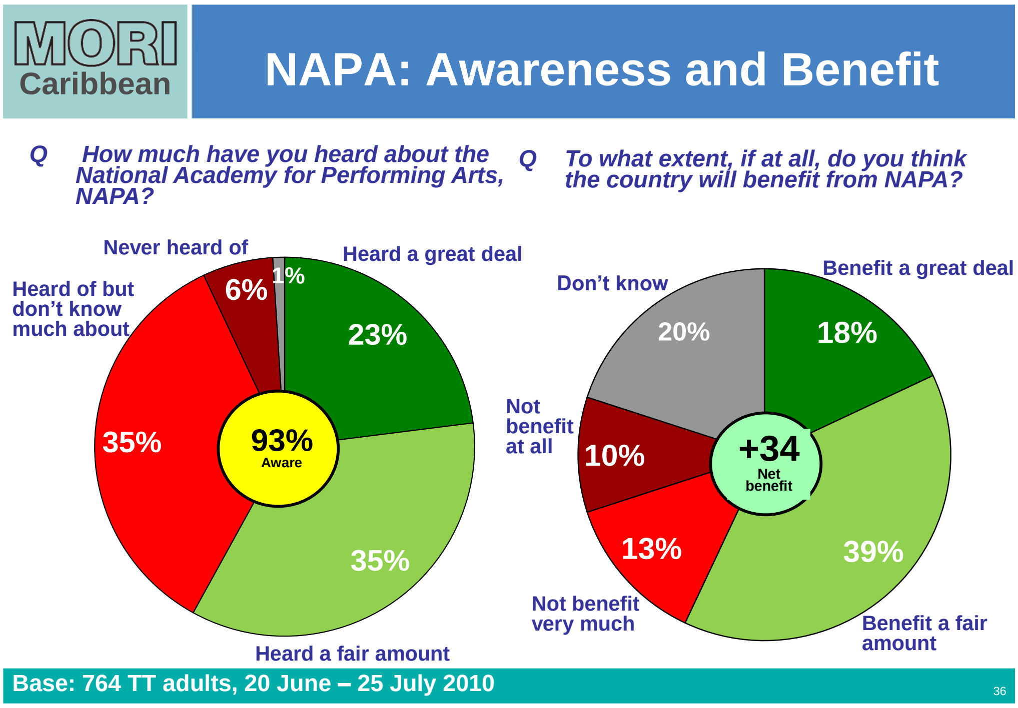
8.1. Awareness and Benefit

Virtually everyone (93%) has heard about the National Academy for the Performing Arts (NAPA) and almost three in five people have heard either a “fair amount” (35%) or a “great deal” (23%) about it.

More people think that the country will benefit than not benefit from NAPA (57% say it will benefit at least a fair amount, and 23% believe it will “not benefit at all” or “not benefit very much”. This gives a “net benefit” score of +34.

There is a significant gender split in attitudes towards NAPA with many more women being positive than men (+44 vs. +23, respectively “net benefit”). More middle class (+45) than working class people (+31) think the county will benefit; and Afro-Trinidadians (+44) are much more positive than Indo-Trinidadians (+22).

Slightly fewer people in the South Trinidad (51% think the country will benefit) than on average are positive about the impact of NAPA, though the main regional difference is that people living in Tobago are much less likely to appreciate the benefits, as 37% of Tobagonians think the country will benefit from NAPA and 32% think it will not (giving a “net benefit” of +5).



8.2. Likelihood of Use

Only a small proportion of the public (6%) are “certain” that they will attend NAPA in the next 12 months, but over a third (36%) saying that they are “likely” to go, meaning that overall just over two in five people (42%) say they are “certain/likely” to use NAPA over the next year. In contrast, slightly less than half the public (47%) do not expect to use NAPA, including one in five (21%) who say they are “certain not to”.

The main sub group difference in likelihood of attending NAPA is by age with persons aged 55 years and over much less likely to go to NAPA than on average (30% vs. 42%). There is also a difference by ethnicity with relatively few Indo-Trinidadians (34%) expecting they will attend a concert of performance at NAPA.

