Ministry of Public Administration and Information

Opinion Leaders' Panel 2005

Wave 5 Report 1 – Key Trends and Policy Areas
29 January – 1 April 2005

Research Study Conducted for the Government of Trinidad & Tobago

MORI | **Social Research**

Contents

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1. Introduction

1.1. Background and objectives

The Opinion Leaders' Panel was established as part of the programme for Modernising Government in Trinidad & Tobago. The purpose of this research is to provide evidence about the views of citizens of Trinidad & Tobago as a basis for informed decision making and policy formulation and implementation with respect to public service delivery.

This volume contains the report of the key trends and policy areas from Wave 5 of the Opinion Leaders' Panel. This survey was conducted by the UK based research firm Market and Opinion Research International (MORI) with HHB & Associates on behalf of the Government of Trinidad & Tobago.

A second report focusing on ICT-related issues has been produced separately.

1.2. Methodology

1.2.1. Sampling

In the initial design of the Opinion Leaders' Panel, concern for panel 'wearout' and 'decay' suggested that after the baseline of 2,747 randomly sampled citizens were interviewed, subsequent waves would target approximately one third of the participants on each occasion. MORI therefore instructed HHB & Associates to select approximately 900 members of the panel as the 'universe' for each subsequent wave. Random number selection was utilised for this exercise, and the field staff were instructed to contact these original panellists. MORI anticipated that this would result in approximately 700 interviews allowing for deaths, serious illness, those away during the fieldwork period, non-contacts after three recalls and refusals to participate.

For Wave 5, it was decided to return to the original Panel members in order to conduct a "baseline" survey. However, because of panel 'decay' it was necessary to recruit some new members to the Panel who had not previously taken part in any Opinion Leaders' Panel studies. In total, 2,426 Panel members were interviewed, which was made up of 1,538 existing and 888 new members.

The new members were selected on the basis of the required demographic characteristics to bring the overall panel in line with the population characteristics of the 2000 census. This was determined with respect to race, gender, age and location (regional corporations).

Enumeration district (ED) maps for the selected regional corporation locations were then selected and the relevant quota was assigned to each map. Each map had marked on it a random walk (arrows showing how the interviewer should proceed) and a start position. Interviewers were instructed to follow the arrows and to select every "nth" house. A listing of eligible members of the household was made and any person fitting one of the quotas was selected and interviewed. Only one person per household was allowed. Interviewers proceeded in this way until the required quotas were obtained.

1.2.2. Response rates

Interviews for Wave 5 were carried out face-to-face, in home, between 29 January – 1 April 2005. There was a break of five days because of the Carnival season. 1,538 successful interviews were completed with existing Panel members, out of a total sample of 2,023, giving a response rate of 76%. 888 new Panel members were recruited from an initial selection of 1,152, giving a response rate of 77% (see appendix IV for details).

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1.2.3. Weighting

The data have been weighted by age, ethnicity, gender and regional corporation to the 2000 census data. Weighting for work status is derived from an analysis of the most recent labour force survey data.

1.2.4. Area combinations

Reference is made in this report to different areas of the country, which have been classified as follows:[1]

    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**.

1.3. Qualitative research

In addition to the main survey, four focus groups were recruited and conducted by Trends Limited. The topic guide was prepared by MORI. The focus groups were conducted prior to the survey fieldwork in order to inform and assist the design of the questionnaire, as well as to use some of the verbatim comments in this report. The composition of the groups is shown below.

Table 1: Focus groups composition

Area	Gender	Age	Class[2]
Central Trinidad (rural)	5 men, 5 women	25-35 years	DE
North Trinidad (urban)	5 men, 5 women	40-50 years	ABC1
Tobago (urban)	5 men, 6 women	65+ years	DE
South Trinidad (urban)	4 men, 4 women	18-34 years	C1C2

Source: MORI

All four groups were comprised of a mix of different ethnicities. Verbatim comments are used throughout the report to illustrate participants' discussions. The full reports from each focus group are also appended.

[1] Note because of the very low base size of respondents in Tobago, no breakdown of results in this area are reported.

[2] In this report professional/non-manual workers refer to those residents in social grades ABC1. Residents in social grades C2DE are referred to as working class and unemployed/not working. Please see the appendix for further details.

1.4. 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.

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 a service records 40% satisfied and 25% dissatisfied, the "net satisfaction" figure is +15 points.

In several places where identical questions were put to the baseline sample of 2,747 citizens, and repeated in this fifth wave with 2,426, a calculation of 'swing' is offered to indicate the change over time, comparing the attitudes of the T&T public this year against last. 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.

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

1.5. Acknowledgements

MORI would like to thank Senator, Dr. the Honourable Lenny Saith, Minister, Ms Jacqui Wilson, Permanent Secretary, and Ms Gillian Macintyre, Permanent Secretary, at the Ministry of Public Administration and Information and their colleagues Donna Ferraz, Alexa Khan, Lisa Branker, and Ramon Gregorio and the rest of the Divisional team; the Central Statistical Office, Maxine Richards at Trends Limited 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 2,426 citizens of Trinidad & Tobago who gave up their time to take part in this survey and to tell us their views.

1.6. Publication of data

As the Government of Trinidad & Tobago has engaged MORI to undertake an objective programme of research, it is important to protect the interests of both organisations by ensuring that it is accurately reflected in any press release or 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 advance approval of MORI. Such approval will only be refused on the grounds of inaccuracy or misrepresentation.

2. Executive Summary

National priorities and government performance

The fight against crime continues to be seen by the vast majority of the public as the most important national priority. This dominates the public's concerns to such an extent that only about one person in every ten does *not* think crime is one of the most important issues facing the country.

The high level of concern about crime is not a new development. In every single wave of the Opinion Leaders' Panel that the question has been asked, crime has been at the top of the list of the nation's priorities, though it is worth remembering that in 2002 the total number of people who mentioned crime (56%) was much lower than in all subsequent waves (now the proportion is 87%).

It would be a mistake to interpret these findings to mean that crime is the only thing that people are worried about for the country as a whole. There are other issues which a sizeable minority of the public spontaneously refer to as pressing concerns nationally. Over recent Waves, increasing significance has been placed on inflation/prices (21% of the public now cite as an important issue, up from 3% in 2002) and poverty/inequality (where over three times as many people cite it as an issue than in 2002 - 25% versus 7% respectively).

Nevertheless, the crime situation in the country is given as the main reason for people's dissatisfaction with the government's performance. And despite higher approval ratings found in this survey than the two previous Opinion Leaders' Panels, more people remain dissatisfied than satisfied with the job the government is doing (40% are currently satisfied with the way the government is running the country, compared to 55% who are dissatisfied. In 2004 (Wave 4) 31% were satisfied compared to 61% dissatisfied.

To a large extent, the Trinidad and Tobago population is polarised on two axes in terms of their ratings of the government. The first is by ethnicity, with Indo-Trinidadians being substantially more dissatisfied than Afro-Trinidadians. The second is by age, with more younger people dissatisfied than older people. The swing towards further dissatisfaction since July-August 2002 has been greatest in the 25-34 year old age group.

Vision 2020

The latest survey data provide mixed results in relation to public attitudes about Vision 2020. On the one hand, the majority of the public have heard about it – and trends in levels of awareness have increased every time the question has been covered in the Opinion Leaders' Panel. On the other hand, there are clear signs that the public are losing faith that Vision 2020 can be achieved. They are now almost exactly divided on whether it is likely or unlikely that Trinidad and Tobago will reach fully developed nation status by 2020.

The principal reason for pessimism about Vision 2020 is a failure to recognise any progress having been made so far. If the government can demonstrate progress and a timetable for other developments, linking these with optimism over the future of some public services (see later), it would go some way into answering these concerns. This would also address some of the other reasons given for scepticism about the plan, including the belief held by some that it is "just political talk" or that "the people are not ready for it".

In addition, it is evident that the public feel there is a long way to go to achieve what they consider to be the most important features of an ideal developed nation. The two most important features are thought to be *being well educated* and *productive* – yet fewer than one in four people would use these terms to describe the country at present, and fewer still see Trinidad and Tobago as healthy, disciplined, safe or technological (all features the same respondents say are important for a developed nation).

Happiness

Consistent with findings from Wave 3 of the Panel (conducted in December 2003), the vast majority of the public say they are happy with their lives at the moment. In fact, 45% say they are *very* happy. As such, Trinidadians and Tobagonians score very highly on any comparison of "happiness" with countries across the world.

Confidence in institutions

People have more confidence in the Church (74% have a lot or some confidence in the church) than any other of the thirteen institutions covered in the survey, and it is the only institution in which at least half the public say they have a lot of confidence.

For nine of the 14 institutions, at least half the public say they have *some* or *a lot* of confidence in them, including 52% who have confidence in the Prime Minister. However, it is political institutions that are least well rated overall, with just 34% saying they have *some* or *a lot* of confidence in political parties and 39% in Parliament.

Public services

The most common way people describe public services is to say that they provide a *poor service* – half the population select this attribute when shown a list of 17 adjectives used to describe them. In fact, all the top most popular descriptions of public services are negative: *unsatisfactory* (39%), *slow* (33%) and *inadequate* (31%).

The most popular positive attribute, in fifth place overall, is *hardworking* (selected by 26% of people). Very few, however, would use *honest* (8%), *open* (6%) or *good value for money* (5%) as ways of describing public services.

Police and crime

The image of the police is still worse than the image of other services generally, with the most common way of describing the police being *corrupt* (43%). In fact, more people selected *corrupt* than did when the same question was asked in December 2003.

Despite the negative image of the police, there could be signs of some improvements in the public's mind with fewer people now saying they are *inadequate*, *uninterested*, *under-funded* or *unaccountable* – though of course there remains a long way to go before the image of the police can be compared favourably with that of teachers, or even in a generally positive light.

People are, however, somewhat more optimistic about the direction in which policing seems to be heading. About half the public expect that policing in both their local area and the country generally will get better in the next few years. More people are positive about the future of policing than are negative – although this level of negativity is somewhat higher at a national than local level.

When shown a list of 20 different crimes, anti-social behaviours and environmental problems, over half the public (53%) say they have not experienced any of them in the past 12 months. This is an improvement from the 44% who said they had no experience of any of these in December 2003.

Environmental problems, such as *poor street lighting* and *litter/dog mess in the street* are much more commonly cited than any more serious crime or anti-social behaviour.

The survey results suggest that there is substantial under-reporting of many types of problems covered in this survey. While some caution needs to be exercised when interpreting these results because of the base sizes involved, it is clear that many crimes and problems go unreported to the police. When combining all experiences of environmental problems in the past 12 months, as many as seven in ten incidents were not reported. For experiences of anti-social behaviour the figure is 67%. Even for incidents of crime, as many as half are not reported to the police.

The qualitative findings suggest that public perceptions of the quality and honesty of the police service are key reasons why people would not report a crime or problem.

Health

Two in three people have been treated at either a public or private health centre or hospital in the past 12 months. Public facilities are used much more than private facilities.

While on balance more of the public are satisfied than dissatisfied with the public health centres and hospitals, private facilities are rated even better. In addition, there is a sizeable minority of the public (24%) who are *very* dissatisfied with public hospitals.

Ratings among those people who have used each of the health facilities in the past year are somewhat better than the ratings given by the general public. This is consistent with other non-health related services, and suggests that people's experience of health care is better than their perception of the services, which is likely formulated by the media, from family and friends, or both. Yet still, a sizeable minority of users of public hospitals (23%) are *very* dissatisfied with the service provided.

Two in three (66%) people believe the health service will get better in the next few years – this is over three times the proportion who think it will get worse (19%) – and optimism is higher now than in July-August 2004 when the question was last asked, when 54% thought it would get better, and 26% thought it would get worse. Without doubt, this is an encouraging finding and may reflect the public seeing improvements taking place. However, there is also evidence that the optimism, for some people, represents a belief that the service is in such a poor state at present that it can only get better. The challenge for the government, therefore, is to meet these rising expectations in order to tackle some of the deep underlying dissatisfaction, especially with public hospitals.

Education

The image of the teaching profession is positive, with the top attributes people select to describe them as being positive – in particular seeing teachers as *hardworking*, *friendly*, *keen to help* and *efficient*. In contrast to the image of the police, very few consider teachers to be *corrupt*.

There are some signs that the image of teachers is a little less positive than when the same question was asked in December 2003, with several of the positive image descriptions now being chosen by fewer people. For example, the proportion who say *good value for money* has fallen from 19% to 8%. However, more people now say that teachers are *hardworking* (from 59% to 64%).

Awareness of the new University of Trinidad and Tobago is high. A little over half the public say they heard at least a fair amount about it. Support for the University being established is very high, with 86% of the public saying they support it (68% say they *strongly* support it).

Housing

Almost everyone has heard of the National Housing Association (NHA) and around half the country say they have heard of the Land Settlement Agency (LSA).

Among those who have contacted the NHA in the past 12 months (one in eight), the most common method was in person, followed by contacting them in writing.

Satisfaction levels and ratings of customer care among those who have contacted the NHA are not high. Half of users of the NHA say they are satisfied with the quality of care provided – a large proportion (28%) are *very* dissatisfied. The speed with which enquiries are dealt with seems to be the area in which dissatisfaction is highest.

While ratings of the NHA are, on the whole, favourable when compared to people's rating of their local government body, they are not as high as ratings of contact with public services generally.

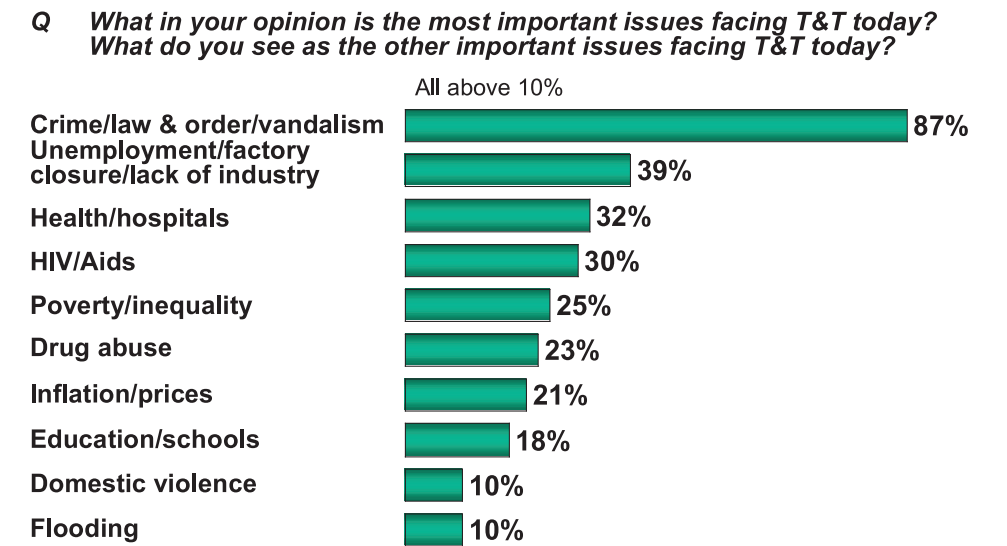*Prof Robert M Worcester*
Mark Gill
Tom Huskinson

3. National Issues and Government Performance

3.1. Crime continues to dominate

Concern about crime continues to dominate the public mind, as shown in the following chart. The significance of the perceived problem is underlined by the fact that more than twice as many people say that crime and related activities are the most important issues facing the country, than those who say that the next biggest concern is jobs and unemployment (cited by 39%).

Chart 1: Most important issues facing the country

Q   *What in your opinion is the most important issues facing T&T today?*
    What do you see as the other important issues facing T&T today?

All above 10%

Issue	%
Crime/law & order/vandalism	87%
Unemployment/factory closure/lack of industry	39%
Health/hospitals	32%
HIV/Aids	30%
Poverty/inequality	25%
Drug abuse	23%
Inflation/prices	21%
Education/schools	18%
Domestic violence	10%
Flooding	10%

Base: 2,426 TT adults, 29 Jan – 1 Apr 2005   Source: MORI

The computer tables from the survey provide detailed sub-group analysis of the findings for every question. The key differences for the main sub-groups are as follows:

- **Gender:** women are more likely than men to mention HIV/AIDS (35% vs. 25% for men) and domestic violence (13% vs. 7%) as important issues;

- **Age:** HIV/AIDS, drugs and unemployment are mentioned more often by younger people than other age groups. Middle aged people are more likely to cite health/hospitals and inflation/prices and older people are more likely to view agriculture as an important issue;

- **Ethnicity:** Overall, Indo-Trinidadians are more likely than other ethnic groups to mention multiple issues, some of which are roads (10%), flooding (16%), inflation/prices (27%) and race relations (11%). Afro-Trinidadians tend to mention fewer issues overall, though more of them do say housing (10%).

The table on the following page shows the breakdown of the main national priorities by local area.

This table shows that while crime is the single most important issue across Trinidad and Tobago, for the other key priorities there are some notable differences in emphasis both between and within the regions of Trinidad. For instance, people living in Port of Spain are particularly likely to cite unemployment and health as issues (the latter is mentioned more than average for those in the Tunapuna/Piarco area).

Concern about HIV/AIDS shows even greater regional and local variation. Those in the South are much less likely to cite these as national priorities, whereas people in the Central area and large parts of the East are more than twice as likely to think HIV/AIDS is one of the most important issues facing the country.
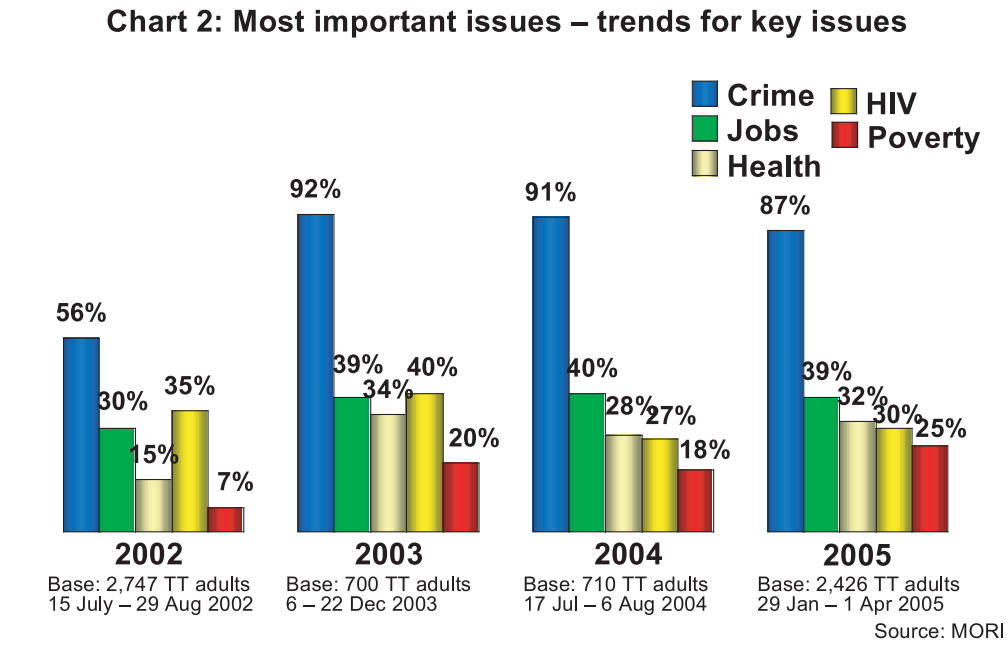
Table 2

Q **What in your opinion is the most important issue facing Trinidad & Tobago today?**

Q **What do you see as other important issues facing Trinidad & Tobago today?**

Base: 2,426 TT adults **Top 4 - % mentioned**	**Crime**	**Unemploy-ment**	**Health**	**HIV/Aids**
	%	%	%	%
Total	**87**	**39**	**32**	**30**
North	**83**	**37**	**34**	**33**
Diego Martin	85	31	27	31
Port of Spain*	77	50	48	36
South	**88**	**42**	**21**	**17**
Penal/Debe	90	39	19	14
Siparia	86	40	20	20
Point Fortin Borough*	81	49	20	21
Princes Town	88	44	21	15
San Fernando	89	47	25	18
East	**88**	**34**	**36**	**33**
San Juan/Laventille	88	27	27	26
Rio Claro/Mayaro	90	52	23	40
Arima Borough*	78	20	35	50
Sangre Grande	87	48	36	40
Tunapuna/Piarco	91	34	44	34
Central	**91**	**49**	**38**	**45**
Couva/Tabaquite/Talparo	89	51	41	52
Chaguanas Borough	95	45	31	27

*NB: Please note that the base size of these areas is small (<50). Results should be seen as indicative only.

29-Jan – 1ˢᵗ Apr 2005
Source: MORI

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3.2. Trends

The high level of public concern about crime is not a new phenomenon – in all five waves of the Opinion Leaders' Panel, crime has always been the most prominent issue, though many more people now spontaneously mention crime (87%) than did in the first wave in 2002. The following chart shows the changing levels of concern about the current top five issues over time.

Chart 2: Most important issues – trends for key issues

Legend: Crime | Jobs | Health | HIV | Poverty

2002 (Base: 2,747 TT adults, 15 July – 29 Aug 2002): Crime 56%, Jobs 30%, Health 15%, HIV 35%, Poverty 7%
2003 (Base: 700 TT adults, 6 – 22 Dec 2003): Crime 92%, Jobs 39%, Health 34%, HIV 40%, Poverty 20%
2004 (Base: 710 TT adults, 17 Jul – 6 Aug 2004): Crime 91%, Jobs 40%, Health 28%, HIV 27%, Poverty 18%
2005 (Base: 2,426 TT adults, 29 Jan – 1 Apr 2005): Crime 87%, Jobs 39%, Health 32%, HIV 30%, Poverty 25%

Source: MORI

Since the last wave of the Panel, conducted between July – August 2004, there have been some changes in the relative importance of several of the main priorities. The following issues are now seen as important by *more* people:

- **Flooding** – from 3% to 10%;

- **Health/hospitals** – from 28% to 32% (and doubled from 15% in 2002); and

- **Poverty/inequality** – from 18% to 25% (and more than three times the 7% of people who mentioned this in 2002).

Two issues have *fewer* people mentioning them compared to the last wave of the Panel:

- **Crime** – from 91% to 87% (but this is still considerably higher than the 56% mentioning crime in 2002); and

- **Drug abuse** – down from 29% to 23%.

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3.3. Satisfaction with the government

More of the general public are dissatisfied (55%) with the way the government is running the country than are satisfied (40%). As can be seen from table 3, although more people are satisfied now than when the question was asked in the previous two waves of the Panel, net satisfaction with the government is no higher in these latest results (-15%) than when first asked in July-August 2002   (-12%) and somewhat lower than in June-July 2003 (+4%).

Table 3

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

	Wave 1	Wave 2	Wave 3	Wave 4	Wave 5
Satisfied	34	48	36	31	40
Dissatisfied	46	44	57	61	55
Don't know	19	8	7	7	5

Source: MORI

Among those people who say they are dissatisfied with the government's performance, the main reason spontaneously given for this is the **crime situation** (34% say this), particularly among women (37%), under 35 year olds (38%) and Indo-Trinidadians (40%).

The following three issues are also mentioned by at least one in six people as reasons for dissatisfaction with the government:

- **Lack of government attention to citizen's needs/standard of living/poverty** (19%) – higher among Afro-Trinidadians (23%);

- **Cost of living** (16%) – higher among Indo-Trinidadians (21%); and

- **Unemployment/low wages** (15%) – higher among under 35 year olds (19%).

Table 4 on the following page, shows the levels of net satisfaction with the government in Wave 1 (July-August 2002) and Wave 5 (Feb-Mar 05).

The change in net satisfaction scores between these two waves, represented in the swing figure, is also shown – a positive swing number indicates that, on average, more people have become satisfied than dissatisfied over time; a negative figure indicates the reverse.

Table 4: Change in levels of net satisfaction (Wave 1 to Wave 5)

	Wave 1	Wave 5	Swing
Total	-12%	-15%	-1.5%
Male	-15%	-18%	-1.5%
Female	-10%	-12%	-1%
18-24 years	-25%	-30%	-2.5%
25-34 years	-14%	-32%	-9%
35-44 years	-18%	-20%	-1%
45-54 years	-12%	-4%	+4%
55+ years	+10%	+19%	+4.5%
ABC1[3]	-14%	-14%	0
C2DE	-14%	-16%	-1%
Afro-Trinidadians	+12%	+11%	-0.5%
Indo-Trinidadians	-36%	-40%	-2%

Source: MORI

The two key variables in levels of satisfaction with the government are **ethnicity** and **age**. Indo-Trinidadians are considerably less satisfied with the government's performance than are Afro-Trinidadians, though there has been little change in these levels of satisfaction over the past three years.

In contrast, there has been greater movement in levels of satisfaction when the overall results are broken down by age. More people over the age of 45 years have, on the whole, become satisfied than dissatisfied with the government since 2002. Younger people, who were the most critical of the government in 2002 (especially the 35-34 age group) have swung more heavily to dissatisfaction than other groups.

[3] In this report professional/non-manual workers refer to those residents in social grades ABC1. Residents in social grades C2DE are referred to as working class and unemployed/not working. Please see the appendix for further details.
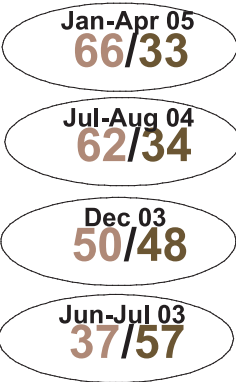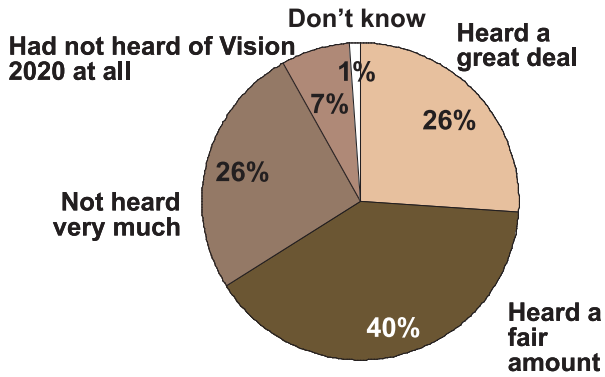
4. Vision 2020

4.1. Awareness of Vision 2020 continues to rise

One in four people (26%) say they have heard a great deal about Vision 2020 – this is three times the proportion (8%) who said the same in June-July 2003. In fact, two in three people (66%) now say they have heard at least a fair amount about the plan, which is twice the number who say they have heard either "not very much" (26%) or "nothing at all" (7%).

As the figures on the right side of the chart below illustrate, awareness of Vision 2020 has increased in every wave of the Panel – the green numbers represent the proportion who have heard a fair amount or a great deal (66%); the red numbers represent the proportion who have heard not very much or nothing at all (33%).

Chart 3: Awareness of Vision 2020

Q I would now like to ask you about Vision 2020. Other than havin g taken part in this survey, how much have you heard about Vision 2020 – a great deal, a fair amount, not very much or had you heard of Vision 20 20 at all before this interview?