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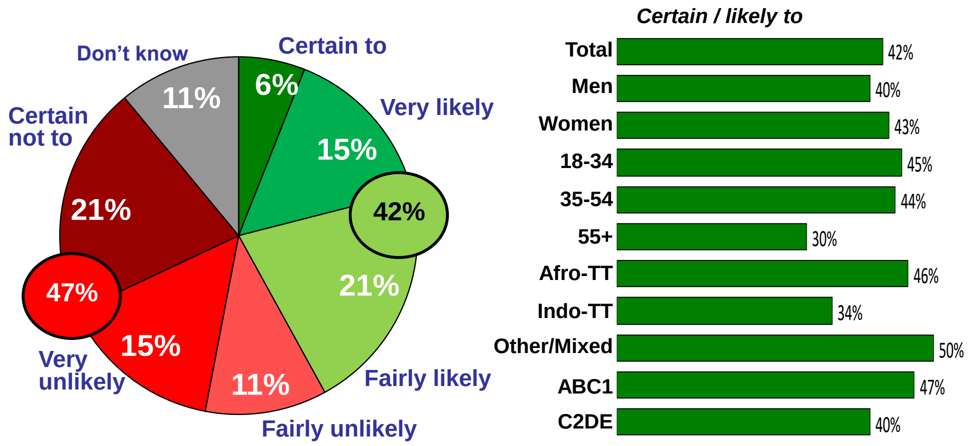
NAPA: Likelihood of Use

Q How likely, if at all, are you to visit NAPA in the next 12 months, for example to attend a concert or performance?



Base: 764 TT adults, 20 June – 25 July 2010 37

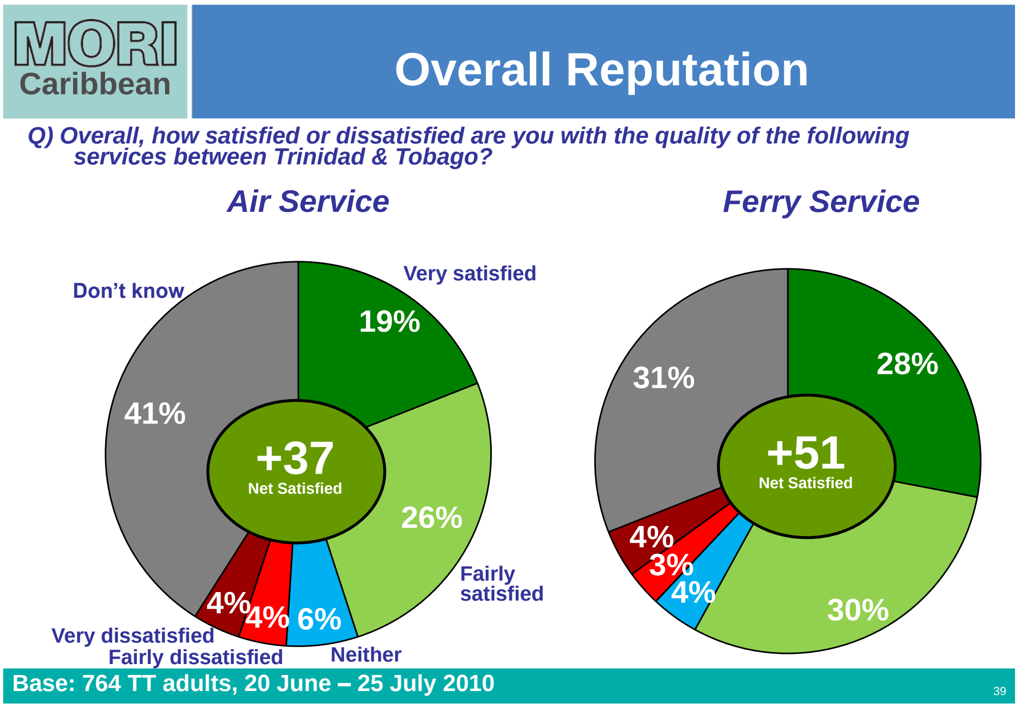
People living in North Trinidad are considerably more likely than those living elsewhere to expect to use NAPA. Three in five (61%) of these residents think they will use NAPA in the next 12 months, for people living in other regions this ranges from 36% to 41% (including 36% of those living in Tobago).

9. The Sea and Air Bridge

9.1. Satisfaction and Use

Among the general public, many more people are satisfied than dissatisfied with the Air Service between Trinidad and Tobago (45% satisfied vs. 8% dissatisfied) giving a "net satisfied" score of +37. In addition, two in five people (41%) do not have an opinion on the Air Service.

A higher proportion of the public, almost six in ten people (58%), are satisfied with the Ferry Service, but levels of dissatisfaction (7%) are no different from that with the Air Service, giving a "net satisfaction" score of +51. Again, a high proportion of the public, three in ten people (31%), do not express an opinion.



Four in ten people (41%) have used the Air Service in the last 12 months (and among this group seven in ten (71%) are satisfied with the service). Only one in eight (12%) people aged 55 years or older have used the service and an even smaller proportion of those living in South Trinidad (9%) have used the service. Approximately two thirds (64%) of Tobagonians have used the Air Service in the past 12 months. More Afro-Trinidadians (26%) than Indo-Trinidadians (11%) have used the service within that period.

The patterns of use of the Ferry Service are similar to that of the Air Service. Approximately one third of adults (32%) have used the Ferry Service in the last 12 months and among this group 86% are satisfied with the service (compared with 58% of the general public). Relatively few people aged 55 years or older have used the Ferry Service (18% have) as are people living in South Trinidad (19%). In contrast, three quarters (76%) of Tobagonians have used it. Almost twice as many Afro-Trinidadians (41%) than Indo-Trinidadians (22%) have used the service during this time period.

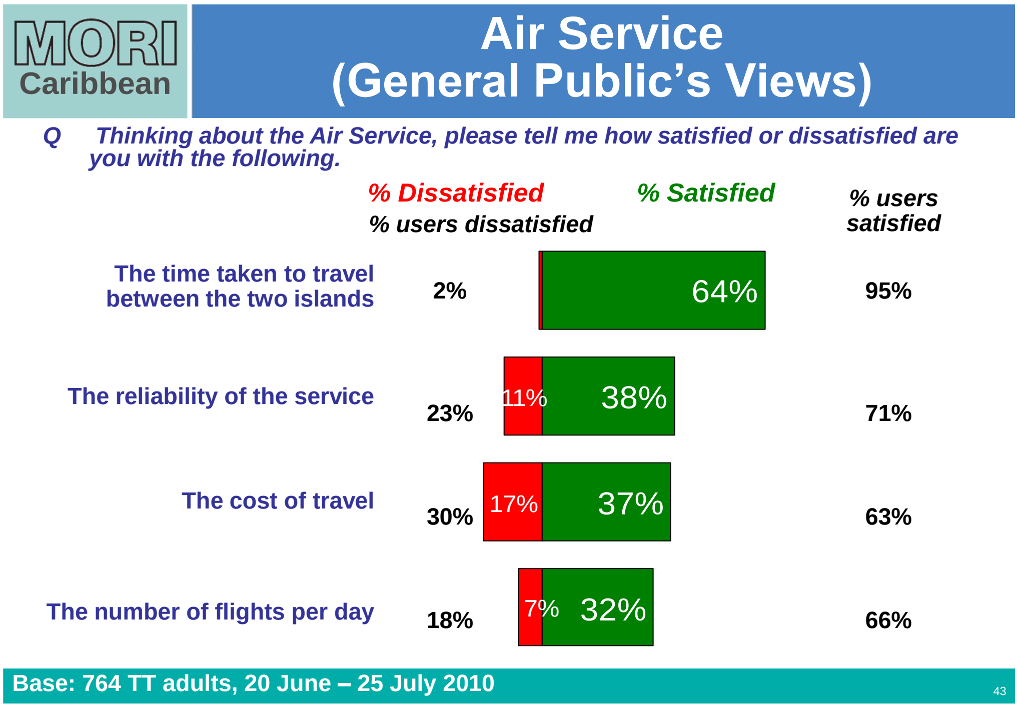
The main difference in sub groups between use of the services are that more middle class than working class people use the Air Service (37% and 20%, respectively), whereas the reverse is the case for the Ferry Service (31% of middle class people and 37% of working class people, respectively).

9.2. Air Service: Detailed Satisfaction Ratings

The chart below shows the proportion of the general public satisfied or dissatisfied with five aspects of the Air Service. These results are represented by the green (satisfied) and red (dissatisfied) bars.

This analysis shows that people are much more likely to be satisfied than dissatisfied with each of the service factors, particularly with the time taken to travel between the two islands (64% satisfied and 2% dissatisfied). As with overall levels of satisfaction with the service, however, many people do not express an opinion.

The chart also shows the attitudes of users (defined as having used the service within the last 12 months). Nearly all users (95%) are satisfied with the time taken to travel between the two islands; and more users are satisfied than dissatisfied with the other three aspects of the service. The highest level of dissatisfaction is with the cost of travel – even though on this measure twice as many are satisfied than dissatisfied (63% satisfied vs. 30% dissatisfied).