Don't know 1%
Had not heard of Vision 2020 at all 7%
Heard a great deal 26%
Not heard very much 26%
Heard a fair amount 40%

Jan-Apr 05 **66/33**
Jul-Aug 04 **62/34**
Dec 03 **50/48**
Jun-Jul 03 **37/57**

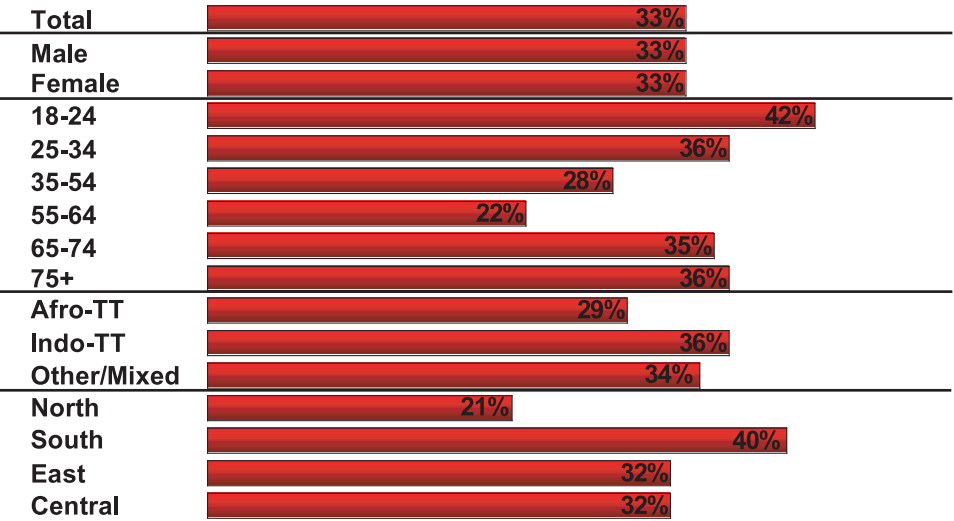Base: 2,426 TT adults, 29 Jan – 1 Apr 2005   Source: MORI

As shown in the following chart, young people and those living in the South of the country feel least informed about Vision 2020. Around two in every five of these groups say they have not heard very much or anything at all about it – this is almost twice the level of unfamiliarity found in North Trinidad.

Differences are less marked in terms of people's ethnicity, but there are clearly more Afro-Trinidadians than other ethnicities who feel informed.

Awareness levels of Vision 2020 also vary by age. Middle aged people are the most likely to know about the scheme, while the youngest and oldest report much lower levels of familiarity.

Chart 4: Least informed about Vision 2020
(% know not very much/not heard of)

Total	33%
Male	33%
Female	33%
18-24	42%
25-34	36%
35-54	28%
55-64	22%
65-74	35%
75+	36%
Afro-TT	29%
Indo-TT	36%
Other/Mixed	34%
North	21%
South	40%
East	32%
Central	32%

Base: 2,426 TT adults, 29 Jan – 1 Apr 2005   Source: MORI

4.2. Confidence that Vision 2020 will be achieved

Only one in every 25 people is *certain* that Trinidad and Tobago will become a fully developed nation by the year 2020. Overall, the public are divided on the *likelihood* of this happening, with 49% saying it is certain to or very/fairly likely, and 46% saying it is certain not to or very/fairly unlikely.

Chart 5: Divided about whether V2020 will be achieved

Q   In fact, Vision 2020 is the Government's commitment to make T&T a fully developed nation by the year 2020. How likely or unlikely do you think it is that Trinidad & Tobago will achieve this by the year 2020?

Don't know 5%
Certain to 4%
Certain not to 7%
Very likely 17%
Very unlikely 22%
Fairly likely 28%
Fairly unlikely 17%

Jan-Apr 05 **49/46**
Jul-Aug 04 **58/35**
Dec 03 **59/33**
Jun-Jul 03 **63/30**
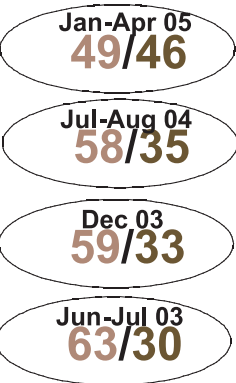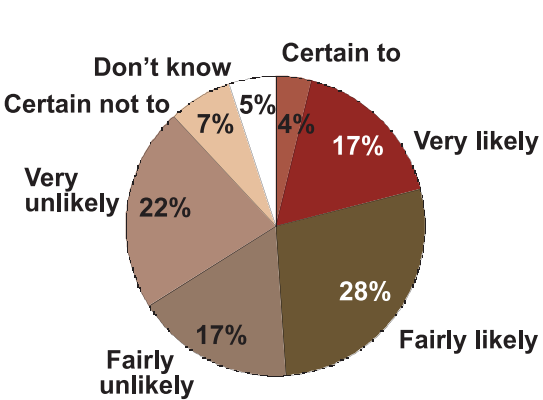
Base: 2,426 TT adults, 29 Jan – 1 Apr 2005   Source: MORI

The data on the right side of chart 5 shows the trends in confidence in Vision 2020 since June-July 2003. In contrast to improving awareness of Vision 2020, the public are losing faith that it will actually be achieved. In June-July 2003, twice as many people were optimistic (63%) than pessimistic (30%) about Vision 2020, giving a "net" score of +33%. The latest data shows, however, a "net" score of just +3%. This equates to a swing of 15% from optimism to pessimism since the middle of 2003.

The following table presents the net optimism scores for some key sub-groups of the population, comparing the results when this question was first asked in Wave 2 of the Panel, with the latest results. This shows that within the overall population there are some marked differences in optimism, although all groups have become more pessimistic over the last couple of years.

Generally, those people who were most optimistic in 2003 have swung more heavily towards pessimism. As such, the swing is highest among older people, those living in the North and those not working.

Currently, the only two groups where there is a sizeable level of optimism is among women (+15% net optimism) and among Afro-Trinidadians (+18% net optimism).

Table 5: Net optimism that Vision 2020 will be achieved

	Wave 2 Jun – July 2003	Wave 5 Feb – March 05	Swing (%)
Total	+33	+3	-15
Male	+28	-10	-19
Female	+37	+15	-11
18-34 years	+32	+5	-13.5
35-54 years	+24	0	-12
55+ years	+49	+2	-23.5
Afro-Trinidadian	+50	+18	-16
Indo-Trinidadian	+17	-10	-13.5
North Trinidad	+48	0	-24
South Trinidad	+37	+1	-18
East Trinidad	+43	+2	-20.5
Central Trinidad	+11	+2	-4.5
Working	+24	0	-12
Not working	+46	+6	-20

Source: MORI

[4] In this report professional/non-manual workers refer to those residents in social grades ABC1. Residents in social grades C2DE are referred to as working class and unemployed/not working. Please see the appendix for further details.

4.3. Why do people think Vision 2020 will not happen?

Participants in the focus group discussions were asked why they felt that Vision 2020 might not be realised, and the answers from this were then used to develop a question for the main survey. The most popular reasons given are shown in chart 6.

About half (47%) of those saying it is unlikely that Vision 2020 will be achieved say the reason for this is that there are no signs of progress so far. This is clearly the key problem facing Vision 2020 at present, as also illustrated by several comments made by focus group participants.

It is not impossible for us to reach developed country status by 2020, but I am not seeing any evidence of steps being made towards it.
Female, 40-50 years, ABC1[4]

Nothing has been done and we are in 2004. I don't see anything being done in the near future.
Male, 25-35 years, DE

We have to make it happen, but at this rate we will not achieve it.
Male, 18-34 years, C1C2

Chart 6: "Why do you think it is unlikely that Trinidad & Tobago will become a fully developed nation by the year 20202?

(47%) No signs of progress so far

(3%) It will cost too much money

(23%) Too much to achieve/too ambitious

(26%) People not ready for it/committed to it

(13%) Not everyone will benefit

(36%) Just "political" talk

Base: 1,103 TT adults who think it unlikely/certain not that V2020 will be achieved (excludes other (14%) and DK (2%))

Source: MORI
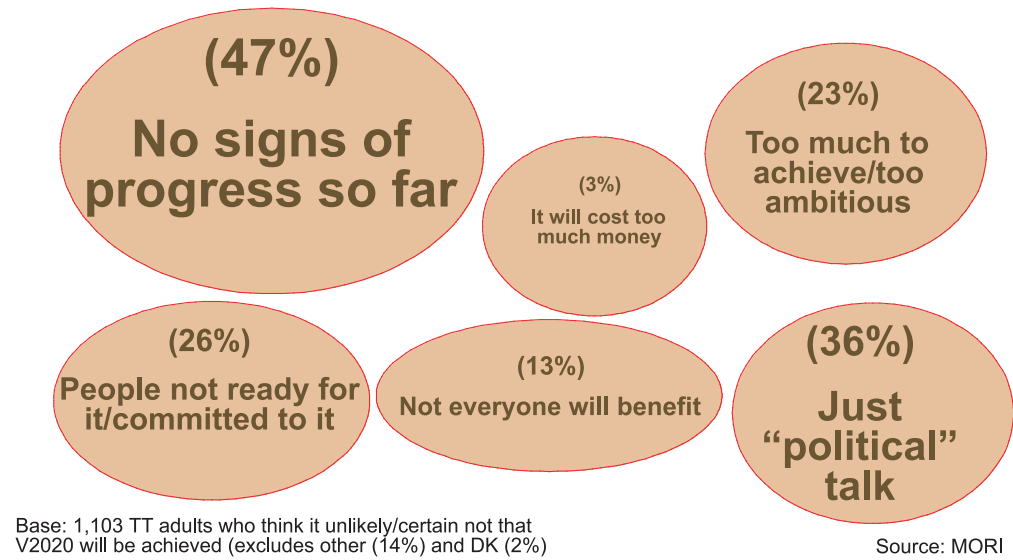
It seems clear that demonstrating how Vision 2020 is being implemented, and showing examples of progress being made, will be important to build confidence that the initiative is going to be successful.

Concern about lack of progress so far is further illustrated when all respondents to the survey were asked for any examples they could think of that showed the country was moving towards becoming a fully developed nation. Over half the public (53%) say that they cannot think of any signs of progress so far.

The top five perceived developments are as follows (albeit mentioned by a small proportion of the public):

- 12%: Improvements in education/building of new schools/higher quality;

- 11%: Improvements in housing;

- 9%:   Roads, ports, transport, sanitation, general infrastructure on the up;

- 6%:   Improvements in health sector; and

- 6%   Technological advance.

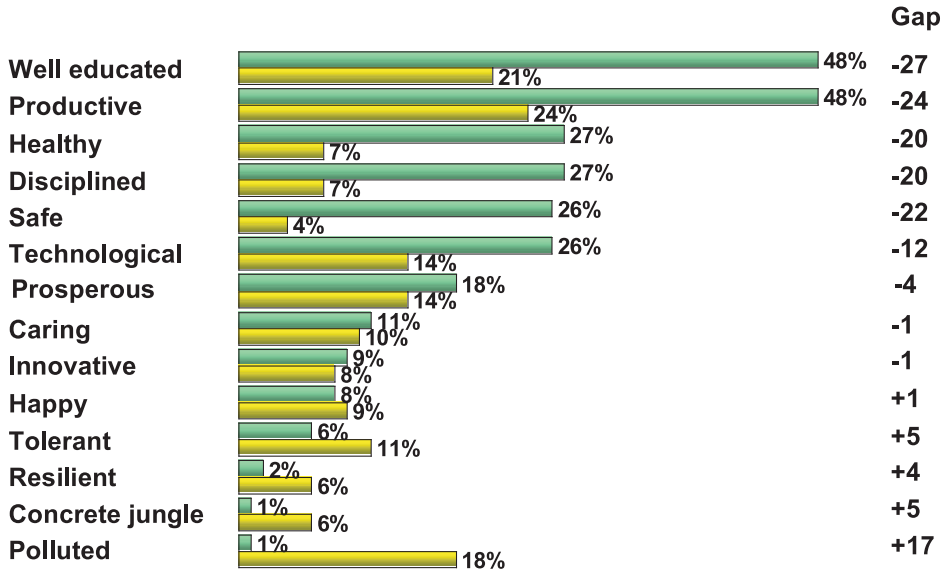## 4.4. The "ideal" developed nation

When shown a list of 14 different attributes, more of the Trinidad and Tobago public select being **well educated** and **productive** (both 48%) as the two key attributes of a fully developed nation than any other. The former term is especially chosen by younger people; the latter is selected by more Afro-Trinidadians than Indo-Trinidadians.

The second tier of attributes, selected by just over one in four people are:

- 27% **healthy** (consistently selected by different sub groups of the population);

- 27% **disciplined** (higher among older people, and less so by Indo-Trinidadians);

- 26% **safe** (though selected much less so by older people); and

- 26% **technological** (again selected much less so by older people, but more often by Indo-Trinidadians than other ethnic groups).

At the same time there is a perception that the country at present is far off from meeting the ideals of a developed country. The green bars in the following chart represent the proportion who say it is one of the most important features, and the yellow bars represent the proportion of the public who say that this word can be applied to the country now.

Chart 7: Most important features of a fully developed nation… vs. perceived actual features now

Attribute		Gap
Well educated	48% / 21%	-27
Productive	48% / 24%	-24
Healthy	27% / 7%	-20
Disciplined	27% / 7%	-20
Safe	26% / 4%	-22
Technological	26% / 14%	-12
Prosperous	18% / 14%	-4
Caring	11% / 10%	-1
Innovative	9% / 8%	-1
Happy	8% / 9%	+1
Tolerant	6% / 11%	+5
Resilient	2% / 6%	+4
Concrete jungle	1% / 6%	+5
Polluted	1% / 18%	+17

Base: 2,426 TT adults, 29 Jan – 1 Apr 2005   Source: MORI

For the most part, fewer people feel that the country can be described in each of the ways above than the number who feel each are important attributes (this is represented by the fact that the gap figures are for the most part negative). Indeed, the gap is widest among those attributes seen as most important.

The main exception to this is "polluted" where there is a 17 point gap between the percentage who say this word accurately reflects the country now than feel it is an important feature of a fully developed nation.

5. Happiness

5.1. The vast majority of people are happy with their lives

Despite the continuing high levels of concern about the crime situation in the nation – and the fact that the majority of the country are dissatisfied with the way the government is running the country – the vast majority of people are either fairly (42%) or very (45%) happy with their lives. These findings are consistent with the results from December 2003.

Chart 8: Happiness

Q   *Overall, how happy or unhappy are your with your life at the mom ent?*

December 2003

Very unhappy
Fairly unhappy
No opinion (*%)
Neither happy nor unhappy
5% 3%
6%
Very happy
41%
45%
Fairly happy

Base: 700 T&T residents, 6 -22 December 2003

Feb – March 2005

Very unhappy
Fairly unhappy
No opinion (*%)
Neither happy nor unhappy
4% 3%
5%
Very happy
45%
42%
Fairly happy

Base: 2,426 TT adults, 29 Jan – 1 Apr 2005
Source: MORI

The high levels of overall happiness scores are repeated across sub groups of the population, as shown in the table below which presents the percentage of different groups who say they are *very* or *fairly* happy with their lives.

Table 6: % who say they are <u>very</u> and <u>fairly</u> happy with their lives

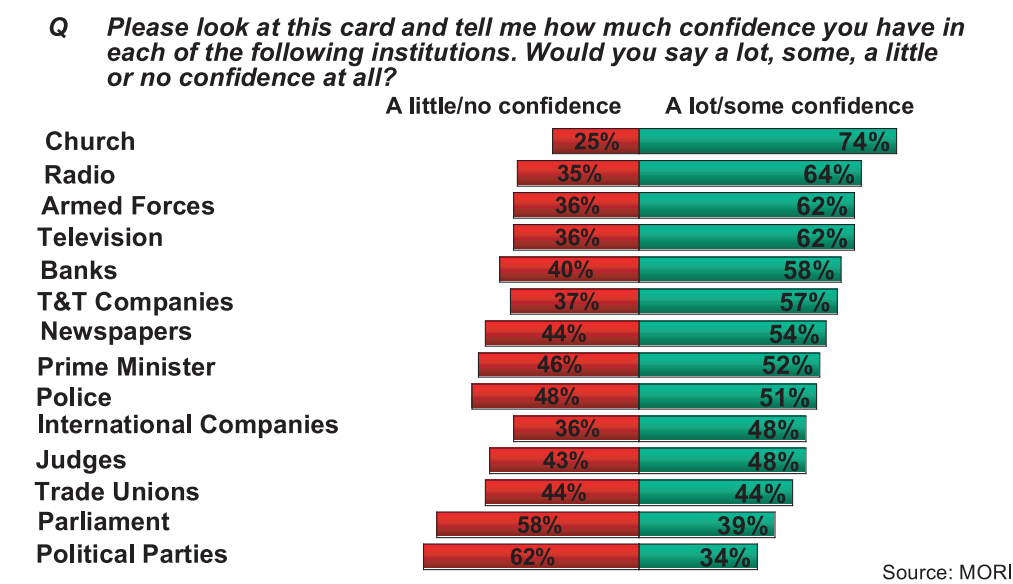|	Very happy	Fairly happy
	%	%
Total	45	42
Male	44	44
Female	46	41
18-24 years	45	45
25-34 years	46	41
35-44 years	42	47
45-54 years	47	40
55+ years	47	37
ABC1[5]	45	44
C2DE	45	42
Afro-Trinidadians	43	43
Indo-Trinidadians	46	41
North Trinidad	47	40
South Trinidad	41	44
East Trinidad	46	42
Central Trinidad	47	41

Source: MORI

[5] In this report professional/non-manual workers refer to those residents in social grades ABC1. Residents in social grades C2DE are referred to as working class and unemployed/not working. Please see the appendix for further details.

6. Confidence in institutions

6.1. More people have confidence in the church than any other institution

More people have confidence in the church than any other institution covered in the survey. Of the 14 institutions asked about, at least half the population have some or a lot of confidence in nine of them, including 52% who have confidence in the Prime Minister and 74% who have confidence in the church. Political parties are rated the lowest.

Chart 9: Confidence

Q *Please look at this card and tell me how much confidence you have in each of the following institutions. Would you say a lot, some, a little or no confidence at all?*

	A little/no confidence	A lot/some confidence
Church	25%	74%
Radio	35%	64%
Armed Forces	36%	62%
Television	36%	62%
Banks	40%	58%
T&T Companies	37%	57%
Newspapers	44%	54%
Prime Minister	46%	52%
Police	48%	51%
International Companies	36%	48%
Judges	43%	48%
Trade Unions	44%	44%
Parliament	58%	39%
Political Parties	62%	34%

Source: MORI

The pattern of responses reveals some key themes:

- More people have confidence in the **armed forces** (62%) than do in the **police** (51%). This is similar to previous Opinion Leaders' findings on trust where the military were also better regarded than the police;

- The **media** are generally positively regarded, particularly radio (64%) and television (62%). Again, this is consistent with previous findings on trust in different institutions. Journalists and newspapers tend to be better regarded in this country than MORI typically finds in Great Britain;

- Local **businesses** fare better than international businesses, although there is a higher level of "don't knows" among the latter; and

- **Political institutions** record the lowest levels of confidence, with trade unions (44%), Parliament (39%) and political parties (34%) coming in at the bottom. The Prime Minister is the only political "institution" where at least half the public express at least some confidence. These findings are not unique to Trinidad and Tobago. Many social surveys across the world find that the public are turned off by institutions they regard as acting primarily in the interest of the political party rather than the public good.

When taking just the proportion of these who have a lot of confidence in each, the key differences by the main sub-groups are as follows:

- **Gender:** More men than women express a lot of confidence in four institutions – banks, international companies, trade unions and Trinidad and Tobago companies. Only for the Church are there more women than men saying they have a lot of confidence in it;

- **Age:** Confidence in most institutions increases as people get older. The exceptions are different medias, trade unions and companies (local international) where younger people are no less likely to express a lot of confidence in them, and in some cases more likely to say they have a lot of confidence; and

- **Ethnicity:** There is a mixed pattern here. More Indo-Trinidadians than Afro-Trinidadians express a lot of confidence in the church, local and international companies, judges, newspapers and the police. Reflecting the political situation in the country, more Afro- than Indo-Trinidadians express a lot of confidence in Parliament and especially the Prime Minister.
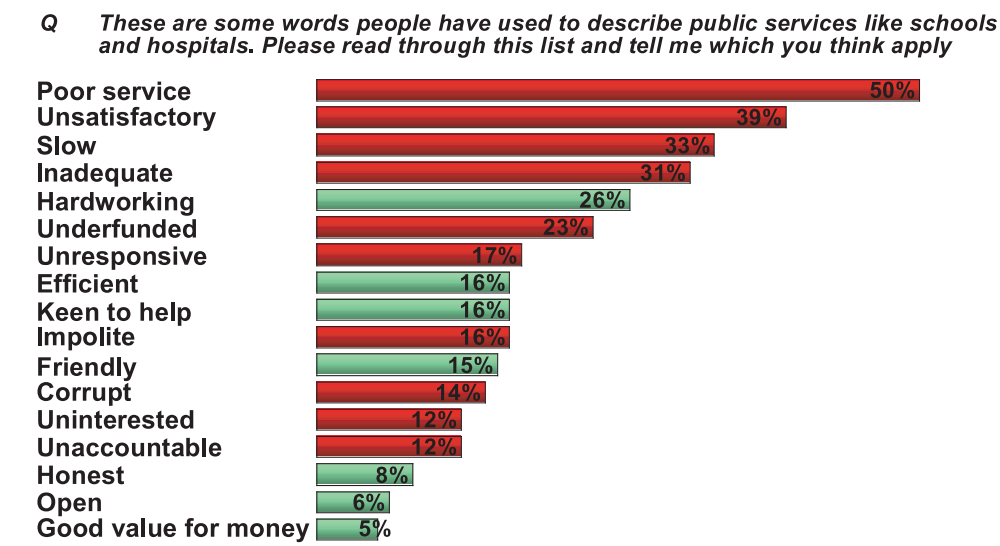
7. Public Services

7.1. Half say public services provide a poor service

The image of public services is at best mixed, though the top attributes associated with it are negative. In particular, half the public say that it provides a **poor service** and four in ten (39%) say that it is **unsatisfactory**.

The highest placed positive attribute is **hardworking** which is in fifth place (selected by 26% of people), but the three least selected attributes are positive, with few people seeing the public service as **honest** (9%), **open** (6%) or providing **good value for money** (5%).

Chart 10: Image of the public services

Q   These are some words people have used to describe public services like schools and hospitals. Please read through this list and tell me which you think apply

Attribute	%
Poor service	50%
Unsatisfactory	39%
Slow	33%
Inadequate	31%
Hardworking	26%
Underfunded	23%
Unresponsive	17%
Efficient	16%
Keen to help	16%
Impolite	16%
Friendly	15%
Corrupt	14%
Uninterested	12%
Unaccountable	12%
Honest	8%
Open	6%
Good value for money	5%

Base: 2,426 TT adults, 29 Jan – 1 Apr 2005   Source: MORI

The words chosen to describe public services vary slightly between sub-groups of the population. Considering the highest placed positive attribute chosen to describe public services, hardworking, those in the South and Central areas are most likely to choose this attribute (33% and 29% respectively), in comparison to only 18% in the North. Further, older residents are more likely than middle aged residents to think that the public services are hardworking (30% of those 55 and over, compared to 24% of those aged 35-54).

People living in the Central area are most likely to say "poor service" (54%), while those in the South and the East are less likely to (48% each). Similarly, "slow" is more likely to be chosen by those in the Central area (42%), and is also more frequently chosen by younger residents (35% of those aged 18-34, compared to 25% of those 55 and over). "Unsatisfactory" is less likely be chosen by older residents (33% of those 55 and over, compared to 39% of those 18-34), and is more likely to be chosen by those in the higher social grades (43% ABC1[6] residents, compared to 36% of those in classes C2DE).

Of course, within the sphere of the "public service" different services have substantially different image profiles, as shown with the negative image of the police (see page 28) compared with the positive image of teachers (see page 45).

The image of the public services was also gauged in Wave 1. The following table details how perceptions have changed over time. While the public are more likely to think of public services as more hardworking than they were in 2002, they are also less likely to see them as open, efficient and friendly. The most significant change between these periods however has been a sharp increase in the proportions choosing various negative attributes to describe public services. Most notably, there have been large increases in the proportions of people who see public services as providing poor service, as being unsatisfactory, and as being inadequate.

Table 7: Image of the public services over time

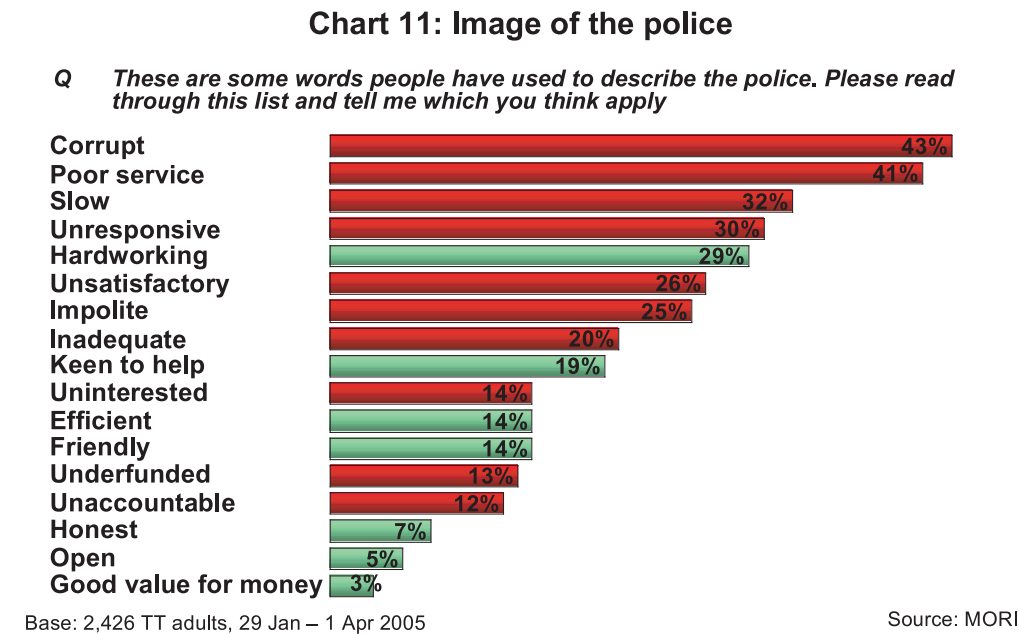|	Wave 1	Wave 5	Change
	%	%	%
Positive Attributes			
Hardworking	17	26	+9
Good value for money	3	5	+2
Honest	9	8	-1
Keen to help	18	16	-2
Open	12	6	-6
Efficient	23	16	-7
Friendly	22	15	-7
Negative Attributes			
Poor service	27	50	+23
Unsatisfactory	20	39	+19
Inadequate	18	31	+13
Under-funded	16	23	+7
Slow	27	33	+6
Unaccountable	6	12	+6
Unresponsive	12	17	+5
Impolite	14	16	+2
Corrupt	11	14	+3
Uninterested	12	12	0

Source: MORI

[6] In this report professional/non-manual workers refer to those residents in social grades ABC1. Residents in social grades C2DE are referred to as working class and unemployed/not working. Please see the appendix for further details.

8. Police and Crime

8.1. Image of the police

The image of the police continues to be predominantly poor, with the top four attributes that people select to describe them being negative. Similar to the image of the public services generally, **poor service** is chosen by many people (41%), though the most common way to describe the police is to say they are **corrupt** (43%).

The highest positive attribute is **hardworking** (selected by 29% of people), but (as with public services generally) but the positive attributes are selected by only a few people, and the three lowest ones on the list are all positive – **honest** (7%), **open** (5%) and **good value for money** (3%).

Chart 11: Image of the police

Q *These are some words people have used to describe the police. Please read through this list and tell me which you think apply*

Corrupt	43%
Poor service	41%
Slow	32%
Unresponsive	30%
Hardworking	29%
Unsatisfactory	26%
Impolite	25%
Inadequate	20%
Keen to help	19%
Uninterested	14%
Efficient	14%
Friendly	14%
Underfunded	13%
Unaccountable	12%
Honest	7%
Open	5%
Good value for money	3%

Base: 2,426 TT adults, 29 Jan – 1 Apr 2005   Source: MORI

The image of the police as **corrupt** is more prevalent among men than among women (47% vs. 39%), younger than older people (50% of those aged 18-34 vs. 31% of those 55 and over), and those in higher social classes (46% of ABC1s[7] vs. 41% of C2DEs). Also, geographically those in the North are most likely to see the police as corrupt (49% vs. 41% in the South).

Taking the image of the police as a whole, there is a general trend that men and younger people are more critical of the police than other groups. For instance, 43% of men describe the police as providing a poor service, compared with 39% of women who say this. Similarly, 46% of 18-34 year olds say the same, compared with just three in ten (31%) over 55s.

There is little variation in the image of the police in terms of people's ethnic origin.

[7] In this report professional/non-manual workers refer to those residents in social grades ABC1. Residents in social grades C2DE are referred to as working class and unemployed/not working. Please see the appendix for further details.

The same image question was asked in the December 2003 Opinion Leaders' Panel. There have been some changes in the image of the police since then. Encouragingly, *fewer* people say the police are:
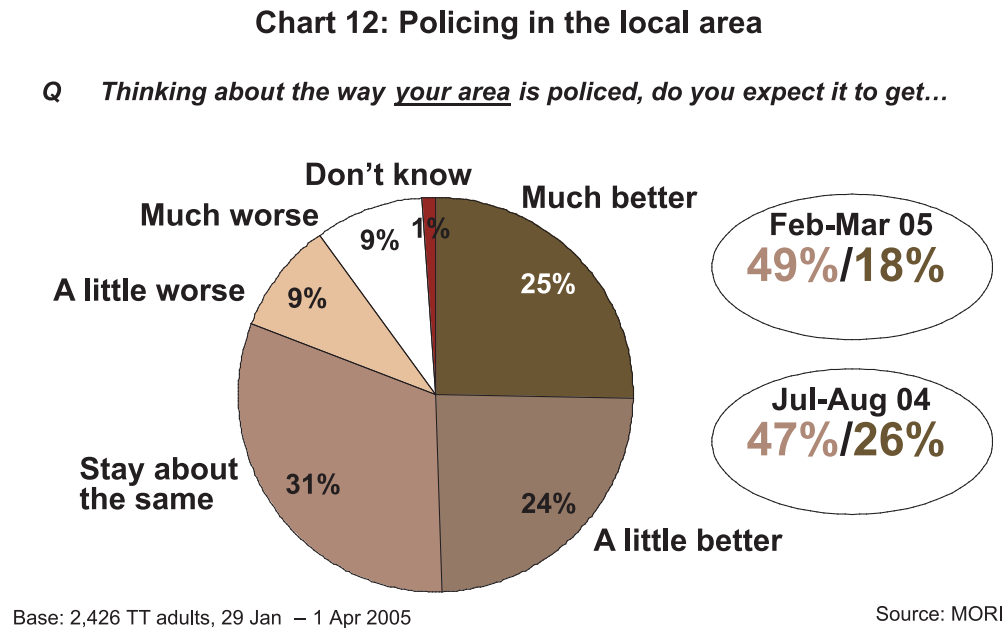
- **inadequate** (down 9 percentage points);
- **uninterested** (down 8 percentage points);
- **under funded** (down 10 percentage points); and
- **unaccountable** (down 6 percentage points).

Perhaps this reflects public perception that the government is starting to reform the police service, particularly in terms of investment and levels of customer service? However, the number of people who believe the police are **corrupt** has actually increased by 7 points since December 2003.

8.2. Policing: local vs. national

One of the key findings from Wave 4 of the Panel was that far more people felt the country was unsafe than those who felt unsafe in their local area. Indeed, on balance more people felt safe than unsafe in their local area (+17%), whereas people overwhelmingly felt the country generally was unsafe (-75%).

In this wave we have sought to explore whether *expectations* about policing are also different locally and nationally. As shown in chart 12 below, about half the population (49%) believe that the way their own area is policed will get better over the next few years – one in four expects it to get *much* better. At the same time, one in five (18%) is concerned that policing locally will deteriorate.

Chart 12: Policing in the local area

Q *Thinking about the way your area is policed, do you expect it to get…*

Don't know 1%
Much better 25%
Much worse 9%
A little worse 9%
Stay about the same 31%
A little better 24%

Feb-Mar 05 **49%/18%**

Jul-Aug 04 **47%/26%**

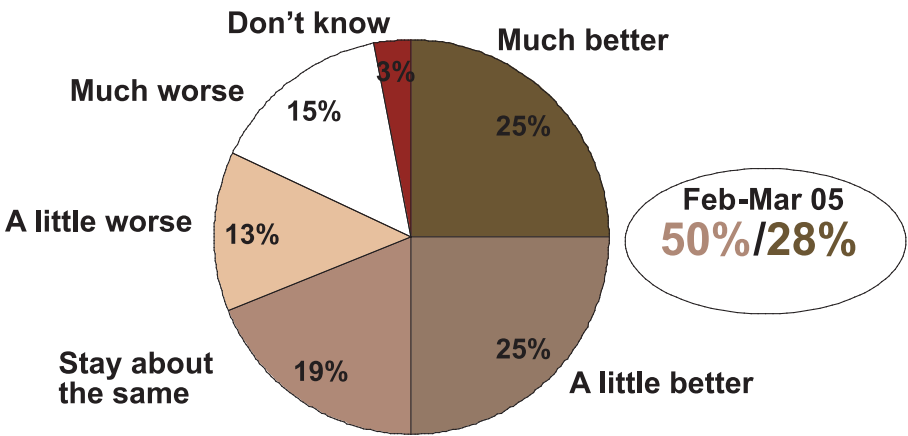Base: 2,426 TT adults, 29 Jan – 1 Apr 2005   Source: MORI

Among the most optimistic are older people. Almost three in five (57%) of those aged 55 and over think policing in their area will get better, compared to 46% of those aged 18-34. Women express slightly more optimism than men: over half (53%) are optimistic, compared to 47% of males. Those in lower social classes also have slightly more positive opinions about the quality of future policing: 46% of those in classes C2DE feel policing will get better, compared to 52% in ABC1s.

However, there is little variation geographically on this matter.

When compared to expectations about how the country on the whole is policed, again half of the people are optimistic that things will get better. In line with the pattern of opinion concerning local policing, it is older residents and women who are among the most optimistic groups. Almost three in five (58%) of those aged 55 and over feel policing will improve nationally, compared to 45% of those aged 18-34. Over half of women (54%) feel policing will improve nationally, compared to less than half of men (47%).

Chart 13: Policing in the country

Q *Thinking about the way <u>the country</u> is policed, do you expect it to get…*

Base: 2,426 TT adults, 29 Jan − 1 Apr 2005   Source: MORI

In contrast to opinion on local policing, there is little difference between social classes on their views on whether policing will improve nationally (49% of ABC1s say better, compared to 51% of C2DEs).

There are also more geographical differences, as shown in the table below.

Table 8: Net expectations for policing in local area and country generally, by region

	Local area	Country generally
		%
	%	%
Total	+32	+22
North Trinidad	+37	+29
South Trinidad	+30	+17
East Trinidad	+31	+19
Central Trinidad	+30	+27

Source: MORI

It is worth highlighting that there are many more people who think that policing will get worse nationally (29%) than who think it will get worse locally (18%) over time. Further, more people think that the quality of policing will "stay about the same" in their local area (31%) than nationally (19%).

This difference may be explained by people naturally feeling safer in their local area and therefore fewer people feeling pessimistic about what will happen locally than nationally. It may also reflect what people hear in the media, with more negative stories about crimes and the (deteriorating) crime situation being reported nationally, or at least not in their own local area.

8.3. Experience of crime, environmental problems and anti-social behaviour

The table on the following page shows the proportion of the public who say that they have personally experienced a range of different crimes, environmental problems and anti-social behaviours in the past 12 months. Comparisons with the results of the same question asked in December 2003 are also presented.

The first interpretation of these results is that over half the public (53%) say they have *not* experienced or been victims of any of these crimes or problems, and 47% saying they have experienced at least one of them. Overall, more people now say they have *not* experienced one or more of the crimes or problems than said the same in December 2003 (a 9 point difference).

There are no items on the list for which more people now say they have experienced than in December 2003, and for virtually all the others, there are fewer people now reporting the experience. However, the differences are small and within the statistical margin of error for the surveys with the exception of litter/dog mess in the street where there has been a six point drop between the two surveys.

Analysis of the latest results show that there are some significant differences between sub groups of the public when looking at overall experience of crimes or problems:

- **Women** are more likely than **men** to say they have experienced at least one of these crimes or problems (52% versus 43%);

- **Younger people** are also more likely to have experienced at least one of them (51% of those aged 18-34, compared to 36% of those 55 and over);

- More of those in **social classes** ABC1 (52%) say they have been a victim than those in social classes C2DE (44%); and

- **Geographically**, those in the Central and Eastern areas are most likely to have experienced at least one of the crimes or problems (52% and 48% respectively), while those in the North and South are less likely to have had such experiences (42% and 43% respectively).

Table 9: Experience of crime, environmental problems and anti-social behaviour

Q. Which, if any, of these crimes have you personally been a victim of in the past 12 months?

	Wave 3 (Dec 03) %	Wave 5 (Feb-Mar 05) %
Poor street lighting (e)	19	16
Litter/dog mess in the street (e)	19	13
Noise from neighbours (a)	13	11
People hanging around in the streets/groups (a)	12	10
Disturbances from teenagers or youths (a)	11	8
Drunkenness in the street (a)	9	7
Abuse from neighbours (a)	6	6
Drug abuse or drug dealing (c)	5	6
Burglaries/house-breaking (c)	7	5
Attacks or threats in your own home (c)	4	4
Lack of personal safety on public transport (c)	5	4
Mugging and theft (c)	5	3
Vandalism/property abuse/graffiti (e)	2	2
Poor housing conditions (e)	4	2
Racist attacks or harassment (a)	3	2
Theft from/damage to parked cars (c)	4	2
Kidnapping (c)	1	1
Sexual attacks or harassment (c)	2	1
Arson (c)	1	*
Prostitution (c)	*	*
Other	2	1
None of these	44	53
Don't know	*	*

Note: (a) = anti-social behaviour problem; (c) = crime; (e) = environmental problem

Source: MORI

To help differentiate among different types of problems asked about in the survey, each one has been classified as either a crime, environmental problem or anti-social behaviour issue. This shows that the top two problems that people say they experience are environmental, being **poor street lighting** (16%) and **litter/dog mess in the street** (13%). These problems are more widely reported in the Central and Eastern areas than in other parts of the country. Experience of poor street lighting is reported by one in five (20%) in the Central area, and a similar proportion in the Eastern area (18%), compared to half this proportion for the North and South areas.

The experience of litter/dog mess in the streets exhibits less geographical variation, with 15% and 14% experiencing it in the East and Central areas respectively, compared to 10% and 12% in the North and South areas, respectively.

Experience of anti-social behaviour in the form of **noise from neighbours** (11%), **people hanging around in streets/groups** (10%) and **disturbances from teenagers or youths** (8%) also seem to be a problem for a significant minority of the public. Noise from neighbours is reported more frequently by women (15%) than men (8%), as is **people hanging around in the streets** (12% versus 8% respectively). These issues do not show large geographic variations.

The vast majority of people say they have not experienced any specific crime in the past 12 months – **drug abuse or drug dealing** (6%) is the highest mentioned crime. Again, this problem is reported more widely by women (7%) than men (4%), and geographically is reported most often in the Central area (8%, versus 4% in the North and South). In no sub-group, however, do more than on in ten residents report this experience.

8.4. Non-reporting of crime and anti-social behaviour

All those people who say they had experienced individual crimes or problems were asked whether they had <u>not</u> reported it to the police.

These findings suggest that there are substantial levels of under-reporting of different crimes, anti-social behaviours and environmental problems. The highest levels of under-reporting are for environmental problems, which we may expect few people to report these to the police – although of course the fact that on average 71% of all environmental problems go unreported to the police could be significant. If these are issues that affect people's quality of life, in particular how safe they feel in their neighbourhoods, then it will be important for the government to provide the public with an opportunity to complain and get something done about it (either through the police or some other body).

The high levels of under-reporting are not exclusive to environmental problems. More than two in three people who say they have experienced anti-social behaviour and almost half of those who have experienced a crime in the past 12 months say that they did not report these to the police. These include some serious crimes such as:

- **drug dealing** (65% of incidents were not reported);
- **theft from cars** (51% not reported);
- **muggings** (44% not reported); and
- **house burglaries** (22% not reported).

The qualitative discussions suggests that the image of the police is one of the key reasons for these high levels of non-reporting. While group participants agreed that they felt people *should* report crimes to the police, they acknowledge that they *would not* necessarily do this, even for the most serious of crimes. Some focus group participants argued that there is no point in reporting crimes to the police, because the police are either not around to do anything about it or would not be able to do anything about it after the event.

> *It doesn't make sense to contact the police since they do nothing about it.*
> Female, 18-34 years, C1C2

Others argued that the police are so corrupt that they are essentially part of the crime problem, not the crime solution. In this sense, some were fearful that reporting crimes to the police would make them vulnerable in the future because their anonymity would not be protected. It is worth noting this was also a concern expressed by the Crime Stoppers Initiative covered in Wave 3 of the Panel.

> *In Diego Martin they firebomb your home when they find out you reported the issues.*
> Male, 40-50 years, ABC1

Table 10: Non-reporting of crime, environmental problems and anti-social behaviour

Q. And which, if any, did you not report to the police?

Base: All who had experienced each crime, anti-social behaviour or environmental problem	Base size	% not reported to the police %
Litter/dog mess in the street	333	78
Drunkenness in the street	164	72
Disturbances from teenagers or youths	211	66
Poor street lighting	395	65
Drug abuse or drug dealing	140	65
Lack of personal safety on public transport	106	64
Noise from neighbours	293	63
People hanging around in streets/groups	244	63
Theft from/damage to parked cars	53	51
Abuse from neighbours	138	50
Mugging and theft	78	44
Burglaries/house-breakings	114	22
Any	1,139	69
Any crime	509	48
Any anti-social behaviour	657	67
Any environmental problem	641	71

*NB: Please note that only those crime, anti-social behaviour or environmental problems where more than 50 respondents had had experience of them are shown above.
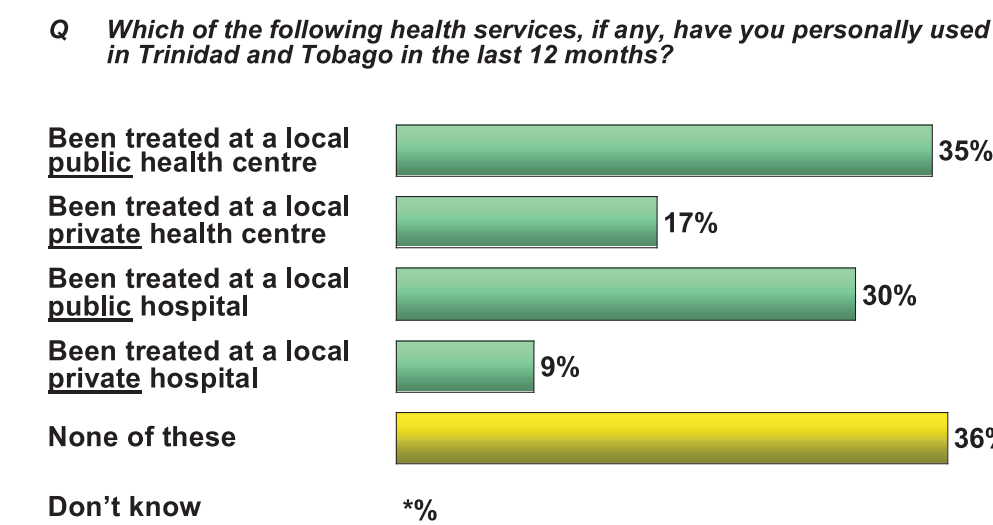
Source: MORI

9. Health

9.1. Experience of different health services

Previous waves of the Opinion Leaders' Panel have sought to measure satisfaction with hospitals and health centres in Trinidad and Tobago. As has been illustrated before, hospitals in particular are often regarded as one of the poorest public services in terms of both general public and user satisfaction.

In Wave 5 the research sought to explore any differences in terms of use and satisfaction of public and private health services. The following chart shows the proportion of the public who say they have used either public or private health centres and/or hospitals in the last 12 months or so. Overall, 63% of the public have accessed some sort of health facility in the past twelve months.

Chart 14: Experience of different health services

Q   *Which of the following health services, if any, have you personally used in Trinidad and Tobago in the last 12 months?*

Been treated at a local <u>public</u> health centre	35%
Been treated at a local <u>private</u> health centre	17%
Been treated at a local <u>public</u> hospital	30%
Been treated at a local <u>private</u> hospital	9%
None of these	36%
Don't know	*%

Base: 2,426 TT adults, 29 Jan – 1 Apr 2005   Source: MORI

Public health facilities are used more often than private ones, with twice as many people having been treated at a public health centre than a private health centre (35% to 17%) and three times as many having been treated at a public than a private hospital (30% to 9%).

Use of health services, whether they are private or public, varies in different parts of the country. People living in the Central area are most likely to have used some sort of health services in the past 12 months (72% have), and over half have been treated at a public health centre, compared with one in three (35%) for the country as a whole. Use of private facilities – hospitals and health centres – also tends to be higher in the Central area (and to a lesser extent the East) than elsewhere in the country.

People living in the North are least likely to have used any health facility – just 54% say they have in the past year.

Table 11: Use of different health facilities in past 12 months

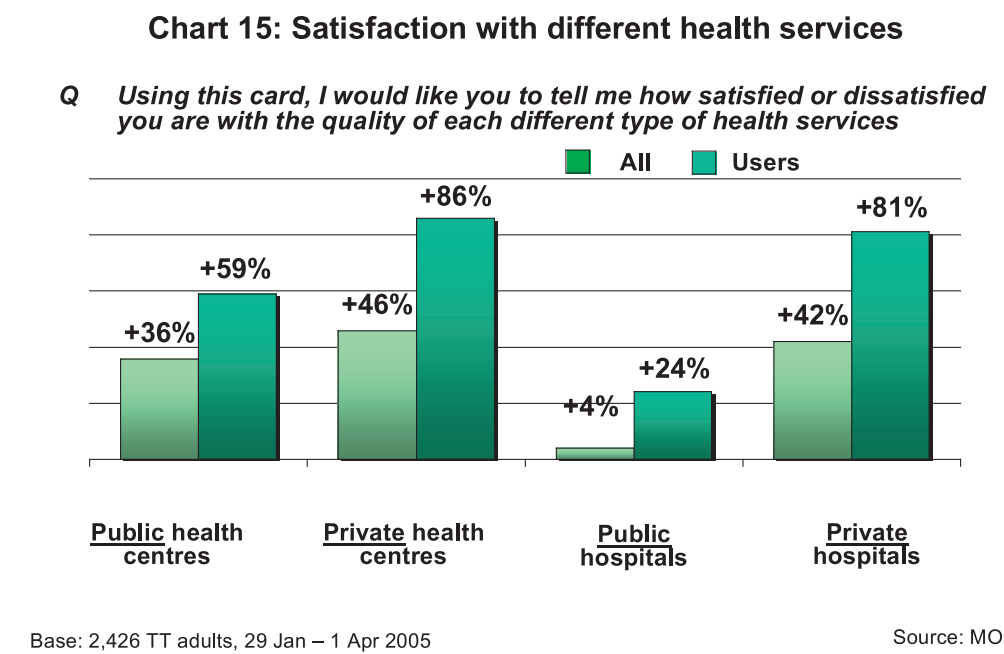|	Public health centre	Private health centre	Public hospital	Private hospital
	%	%	%	%
Total	35	17	30	9
Male	27	15	25	9
Female	43	18	35	10
18-24 years	33	19	29	7
25-34 years	37	21	34	9
35-44 years	32	15	29	10
45-54 years	35	12	27	10
55+ years	39	15	30	10
ABC1[8]	29	20	25	12
C2DE	39	15	33	7
Afro-Trinidadians	35	13	33	9
Indo-Trinidadians	37	18	28	10
North Trinidad	32	12	27	5
South Trinidad	30	12	30	9
East Trinidad	34	18	33	9
Central Trinidad	52	25	23	11

29 Jan – 1 Apr 2005
Source: MORI

While similar proportions of men and women have used private health centres and private hospitals, women are substantially more likely to have used the public facilities – both health centres (43% of women versus 27% of men) and hospitals (35% versus 25%).

As such, gender is the biggest discriminator in terms of use of health facilities in the country. There are other differences across sub-groups, such as older people and those in lower social classes also tend to rely on public provision, but these differences are not as strong as between men and women.

[8] In this report professional/non-manual workers refer to those residents in social grades ABC1. Residents in social grades C2DE are referred to as working class and unemployed/not working. Please see the appendix for further details.

9.2. Satisfaction with different health services

The following chart shows the level of net satisfaction with different health services, both among the general public and users. Net satisfaction is derived by subtracting the percentage who are dissatisfied from the percentage who are satisfied with each service. The light green bars illustrate the views of the general public ("all") and the dark green bars, the views of just those people who have accessed each service in the past 12 months ("users").

Chart 15: Satisfaction with different health services

Q Using this card, I would like you to tell me how satisfied or dissatisfied you are with the quality of each different type of health services

Base: 2,426 TT adults, 29 Jan – 1 Apr 2005   Source: MORI

Private health centres and hospitals are better regarded than public health services among the general public (light green bars), despite the fact that over a third of the public do not give an opinion about the private facilities. This is to be expected given that most people do not have any direct experience or do not fund (though their taxes) private provision.

Overall, more of the public are satisfied than dissatisfied with public health centres (+36% net satisfied) and hospitals (+4%). However, within this there are quite sizeable groups of the public who are dissatisfied – particularly the 24% who say they are *very* dissatisfied with public hospitals.

Satisfaction levels vary across the country and between sub groups of the population, and this may partly be explained by users of services tending to have higher levels of satisfaction than non-users (see below). As such, net satisfaction levels with public health centres and hospitals are higher among women than men (+41% versus +31% for public health centres; +7% versus +1% for public hospitals). People living in the South and Central areas are also more satisfied with public health centres: (+42% and +39%, respectively), while those in the North are less satisfied on balance (+25% net satisfied).

When comparing users of individual services (dark green bars) against the population as a whole (light green bars), the most significant finding is that users are more satisfied with each of the services than the general public – for instance net satisfaction rises from +36% among the public to +59% among users for public health centres. To some extent this is a positive finding, which may well reflect that the experience of health services is somewhat better than their image. However, this applies much more to private facilities than public ones, as the difference in ratings for private institutions is much greater than the difference for public services.
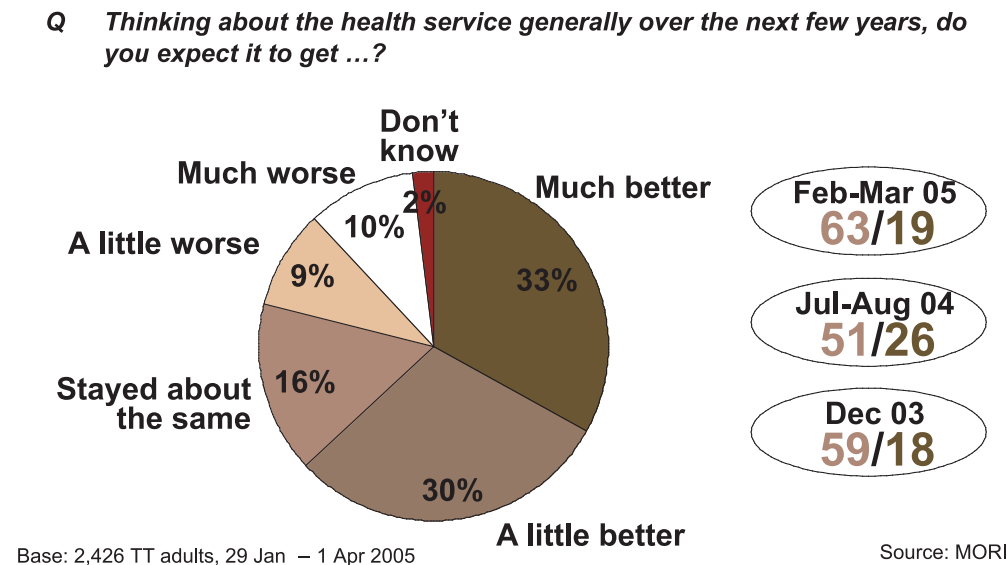
In addition, well over half of users of private health centres (55%) and private hospitals (58%) are *very* satisfied with the quality of service provided. In contrast, only one in three users of public health centres and one in four users of public hospitals are *very* satisfied.

It is also worth noting that even among users of public hospitals there remains a significant proportion (23%) who say they are *very* dissatisfied – this is six times as many who are very dissatisfied with private hospitals (4%).

The qualitative research explored the reasons why users rate public and private provision differently. Among those focus group participants who have had experience of both, private was primarily seen to be better than public because of the quality of care and reliability offered. However, participants also noted that these were only part of the difference: superior environments (e.g. air conditioned rooms) and a greater focus on customer services were also regarded as positive features of private sector facilities lacking elsewhere.

9.4. Expectations for the future

Three times as many people (63%) believe that the state of the health service will get better over the next few years than believe it will get worse (19%). One in three people (33%) expect it to get *much* better. This gives a "net better" score of +44%.

Chart 17: Optimism for health service in the future

Q   *Thinking about the health service generally over the next few years, do you expect it to get …?*

Base: 2,426 TT adults, 29 Jan – 1 Apr 2005   Source: MORI

As shown on the right side of the above chart, this is the highest level of optimism recorded so far in each of the three Panel waves when the question was asked. In December 2003, the "net better" score was +41% (59% minus 18%), which slipped to +25% (51% minus 26%) in July-August 2004.