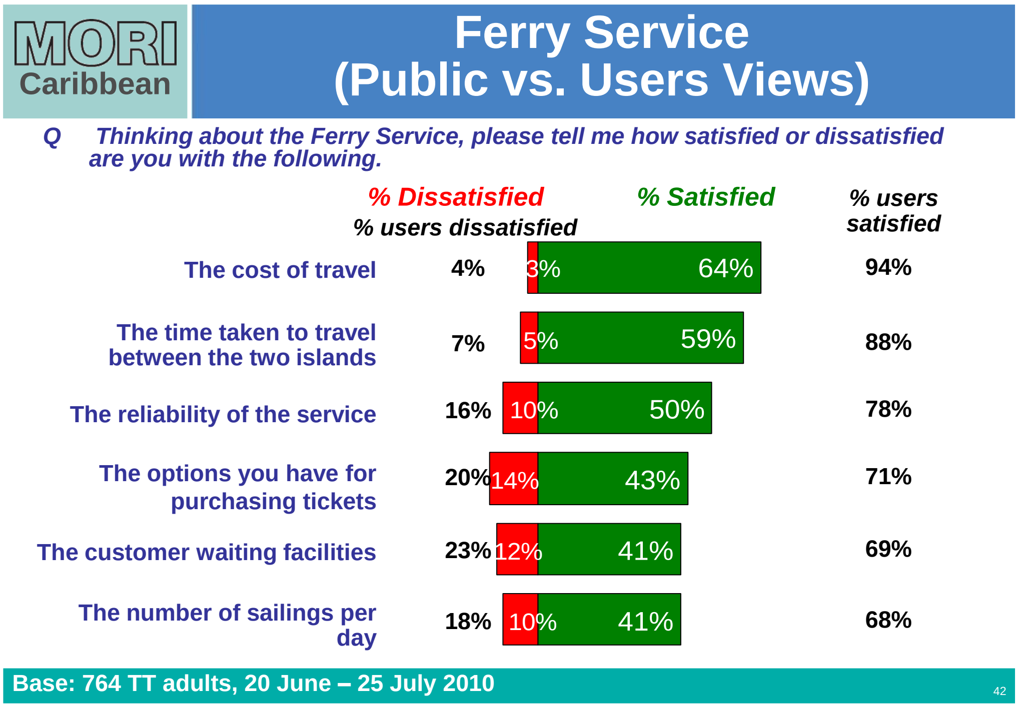
Tobagonians are more critical of the Air Service than Trinidadians. Overall, **39% of Tobagonians are dissatisfied with the Air Service** and approximately three in ten (28%) are dissatisfied with "the reliability of the service", "the cost of travel" and "the number of flights per day".

9.3. Ferry Service: Detailed Satisfaction Ratings

The chart below shows the proportion of the general public who are satisfied or dissatisfied with five aspects of the Ferry Service. These results are represented by the green (satisfied) and red (dissatisfied) bars.

As with attitudes towards the Air Service, more of the general public are satisfied than dissatisfied with each of the six service factors related to the Ferry Service, for example 64% of people are satisfied with the "cost of travel" and 4% are dissatisfied. Similarly, there is a high proportion of the general public do not express an opinion either way on the performance of the Ferry Service.

Among users of the Ferry Service satisfaction levels are high ranging from 68% satisfied with the number of sailings per day to 94% satisfied with the cost of travel. The two highest levels of dissatisfaction are around the options available to purchase tickets (20% dissatisfied) and customer waiting facilities (23% dissatisfaction).



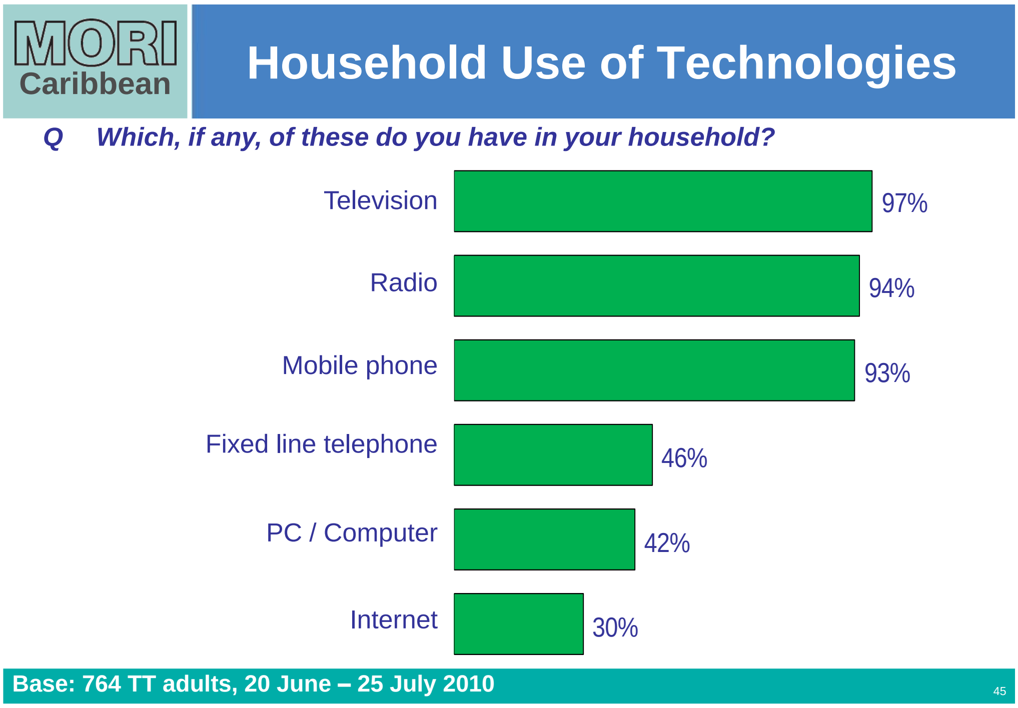
As with attitudes to the Air Service, **more Tobagonians are dissatisfied with the Ferry Service – two in five (40%) are dissatisfied with the Ferry Service**. Tobagonians are particularly critical of "the customer waiting facilities" (47% dissatisfied), "the reliability of the service" (38%) and "the number of sailings per day" (37%).