Women are somewhat more positive than men, with 66% of them thinking the health services will get much better compared with 60% of men. Optimism also varies by ethnicity with Afro-Trinidadians being more positive (66% say it will get better) than Indo-Trinidadians (60%). Differences by age are more complicated, with middle aged people being least positive, as shown in the following table.

Table 12: Expectations about the future of the health service

	Better	Worse	Don't know
	%	%	%
Total	63	19	2
Male	60	20	2
Female	66	18	1
18-24 years	64	18	1
25-34 years	61	23	1
35-44 years	57	20	2
45-54 years	65	18	1
55+ years	69	15	3
ABC1	61	19	1
C2DE	64	19	2
Afro-Trinidadians	66	16	2
Indo-Trinidadians	60	21	1
North Trinidad	60	16	3
South Trinidad	64	19	1
East Trinidad	63	22	1
Central Trinidad	64	17	2

Source: MORI

The increasing optimism about the future of the health service is a positive finding as it could reflect public recognition and approval of changes taking place. At least a few of the participants in the focus groups said they had started to notice some improvements:

> *The measures that were described in the budget seem to be showing us that there will be an improvement.*
>
> Male, 18-34 years, C1C2

However, several other focus group participants suggested that their current levels of optimism were largely based on the sense that things could not get any worse rather than seeing any concrete signs of improvement.

> *I think it will get better because this is the only way for it to go. It's so bad already that it can get no worse.*
>
> Male, 40-50 years, ABC1

Further, increased optimism among the public will also mean that public expectations rise – if they are told by the government that things are getting better and believe promises of improvements, they will verify this by what they experience, hear or see in the media, or by what employees in the service tell them. Increased experiences therefore create a greater demand for service improvements, and if these are not thought to be delivered then dissatisfaction with health services could increase (even if object assessments of the quality of health provision do not deteriorate).
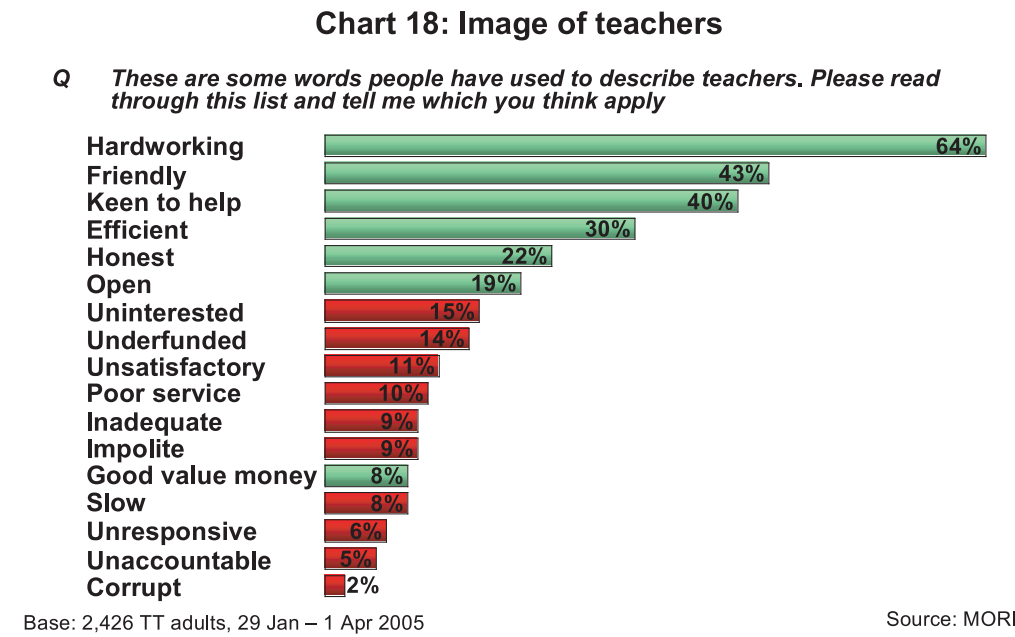
10. Education

10.1. Image of teachers

On the whole, teachers in Trinidad and Tobago have a very positive image, especially when compared to the police or to public services generally. As the chart below illustrates, the top six attributes people select to describe teachers are all positive.

The most popular way to describe teachers is to say that they are **hardworking,** with almost two in every three people (64%) using this term. A further two in five people would describe teachers as **friendly** (43%) and **keen to help** (40%).

Being seen as **under-funded** and **uninterested** are the two most commonly held negative associations about teachers – but these impressions are held by just around one in six people. In contrast to the image of the police, very few people think that teachers are **corrupt** – only two in every 100 people select this as an adjective to describe them (compared with more than four in every 10 people who say the same about the police).

Chart 18: Image of teachers

Q *These are some words people have used to describe teachers. Please read through this list and tell me which you think apply*

Attribute	%
Hardworking	64%
Friendly	43%
Keen to help	40%
Efficient	30%
Honest	22%
Open	19%
Uninterested	15%
Underfunded	14%
Unsatisfactory	11%
Poor service	10%
Inadequate	9%
Impolite	9%
Good value money	8%
Slow	8%
Unresponsive	6%
Unaccountable	5%
Corrupt	2%

Base: 2,426 TT adults, 29 Jan – 1 Apr 2005   Source: MORI

There is not a great deal of variation among sub-groups of the public in terms of the image of teachers. The key differences are:

- More **men** than **women** select under-funded (17% vs. 12%), but fewer say they are hardworking (61% vs. 67%) or impolite (8% vs. 11%);

- There are some differences by **age:** generally older people are less likely to select any of the attributes at all, particularly the positive ones – though this is probably explained by the fact that fewer in this age group have any direct contact with teachers or schools. The exception to this is with poor service, which is selected by more older people than younger people, especially the 60-64 year old age group (15% of these describe teachers as providing a poor service – double the proportion of 18-34s who say the same thing);

- On the whole, Indo-Trinidadians have a more positive image of teachers than do people from other **ethnic groups**. For example, exactly half of Indo-Trinidadians say that teachers are friendly (compared with 37% of Afro-Trinidadians saying this) and 68% would describe teachers as hardworking (compared with 62% among Afro-Trinidadians). Conversely, more Afro-Trinidadians believe teachers are under-funded (17%) than do people in other ethnic groups.
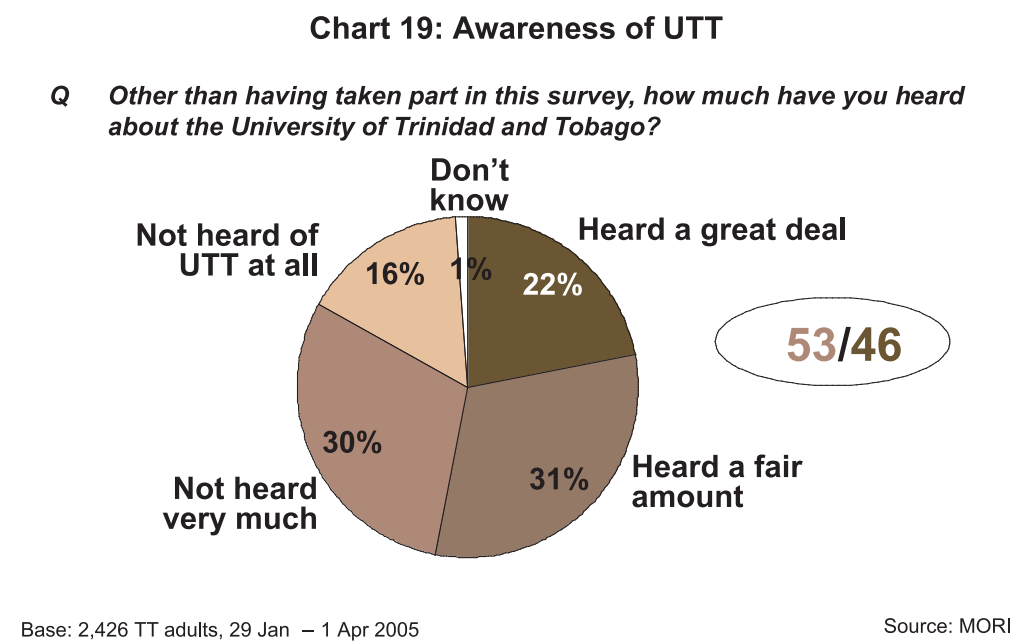
Despite their continuing positive image, on some aspects teachers are viewed less favourably than when the same question was asked in December 2003 (Wave 3). The following attributes were selected by fewer people this time:

- **Efficient** (from 38% in December 2003 to 30% now);

- **Honest** (from 30% to 22%);

- **Open** (from 26% to 19%); and

- **Good value for money** (from 19% to 8%).

Only one attribute, hardworking, was selected by more people in this survey than in December 2003 (64% compared with 59% then).

10.2. Awareness of the University of Trinidad and Tobago

A little over half the public (53%) say they have heard at least a fair amount about the University of Trinidad and Tobago, with one in five (22%) saying they have heard a great deal. Given the early stages of development for the University these are very encouraging findings.

Chart 19: Awareness of UTT

Q *Other than having taken part in this survey, how much have you heard about the University of Trinidad and Tobago?*

- Don't know: 1%
- Heard a great deal: 22%
- Heard a fair amount: 31%
- Not heard very much: 30%
- Not heard of UTT at all: 16%

53/46

Base: 2,426 TT adults, 29 Jan – 1 Apr 2005   Source: MORI

More younger people feel they know about the University than older people, with 54% of those aged 18-34 saying they have heard at least a fair amount about the University, compared to 47% of those aged 55 and over. Nevertheless, at least one in every five people across all age groups (except the over 75 year olds) say they have heard *a great deal* about UTT.

Awareness of the University shows some divide along class lines. Three in five (61%) of those in the higher social classes (ABC1[9]) say they have heard at least a fair amount, compared to just under half (48%) of those in the lower social classes (C2DE).

In terms of geographical differences, people in the North and Central areas of Trinidad are most likely to have heard at least a fair amount (61% say they have), while people in the East (56%) and particularly the South (42%) are less likely to have.
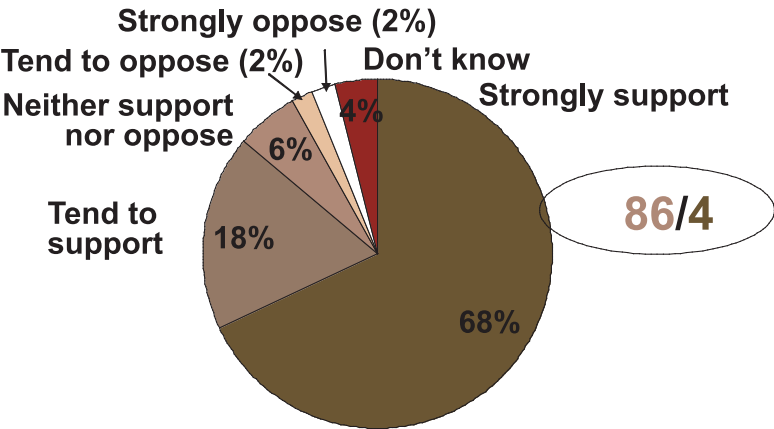
[9] In this report professional/non-manual workers refer to those residents in social grades ABC1. Residents in social grades C2DE are referred to as working class and unemployed/not working. Please see the appendix for further details.

10.3. Support for the University of Trinidad and Tobago

As the following chart illustrates, support for UTT is very high with almost seven in ten people (68%) saying that they strongly support it being established and a further one in five (18%) saying they tend to support it. Few people overall are opposed (4%).

Chart 20: Support for UTT

Q   *To what extent do you support or oppose this University being established in Trinidad and Tobago?*

Strongly oppose (2%)
Tend to oppose (2%)   Don't know
Neither support nor oppose   4%   Strongly support
6%
Tend to support   18%   86/4
68%

Base: 2,426 TT adults, 29 Jan – 1 Apr 2005   Source: MORI

Support for the University is high across all sub groups of the population – with no fewer than three in every five people in any sub group saying that they *strongly* support it. Further, where support is comparatively lower, such as among over 75 year olds (where 59% say they *strongly* support the University) this is because more of this age groups say they "don't know" rather than oppose it.

Encouragingly, those people who claim to have heard the most about UTT are more supportive than those who have heard little about it – suggesting that greater familiarity is breeding greater favourability.

11. Housing

11.1. Importance of housing issues

One in twelve people (8%) say that housing is one of the most important issues facing the country. This is the same proportion that mentioned housing as an important issue in the last Panel wave in July-August 2004, but double the number mentioning it in the first Panel wave in 2002.
Housing is a particular worry for those in the Central area (12%), as it is mentioned by twice as many people there than in the South (6%).

11.2. Awareness and use of the NHA and the LSA[10]

Almost everyone (98%) has heard of the National Housing Authority (NHA), but just half the population (48%) have heard of the Land Settlement Agency. Awareness of the former is the same as was measured in the last Panel wave, with somewhat fewer people recalling hearing of the latter (down from 57%).
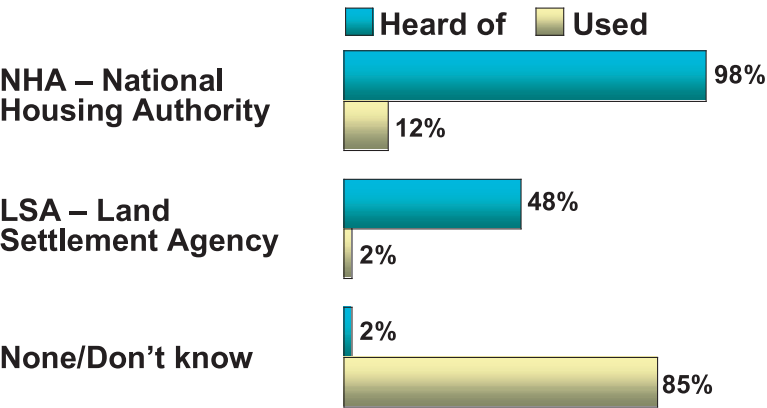
One in eight people (12%) across the country say they personally, or someone in their household, have used or contacted the NHA in the past 12 months. Younger residents are more likely than older residents to claim such contact (13% of those aged 18-34, versus 10% of those aged 55 and over). Also, Afro-Trinidadians (16%) are more likely to have had contact than Indo-Trinidadians (7%).

Very few people (2%) have had contact with the LSA, and this low level of contact is consistent across sub-groups of the population.

Chart 21: NHA and LSA: awareness and use

Q   *Here is a list of agencies that deal with housing. Which, if any, of these had you heard about before this interview? Which others?*

Q   *And which, if any, of these agencies have you or anyone in your household used or accessed in the last 12 months? Which others?*

■ Heard of   □ Used

NHA – National Housing Authority   98%
12%

LSA – Land Settlement Agency   48%
2%

None/Don't know   2%
85%

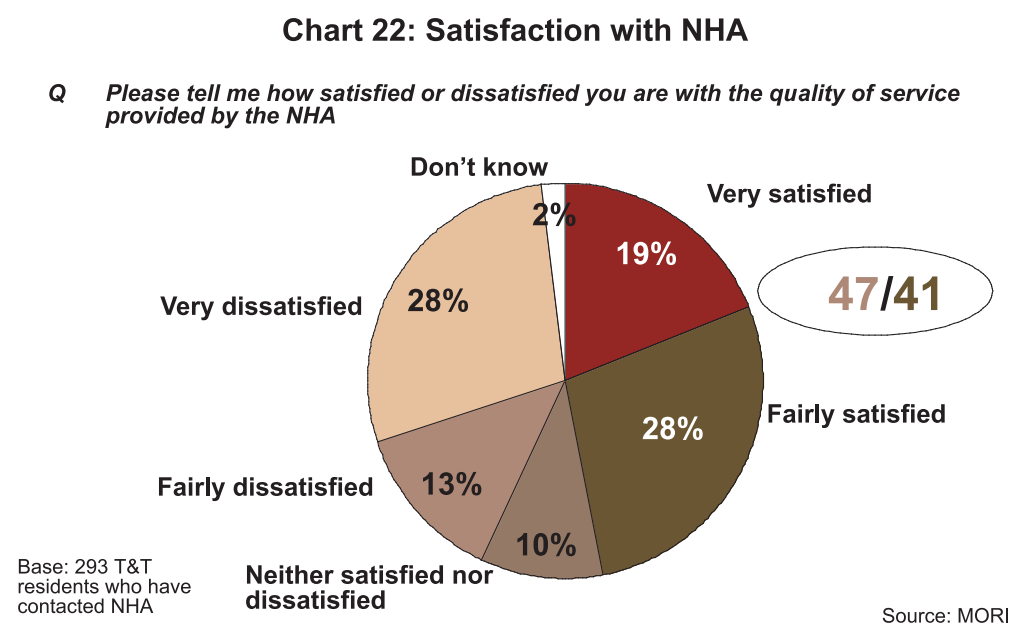Base: 2,426 TT adults, 29 Jan – 1 Apr 2005   Source: MORI

[10] In this report professional/non-manual workers refer to those residents in social grades ABC1. Residents in social grades C2DE are referred to as working class and unemployed/not working. Please see the appendix for further details.

11.3. Rating customer care at the NHA

The most common way to contact the NHA is in person, with over half of contacts (55%) conducted this way. One in four (24%) say they have contacted it in writing, and one in twelve (8%) either by telephone or through someone else. Very few users (2%) say their last contact with the Authority was by visiting its website.

As shown in the chart below, fewer than half (47%) of the users of the NHA in the past 12 months say they are satisfied with the quality of service it provides. Two in five say they are dissatisfied, which includes a high proportion (28%) who are *very* dissatisfied.

Chart 22: Satisfaction with NHA

Q   Please tell me how satisfied or dissatisfied you are with the quality of service provided by the NHA

Base: 293 T&T residents who have contacted NHA

Source: MORI

The table on the following page shows how users of the NHA rate their customer care across several different aspects. This table includes a comparison taken from the first wave of the Panel in 2002 which asked people to rate the level of customer care with public services generally, and also from Wave 3, which surveyed those people who had had contact with a local government body.

On one hand, there are some positive findings here. For each aspect of customer care, more users of the NHA give a positive rating than give a negative rating. For instance, 77% say that the staff are helpful compared to 18% who say they are unhelpful. The exception to this is satisfaction with the final outcome where as many users were dissatisfied as satisfied (46%). It is possible that the lower rating of outcome reflect the nature of the enquiries made to the NHA rather than the levels of customer service provided Although, there does seem to be some improvement needed in the speed of dealing with enquiries, as just over half of users (51%) say staff were quick.

On the other hand, when compared with public services generally, customer care ratings for the NHA seem low. On every aspect, fewer users of the NHA rate the service positively than do users of public services generally. For instance, while 61% of NHS users say it is easy to get hold of the right person (and this is twice the proportion who say it is difficult), many more people (81%) say the same about public service generally. An alternative comparison, therefore, may be local government bodies where the NHA compares more favourably on every aspect with the exception of ease of getting hold of the right person.

Table 13: NHA customer care rating

Q. When you contacted the National Housing Authority, did you find the staff here…?

Base: 183 people who have contacted NHA by telephone or in person in the last year	NHA	W1 Public services benchmark	W3 Local Govt. benchmark
	%	%	%
Helpful	77	84	80
Unhelpful	18	12	17
Quick	51	72	43
Slow	43	21	41
Efficient	59	77	54
Inefficient	32	16	35
Interested	67	78	68
Uninterested	26	13	21
Able to deal with problem	54	79	46
Unable to deal with problem	38	13	41
Easy to get right person	61	81	73
Difficult to get right person	33	15	23
Satisfied with final outcome	46	79	42
Dissatisfied with final outcome	46	17	45

Source: MORI

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.

Table 13: 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
710 interviews	2	3	4
2,426 interviews	1	2	2

Source: MORI

For example, on a question where 50% of the people in a sample of 2,426 respond with a particular answer, the chances are 95 in 100 that this result would not vary by more than 2 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 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.

Table 14: 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
1,085 and 1,341 (Men v. Women)	2	4	4
866 and 1,056 (Afro-Trinidadians vs. Indo-Trinidadians)	3	4	5
710 and 2,426	3	4	4
2,747 and 2,426	1	2	2

Source: MORI

The table above also shows that when comparing full results from the baseline survey with Wave 4 findings, differences need to be around $\pm$4% at the 50% level to be significant.

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.

Table 15: 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

III. Sample Profile

Table 16	Unweighted		Weighted	
	N	%	n	%
Total	2,426	100	2,426	100
Gender				
Male	1,085	45	1,213	50
Female	1,341	55	1,213	50
Age				
18-34	1,065	44	1,044	43
35-54	905	37	922	38
55+	456	19	461	19
Work Status				
Full/Part-time/Self-employed	1,483	60	1,431	59
Not working	943	40	995	41
Ethnicity				
Afro-Trinidadian	866	36	931	38
Indo-Trinidadian	1,056	44	1,005	42
Other	504	21	490	20
Regional area				
North	234	10	278	11
South	720	30	669	28
Central	482	20	467	19
East	956	39	918	37
Tobago	34	1	94	4

Wave 1 – 5 weighted profiles

Table 17	Wave 1		Wave 2		Wave 3		Wave 4		Wave 5	
	N	%	N	%	N	%	N	%	N	%
Total	2,772	100	693	100	700	100	710	100	2,426	100
Gender										
Male	1,335	48	333	48	336	48	355	50	1,213	50
Female	1,437	52	360	52	364	52	355	50	1,213	50
Age										
18-34	1,392	51	350	51	353	50	305	43	1,044	43
35-54	835	30	210	30	212	30	270	38	922	38
55+	533	19	133	19	135	19	135	19	461	19
Work Status										
Full/Part Time/Self Employed	1,638	59	409	59	413	59	419	59	1,431	59
Not Working	1,499	41	284	41	287	41	291	41	995	41
Ethnicity										
Afro-Trinidadian	1,105	40	277	40	280	40	270	38	931	38
Indo-Trinidadian	1,130	41	284	41	287	41	298	42	1,005	42
Other	522	19	132	19	133	19	142	20	490	20

IV. Detailed Information on Response Rates

The 'universe' for Wave 5 of this research was all the remaining 2,023 members of the Opinion Leaders Panel and 1,152 other people newly sampled to take part. The new baseline Panel, now updated to take into account Panel decay since the original Panel was recruited in 2002 and more recent census information now consists of 2,426 members.

The profile and weighting details for Wave 4 onwards was updated to reflect the new profile information available from the 2000 Census. This data differed from the 1990 Census data in several respects – see below.

Table 18: Profile 1990 vs. .2000 Census Data

	2000	1990
18-24	21	24
25-34	22	26
35-44	22	18
45-54	16	12
55-64	9	9
65+	10	10
Male	50	48
Female	50	52
Afro	38	40
Indo	42	41
Others	20	19

At the start of fieldwork for Wave 5 there were 2,023 members still on the Panel. The total number of non-respondents was 485, which can be broken down as follows:

- i)   32 Panel members deceased;
- ii)   17 Panel member too ill to take part;
- iii)   44 Panel members had migrated;
- iv)   73 Panel members had moved;
- v)   159 Panel members were not located after three attempts;
- vi)   77 Panel members could not be located;
- vii)   68 Panel members refused to take part in the survey; and
- viii)   15 Panel members did not take part for other reasons.

For the recruitment of the new Panel members, HHB & Associates initially sampled 1,152 people. The new members were selected to join the panel in the following way: First, the required demographic characteristics of the new members were determined to bring the overall panel in line with the population characteristics of the 2000 census. This was determined with respect to race, gender, age and location (regional corporations).

Enumeration district (ED) maps for the selected regional corporation locations were selected and the relevant quota was assigned to each map. Each map had marked on it a random walk (arrows showing how the interviewer should proceed) and a start position. Interviewers were instructed to follow the arrows and to select every "nth" house. A listing of eligible members of the household was made and any person fitting one of the quotas was selected and interviewed. Only one person per household was allowed. Interviewers proceeded in this way until the required quotas were obtained.

Of these, 888 were successfully interviewed

V. Validation Checks

HHB & Associates carried out a series of validation checks to monitor the quality of interviewing. A summary of the validation process outcome is shown below.

Validation checks were done continuously while in the field by a special team which had been set up to locate the names and addresses of panel members in an effort to speed up fieldwork. The major concern at this time was to determine if each member of the Wave 5 sub sample was "eligible" in the sense that:

- they were a valid member of the panel and willing to participate; and
- they fit the quotas required to bring the sample in line with the newly available census data.

Checks by supervisors

In the field by the Supervisors and the Co-ordinator:

i) 6 people were incorrectly interviewed (action – the correct persons were identified and re-interviewed);

ii) 11 respondents reported the interviewer did not ask all the questions (action – the questionnaires were completed by phone); and

iii) 2409 questionnaires completed properly.

VI. Marked up Questionnaire

- Results are based on 2,426 face-to-face interviews with residents of Trinidad & Tobago who are members of the Opinion Leaders' Panel

- Data are weighted to the known population profile using the 2000 census data

- Fieldwork conducted between 29 January – 1 April 2005

- Where results do not sum to 100, this may be due to multiple responses, computer rounding or the exclusion of don't knows/not stateds

- Results are based on all respondents unless otherwise stated. "Not stateds" have been included as "don't know"

- An asterisk (*) represents a value of less than half of one percent, but greater than zero

- Trend data from previous Opinion Leaders' Panel waves are shown where appropriate:
  Wave 1 survey, 15 July to 29 August 2002, base size 2,747
  Wave 2 survey, 28 June to 16 July 2003, base size 693
  Wave 3 survey, 6-22 December 2003, base size 700
  Wave 4 survey, 17 July – 6 August 2004, base size 710

Good morning/afternoon/evening. As you know, I'm from HHB & Associates, an independent market research company. Many thanks for agreeing to take part in this interview. I would like to start by asking you some questions about public services… Your individual replies will be held in confidence, of course.

HAPPINESS, CONFIDENCE AND GOVERNMENT PERFORMANCE

Q1. SHOWCARD 1 (R) **Overall, how happy or unhappy are you with your life at the moment?** SINGLE CODE ONLY

	Wave 3	Wave 5	
	%	%	
Very happy	41	45	
Fairly happy	45	42	
Neither happy nor unhappy	6	5	
Fairly unhappy	5	4	
Very unhappy	3	3	
No opinion	*	*	

Q   SHOWCARD 2 (R) **Please look at this card and tell me how much confidence you have in each of the following institutions. Would you say you have a lot, some, a little or no confidence at all?** READ OUT Q2-15 AND ROTATE ORDER SINGLE CODE ONLY FOR EACH QUESTION

		A lot of confidence %	A little confidence %	Some confidence %	No confidence at all %	Don't know %
Q2.	Armed Forces	26	26	36	10	3
Q3.	Banks	24	29	34	11	2
Q4.	Church	51	17	23	8	3
Q5.	International Companies	14	25	34	11	16
Q6.	Judges	13	29	35	14	8
Q7.	Parliament	8	27	31	31	3
Q8.	Newspapers	14	34	40	10	2
Q9.	Police	13	27	38	21	1
Q10.	Political Parties	6	27	28	35	3
Q11.	Prime Minister	19	27	33	19	2
Q12.	Radio	23	30	41	5	2
Q13.	Television	23	29	39	7	2
Q14.	Trade Unions	11	27	33	17	12
Q15.	Trinidad & Tobago Companies	17	29	40	8	6

Q16.   Are you satisfied or dissatisfied with the way the Government is running the country? SINGLE CODE ONLY

	Wave 1 %	Wave 2 %	Wave 3 %	Wave 4 %	Wave 5 %
Satisfied	34	48	36	31	40
Dissatisfied	46	44	57	61	55
Don't know	19	8	7	7	5

ASK IF DISSATISFIED WITH THE GOVERNMENT (CODE 2 AT Q16)

Q17.   **WHY ARE YOU DISSATISFIED WITH THE WAY THE GOVERNMENT IS RUNNING THE COUNTRY?** PROBE FULLY WRITE IN ANSWER

	%
Crime situation	34
Lack of government attention to citizen's needs/standard of living/poverty	19
Cost of living	16
Unemployment/low wages	15
Unfulfilled promises	7
Lack of infrastructural development	7
Wealth/resources being poorly distributed	6
Bad spending & mismanagement	5
Lack of transparency/too much corruption	5
Not seeing progress	5
Health services need to improve/poor	4
Kidnapping	3
Neglect of the youth	3
Education system unsatisfactory	3
Square pegs in round holes/things out of hand/errors abound	2
There is major ethnic discrimination/racial disunity	2
Too much disharmony in the country	2
Judicial system inadequate/justice can be bought	1
Approach to local problems	1
Government spending favors other countries rather than domestic issues	1
Government dictatorial/participation lacking	1
Removal of NBM/other policies/loss of court cases	1
Water shortages	1
Closure of Caroni 75 Ltd/other companies	1
Neglect of important industries eg agriculture	1
Traffic and transport situation unsatisfactory	*
Government bureaucracy	*
Approach to Caricom problems	*
Disaster preparedness neglected	*
High taxes	*
Other	*
Refused/not sure	1
Don't know	1

Base: All dissatisfied with government (1,346)

ISSUES FACING COUNTRY

Q18. **WHAT IN YOUR OPINION IS THE MOST IMPORTANT ISSUE FACING TRINIDAD & TOBAGO TODAY?**
SINGLE CODE ONLY
Q19. **WHAT DO YOU SEE AS OTHER IMPORTANT ISSUES FACING TRINIDAD & TOBAGO TODAY?**
MULTICODE OK

	WAVE 1		WAVE 3		WAVE 4		WAVE 5	
	Q18 %	Q18/19 %	Q18 %	Q18/19 %	Q18 %	Q18/19 %	Q18 %	Q18/19 %
AGRICULTURAL PRODUCTION	*	2	*	3	*	3	1	7
HIV/AIDS	14	35	8	40	4	27	5	30
BANK INTEREST RATES	*	3	-	1	-	2	*	1
CHILD ABUSE	1	8	*	13	-	5	*	9
CHILD POVERTY	2	9	*	6	*	5	1	7
CRIME/LAW & ORDER/VIOLENCE/ VANDALISM	29	56	74	92	82	91	70	87
DEFENCE/FOREIGN AFFAIRS/ INTERNATIONAL TERRORISM	*	2	*	3	*	1	*	1
DOMESTIC VIOLENCE	2	13	*	15	-	10	*	10
DRUG ABUSE	4	24	1	25	1	29	1	23
ECONOMY/ECONOMIC SITUATION	3	7	1	8	1	7	1	9
EDUCATION/SCHOOLS	2	9	3	26	1	19	1	18
EXCHANGE RATE	*	1	-	1	-	*	-	1
FISHING	*	1	-	1	-	*	-	*
FLOODING	1	3	*	11	*	3	*	10
FORESTRY	*	*	-	1	-	1	-	1
HEALTH/HOSPITALS	2	15	2	34	1	28	3	32
HOUSING	*	4	*	6	*	8	*	8
INFLATION/PRICES	*	3	*	11	1	23	1	21
LAND & BUILDING TAXES	*	1	-	1	-	2	-	1
LOW PAY/MINIMUM WAGE/FAIR WAGES	*	5	*	9	*	10	*	9
MORALITY IN PUBLIC AFFAIRS	3	7	*	3	-	2	*	3
NATIONAL INSURANCE BOARD (NIB)	*	1	-	1	-	*	-	*
OIL PRICES	-	*	-	1	*	*	*	1
POLLUTION/ENVIRONMENT	*	2	-	4	-0	3	*	3
POVERTY/INEQUALITY	1	7	1	20	1	18	3	25
PRESERVATION AND PROTECTION OF THE ENVIRONMENT	-	1	*	1	-	1	*	2
PRIVATISATION	*	1	-	1	-	*	-	*
RACE RELATIONS	4	12	*	11	*	6	2	9
RELATIONSHIP WITH THE REST OF THE CARIBBEAN	*	1	*	*	-	-	*	*
RELATIONSHIP WITH THE UNITED STATES	-0	*	-0	1	-	*	*	*
RELATIONSHIP WITH VENEZUELA	*	*	-0	*	-	*	-	*
ROADS	1	5	-0	8	-	5	*	9
TAXATION	1	4	-0	1	-	1	-	1
TOURISM	*	1	-0	1	-	*	-	*
TRADE UNIONS/STRIKES	-0	*	-0	*	-	1	-	*
TRANSPORT/ PUBLIC TRANSPORT	*	1	*	5	-	3	*	3
UNEMPLOYMENT/FACTORY CLOSURE/LACK OF INDUSTRY	6	30	5	39	3	40	5	39
WATER SHORTAGES	1	6	*	6	*	3	*	6
OTHER	19	30	2	20	2	13	2	14
DON'T KNOW	0	9	*	*	1	6	1	4
NOT STATED	2	2	-	-	-	-	-	-

"Lack of focus on the unemployables."

"Need to increase road infrastructure. Presently there are 10,000 vehicles licensed every four months

BUDGET SPEECH

Q19B SHOWCARD 2A (R) **As you may already know, the Prime Minister gave his last Budget Speech in October 2004. Which of the statements on this card apply to you?** MULTICODE OK

	Wave 3 %	Wave 5 %
I listened to/watched the speech live	33	20
I have seen or heard the speech discussed on newspaper/television/radio	51	39
I have heard about the speech in another way	15	15
I have not heard about the speech at all	11	28
Don't know	2	2

Q19C ASK ALL WHO HAVE HEARD ABOUT THE BUDGET SPEECH (CODES 1-3 AT Q 19B) OTHERS GO TO Q20

SHOWCARD 2B (R) **To what extent, if at all, do you agree or disagree that "the Prime Minister's Budget Speech outlines what's right for the country"?** SINGLE CODE ONLY

	Strongly agree %	Tend to agree %	Neither agree nor disagree %	Tend to disagree %	Strongly disagree %	Don't know/No opinion %
Wave 3	13	34	20	20	8	4
Wave 5	14	35	22	16	10	3

Base: All who have heard about the Budget Speech (1,698) and 618 for Wave 3

IMAGE OF PUBLIC SERVICES

showcard 3 (R)

Q20. These are some words that people have used to describe public services like schools and hospitals.
Please read through the list and tell me the letters that you think apply.

MULTICODE OK

		Wave 1 %	Wave 5 %
A	Uninterested	12	12
B	Efficient	23	16
C	Inadequate	18	31
D	Friendly	22	15
E	Hardworking	17	26
F	Keen to help	18	16
G	Honest	9	8
H	Unsatisfactory	20	39
I	Open	12	6
J	Impolite	14	16
K	Unresponsive	12	17
L	Unaccountable	6	12
M	Good value for money	3	5
N	Corrupt	11	14
O	Slow	27	33
P	Poor service	27	50
Q	Under-funded	16	23
	Other	3	1
	None of these	3	*
	Don't know	4	1

CRIME AND THE POLICE

SHOWCARD 4 (R)

Q21. **Thinking about the way your area is policed, do you expect it to get…** READ OUT /REVERSE ORDER. SINGLE CODE ONLY

	Wave 4 %	Wave 5 %
Much better	18	25
A little better	29	24
Stay about the same	26	31
A little worse	17	9
Much worse	9	9
Don't know	2	2

CRIME AND THE POLICE

SHOWCARD 4 (R)

Q21. **Thinking about the way your area is policed, do you expect it to get…** READ OUT /REVERSE ORDER. SINGLE CODE ONLY

	Wave 4 %	Wave 5 %
Much better	18	25
A little better	29	24
Stay about the same	26	31
A little worse	17	9
Much worse	9	9
Don't know	2	2

SHOWCARD 4 (R) AGAIN

Q22. **Thinking about the way the country is policed, do you expect it to get…** READ OUT/REVERSE ORDER. SINGLE CODE ONLY

	%
Much better	25
A little better	25
Stay about the same	19
A little worse	13
Much worse	15
Don't know	3

showcard 5 (R)

Q23. **These are some words that people have used to describe the police.**
Please read through the list,
and tell me the letters that you think apply to the police

MULTICODE OK

		Wave 3	Wave 5
		%	%
A	Uninterested	22	14
B	Efficient	17	14
C	Inadequate	29	20
D	Friendly	17	14
E	Hardworking	29	29
F	Keen to help	22	19
G	Honest	9	7
H	Unsatisfactory	29	26
I	Open	8	5
J	Impolite	24	25
K	Unresponsive	31	30
L	Unaccountable	18	12
M	Good value for money	5	3
N	Corrupt	36	43
O	Slow	33	32
P	Poor service	38	41
Q	Under-funded	23	13
	Other	1	2
	None of these	*	*
	Don't know	2	1

SHOWCARD 6 (R)

Q24. **Which, if any, of these crimes have you personally been a victim of in the last 12 months?**
Just read out the letters that apply. MULTICODE OK

		Wave 2	Wave 3	Wave 5
		%	%	%
A	Arson	0	1	*
B	Abuse from neighbours	3	6	6
C	Attacks or threats in your own home	2	4	4
D	Burglaries/house-breaking	6	7	5
E	Drunkenness in the street	1	9	7
F	Drug abuse or drug dealing	2	5	6
G	Disturbances from teenagers or youths	3	11	8
H	People hanging around in streets/groups	1	12	10
I	Kidnapping	0	1	1
J	Noise from neighbours	4	13	11
K	Mugging and theft	2	5	3
L	Lack of personal safety on public transport	1	5	4
M	Poor street lighting	*	19	16
N	Litter/dog mess in streets	1	19	13
O	Vandalism/property abuse/graffiti	*	2	2
P	Poor housing conditions	*	4	2
Q	Racist attacks or harassment	1	3	2
R	Sexual attacks or harassment	*	2	1
S	Theft from/damage to parked cars	1	4	2
T	Car jacking/theft of cars/joy riding	1	2	1
U	Prostitution	0	*	*
	Other	1	2	1
	None of these	77	44	53
	Don't know	*	*	*
	Any			47
	Any crime			21
	Any environmental problem			26
	Any anti-social behaviour			27

SHOWCARD 6 (R) AGAIN

Q25. **And which, if any, did you not report to the police?**
Just read out the letters that apply. MULTICODE OK

Bases: Total

A	Arson	N	(11)	3
B	Abuse from neighbours	%	(138)	50
C	Attacks or threats in your own home	%	(106)	36
D	Burglaries/house-breaking	%	(114)	22
E	Drunkenness in the street	%	(164)	72
F	Drug abuse or drug dealing	%	(140)	65
G	Disturbances from teenagers or youths	%	(211)	66
H	People hanging around in streets/groups	%	(244)	63
I	Kidnapping	N	(13)	3
J	Noise from neighbours	%	(293)	63
K	Mugging and theft	%	(78)	44
L	Lack of personal safety on public transport	%	(106)	64
M	Poor street lighting	%	(395)	65
N	Litter/dog mess in streets	%	(333)	3
O	Vandalism/property abuse/graffiti	N	(57)	24
P	Poor housing conditions	%	(61)	71
Q	Racist attacks or harassment	N	(40)	21
R	Sexual attacks or harassment	N	(20)	12
S	Theft from/damage to parked cars	%	(53)	51
T	Car jacking/theft of cars/joy riding	N	(33)	7
U	Prostitution	N	(5)	4
	Other	N	(30)	13
	Any	%	(111)	69
	Any crime	%	(111)	48
	Any environmental problem	%	(111)	71
	Any anti social behaviour	%	(111)	67

EDUCATION

showcard 7 (R)

Q26. **These are some words that people have used to describe teachers.**
Please read through the list, and tell me the letters that you think
apply to teachers

MULTICODE OK

		Wave 3	Wave 5
		%	%
A	Uninterested	17	15
B	Efficient	38	30
C	Inadequate	9	9
D	Friendly	45	43
E	Hardworking	59	64
F	Keen to help	41	40
G	Honest	30	22
H	Unsatisfactory	10	11
I	Open	26	19
J	Impolite	9	9
K	Unresponsive	6	6
L	Unaccountable	9	5
M	Good value for money	19	8
N	Corrupt	1	2
O	Slow	7	8
P	Poor service	10	10
Q	Under-funded	16	14
	Other	2	1
	None of these	1	*
	Don't know	2	2
	None	*	*

Q27. **Other than having taken part in this survey, how much have you heard about the**
University of Trinidad and Tobago – a great deal, a fair amount, not very much or
had you not heard of the University of Trinidad and Tobago at all before this
interview? SINGLE CODE ONLY

	%
Heard a great deal	22
Heard a fair amount	31
Not heard very much	30
Had not heard of the University of Trinidad and Tobago at all	16
Don't know	1

SHOWCARD 8 (R)

Q28. To what extent do you support or oppose this University being established in Trinidad and Tobago? SINGLE CODE ONLY

	%
Strongly support	68
Tend to support	18
Neither support nor oppose	6
Tend to oppose	2
Strongly oppose	2
Don't know	4

HEALTH

SHOWCARD 9 (R)

Q29. Thinking about the health service generally <u>over the next few years</u>, do you expect it to get...?
READ OUT/REVERSE ORDER. SINGLE CODE ONLY

	Wave 3 %	Wave 4 %	Wave 5 %
Much better	23	16	33
A little better	36	35	30
Stay about the same	17	21	16
A little worse	10	15	9
Much worse	8	11	10
Don't know	6	2	2

and no infrastructure put in place to accommodate them." (Male)

SHOWCARD 10 (R)

Q30. Which of the following health services, if any, have you <u>personally</u> used in Trinidad and Tobago the last 12 months? Just read out the letters that apply. MULTICODE OK

		%
A	Been treated at a local <u>public</u> health centre	35
B	Been treated at a local <u>private</u> health centre	17
C	Been treated at a local <u>public</u> hospital	30
D	Been treated at a local <u>private</u> hospital	9
	None of these	36
	Don't know	*

SHOWCARD 11 (R)
I am going to read out a number of different types of health services. Using this card, I would like you to tell me how satisfied or dissatisfied you are with the quality of each.
READ OUT Q31-34 AND ROTATE ORDER. SINGLE CODE ONLY FOR EACH QUESTION

	BASE: ALL	Very satisfied %	Fairly satisfied %	Neither satisfied / nor dissatisfied %	Fairly dissatisfied %	Very dissatisfied %	Don't know %
Q31.	<u>Public</u> health centres	20	38	7	9	13	13
Q32.	<u>Private</u> health centres	28	23	9	3	2	36
Q33.	<u>Public</u> hospitals	13	30	7	15	24	11
Q34.	<u>Private</u> hospitals	25	21	9	2	2	41

NHA

SHOWCARD 12 (R)
Here is a list of agencies that deal with housing. Which, if any, of these had you heard about before this interview? Just read out the letters that apply. MULTICODE OK

Q35.

SHOWCARD 12 (R) AGAIN
And which, if any, of these agencies have you or anyone in your household used or accessed in the last 12 months? MULTICODE OK

Q36.

		Q35 Heard of		Q36 Used	
		Wave 4	Wave 5	Wave 4	Wave 05
		%	%	%	%
A	**NHA – National Housing Authority**	98	98	11	12
B	**LSA – Land Settlement Agency**	59	48	2	2
	None/Don't know	2	2	88	85

Q   ASK Q37 – Q38 FOR ALL WHO HAVE USED OR ACCESSED EACH AGENCY (CODE 1 OR 2 AT Q36).
IF CODED 3 OR 4 AT Q36 THEN GO TO Q48
SHOWCARD 13 (R)
Using this card, please tell me how satisfied or dissatisfied you are with the quality of each of the following services READ OUT ONLY THOSE SERVICES USED OR ACCESSED. SINGLE CODE ONLY FOR EACH

			Bases (293)	Very satisfied 19	Fairly satisfied 28	Neither satisfied nor dissat-isfied 10	Fairly dissat-isfied 13	Very dissat-isfied 28
Q 37.	**NHA – National Housing Authority**	%	(293)	19	28	10	13	28
Q 38.	**LSA – Land Settlement Agency**	%	(42)	17	19	11	9	35

ASK ALL WHO HAVE ACCESSED OR USED NATIONAL HOUSING AUTHORITY (NHA) IN LAST 12 months (code 1 at q36). OTHERS GO TO Q48

Q39.   showcard 14 (R)

HOW DID YOU LAST GET IN CONTACT WITH the National Housing Authority? **Just read out the letter that applies.** SINGLE CODE ONLY

		%
a	By telephone	8
b	In person	55
c	In writing	24
D	By email	1
d	By fax	-
E	Visited their website	2
F	Through someone else	8
	Other	1
	Don't Know	1

BASE: ALL WHO HAVE USED THE NHA (293)

ASK ALL WHO GOT IN TOUCH WITH THE NHA BY TELEPHONE OR IN PERSON (CODES 1 OR 2 AT Q39) OTHERS GO TO Q48
When you contacted the National Housing Authority, did you find the staff there…?
READ OUT Q40 – Q44. SINGLE CODE ONLY FOR EACH

			%
Q40.		**Helpful**	77
	Or	**Unhelpful**	18
		Neither/don't know	5
Q41.		**Quick in dealing with your request or problem**	51
	Or	**Slow in dealing with your request or problem**	43
		Neither/don't know	6
Q42.		**Efficient**	59
	Or	**Inefficient**	32
		Neither/don't know	9
Q43.		**Interested in your problem**	67
	Or	**Uninterested in your problem**	26
		Neither/don't know	7
Q44.		**Able to deal with your problem**	54
	Or	**Unable to deal with your problem**	38
		Neither/don't know	8

Base: All who have contacted NHA by telephone or in person in the last year (183)

Q45.   Was it simple or difficult to get hold of the right person? **SINGLE CODE ONLY**

	%
Simple	61
Difficult	33
Neither/don't know	6

Base: All who have contacted NHA by telephone or in person in the last year (183)

Q46.   And were you satisfied or dissatisfied with the final outcome? **SINGLE CODE ONLY**

	%	
Satisfied	46	GO TO Q48
Dissatisfied	46	ASK Q47
Neither/don't know	8	GO TO Q48

Base: All who have contacted NHA by telephone or in person in the last year (183)

Q47. **Why do you say that you were dissatisfied?** MULTICODE OK

	%
Passed from one department to the other	17
Had to give personal details on more than one occasion	7
Personal details were lost	6
Passed from one organisation to the other	7
It took a long time to deal with my enquiry	50
Other	33
None of these	1
Don't know	1

Base: All who were dissatisfied with the final outcome (86)

VII. Reports from each Focus Group

TRINIDAD & TOBAGO OPINION LEADERS – WAVE 5
Crime & Police, Health and Vision 2020.
GROUP 1 – North Trinidad

Conducted: Monday 11th October, 2004
Start Time: 4:45pm
End Time: 6:30pm

Group Composition:

Urban North Trinidad
ABC1 Class
40 – 50 years
Mixed
5 Males, 5 Females

Level of Satisfaction with the Government:

Participants all noted a level of dissatisfaction with the way the Government is running the country. This based on the following:

"I am very dissatisfied. When I look around in the town and see the amount of vagrancy and children begging, I know as a fact that the Government is doing nothing to help the people of the country. I can talk for myself and for my parents. For example in July this year, my mother who lives in a free hold property in Belmont, at the back of my mother's property is the POS City Corporation land. But they allow people to build on it like squatters. One morning after a significant amount of rain the previous night, the land came down on my mother's house and all the dirt caved in and the whole house was flooded with three feet of water and three of the rooms buried under the dirt. Up to today nobody has come to her assistance and told her that they will find somewhere for her to live, they sent us to NHA one morning to see someone, when we got there we got a note that the gentleman could not see us this morning. We made another appointment and then could not see that person because she was on vacation for two months. The City Council who was responsible for the dirt, the first morning they came, they came with no boots, the second morning they came, they came with no tools, the third morning they came was another problem, by the fifth day, which was the Friday, they told her they were going on another project. Up to today, that house is in a horrible mess." (Female)

"The Government does not treat their employees properly. So how can they expect their employees to work properly. The Ministry of Health has condemned many buildings and the Government still insists that the employees go to work." (Male)

"The Government takes advantage of us as a people. We have to understand that the Government is the people, we placed them there and they are there to serve us. But whenever they do anything that is not in our favour, we let them do it and don't protest. Each government that comes in power will continue to take advantage of us because they know how we think." (Female)

The most important issues facing the country according to this group of participants were noted as follows:

Crime

Murders

Violent Crimes

The participants noted that this type of crime was on the increase. *"It was always bad, but not like it is now."* (Male)

Increase in the prices of food items *"Over the past year"* (Male)

"Lack of unity as a people" (Female)

"Unemployment" (Male)

"Decline of a middle class so now all we have is a rich and poor class." (Male)

"Education system not taking the unemployables into account." (Male)

In terms of the local area, the participants noted the following issues:

"No cleaning of drains in Maraval – this leads to congestion and blockage of the drains." (Male)

"Lack of simple things like street signs in Port of Spain." (Male)

"No road maintenance"

"Crime"

"High level of illiteracy especially in the young African Males and Females. After five years they still can't read and write." (Male)

Crime & Police:

Participants were all of the view that the level of crime in their area was lower than that of the rest of the country.

"In Sangre Grande it is not as bad, the police control the area and make regular checks on the drug areas. There is crime, but nothing like the rest of the country." (Male)

"Maraval is not as bad" (Male) *"I feel more comfortable living where I live."*

"I believe that everyone has a responsibility towards trying to stop crime, not the government alone. The government can't stop crime because the government can't place someone on every street to stop someone from grabbing your chain. Placing security with guns at business places to protect the business, the guns only attract other guns. Every citizen has a responsibility towards stopping crime. Everybody knows someone who commits crime, crime is a social ill. You will know someone who has guns in the area and not reporting it to the police. Why not report it to the police? Instead they want to just talk it with everyone. But when something happens in the area, they like to blame the police." (Male)

One of the participants brought up the issue of the white collar crime being prevalent throughout the country at the same level. This being in the line of the insurance companies. *"There is the need for the Government to regulate the insurance industry. Every year they have to get a certificate in order to run the following year based on their final accounts. There are companies that do not pay and continue to not pay."* (Male)

The participants all noted that there had been an increase in police presence in their area recently however, they were of the view that this is not an indication of increased policing in the future.

"I personally feel that from here on in it has no better to get, whether they spend ten million dollars on the police service because crime is embedded in the society. The young people at this time look up to criminals and emulate them. So instead of wanting to be an accountant, they want to be a criminal. No government can stop that. So regardless of how much policing that they do, they will be unable to stop the crime." (Male)

"The level of corruption within the police service is a critical issue here. They need to weed out the bad police before they can get anywhere." (Female)

"Things are not going to get any better here in Trinidad." (Male)

The main barriers to reducing the crime situation according to this group of participants were as follows:

Citizens do not want to take the responsibility to report crime to the police.

The lack of trust in 800-TIPS – *"Recently two people were killed because they reported an incident in Tobago. The police responded by saying 'it is the illiteracy of the people evident by their bragging that they called 800-TIPS to report the incident, that is why they got bumped off.'"*

"As a people, we have to be clear on our thinking that the Government is not able to stop crime at this time. Each citizen is responsible for himself and do something to help stop crime." (Male)

"The lack of a value system in each on of us. Crime has to do with values. Argument that unemployment is a contributor to crime, then if that is so, how is it that according to our Prime Minister in his Budget Speech unemployment is at its lowest and if that is so crime is supposed to be at its lowest also." (Male)

The participants noted the following that the government has done to reduce crime:

Increase in the number of youth programs
Introduction of Community Police
Making the access to education easier for all through the Dollar for Dollar Programs and COSTATT
Joint police and army patrols

The participants were of the view that the Government cannot realistically do anything to combat crime in these next few months. They saw the high level of crime that we see today as being due to many years of the reduction of the family unit and value system.

"Need to instill and train the right values from young is the only solution to the crime situation that exists." (Female) *"Crime cannot be tackled in the short term. It's a long term problem and the only way that it can be tackled is in the long term by instilling values in the young people of today. This can only come from the home."* (Male)

"The Government needs to do something about the increasing number of street children, because crime starts with them. In my opinion the Community Police started some program and started off well. But for us to reduce crime we have to start getting these children off the street." (Female)

"There should be some sort of investigation done on the parents of these street children, I am sure in most of the cases the children are being prostituted by their parents. The parents send them out there. All these things contribute to the crime situation." (Male)

"I think there was something in the budget concerning a training academy for police. This is a good idea and would work in the long term." (Male)

"More stringent measures for the soldiers – look at those in Teteron who were stealing food supplies." (Female)

"We as parents must watch at their children from home, the role models now are men like P. Daddy, Little Bow Wow and Fifty Cents. Children now are parenting the parents and the parents are not parenting the children. Simple things like the parents asking the children things like 'you want to bathe or you want to eat?' The parents are giving the children too many choices. You can see things in people children, but you can't see it in your own children." (Male)

"Parents can't see that their children will be menaces to society, only because they don't want to. Parents cannot see that their children have attitude problems and can't speak to adults properly. The parents of today are too laid back and enjoy watching their children's unruly attitudes. When he comes out with his pants rolled up, they don't correct them. It's how they are bringing up their children." (Male)

The animals that were used to describe the police service are outlined as follows:
Pigs – *"some of them are just what they call them – they really behave like pigs"*
Dogs
Bull dogs without teeth
Old tired, arthritic bull dog
Impotent dog

One participant noted the following: *"The police service and its intent is good, but when you meet some characters who have their own agenda using the police service as a cover. I have a problem with that. I find police have a tendency to rough up law abiding people and stay away and encourage the criminals. If you happen to be in an area and police come in they want to rough you up. But let them see a tinted Sentra motor car with four men, you know that car has criminals and they are not stopping them. And then police telling you that they know these people have better guns than them and we just working and want to be able to go home at night to out family. Police are living in fear."* (Male)

The Government is not doing enough to reform and modernize the police service according to this group of participants. *"This last budget here they allocated some money for training but that will not help."* (Female)

The participants were of the view that the Government needs to do the following to modernize the police service:
"Increase the amount of money allocated to the police stations. If you go inside a police station, they are old, lack computer access, no air conditioning. They need to put more money into modernizing the stations and also the infrastructure." (Female)
Proper training of the police officers

Two of the participants tried to contact the police in the past 12 months. One noted that she tried first via telephone but was unsuccessful and had to therefore go to the station. Their encounters are as follows:

"Last Friday I had cause to go to the station at St. Clair. When I left the mechanic and was coming out by a junction, I put my hand out and did the hand signals, no cars were behind me, a car flew around the corner and ran straight into my car. So I went to the St. Clair Police Station. But when you walk in there a guy locked up in the cell sitting down on some boxes, the bench across had a lady sitting down. Female officer who was doing the investigation took my statement on the back of a book, not even the proper book. She didn't even let me sign the statement, so what is that worth? No professionalism what so ever in that station." (Female)

"The police don't even have pens to write the reports with, and their attitude is the worst." (Female)

"I went into West End Police Station on Monday morning at 12:10am and there were three officers on duty, one in uniform and the other two without. I told them my problem. The gentleman said okay. I told them we had transport outside and it was only a two minute drive. The one in uniform said 'okay, I'll go with you' and the lady without uniform said 'no you can't go and leave me here.' In a very rude tone.