10. ICT Indicators

10.1. Household Use of Technologies

Nearly all households in Trinidad and Tobago possess a television (97%) and there is almost universal ownership of radios (94%) and mobile phones (93%). In contrast less than half of households have a fixed line telephone (46%). Additionally, a minority of persons have Internet access (30%) or PCs (42%) in their households.

It is worth highlighting that household ownership in Tobago is higher than average for fixed line telephone (63% in Tobago), Internet (42%) and PCs (63%).



10.2. Use of Mobile Phones

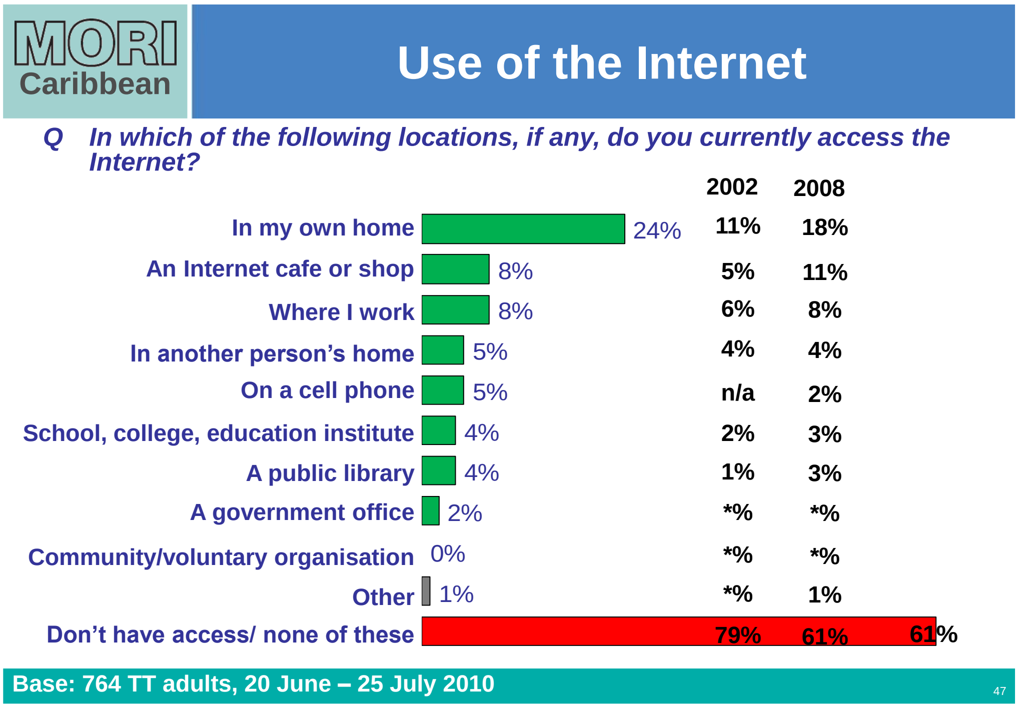
Nearly all adults say they personally use a mobile phone (94%) which is marginally higher than when measured in April 2009 (91%).

Seven in ten (70%) mobile phone users say that they send text messages (including 32% who send them everyday) but more (90%) say they receive text messages (including almost half, 47%, who receive them everyday). In contrast, only a small proportion of mobile phone users currently use their mobiles to surf the Internet (7%) or to send/receive emails (5%).

10.3. Internet Use

A quarter of adults say they access the Internet "in my own home" (24%), which has more than doubled since 2002 when one in nine adults (11%) said they accessed the Internet in this way. Home access to the Internet is considerably higher than any other way of connecting to the Internet – the next most popular methods are through "an Internet cafe or shop" or "where I work" (both 8%).

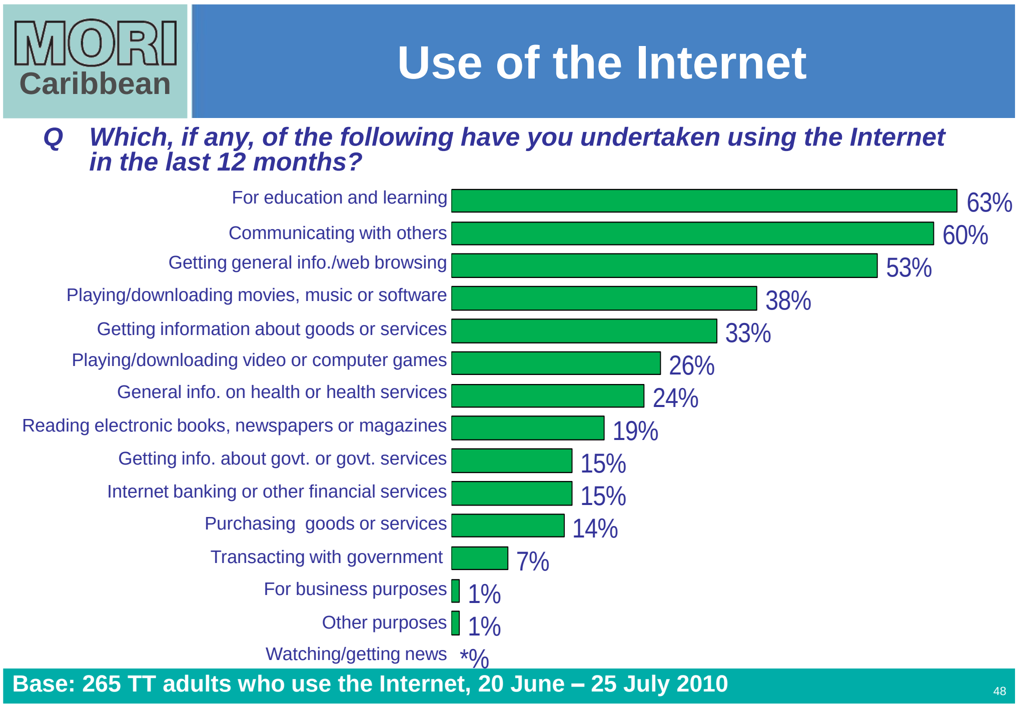
With the exception of accessing the Internet at home, the proportion of people using the different means to connect to the Internet are broadly similar to 2008 (and higher than in 2002). It is worth highlighting that more people now say they connect "on a cell phone" than said this in 2008 (5% now vs. 2% in 2008) but this difference is not statistically significant.



Overall 61% of the public do not access the Internet, which is the same as in 2008 and down from 79% in 2002.

There are large sub group differences with respect to Internet access. Three in five people (61%) between the ages of 18 to 24 years use the Internet; this figure decreases with increasing age so that just 14% of people aged 55 years old or more have internet access. More middle class people (55%) than working class (35%) are online, and relatively few Indo-Trinidadians (28%) compared with other ethnic groups are. In Central Trinidad only one in five adults (19%) access the Internet, which compares with almost two thirds (64%) of those people living in North Trinidad.

The three most popular uses of the Internet are “for education and learning” (63%), “communicating with others” (60%) and “getting general information/web browsing” (53%). Only a small number of people currently use the Internet to “transact with Government” (7%), though twice this proportion say they use the web to “get information about government or government services” (15%).



10.4. Text Messages and Government Information

There is a high level of interest in allowing a Government agency to text a customer when “an application or document is ready for collection” where people use such a service. In total almost nine in ten people (88%) say that they would be interested in receiving these types of text messages.

The same proportion of the public (88%) are also interested in receiving text messages from Government that keeps them “informed about new Government services and benefits”.

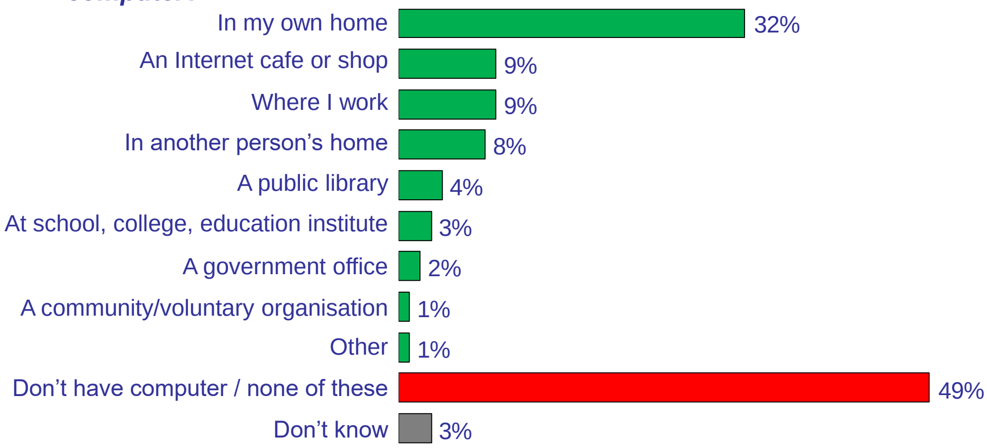
10.5. Use of Computers

Approximately a third of adults use a computer in “my own home” (32%), which is by far the most popular way, ahead of using a computer at “an Internet cafe or shop” (9%), “where I work” (9%) or “in another person’s home” (8%). Only one in twenty five people use a computer at “a public library” (4%).