At first when we went in the station, they could not find a pen to write with, which was so frustrating. We were trying to call them and couldn't get through on the line. So you end up going there in person and they can't find a pen to write the report. Then they can't spell your name properly. Then she is going to say that she is not staying there by herself. So then I ask – what do we do? She says 'the next officer gone out in the car.' When I asked where he went to, why can't you reach him by phone. They called him on his cell and a woman answered the phone. I mean – let's get real where is this vision 2020, why are they employing these people if they can't work?"

"It is expected that the standard of the police service will raise as they are now calling for more educated people, you have to have a certain amount of CXC passes. Long time they would pass because they tall and whatever else. When they institute that training college, they will improve because they will finally be trained properly. Now they are training them to be illiterate, bad and wrong." (Male)

"Also the police officers when they are at events, they drink alcohol faster and more than the patrons." (Female)

All participants were of the view that arson should be reported. There were mixed views about reporting Abuse by Neighbours.

Those who were in favor of reporting this said they would do it if it was constantly happening. *"Verbal abuse is like annoyance. There are neighbours that are abusing each other and annoying you. I will report it because one day I may react and at least there will be a report in the station."* (Male)

Attacks or threats in your own home, burglaries, muggings and theft, strange people hanging around on the street, kidnapping will be definitely reported.

In terms of drug abuse or drug dealing, there were mixed views regards reporting. *"I will not report it knowing the type of police service we have."* (Female). *"In Diego Martin they*

firebomb your home when they find out you reported the incident." (Female). *"I will report it if I don't I will be helping destroy the area. Depending on the ages of the children in the area, they too can be influenced."* (Male) *"If I have an idea that someone is selling drugs in my area I will tell the police since if I don't I will be putting my family at risk."* (Male)

"Depending on the level of disturbances from teenagers and youth." (Female) Other participants were of the view that they will not report it.

Personal safety on public transport will be reported to the authorities responsible for public transport and not the police service.

"I will not report prostitution, that's a profession by itself." (Male). *"High people in society encourage that."* (Female)

Health – Expectations, Patients Charter & Private Provision:

Participants were of mixed views regards the future of the health service. Six of the participants were of the view that the service will improve in the future, purely through sheer optimism. *"I think it will get better because this is the only way for it to go. It's so bad already that it can get no worse."* (Male)

"It's up to the doctors, we can't expect anyone else to fix the situation." (Female)

"It has to improve." (Female)

These participants were unable to state how they could judge improvements. *"This can only be done if you are part of the system. Then you will be aware of the duration of time spent, how long you take to get attention, etc. The average person who is not part of the system would not know."* (Male)

The remaining participants viewed the health service as being on the down slide and will continue to go down. *"It will get worse, the Cuban doctors and nurses that are seeing patients at health centres are not allowed to give medication, sick leave and are not allowed to sign anything that can be taken to social welfare. I have been to Diego Martin Health Centre four times with my sick uncle and it's a waste of time. And these are the doctors and nurses that are taking over the health service now."* (Female)

None of the participants had heard about the Patients Charter.

Two participants used private healthcare facilities in the past 12 months. One used the St. Joseph Medical Centre. She used this facility because she got up with a bad pain one morning. She was of the view that the facility was far better than the public facility.

The other participant used a private doctor because she suffered with a bad pain for many years. No matter how many times she went to get X-rays done in the public facility but the doctors saw nothing. She eventually went to a private doctor on Lucknow Street and he immediately saw a fracture. *"The private facilities are far more reliable."* (Female)

Vision 2020 – Awareness, Progress & Expectations:

Vision 2020 meant the following to the participants:
More money for the rich
Seeing too far
Lovely coin phrase
No concrete planning

"Do you realize how many of these phrases came, passed and gone and nothing happened?" (Male)

"Nothing was said directly about Vision 2020 in the budget." (Male)

Participants shared mixed views about the ability for us to achieve developed country status by 2020.

"It is not impossible for us to reach developed country status by 2020, but I am not seeing any evidence of steps made towards it." (Female)

"We can get there, but the first thing that needs to be done is from us the people, but we sit down there and believe the Government has to give us everything and we grumble when things don't go our way, we do nothing to move forward." (Female)
"I believe we can achieve it." (Male)

"If at this stage we have not yet understood that we have to identify simple things like streets by names and street signs and number our buildings and we have not reached there yet, what will happen in 2020?" (Male)
"When people start being patriotic and stop littering and keep the paper from a dinner mint that you opened while out in your pocket until you reach home to throw away, then we can start to move towards Vision 2020." (Female)

"Everyday I still sit in traffic for three hours, and there is no sign of change, so I do not expect Vision 2020 to be achieved by 2020." (Female)

The only example of progress towards achieving Vision 2020 was noted as the impending deregulation of the telecommunication industry (Male). The remaining participants had no examples.

The words and/or phrases that come to mind when the participants think of a fully developed nation are as follows:
Quality
High standard of living
Lifestyle
Opportunity
High quality of education

None of these phrases apply to Trinidad & Tobago.

TRINIDAD & TOBAGO OPINION LEADERS – WAVE 5
Crime & Police, Health and Vision 2020.
GROUP 2 – South Trinidad

Conducted: Tuesday 12th October, 2004
Start Time: 4:45pm
End Time: 6:30pm

Group Composition:

Urban South Trinidad
C1 C2 Class
18 - 34 years
Mixed
4 Males, 4 Females

Level of Satisfaction with the Government:

The participants of this group were neither satisfied nor dissatisfied with the way in which the Government was running the country. They had their problems with certain issues whereas they were in full support of the Government's decisions. This based on the following:

"I am dissatisfied with the issue of crime. It seems as though nothing is being done to deal with the issues of crime." (Male)

"I am dissatisfied with crime, I don't think they are handling it too well at all." (Male)

"I am disappointed at the plans and things being put in place for the young people, if you look at the youth today, they are not at all serious. Everything is a joke for them. They do crime and as they get away with it they will continue doing worse crimes." (Female)

"I am satisfied with the plans that are being put in place for education, once it works all should be well in that aspect." (Male)

"I find the police are not doing anything at all to solve the problems and they never have any vehicles to come to investigate the crimes when they are reported." (Female)

"I am of the view that they are trying to do too much right now, on one hand they are trying to fix crime, while education and health are suffering. I am aware that they can only do so much, and not satisfy everyone, but they need to divide all the resources equally so that everyone will benefit." (Female)

"I am dissatisfied with they way the Government is running the country, they are only seeing about themselves and their friends and not the average person on the street." (Male)

"They have done nothing to date that will make you say that they have done a good job. Nothing hits you as being worthy of mention." (Female)

"I am satisfied with the work of the PNM, they have looked after the poor people, which is something the UNC never did. They have put a lot in place for the poor, take CEPPEP for example, that has put a lot of poor people off the bread line." (Female)

The participants were mainly of the view that the budget did not set out what it was supposed to.

"If you look at the budget, it did not touch much on the necessities like food, they poor people are no better off now than before." (Male)

"There was not much emphasis on pension and housing. There were also so many other things that the Government could have focused on. There are so many other prices they could have dropped. As they increasing some things for the poor they are taking them away in taxes. Look at the last budget, the only thing the Prime Minister could have thought to reduce was curry, how much curry do we really eat?" (Male)

"This was not a budget for the poor people, it only took care of the investors and the rich people." (Female)

Two participants on the other hand was of the view that it did set out to do what it was supposed to. However one was unsure if it would be put in place as the Government has an implementation problem. *"The Government usually has great ideas, but when it comes to implementing the ideas, it falls short."* (Male)

"The budget did set out what it was supposed to do. The increase in the minimum wage was a good move as it appears to look as the Government is interested in the bringing up the level of these individuals." (Female)

The most important issues facing the country according to this group of participants were noted as follows:
Crime
Kidnapping
Murders
Education
Housing
Increase in prices of food items
Breakdown of the family unit

The participants were of the view that all these issues had worsened over time. Especially in the case of kidnapping, when they noted that a lot of the kidnapping was kept quiet and unknown to the public. Only some were published by media.

The issue of crime such as violent crimes were as a result of the breakdown of the family unit.
"There is no longer the link between the older generations and the younger generations. This is the problem." (Male)
"People are killing each other because of drugs and money." (Female)
"There is too much hate and no love anymore." (Male)

In terms of education, the participants noted that the children are not being taught proper values in school today and as such are being brought up badly. Again this was linked to the breakdown of the family unit.

One of the participants noted that the lack of interest shown by the teachers in the welfare of the students was on the increase. It was noted that the teachers were only concerned about themselves and their salaries.

The increase in the persons that are considered "poor" was also on the increase. This was attributed to the increase in the unemployment level. *"Even though the Minister of Finance noted that there was a decline in this level, I am of the view that it has increased."* (Male)

"People are not teaching their children right from wrong again. That is why the society is as it is. The children are not taught anything about God again. They are taught that shacking up and fornication is good, this is what they are being taught, this is why they are getting into that." (Female)

"The only solution is to find back the family unit and values, without it all issues like crime will take place. From the family unit, the proper values will be carried into the schools. You can't change what children are taught at home when they are sent to school." (Female)

In terms of the local area, the participants noted the following issues:
Crime
Poor road conditions
Lack of jobs for young people leaving school
Too much selling and using of drugs
Too many unsupervised children – at 10pm in the night you see 6 year old children on the road unsupervised at 10pm. What is that child doing there at that hour? Looking to get kidnapped? This is attributed to the amount of single mothers out there today. They gone to their party and leave their children unsupervised." (Male)

Crime & Police:

Participants were all of the view that the level of crime in their area was on par with that of the rest of the country. *"All the crime that exists in the country exists in San Fernando. We are not saved from it. Some types may not be as bad, others may be worse."* (Male)

"The corrupt police service is one of the reasons why the crime will never be reduced. They encourage it too much." (Male)

"The crime in San Fernando is more of the petty crime and not the violent crime that you hear about in Laventille and those areas." (Female)

Two female participants noted that they were scared to be at home by themselves at night and even more so to be on the street any time of the day by themselves.

They were all of the view that the way that their area is being policed will get worse in the future.

"Look at for all the police cars the Government buying there is no sign of additional policing. They are just using the vehicles for their personal errands. When you call them they are never available to come to your assistance." (Male)

"I remember up to a few years police used to come within minutes of making a report, nowadays, there is no urgency when you call." (Female)

"Police are not taking their job seriously now and therefore I am of the view that it will get no better, it is just a down hill journey now. (Male)

"There may be an increase in the number of police, but that is no indication that they will do anything to assist in the crime reduction, since the police are never available to attend to the crime situation, they never have any vehicles and can never be on a crime scene when they are needed." (Male)

"I have no confidence in the police service. I am of the view that they will never have enough police to properly police the whole of Trinidad so as to eradicate all the criminals. There are more criminals than police today." (Female)

The main barriers to reducing the crime situation according to this group of participants were as follows:

Corrupt police service
Increasing unemployment levels
800-TIPS is not trusted by the public. There is a flaw in the system somewhere
Lack of values in the young people of Trinidad & Tobago
Citizens fear their life when it comes to reporting crime. They are of the view that the police will find out that they reported a crime and come after them
Our present judicial system

The participants noted the following that the government has done to reduce crime:
Increase in the number of youth programs
Increase in the money allocated to the NGOs and youth groups for expansion
Introduction of Community Police
Joint police and army patrols

The participants were of the view that the Government cannot realistically do anything to combat crime in these next few months. They saw the high level of crime that we see today as being due to many years of the reduction of the family unit and value system and also the creation of a very corrupt police force which will not be in a position to properly combat crime.

Crime can only be tackled in the long term. This will come from the following:
Creation of a proper judicial system that will deal with criminal issues in a more timely manner
Police service needs to be cleaned up
Job creation
Instill proper morals and values in the family
More serious police officers
Police officers that a corrupt should be penalized

The animals that were used to describe the police service are outlined as follows:
Pompeks – too soft
Lion – aggressive
Dog

The participants were of the view that ideally the police service should be a dog because a dog is faithful to its owner, its owner being the citizens of Trinidad & Tobago in this case.

The Government is not doing enough to reform and modernize the police service according to this group of participants, particularly because they did not know what to do.

The participants were of the view that the Government needs to do the following to modernize the police service:

Better training programs for the police officers
Inject more money into the system
Seek advice from foreign consultants/specialists who have done similar projects abroad
Start hiring more educated persons in the police force

None of the participants tried to contact the police in the past 12 months.

"It doesn't make sense to contact the police since they do nothing about it. So in fact you are wasting your time to contact them." (Female)

All participants were of the view that all of the crimes and anti-social behavior with the exception of prostitution, personal safety on public transport, poor street lighting, litter, dog mess in the streets, graffiti and poor housing conditions should be reported to the police.

Health – Expectations, Patients Charter & Private Provision:

Participants were of mixed views regards if that the health service will get better or worse in the future. However, none of the participants were of the view that there would be a total improvement it the system. However they thought that *"we should give it a chance."* (female)

"The measures that were described in the budget seem to be showing us that there will be an improvement." (Male)

"We will have to wait and see in order to judge the improvements. We will have to see the signs. There have been some changes, but again we will have to wait and see." (Male)

This was based on the decline of the service over the past years. They noted that there have been no signs of improvement and there has only been a deterioration as far as the services offered. They noted that the hiring of foreign doctors and nurses were not assisting the situation.

"My grand parents told me that long ago when a doctor was a doctor in the hospital, he could not have his private practice as is the case now. Nowadays most of these doctors have private practice and when they come in the hospital, they just make their rounds and disappear. They don't come in the hospital often enough." (Female)

"The administration needs to start looking at these things, there are doctors who will work full time in the hospital from 8 am – 4pm. Then after than they do their private practice. But to be doing the private practice during the hours that they should be in the hospitals is wrong. They are wasting the tax payers money." (Female)

"The doctors these days all they study is money, nothing else. They no longer studying the sick people. just how much money they will make." (Male)

The participants noted that the only way to improve the health service was to start from management of the administration and the top of the system, inclusive of the Ministers. "Need to have Ministers who are accountable, able to take the bull by the horn when someone does something wrong and fire them." (Female)

None of the participants had heard about the Patients Charter.

None of the participants had used any private health care facilities in the past twelve months.

Vision 2020 – Awareness, Progress & Expectations:

Vision 2020 meant the following to the participants:
"A nice picture, but not realistic."
"A remote promise"
More money for the rich
Lack of planning
"All the promises that they are planning to do will fall in place by 2020."
"Identify for us a better country"
"In order to achieve better living, we as a people need to change our way of thinking, our dependency on Government. We have to play our part. If we don't change our culture, because right now, if we continue going around doing simple things like littering we will never get to Vision 2020." (Female)

Participants were all of the view that we will NOT achieve Vision 2020 status by the year 2020. *"Because we as a people cannot change our ways."* (Female)
"We have to make it happen, but at this rate we will not achieve it." (Male)

Examples of progress towards achieving Vision 2020 were as follows:
"Changes in the education system – things are being put in place to improve it."
"Trying to fix the health system"

"Well it is slowly coming. There a lot of things being done, but we are not seeing what is going on." (Female)
"The Prime Minister has spoken about several things, but again it is up to us. We are not taking the opportunity." (Male)
The words and/or phrases that come to mind when the participants think of a fully developed nation are as follows:
Good transportation
Minimal crime
Employment for all
Free Education for all
Proper housing for all
Dependence on no one

Most of the phrases above apply to T & T in some minor way but far from what is required to achieve Vision 2020 by year 2020.

TRINIDAD & TOBAGO OPINION LEADERS – WAVE 5
Crime & Police, Health and Vision 2020.
GROUP 3 – Tobago

Conducted: Wednesday 13th October, 2004
Start Time: 4:45pm
End Time: 6:05pm

Group Composition:
Urban Tobago
DE Class
≥ 65 years
Mixed
5 Males, 6 Females

Level of Satisfaction with the Government:
Participants all noted a certain level of dissatisfaction with the way the Government is running the country. This based on the following:

"There is still a lot to be done. Things are done to their own benefit and not that of the population. So many people are crying out for so many things and you can't see an end to the problems that exist." (Female)

"They are trying their best, but that still is not good enough. People in the country have problems with roads. They should try to help those people because they are poor people who are trying to make an honest living." (Female)

"Too many health problems, the poor people lack drugs and not enough money to buy the expensive drugs."

"There is still too much corruption in the Government." (Male)

"The people in charge are not doing their job. If they did their job things will go well. Communication is another factor that is lacking. Poor systems in place in this country." (Female)

"No honest & truthful people running the country." (Female)

In terms of the recent budget speech, there were mixed views about what the budget set out to do for the country.

"In some areas maybe, they increased the pensions but it is going back to the supermarket owners because they will raise prices. But the government has to put a stop somewhere if they want to help the real poor people." (Female)
"I thought I would have heard more about the poor people in the country area who are crying out for help." (Female)

"It was a good budget but it's the implementation that will be a problem for them." (Male)

"They seem to want to help the people, doing his best, but all can't be helped at one time." (Male)

The most important issues facing the country according to this group of participants were noted as follows:
Crime
Violent Crimes
The participants noted that this type of crime was on the increase. *"People are on edge too much, you can't seem to be able to talk to someone without him wanting to pull out a gun. This is because there is too much hate in this country, no more love for your neighbour. If you mash my corn, the next thing is I will bring a cutlass and chop you up. That's the mentality now." (Female)*
"Crime is a holistic thing, all is not on the drug side"
"Unemployment, especially for the young people"
Health
Housing
Drugs
Breakdown of the family unit.

In terms of the local area, the participants noted the following issues:

Crime

Unemployment of young people

Drugs

Too many young children on the road alone late at night

Single parents on the increase

This group was of the view that the only solution to help reduce crime was to bring back the days of family values and stability.

"Look at how the young mothers dress and as such they dress their children. This is a sign of lack of morals and values. A short short dress or a short pants and an off the shoulder top to go to church." (Female)

Crime & Police:

Participants were all of the view that the level of crime in their area was lower than that of the rest of the country.

"The crime is on the increase in Tobago, but yet it is still not as bad as in Trinidad." (Female)

The participants all noted that there had been an increase in police presence in their area recently however, they were of the view that it will not get any better in the future.

"When I was younger I know the police station used to open all night, but nowadays they close by 10pm." (Male)

"They need to weed out the bad police from the service so that the work can go on properly. They have to pull up their socks. " (Female)

"The police seem to think that there is no urgency in you reporting your problem because they don't seem ever arrive on time." (Male)

"Parents do not train their children properly and therefore they will continue to commit crimes." (Female)

The main barriers to reducing the crime situation according to this group of participants were as follows:

Any young male 17 years who leaves school without a certificate should be sent to join the army or boot camp to be taught discipline

Bring back the family values

Police should be given the privilege to stop children from liming on the streets at night

People depend on the government too much – the parents should be taking the responsibility now

The participants noted the following that the government has done to reduce crime:

Increase in the number of youth programs

Introduction of Community Police

Introduction of programs like CPEPP, URP, YTEPP

Increase in policing

The participants were of the view that the Government cannot realistically do anything to combat crime in these next few months.

The lack of family life is the root of the problems. Once they get to the bottom of this all the issues will be dealt with.

The government can do the following to tackle crime over the next few years:

Clean up the police service

Re evaluate the bail system

Ensure that the police system has no loop holes – presently too many people get off due to technicalities

The animals that were used to describe the police service are outlined as follows:

Dog – sometimes humble, bad when rushed

Lion – bad, ferocious

Ideally the police service should be a dog – to protect & serve.

The Government is not doing enough to reform and modernize the police service according to this group of participants, however, it is trying.

None of the participants tried to contact the police in the past 12 months.

All participants were of the view that the following should be reported, on the basis that they are serious crimes:

Arson

Abuse from neighbours

Attacks or threats on home

Burgularies

Drug abuse or drug dealing

Kidnapping

Mugging or theft

Racist attacks or harassment

Sexual attacks or harassment

Car jacking

Health – Expectations, Patients Charter & Private Provision:

Participants were of mixed views regards the future of the health service. The reasons for their level of dissatisfaction are as follows:

Length of time waiting to be attended to

Pharmacist is not always in

Based on the measures outlined in the budget, some of the participants were of the view that there would be improvements in the health service. *"We just have to wait and see. It's too early to tell."*

In terms of their expectations for the improvement in the quality of service, the participants were of the view that it could improve with the construction of the new hospital in the Signal Hill area. They stated the following:

One participant stated that she was not entirely sure that it will improve, but it would not get worse. *"I will wait and see."* (Female)

They were of the view that once the administration is fixed, all will go well with the service. For the health service to improve, the management has to improve.

They also noted that there needs to be accountability in terms of the top people in the Ministry.

None of the participants had heard about the Patients Charter. None of the participants had used any private facilities.

Vision 2020 – Awareness, Progress & Expectations:

The participants were not aware of Vision 2020. When explained they were of the view that T & T will not reach developed country status by year 2020 because they were no where close to doing anything to.

There were no examples of progress made towards achieving Vision 2020.

The words and/or phrases that come to mind when the participants think of a fully developed nation are as follows:

Good transportation

No crime

Education

Housing for all

Dependence on no one

None of these phrases apply to Trinidad & Tobago.

TRINIDAD & TOBAGO OPINION LEADERS – WAVE 5
Crime & Police, Health and Vision 2020.
GROUP 4– Central Trinidad

Conducted: Thursday 14th October, 2004

Start Time: 5:00pm

End Time: 6:00pm

Group Composition:

Rural Central Trinidad

DE Class

25 - 35 years

Mixed

5 Males, 5 Females

All with Children

Level of Satisfaction with the Government:

Participants had mixed views regards the way the Government is running the country. Six of the participants were dissatisfied, most mentioned was that of crime. This based on the following:

"I would say that I am dissatisfied with some of the thing like the crime scene in the country. I think the Government is not dealing with it properly. They are not handling it properly at all. The whole thing about the police force and how they never have transport to come and deal with crime. That is a problem, then long after the crime has taken place you see three or four police cars coming to the scene." (Male)

"I am dissatisfied with the health services. There are too many existing problems that they have chosen to sweep under the carpet and no one asks any questions." (Female)

"The crime situation is really ridiculous at this point in time. The young generation that is coming up is being lead astray. Also they need to have stiffer bails so that they will think twice about doing these things. The government should take this more seriously." (Female)

"I am satisfied with the education system, the government is doing a good job to promote education, also they are doing a good job when it comes to construction, they are ensuring there is an employment created." (Male)

The participants were of the view that the budget speech DID NOT set out what is needed for the country.

"It did not touch much on the food issues. Very few prices of food items were dropped." (Male)

"No thought was given to the lower class people. For example they raised the minimum wage, but then raised prices and the business men will also raise prices. So at the end of the day these people are back to square one." (Male)

"This government takes more than it gives out." (Female)

The most important issues facing the country according to this group of participants were noted as follows:

Crime

Kidnapping *"There are a lot of kidnappings going on that people know nothing about."* (Male)

The participants noted that this type of crime was on the increase.

Increase in the prices of food items

Poverty

Racial tension – *"there is no political party that is willing to work with both races. Someone that is genuinely interested in both races. Someone who is really out for the lower class people."* (Male)

In terms of the local area, the participants noted the following issues:

Crime

Lack of job opportunities – URP programs are only short term and as such after two weeks the people are back on the streets

Poor road conditions

Lack of disciplining of children at early ages – need to address the discipline at a primary school level. Teachers and principals have to pay a more important role in disciplining of the children.

The solutions to help reduce crime that were mentioned are:

Increase in the number of jobs

Increase the training of children, especially in the area of sports

Stricter laws

Reduction of the level of corrupt police in the police service. "Some of the police actually supply the guns that are used. Look at the example of the policeman and his wife who were held with a quantity of narcotic and guns. If I have the police supporting me, then there is no way I will get charged. "

Crime & Police:

Participants were all of the view that the level of crime in their area was lower than that of the rest of the country.

"In Carapichaima it's lower when compared to the other areas, especially in terms of kidnappings, child abuse, domestic violence. We don't hear about those things in my area." (Male)

"In my area it's lower because the bandits either got killed or are in jail. Also because it is a small community and in areas like this the people have a tendency to be close knit. " (Male)

The participants all noted that there had been an increase in police presence in their area recently and five of them were of the view that it will improve in the future.

"Based on the level of police, the criminals will think twice to commit any crimes." (Female)

"In most cases when the robberies happen the police are never around, therefore by increasing the police will not solve the problem because they never arrive for about ? hour to 1 hour after the incident." (Male)

"I hope it will not get worse in the future. Someone needs to do something about it." (Male)

"People on the whole are starting to pay attention, they are getting fed up of living behind the burglar proof in their house, so they will force the police to do their job now." (Male)

"We will be able to judge the improvements by a reduction in crime. Normally by the court house there are a lot of people, you might see less of that. Sometimes when you go out in the road and travel all hours of the morning, but now you can't do that. I am scared to be outside by myself once it is 5pm. When you sitting next to someone in a taxi, you never know if they have a gun on them." (Female)

The main barriers to reducing the crime situation according to this group of participants were as follows:

High unemployment

The lack of trust in 800-TIPS

There needs to be an increase in police patrol. Right now there are a lot of drug blocks that the police know about, but they have shares in it, so they leave them alone.

Poor judicial system

The participants noted the following that the government has done to reduce crime:

Increase in the number of youth programs

Introduction of Community Police

Joint police and army patrols

The participants were of the view that the Government cannot realistically do anything to combat crime in these next few months. They saw the high level of crime that we see today as being due to many years of the reduction of the morals and values. The government can do the following to tackle crime in the long term:

Revise the judicial system – harsher penalties. If you look at the offenders, most are repeat offenders who got off on bail or on a short jail sentence.

Clean up the police service – too many corrupt police

Get rid of all the SRPs that they hired, that are doing nothing and only collecting money

Emphasize the family unit and morals

Job creation – CPEPP will not solve the problem. That is not permanent. People want a permanent job that they will be able to achieve something and feel good about themselves.

The animals that were used to describe the police service are outlined as follows:

Puppy Dog – too soft and has no force

Fox – sly, can't be trusted

Lion – Aggressive

Ideally the Police Service should be:

Hawk – moves with grace and looks out while it does its job

Dog – faithful to its owner

The Government is not doing enough to reform and modernize the police service according to this group of participants. *They need to hire a private entity to investigate the police. You can't have the army investigating the police and vice versa. All military is one military Need to bring the police that do wrong to justice, just like the bandit and the murderer. They need to pay time for their crime. If they are there to protect and serve and they are at fault – then they should pay the price.* Proper training of the police officers

None of the participants tried to contact the police in the past 12 months.

All participants were of the view that the following should be reported, on the basis that they are serious crimes:

Arson

Abuse from neighbours

Attacks or threats on home

Burgularies

Drug abuse or drug dealing

Kidnapping

Mugging or theft

Racist attacks or harassment

Sexual attacks or harassment

Car jacking

Health – Expectations, Patients Charter & Private Provision:

Participants were of mixed views regards the future of the health service. *"It's getting from good to bad to worse on a daily basis."* (Female)

"There is nothing in place for it to get better." (Male)

One participant was of the view that it will get better for some of the people, at least according to the budget. *"The cancer patients will now get free medication, but this may make it worse for others."* (Male)

These participants were unable to state how they could judge improvements.

None of the participants had heard about the Patients Charter.

One of the participants used private healthcare facilities in the past 12 months. She used the Eric Williams Medical Sciences Hospital. She used it because nothing was being done in the General Hospital. It was a far better experience than the public hospitals in terms of the treatment she received, her room was air conditioned, the nurses had manners, they respected your privacy and they were there at your every demand.

Vision 2020 – Awareness, Progress & Expectations:

Vision 2020 meant the following to the participants:

To become a 1st world country by 2020.

By 2020 we should not be a 3rd world country

Participants shared mixed views about the ability for us to achieve developed country status by 2020.

"Some parts of the country will achieve this status such as Port of Spain, Chaguaramas and maybe San Fernando. Every where else will remain 3rd world." (Female)

"We are in 2004 and yet we cannot get certain amendments passed that will improve the standard and quality of life in Trinidad. Nothing has been done yet and we are in 2004, I don't see anything being done in the near future." (Male)

The only examples of progress towards achieving Vision 2020 were as follows:

Free text books

Improvement in health care – going in right direction and more resources spent on it.

Proposed free tertiary education

The words and/or phrases that come to mind when the participants think of a fully developed nation are as follows:

1st world

Industrialization

Concrete jungle

Pollution

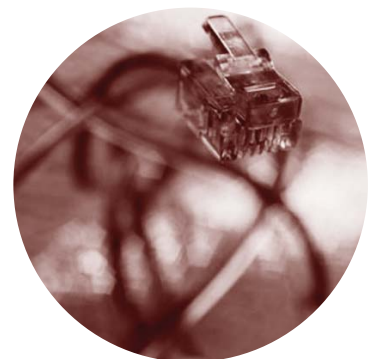The words that apply to Trinidad & Tobago now are:

Pollution

Industrialization

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Ministry of Public Administration and Information

Opinion Leaders' Panel 2005

Wave 5 – ICT Report
29 January – 1 April 2005

Research Study Conducted for the Government of Trinidad & Tobago

MORI | **Final Report**

Contents

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1. Introduction

1.1. Background and objectives

The Opinion Leaders' Panel was established as part of the programme for Modernising Government in Trinidad & Tobago. The purpose of this research is to provide evidence about the views of citizens of Trinidad & Tobago as a basis for informed decision making and policy formulation and implementation with respect to public service delivery.

This volume contains the report on the Information and Communications Technology (ICT) areas researched during the 5th Wave of the Opinion Leaders' Panel. This research was conducted by the U.K. based research firm Market and Opinion Research International (MORI) Social Research Institute with HHB & Associates on behalf of the Government of Trinidad & Tobago.

A second report focusing on the key trends and policy areas has been produced separately.

1.2. Methodology

1.2.1. Sampling

In the initial design of the Opinion Leaders' Panel, concern for panel 'wear out' and 'decay' suggested that after the baseline of 2,747 randomly sampled citizens were interviewed, subsequent waves would target approximately one third of the participants on each occasion. MORI therefore instructed HHB & Associates to select approximately 900 members of the panel as the 'universe' for each subsequent wave. Random number selection was utilised for this exercise, and the field staff were instructed to contact these original panellists. MORI anticipated that this would result in approximately 700 interviews allowing for deaths, serious illness, those away during the fieldwork period, non-contacts after three recalls and refusals to participate.

For Wave 5, it was decided to return to the original Panel in order to conduct a "baseline" survey. Because of panel 'decay' it was necessary to recruit some new members to the Panel who had not previously taken part in any Opinion Leaders' Panel studies. In total, 2,426 Panel members were interviewed, which was made up of 1,538 existing and 888 new members.

The new members were selected to join the panel in the following way: The required demographic characteristics to bring the overall panel in line with the population characteristics of the 2000 census of the new members was first determined. This was determined with respect to race, gender, age and location (regional corporations).

Enumeration district (ED) maps for the selected regional corporation locations were selected and the relevant quota was assigned to each map. Each map had marked on it a random walk (arrows showing how the interviewer should proceed) and a start position. Interviewers were instructed to follow the arrows and to select every "nth" house. A listing of eligible members of the household was made and any person fitting one of the quotas was selected and interviewed. Only one person per household was allowed. Interviewers proceeded in this way until the required quotas were obtained.

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1.2.2. Response rates

Interviews for Wave 5 were carried out face-to-face, in home, between 29 January – 1 April 2005. There was a break of five days because of the Carnival season. 1,538 successful interviews were completed with existing Panel members, out of a total sample of 2,023, giving a response rate of 76%. 888 new Panel members were recruited from an initial selection of 1,152, giving a response rate of 77% (see appendix IV for details).

1.2.3. Weighting

The data have been weighted by age, ethnicity, gender and regional corporation to the 2000 census data. Weighting for work status is derived from an analysis of the most recent labour force survey data.

1.2.4. Area combinations

Reference is made in this report to different areas of the country, which have been classified as follows:[1]

North	(Port of Spain and Diego Martin);
South	(San Fernando, Point Fortin, Princes Town, Penal/Debe and Siparia);
East	(Arima, San Juan/Laventille, Tunapuna/Piarco, Rio Claro/Mayaro and Sangre Grande);
Central	(Chaguanas and Couva/Tabaquite/Talparo); and
Tobago.	

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[1] Note because of the very low base size of respondents in Tobago, no breakdown of results in this area is reported.

1.3. Qualitative research

In addition to the main survey, four focus groups were recruited and conducted by Trends Limited. The topic guide was prepared by MORI. The focus groups were conducted prior to the survey fieldwork in order to help us to design the questionnaire, as well as to use some of the verbatim comments in this report. The composition of the groups is shown in the following table.

Table 1: Focus groups composition

Area	Gender	Age	Class[1]
Central Trinidad (rural)	5 men, 5 women	25-35 years	DE
North Trinidad (urban)	5 men, 5 women	40-50 years	ABC1
Tobago (urban)	5 men, 6 women	65+ years	DE
South Trinidad (urban)	4 men, 4 women	18-34 years	C1C2

Source: MORI

All four groups were of mixed ethnicity. Verbatim comments are used throughout the report to illustrate participants' discussions. The full reports from each focus group are also appended.

1.4. 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.

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 a service records 40% satisfied and 25% dissatisfied, the "net satisfaction" figure is +15 points.

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[2] In this report professional/non-manual workers refer to those residents in social grades ABC1. Residents in social grades C2DE are referred to as working class and unemployed/not working. Please see the appendix for further details.

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In several places where identical questions were put to the baseline sample of 2,747 citizens, and repeated in this fifth wave with 2,426, a calculation of 'swing' is offered to indicate the change over time, comparing the attitudes of the T&T public this year against last. 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.

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

1.5. Acknowledgements

MORI would like to thank Senator, Dr. the Honourable Lenny Saith, Minister, Ms Jacqueline Wilson, Permanent Secretary, and Ms Gillian Macintyre, Permanent Secretary, at the Ministry of Public Administration and Information and their colleagues Donna Ferraz, Alexa Khan, Lisa Branker, Ramon Gregorio, Peter Mitchell, Denyse White and the rest of the Divisional team; the Central Statistical Office, Maxine Richards at Trends Limited 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 2,426 citizens of Trinidad & Tobago who gave up their time to take part in this survey and to tell us their views.

1.6. Publication of data

As the Government of Trinidad & Tobago has engaged MORI to undertake an objective programme of research, it is important to protect the interests of both organisations by ensuring that it is accurately reflected in any press release or 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 advance approval of MORI. Such approval will only be refused on the grounds of inaccuracy or misrepresentation.

2. Executive Summary

Computer and the Internet

Trinidad and Tobago is almost **equally divided in terms of use of and access to new technologies**, such as personal computers (PC) and the Internet. Just over half the population (56%) say they do not own or use a PC at home, work or place of study, nor do they have access to the Internet or use any public access Internet points. Three in ten (31%) households have a PC, and slightly fewer people (27%) use the Internet somewhere. Predictably, there is evidence of both an age and social class/income divide in technology use, with younger and more affluent people most likely to be taking advantage of new technologies.

The **barriers to PC ownership** are not the same for all people. Older people need convincing of the benefits and applicability of PCs and, for some, being taught how to use them. Cost is a more substantial barrier for other people, particularly the less well off.

While the majority of Internet users will go online more than once a week (68%), less than one in three go online every day. Over half of Internet users say they spend between one and five hours online per week.

The most **common use of the Internet** is for education, research or related activities (65% of users say they have done this online in the past three months) and for accessing Internet email (51%). However, younger people spend more time playing or downloading games and using chat rooms.

Regarding different aspects of **dial-up Internet service**, more users are satisfied with each than are dissatisfied. Around half of dial-up users are satisfied with their connection speed (54%), the stability of the connection (52%) and the ability to connect to the Internet at any time (50%). The cost of the services is slightly less well rated (44% satisfied). There are, however, sizeable minorities of between one in five and one in four dial-up users who are *very* dissatisfied with each of these four aspects of the service they receive.

Around one in seven people (15%) use the **Internet at public places** such as Internet cafes and public libraries. The most important consideration for these people when deciding to use such facilities is the cost of the service (49% say this is the most important), followed by the location and the speed of the connection (35% and 34%, respectively).

There is **potentially strong demand for broadband services** and this looks like a good sector for growth in the next few years as just one percent of homes are currently equipped with broadband. Overall, 56% of those with no broadband say they are interested in this service, including 43% who say they are *very* interested. Among those people who currently use or have access to the Internet at home, as many as three in four (74%) say they are interested in broadband services, including 60% *very* interested.

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e-Government

The vast majority of people (69%) **feel it is important for the Government to provide information and services online**, and there is demand for as many services as possible to be available on the Internet. In particular, people want to use the Internet to find out how to **obtain benefits or services** and **to find out what their money is spent on** (both 38%).

However, the majority of the public say they would **not feel safe providing personal information to the Government** either on a website (52%) or by email (51%), and therefore this could be a major obstacle to improving the efficiency and customer focus of public services by utilising modern technology. In addition to encouraging people to use the Internet, the Government needs to demonstrate that this is a safe medium to use. Also given that even higher proportions of the public would not feel safe providing personal information to the Government by telephone (72%) this seems to be a more widespread problem than just about people's attitudes towards modern technology.

e-Commerce

The majority of the public accept that the Government should have some role in **regulating the types of goods and services people can buy online** (59%). As many as 83% of people believe the Government should ensure that **protection for goods bought online** should be the same as for goods bought by other means, and 66% feel that extra protection is needed for purchases from **foreign websites**.
Few Internet users have made any purchases online – just 16% say they have done so in the past 12 months, with books and magazines (42%), computer hardware/software and electronic equipment (both 30%) being the most common purchases. Among those who have bought something online in the past year, about half say they spent less than a $1,000TT in total.

Local and International Calling

A little over seven in ten people (72%) have a **landline telephone** in their home and three in five (60%) personally use a **cellular phone**. Also, a minority of households have both a landline and a cell phone (42%) and exactly one in ten have neither. While older people are more likely to have a landline phone than younger people (86% of over 55 year olds compared with 63% of under 25s), the age gap is much greater in terms of the use of cell phones (31% of over 55 year olds use one compared with 69% of under 25s).

Among people who have a landline telephone, ratings of **TSTT are poor**. On five different aspects of the service covered in the survey, more customers are dissatisfied with the service than satisfied, and significant proportions are *very* dissatisfied. In total, 58% of customers are dissatisfied with the **overall service provided** (compared to 37% satisfied) and 74% are dissatisfied with the **cost of making calls to cell phones** (compared with 15% satisfied).

A similar **poor rating is given by customers of TSTT's cell phone service** with more of these users dissatisfied than satisfied with each of the four service aspects covered in the survey. In particular, 71% say they are dissatisfied with the cost of making local calls (compared to 25% satisfied).

In contrast to the ratings of landline and cell phone, the one in four people who have used an **International Call Centre** in the past 12 months, are on the whole positive about the cost of international calls from these – as many as 93% say they are satisfied.

Given the feelings of customers about TSTT at present, it is not surprising that **many existing cell phone customers say they are likely to switch to another cell phone provider** when competition begins (85% say they are likely). This figure should not be used as a projection of the actual number of people who will move to another service provider in the future since a lot will depend on the exact choices available at the time. The competition for customers is likely to be driven largely by cost considerations, particularly the cost of local calls.

Fastforward

Very few people feel they know a great deal about *fastforward* – just 2% of the population do and a further 26% say they know either just a little or a fair amount. In contrast, the majority say they have heard of *fastforward* but know nothing about it (14%) or have never heard of it (55%).

Despite the low feelings of familiarity with *fastforward*, among those who know at least a little about the initiative, the vast majority feel that it will be either **fairly beneficial (38%)** or **very beneficial (52%)** for the country. Given these positive ratings, the key aim for the Government in the future is to build greater awareness and feelings of familiarity with *fastforward* by utilising both the television and interactive consultations since over half of the public say they would like to be informed via **television** (55%) and a large proportion want more interactive involvement in the form of **face-to-face consultations** (43%).
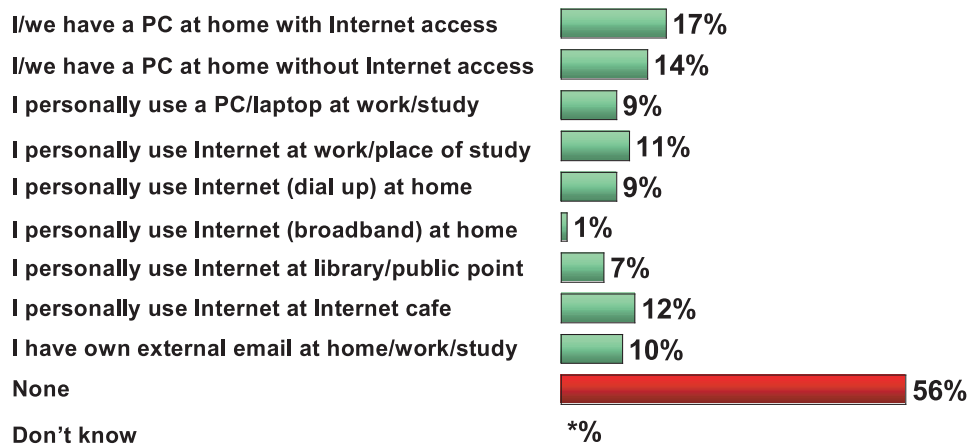

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Prof Robert M Worcester
Mark Gill
Tom Huskinson

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3. Computers and the Internet

3.1. Use of computers and new technology

The country is fairly evenly divided between those who have access to or use a range of new technologies, and those who have no access to any of them, as shown in chart 1 below.

Chart 1: Technology use

Q   *Which, if any, of the following applies to you and your household?*

I/we have a PC at home with Internet access	17%
I/we have a PC at home without Internet access	14%
I personally use a PC/laptop at work/study	9%
I personally use Internet at work/place of study	11%
I personally use Internet (dial up) at home	9%
I personally use Internet (broadband) at home	1%
I personally use Internet at library/public point	7%
I personally use Internet at Internet cafe	12%
I have own external email at home/work/study	10%
None	56%
Don't know	*%

Base: 2,426 TT adults, 29 Jan – 1 Apr 2005   Source: MORI

Three in ten people (31%) say that they have a **personal computer** (PC) at home, with the majority of these having Internet access with it. Seven in ten (69%) do not have a PC at home.

As with new technology use, ownership of PCs is not spread evenly across the population. Three in ten (30%) of 18-34 year olds have a PC in their home, as do one in three (36%) of 35-54 year olds. This level of ownership falls to just 21% among those aged over 55 years. The biggest difference between sub-groups of the population, however, is in terms of social class with half of professionals (49%) owning a PC compared with only one in five of manual/unskilled/unemployed people (19%).

Over half of those people who **do not have a PC** say the reason for this is that computers are **too expensive** for them to purchase (54%). This is particularly so for 35-54 year olds (66%), manual/unskilled/unemployed (57%) and Indo-Trinidadians (58%). The next most frequently provided reason for not owing a PC is a **lack of interest** (22%), which is by far the main reason for anyone aged 55 years or over (52%). Similarly, a relatively high proportion of older people say **not knowing how to use computers** is one of the main reasons why they do not own one (26% of over 55 year olds give this reason compared with 12% of under 55s).

3.3. Use of the Internet

Just over one in four people (27%) use the Internet. This usage is at home, work, or study or in public places such as libraries and Internet cafes. Table 1 compares the profile of those who use the Internet anywhere with the profile of the adult population overall.

As with ownership of computers, use of the Internet is not evenly spread across the population, with significant skews in terms of age and economic status, but not in terms of gender. For instance, 18-24 year olds make up 21% of the adult population but nearly double that of the population of Internet users (37%). In contrast, over 55s account for about one in five adults in Trinidad and Tobago, but just one in twenty-five Internet users.

Table 2: Profile of Internet users vs. adult population

2,426 TT adults	Profile of Internet users	Profile of adults
	%	%
Gender		
Male	51	50
Female	49	50
Age		
18-24	37	21
25-34	29	22
35-44	21	22
45-54	10	16
55+	4	19
Work Status		
Full/Part-time/Self-employed	72	59
Not working	28	41
Ethnicity		
Afro-Trinidadian	39	38
Indo-Trinidadian	34	42
Other / mixed	27	20

Source: MORI

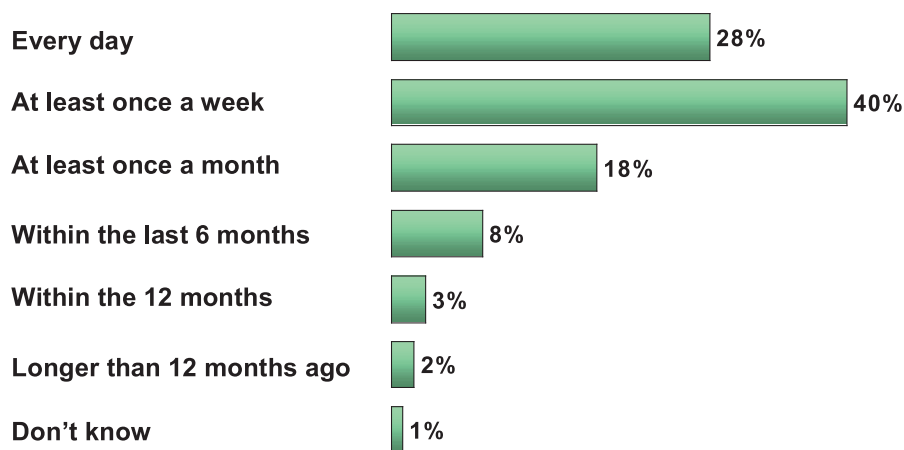As well as access to the Internet, the survey was designed to measure **the frequency**, and **the length of time**, people spend online. Of those who use the Internet, two in three (68%) say they use it either everyday (28%) or at least once a week (40%). For one in eight, frequency of Internet usage is very low – only 13% report using the Internet once every six months or less frequently.

MORI

The most frequent users are most likely to be in the North of Trinidad (40% in the North say they use the Internet every day, compared to an average of 28%), and are more likely to come from the higher social classes (32% of ABC1s vs. 22% of C2DEs).[3]

Chart 2: Computers and the Internet

Q   On average, how often do you usually access the internet?

Every day	28%
At least once a week	40%
At least once a month	18%
Within the last 6 months	8%
Within the 12 months	3%
Longer than 12 months ago	2%
Don't know	1%

Base: All who use the internet anywhere (657)   Source: MORI

Two in five Internet users (19%) are very light users, saying that they spend on average less than one hour per week on it. Just over half (52%) use the Internet between one and five hours per week. A minority say they use the Internet more than five hours per week: one in eight (12%) spend between six and ten hours per week on the Internet; one in ten (10%) spend between 11 and 30 hours per week; and 4% spend more than 30 hours per week online.

The most common use of the Internet is for **education and research**, with two in three people (65%) saying they have used the Internet for this purpose in the last three months. **Internet e-mail** is also commonly used, with half of the people (51%) having used Internet e-mail in this time period, and two in five using it for **playing or downloading games** (40%) or **looking for information or services** (39%).

Internet users from higher social classes are much more likely to go online for education and research reasons (71%), for emailing (60%), looking for information (44%) and purchasing goods (14%) than are those from lower social classes. Games, music and software usage on the Internet is far more popular among younger age groups (53% of those aged 18-24) as is using chat rooms (34%). On average, Internet users took part in about four of the listed activities in Chart 3 in the last three months.

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[3] In this report professional/non-manual workers refer to those residents in social grades ABC1. Residents in social grades C2DE are referred to as working class and unemployed/not working. Please see the appendix for further details.

Chart 3: Internet Usage

Q *Over the last three months, which, if any, have you done on the internet? Read out the options that apply*

Education, research and related activities	65%
Emailed	51%
Played or downloaded games, music or software	40%
Looked for information about goods or services	39%
Read/downloaded online magazines/ newspapers	24%
Used a chatroom	23%
Health related activities	20%
Purchased goods or services	10%
Made a telephone call using the Internet	9%
Used electronic banking or other financial services	5%
Interacted/got in touch with public authorities	4%

Base: All who use internet anywhere (657)   Source: MORI

3.3. Satisfaction with Internet services

People who use the Internet via dial-up at home were asked about their satisfaction levels with the connection speed, cost, stability of the connection and their ability to log on throughout the day and night. The highest level of satisfaction is with the stability of the connection, with 52% saying they are satisfied, and the lowest is with the cost of the service, with fewer than half (44%) saying they are satisfied, as shown in chart 4.

Chart 4: Satisfaction with the Internet

Q *How satisfied or dissatisfied are you with the following factors that relate to your use of the Internet at home (via dial-up)…?*

■ % Very dissatisfied   ■ % Fairly dissatisfied   □ % Fairly satisfied   ■ % Very satisfied

	Very dissatisfied	Fairly dissatisfied	Fairly satisfied	Very satisfied
The connection speed	24	14	39	15
The cost of the service	24	18	38	6
The stability of the connection	19	17	39	13
The ability to connect to the internet at all times of day or night	21	19	34	16
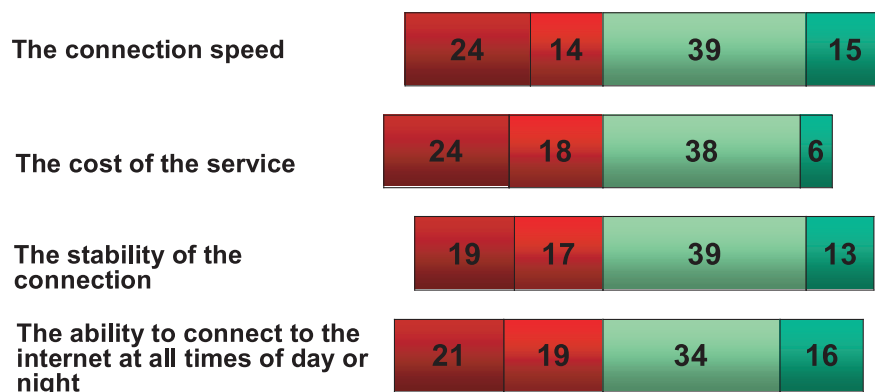
Base: All who use internet at home via dial-up (223)   Source: MORI

MORI

Despite the fact that for each of the four aspects of **dial-up Internet services** covered in the survey, **more people are satisfied than dissatisfied**, it is striking that there are high proportions of people who say they are *very* dissatisfied with each of them. One in four people say they are *very* dissatisfied both with the cost of the service and the connection speed (24% each). Two in five are *very* dissatisfied with the stability of the connection, and the ability to connect at all times of day or night (19% and 21% respectively).

3.4. Broadband

Only one percent of the public currently use broadband Internet services at home. However, as illustrated by chart 5, over half of people who do not currently have broadband Internet access, express an **interest in using broadband Internet services at home** (56%). Indeed, over two in five people (43%) say they are *very* interested.

Chart 5: Broadband Internet at Home

Q   *How interested, if at all, would you be in using high speed, bro adband Internet services at home? By high-speed Internet services I mean a connection other than dial-up, such as through a dedicated modem or telephone line which provides faster access than regular dial-up.*

Don't know 13%

Very interested 43%

Not at all interested 20%

Not very interested 11%

Fairly interested 13%
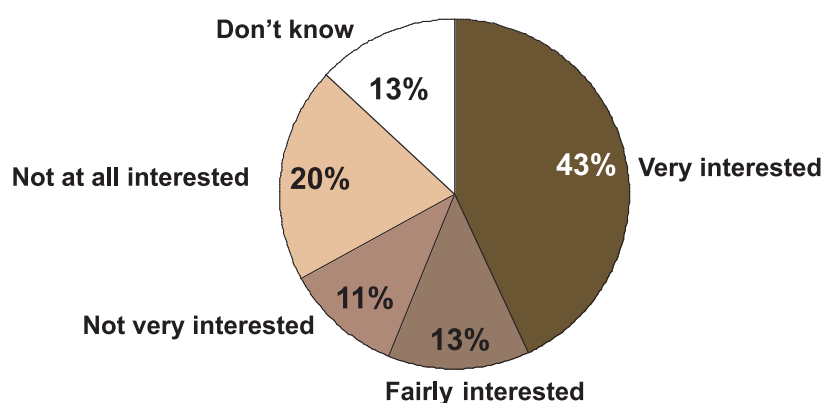
Base: All who do not currently have Broadband Internet access(2, 396)

Source: MORI

Considering those who express an interest in broadband at home (i.e. are either *very* or *fairly* interested), potential demand is far greater among the younger generations: seven in ten (70%) of 18-34 year olds are interested, compared to one in four (26%) of those 55 and over. Over three in five (63%) of those in social classes ABC1 are interested, against half (51%) in CD2E.[4] And geographically, those in the Central area are the most interested (64%), followed by those in the Eastern area (57%); while those in the North express the lowest level of interest (49%).