Overall, almost half the public (48%) use a computer. Sub group differences in use are similar to differences in use of the Internet. The youngest age group, people between the ages of 18-24 years, are most likely to use a computer (66%) while those aged 55 years or older are least likely to do so (18%). More middle class (64%) than working class people (44%) use a computer; and fewer Indo-Trinidadians (36%) do compared to Afro-Trinidadians (56%). Regionally, use is lowest in Central Trinidad (28%) and highest in North Trinidad (71%) and Tobago (70%).

Use of Computers

Q In which of the following locations, if any, do you currently use a computer?



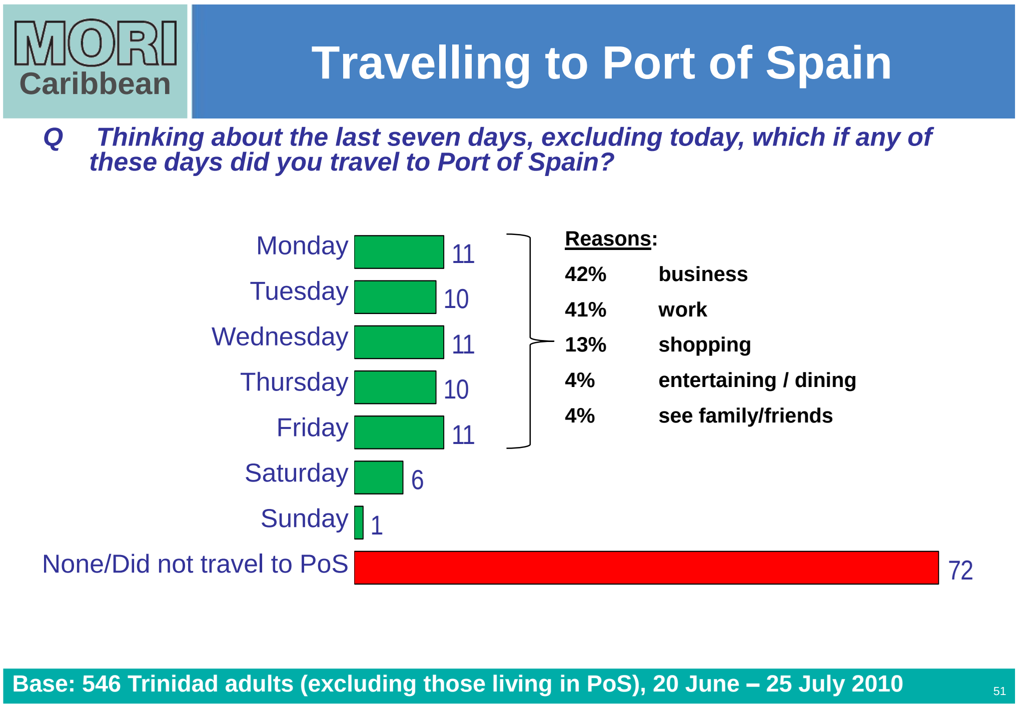
Base: 764 TT adults, 20 June – 25 July 2010 49

11. Visiting Port of Spain

11.1. Visiting Port of Spain

Approximately one in ten Trinidadians (10%) who do not reside in Port of Spain travel to the capital city each weekday, with a further six percent (6%) travelling there on a Saturday, but just one percent (1%) on a Sunday.

During a weekday, the two main reasons that people travel into Port of Spain are for “business” (42%) and “work” (41%). Approximately one in eight people also travel to Port of Spain for “shopping” (13%) during a weekday.

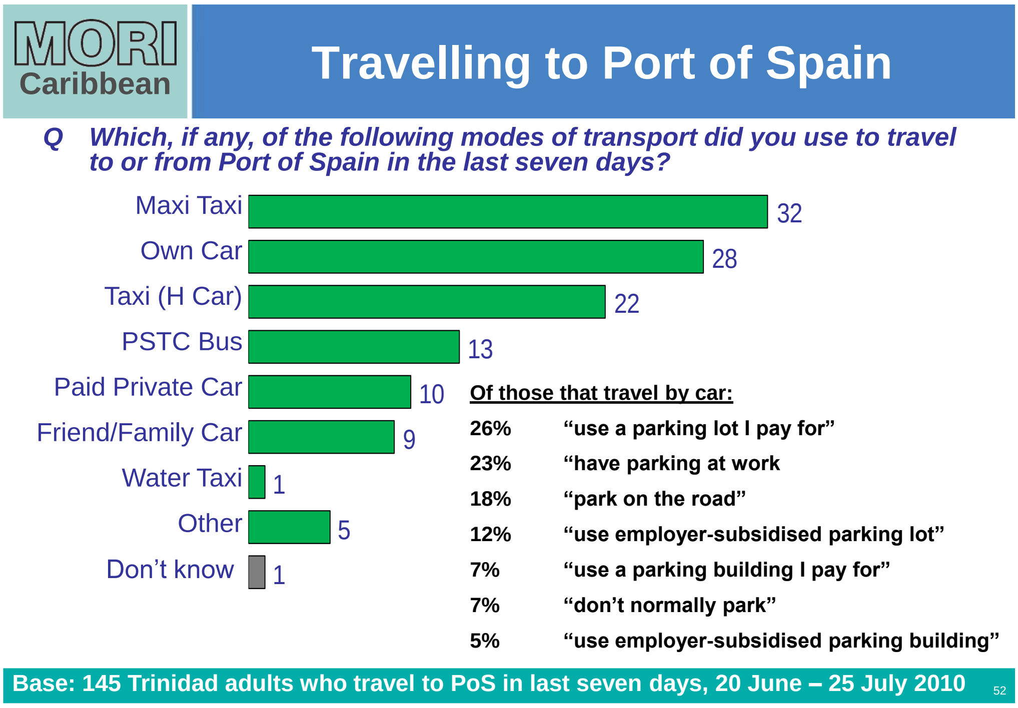


11.2. Travelling to Port of Spain

The most popular mode of transport into Port of Spain is by "Maxi Taxi" (32%), followed by using one's "own car" (28%) or "Taxi (H Car)" (22%).

Approximately one quarter of people who travel to Port of Spain by car use "a parking lot that they themselves pay for" (26%) and a similar proportion have "parking provided for them at work" (23%). A further one in five say that they "park on the road" (18%).

Half of those drivers that park in Port of Spain say that they can "always" (41%) or "usually" (8%) find a convenient parking space, but around two in five say that they only "sometimes" (19%) or "rarely" (22%) can.



Almost two thirds of commuters (64%) to Port of Spain say that it takes them up to an hour to travel into the city, that is 37% say it takes up to thirty minutes and 27% say it takes between thirty and sixty minutes. One in five say it usually takes between one and two hours (21%), and 14% of commuters say it takes them more than two hours to travel to Port of Spain.[1]

[1] The base size for this question is too low to allow for further detailed analysis by the residential location of the respondent. As such, it is not possible to provide statistically reliable comparisons for the length of time taken for Port of Spain bound commuters from different parts of the country

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 samples, 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
764 interviews	2	3	4

Source: MORI Caribbean

For example, on a question where 50% of the people in a sample of 764 respond with a particular answer, the chances are 95 in 100 that this result would not vary by more than four 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
303 and 461 (Men v. Women)	4	7	7
2,987 and 764 (Wave 15 and Wave 16)	2	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	***764***	**100**	***764***	**100**
Gender				
Male	*303*	40	*383*	50
Female	*461*	60	*381*	50
Age				
18-34	*221*	29	*327*	43
35-54	*264*	35	*289*	38
55+	*279*	37	*146*	19
Work Status				
Full/Part-time/Self-employed	*388*	51	*1,843*	62
Not working	*376*	49	*1,130*	38
Ethnicity				
Afro-Trinidadian	*376*	49	*290*	38
Indo-Trinidadian	*260*	34	*320*	42
Other	*126*	17	*152*	20
Regional area				
North	*80*	10	*85*	11
South	*184*	24	*214*	28
Central	137	18	145	19
East	266	35	290	38
Tobago	97	13	30	4

Source: MORI Caribbean

IV. Detailed Information on Response Rates

In total 764 completed interviews were achieved out of a total of 879 panel members where attempts were made at contact. This gives a response rate of 87%.

The reasons for non-contact were:

- 75 no contact after 3 visits
- 7 deceased
- 13 migrated or moved
- 4 were out of the country
- 3 not found/could not be located
- 1 works off shore
- 12 refused to be interviewed and declined to be on the panel

V. Validation Checks

In the field, 80 validation interviews were done by the Supervisors and the Co-ordinator. Five respondents were not asked the full set of questions and these panel members were therefore re-interviewed.

In addition, 75 calls were made to respondents to verify only that these persons were interviewed and all questions were asked. In all cases the interviews were completely done by the interviewer.

VI. Topline Results

VI. Focus Group Reports