The potential for much greater use of broadband in Trinidad and Tobago is therefore high, particularly if consumers here follow recent trends across the world. Research presented in *The Economist* magazine has illustrated a substantial international uptake of broadband over the past year, particularly in developing countries where many have seen growth in the past 12 months of over 100%.[5]

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[4] In this report professional/non-manual workers refer to those residents in social grades ABC1. Residents in social grades C2DE are referred to as working class and unemployed/not working. Please see the appendix for further details.

MORI

Among those people who currently use the Internet at home, potential demand for broadband is much greater than among the public generally. Three in five (60%) home Internet users say they are *very* interested in broadband and 14% are *fairly* interested. In contrast, just under half of people who do not have a PC in their home express any interest in broadband services (47%).

The **cost of the service** and the **speed of connection** are equally important considerations for most people (77%) who are interested in broadband Internet at home. However, similar to the high importance placed on financial considerations relating to computers and the Internet described earlier, about twice as many people say the cost is more important to them than the speed of connection (13% versus 7% respectively).

Chart 6: Broadband – Speed versus Cost

Q *When thinking about whether to use high speed Internet access, what is more important to you – the speed of the connection or the overall cost, or are they equally important?*

Don't know (3%)

Speed of connection

7%

Cost

13%

77%

Equally important
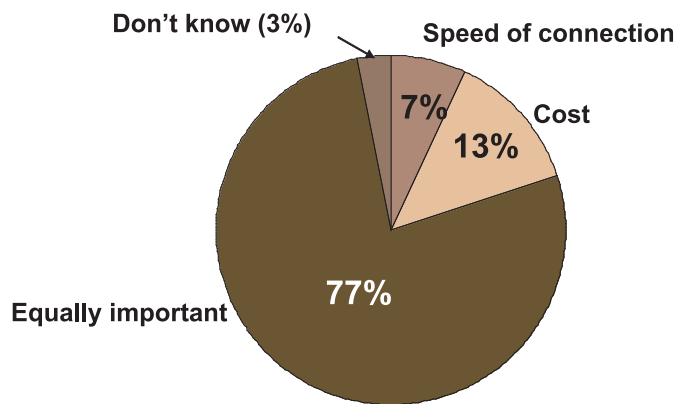
Base: All who would be interested in high speed Internet access   at home (1,343)

Source: MORI

MORI

3.5. Use of Internet in public places

One in seven people (15%) use the Internet at a library, Internet café or a public access point. When deciding to use these Internet services, financial considerations again emerge as the most important factor – half (49%) say that the **cost** is important to them. Other considerations are also important to a large majority of people, notably the **location** (35%) and issues surrounding the service quality, such as the **speed of connection** (34%) and the **reliability of the service** (24%).

Chart 7: Considerations when using the Internet in Public Places

Q What factors are most important when deciding to use the Internet at a library, Internet café or public access point?

% saying important

Factor	%
Cost of service	49%
Location	35%
Speed of internet connection	34%
Reliability of the Internet service	24%
Security when online	23%
Customer service	19%
Safety in getting to place	12%
Cost of printing documents from the Internet	11%
Accessibility	3%
Privacy	2%
Other	9%
Don't know	10%
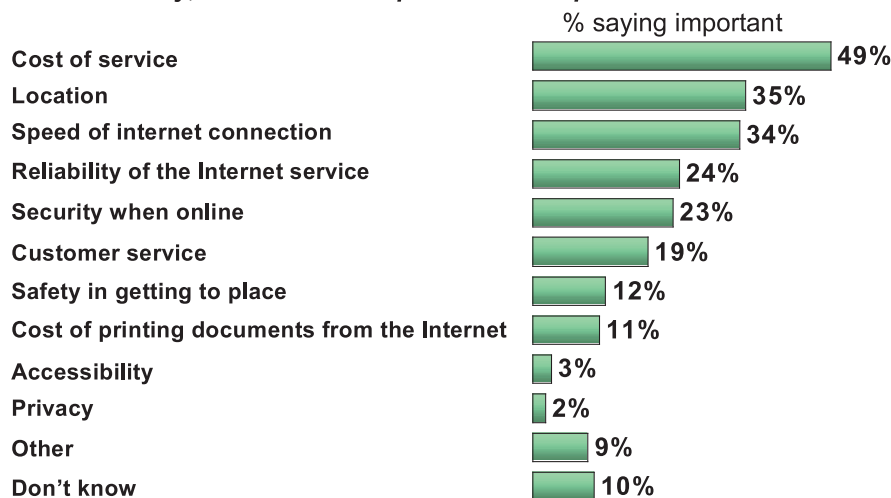
Base: All who use the Internet at a library/public access point/Internet cafe (366)   Source: MORI

While a significant proportion are concerned about security while online (23%), a significantly smaller amount take privacy into account when deciding whether to use these services (2%).

When analysing the relative importance of these factors for different sub-groups, the main differences are that people in the South are more likely to say cost is an important factor (64%). Further, the location of the Internet access point is a more important concern for females (43%) than males (27%).

4. e-Government

4.1. Importance of e-Government

The majority of people (69%) think that it is important for the Government to provide information and services on the Internet, with half (49%) thinking it is *very* important. A little over one in four people (27%) feel it is not important for the Government to do this.

Table 3: Government and the Internet

Q) How important, if at all, is it to you personally that the Government provides information and services on the Internet?

	%
Very important	49
Fairly important	20
Not very important	13
Not at all important	14
Don't know	4

Source: MORI

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he main differences of opinion on this question are in terms of people's age and social class, which broadly reflects current use of the Internet. As such, over 55s and C2DEs[6] are less likely to think it is important for the Government to provide information and service online. Even so, more of these groups say it is important than not important for the Government to do this. If more of these groups begin to use the Internet it is likely that the demand for Government services online will increase in the future.

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[6] In this report professional/non-manual workers refer to those residents in social grades ABC1. Residents in social grades C2DE are referred to as working class and unemployed/not working. Please see the appendix for further details.
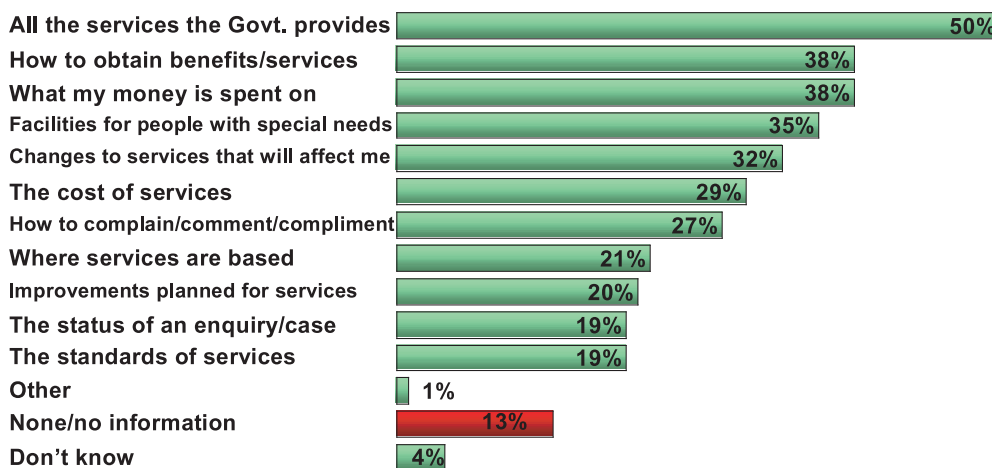
MORI

4.2. e-Government services

When asked what services they would like to have access to on a Government website, there is a high demand for **universal access to all the services the Government provides**, with half the public saying they would like this.

Considering specific types of information, the most frequently mentioned ones are **how to obtain benefits/services** (38%), what their **money is spent on** (38%), facilities for **people with special needs** (35%) and **changes to services** that will affect them (32%).

Chart 8: E-Government Services

Q   Which of these types of information, if any, would you most like to have access to on a Government website?

All the services the Govt. provides	50%
How to obtain benefits/services	38%
What my money is spent on	38%
Facilities for people with special needs	35%
Changes to services that will affect me	32%
The cost of services	29%
How to complain/comment/compliment	27%
Where services are based	21%
Improvements planned for services	20%
The status of an enquiry/case	19%
The standards of services	19%
Other	1%
None/no information	13%
Don't know	4%

Base: 2,426 TT adults, 29 Jan – 1 Apr 2005   Source: MORI

Of secondary importance for people are **cost of services** (29%) and how to make a **complaint** (27%). The third tier of importance, each selected by around one in five people are **where services are based**, **improvements planned for services**, the status of any **enquiries** and the **standards** of services.

Younger people are in general more likely than older people to say they want each of the types of information listed on a Government website. In contrast, older people are more likely to say they "don't know" what types of information they would like, with one in ten (10%) of those aged 55 and over saying they don't know. Again, this reflects current Internet usage.

4.3. Contacting the Government

Part of the survey was designed to test how popular e-Government is as a method of contacting the Government. People were asked how safe they would feel providing personal information, such as their home address and credit card details, to the Government when contacting them via the web and email. Individuals' feelings of safety regarding a number of different methods of communication were also included in the survey to help provide context to these results. Table 3 provides the complete results.

In general, the only communication channel that people feel safe using to provide personal information to the Government is through a personal visit. Eight in ten (78%) feel safe with a personal visit, with one in five (19%) saying they feel unsafe. For the other methods of contacting the Government, more people feel unsafe than safe, with a large percentage in each scenario saying they feel unsafe.

Table 4: Personal information and the Government

Q) How safe or unsafe would you feel about providing personal information, such as your home address and credit card details, to the Government when contacting it in the following ways…?

	Telephone	Letter/ application	Personal visit	Website	Email
	%	*%*	*%*	*%*	*%*
Very safe	7	11	43	6	5
Fairly safe	17	35	35	16	18
Fairly unsafe	13	14	6	11	10
Very unsafe	59	37	13	41	41
Safe	**24**	**46**	**78**	**22**	**23**
Unsafe	**72**	**51**	**19**	**52**	**51**
Don't know	1	1	1	14	14
Would never contact the Government this way	3	2	1	12	12

Source: MORI

More than twice as many people would feel unsafe than safe in providing personal details to the Government either through a website or through email. Notably, there are very high proportions saying they would feel *very* unsafe providing information in either of these ways (41% each), highlighting the strength of concern about these methods.

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People also feel very unsafe providing their personal details by telephone, with seven in ten (72%) saying they would feel unsafe, compared to one in four (24%) feeling safe.

It is clear that there are major barriers to encouraging people to interact with Government services online, given the high degree of insecurity that people feel (even among those who do not simply say they would *never* contact the Government this way). However, these concerns about safety do not seem to be about online methods *per se*, but more about feelings of safety about interacting with the Government in any method other than through a personal visit.

5. e-Commerce

5.1. Government's role and the Internet

Four questions in the survey were asked to test the extent to which the public felt the Government should have a role in regulating different aspects of the Internet. The results are illustrated by chart 9 below.

The majority of the population are keen for the **Government to provide protection** for people who buy goods on the Internet. Over four in five (83%) agree that purchases of goods over the Internet should be extended the same protection by the Government as goods bought by other means.

There is also strong support for the Government to provide **extra protection for Internet purchases made using foreign websites** (66% support this). However, the survey did not cover what extra protection these people think is important.

Chart 9: Government's Role in the Internet

Q   *To what extent do you agree or disagree with the following…?*

- █ % strongly disagree ▨ % Tend to disagree ▨ % Tend to agree █ % Strongly agree

The Govt. should protect people who buy goods on the Internet in the same way as it protects people who buy goods by other means
3 | 5 | 24 | 59

The Govt. should provide extra protection for people who buy goods on the Internet using foreign websites
7 | 13 | 26 | 40

Taxes on goods bought over the Internet should be the same as the tax on goods bought by other means
12 | 18 | 25 | 32

The Govt. should <u>not</u> have a role in regulating the types of goods and services people can buy over the Internet
34 | 25 | 15 | 14

Base: 2,426 TT adults, 29 Jan – 1 Apr 2005

Source: MORI

While over half (57%) agree that the **tax on goods bought over the Internet** should be the same as that on goods bought by other means, three in ten (30%) disagree.

In addition to support for online protection, these results suggest that the majority of the public accept **Government regulation** in relation to what people can buy over the Internet. Three in five people (59%) think the Government *should* have such a role – twice the proportion who believe it *should not* (29%).

For all the statements discussed above, the main differences between sub-groups of the population are due to people's ages, a finding which is largely explained by many more older respondents saying they "don't know" than having significantly divergent views – the higher levels of "don't knows" for this age group are due to more of them not using the Internet.

MORI

5.2. Using the Internet to buy products or services

Overall, few Internet users (16%) have bought any product or services online in the past 12 months. The vast majority (76%) have *never* bought anything over the Internet. Of those who have in the past year, the most popular purchases were:

- 42% - books and magazines;

- 30% - computer hardware/software;

- 30% - electronic equipment (e.g. cameras);

- 26% - clothing; and

- 24% - music and movies.

When buying these products, **product descriptions** are felt to match the actual product very closely in three-quarters of cases (76%) and fairly closely in one in six cases (16%). Only one in twenty buyers (5%) feel that the description of the last product they bought was not a very close match to the actual product they received.

In the past year, of those who have made **online purchases**, half (48%) have spent less than $1,000TT. A further one in three (36%) say they have spent between $1001TT and $5000TT, and one in seven (14%) have spent over $5000TT.

By far, the most frequently used **method of payment** is VISA/Mastercard (over half of buyers, 54%, have used this method in the past year). Other, less frequently used methods of payment include credit cards (15%), cash on delivery (13%), check/money order (12%) and wire transfer (4%).
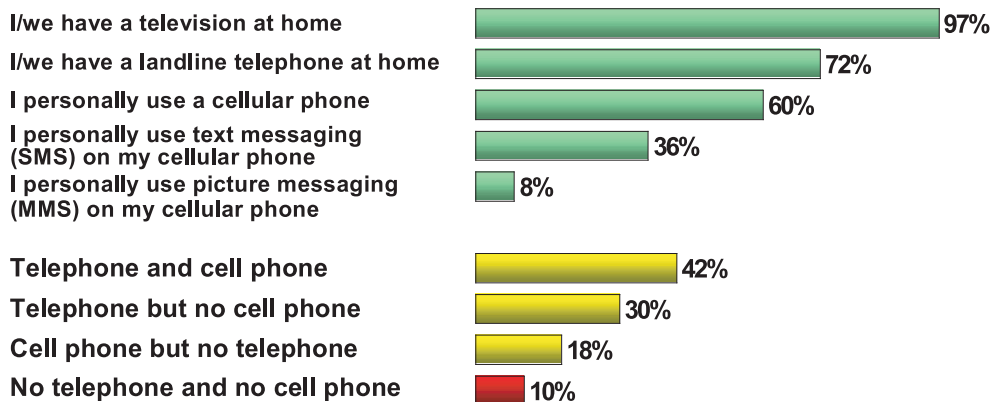
6. Local and International Calling

6.1. Use of landlines and cellular phones

Seven people in ten (72%) have a landline telephone in their home, and three in five (60%) use a cellular phone. One person in ten has neither. Older people are more likely to have a landline (86% of those 55 and over, compared to 64% of those aged 18-34), while younger people are twice as likely as older people to have a cellular phone (69% of those aged 18-34, compared to 31% of those 55 and over).

Chart 10: Television and telephone use

Q Which, if any, of the following applies to you and your household?

I/we have a television at home   97%
I/we have a landline telephone at home   72%
I personally use a cellular phone   60%
I personally use text messaging (SMS) on my cellular phone   36%
I personally use picture messaging (MMS) on my cellular phone   8%

Telephone and cell phone   42%
Telephone but no cell phone   30%
Cell phone but no telephone   18%
No telephone and no cell phone   10%

Base: 2,426 TT adults, 29 Jan – 1 Apr 2005   Source: MORI

Two in five people (42%) have both a landline and a cell phone. Three in ten (30%) have a landline but no cell phone and 18% have a cell phone but no telephone. Over half of the cell phone users say they send text messages, but few say they use picture messaging – or use their phones to take pictures.

The table on the following page shows the breakdown of landline and cell phone ownership by the key demographics of the population.

MORI

Table 5: Profile of landline and cell phone users

2,426 TT adults	Have landline telephone at home	Personally use cell phone
	%	%
Total	**72**	**60**
Gender		
Male	71	59
Female	73	60
Age		
18-24	63	69
25-34	65	70
35-44	73	70
45-54	76	54
55+	86	31
Work Status		
Full/Part-time/Self-employed	72	69
Not working	73	46
Social grade		
ABC1	82	71
C2DE	66	52
Region		
North	74	60
South	64	57
East	71	64
Central	82	55
Ethnicity		
Afro-Trinidadian	73	60
Indo-Trinidadian	73	56
Other	69	66

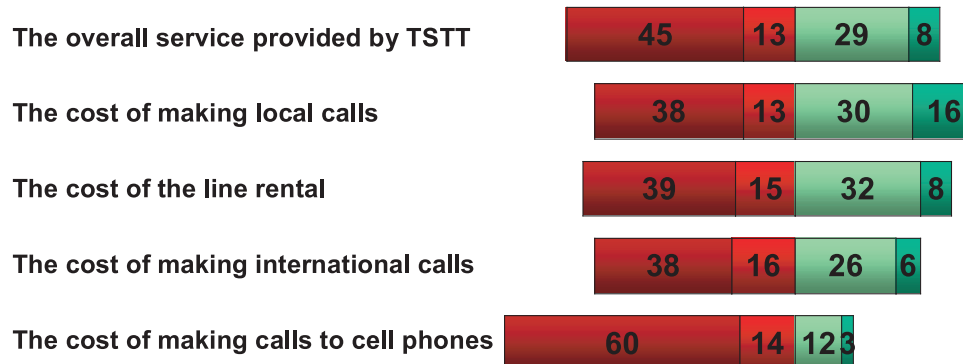*Source: MORI*

6.2. Landlines: rating TSTT

The following chart shows the levels of satisfaction and dissatisfaction that customers of TSTT landline phones have with the overall service provided, and with specific aspects.

None of these aspects make more people satisfied than dissatisfied, and large proportions say they are *very* dissatisfied, especially with the cost of making calls to cell phones. In total, 37% of TSTT customers are satisfied with **the overall service provided**, but three in five (58%) are dissatisfied. The strength of their unhappiness with TSTT is demonstrated by the high proportion who say they are *very* dissatisfied (45%). Indeed, there are nearly six times as many customers very dissatisfied as there are very satisfied. To provide some context to these findings, 36% of users of public hospitals express dissatisfaction with the quality of them – lower than the number of TSTT landline users who express dissatisfaction with the overall TSTT service.

Chart 11: TSTT and landline phone service

Q   How satisfied or dissatisfied are you with the following aspects of home telephone service provided by TSTT…?

■ % Very dissatisfied   ■ % Fairly dissatisfied   □ % Fairly satisfied   ■ % Very satisfied

	Very dissatisfied	Fairly dissatisfied	Fairly satisfied	Very satisfied
The overall service provided by TSTT	45	13	29	8
The cost of making local calls	38	13	30	16
The cost of the line rental	39	15	32	8
The cost of making international calls	38	16	26	6
The cost of making calls to cell phones	60	14	12	3

Base: All who have a telephone at home (1,746)   Source: MORI

The most positively rated aspect of TSTT's service is the **cost of making local calls** – 46% of customers are satisfied. Even so, there are still more expressing dissatisfaction (51%) and, as with other aspects of the service, a large proportion *very* dissatisfied (38%).

The most negatively rated aspect of TSTT's service is with the **cost of making calls to cell phones**, where only 15% of customers express any degree of satisfaction (and only a tiny proportion, 3%, are *very* satisfied). In contrast, three in four are dissatisfied (74%), including 60% *very* dissatisfied.

MORI

The following table presents the levels of net satisfaction (satisfied minus dissatisfied) for key sub-groups of TSTT users. This shows that there are some marked differences in ratings, especially in terms of gender and age though the overall picture remains negative.

Table 6: Net satisfaction with TSTT

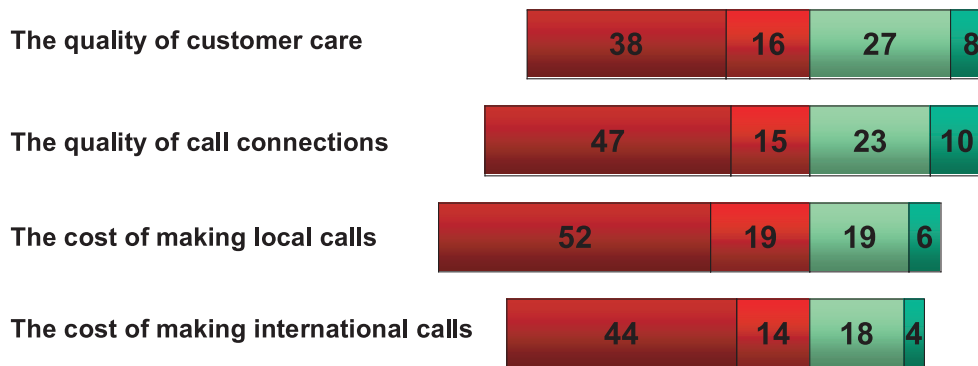| *1,746 TT adults who have a telephone at home*	Overall service	Local calls	Line rental	Interna-tional calls	Cell phones
	%	%	%	%	%
Total	**-22**	**-5**	**-13**	**-22**	**-59**
Gender					
Male	-27	-10	-10	-27	-60
Female	-17	-1	-15	-16	-58
Age					
18-24	-27	+4	-6	-17	-54
25-34	-33	-1	-26	-25	-67
35-44	-26	-10	-14	-25	-63
45-54	-22	-21	-19	-24	-68
55+	-3	+1	0	-17	-47
Work Status					
Full/Part-time/Self-employed	-31	13	-21	-28	-65
Not working	-9	-5	-2	-13	-51
Social grade					
ABC1	-23	-6	-13	-21	-62
C2DE	-21	-5	-13	-21	-57
Region					
North	-18	+1	0	-16	-57
South	-11	-9	-4	-16	-61
East	-28	-11	-18	-25	-60
Central	-25	+3	-15	-23	-61
Ethnicity					
Afro-Trinidadian	-27	-11	-10	-25	-58
Indo-Trinidadian	-16	-2	-18	-19	-60
Other / mixed	-23	-1	-6	-21	-61

Source: MORI

MORI

6.3. Cell phones: rating TSTT

As with landline users, people who use cell phones report high levels of dissatisfaction with a range of cellular phone services provided by TSTT. This dissatisfaction extends to the cost of local and international calls, the quality of call connections, and the quality of customer care. Again, high proportions say they are *very* dissatisfied, with few saying they are *very* satisfied. For instance, over half of cell phone users (52%) say they are *very* dissatisfied with the cost of making local calls, and over two in five (44%) are *very* dissatisfied with the cost of making international calls. These proportions are even higher than those who are *very* dissatisfied with the cost of making local and international calls from landlines.

Chart 12: TSTT and cellular phone service

Q *How satisfied or dissatisfied are you with the following aspects of the cellular phone service provided by TSTT…?*

■ **% Very dissatisfied** □ **% Fairly dissatisfied** □ **% Fairly satisfied** ■ **% Very satisfied**

	Very dissatisfied	Fairly dissatisfied	Fairly satisfied	Very satisfied
The quality of customer care	38	16	27	8
The quality of call connections	47	15	23	10
The cost of making local calls	52	19	19	6
The cost of making international calls	44	14	18	4

Base: All who use a cell phone (1,454)   Source: MORI

The **quality of customer care** records the highest levels of satisfaction, with one in three (35%) saying they are satisfied. But even with this rating, more than half (54%) are dissatisfied.

The **cost of making local calls** is the most negatively rated aspect of those covered, with seven in ten (71%) customers expressing dissatisfaction and just one in four (25%) saying they are satisfied.
The table on the following page presents the net satisfaction ratings for the key sub-groups of cell phone users on each of the four areas covered in the survey.

MORI

The following table presents the net satisfaction ratings (satisfied minus dissatisfied) among cell phone users for key sub-groups.

Table 7: Net satisfaction with cell phone service

1,454 TT adults who use a cell phone	Customer care	Call connections	Local calls	International calls
	%	%	%	%
Total	**-19**	**-29**	**-45**	**-35**
Gender				
Male	-21	-37	-47	-43
Female	-17	-21	-43	-26
Age				
18-24	-22	-37	-31	-25
25-34	-25	-40	-45	-30
35-44	-21	-24	-56	-46
45-54	-17	-22	-56	-44
55+	+6	-2	-37	-27
Work Status				
Full/Part-time/Self-employed	-23	-34	-50	-39
Not working	-10	-17	-34	-25
Social grade				
ABC1	-27	-34	-47	-39
C2DE	-12	-23	-42	-30
Region				
North	-30	-39	-44	-27
South	-8	-19	-37	-31
East	-25	-34	-50	-39
Central	-16	-25	-44	-33
Ethnicity				
Afro-Trinidadian	-18	-30	-49	-39
Indo-Trinidadian	-14	-22	-43	-32
Other	-29	-38	-44	-32

Source: MORI

6.4. International call centres

Just over one in four people (26%) say they have used an international call centre. One in seven people (14%) say they use them at least once a month, with one in eight (12%) using them less frequently. Of those that have used an international call centre in the last 12 months, the vast majority report high levels of satisfaction with the cost of international calls – seven in ten (69%) are *very* satisfied and one in four (24%) are *fairly* satisfied.

This stands in stark contrast to the levels of satisfaction people report with the cost of making international calls on either a cell phone (22%) or landline (32%) operated by TSTT.

Table 8: Satisfaction with cost of making international phone calls on landline, cell phone or at international call centre

|	Landline	Cell	International call centre
	%	%	%
Very satisfied	6	4	69
Fairly satisfied	26	18	24
Neither satisfied nor dissatisfied	5	5	2
Fairly dissatisfied	16	14	2
Very dissatisfied	38	44	3
Don't know	9	15	1

Source: MORI

MORI

6.5. Competition and telephone numbers

Given the poor ratings customers are currently giving TSTT, when the Government allows companies other than TSTT to provide cellular phone services, many people say they are likely to switch from TSTT to another service provider. In total, over four in five (85%) say they are **likely to switch**, and three in five (62%) say they are *very* likely to. Just one person in ten says they are unlikely to switch.

The proportion of people who say they are likely to switch is high across all sub groups of the population, falling only slightly to 75% being likely to switch among those aged over 55 years.

Chart 13: Cellular Phone Competition

Q The Government will soon allow companies other than TSTT to provide telecoms services in Trinidad and Tobago. This will start with cellular phone networks and then move on to all forms of telecoms, including home phones. When you do get a choice of service provider for your <u>cellular phone,</u> how likely or unlikely are you <u>to switch</u> from TSTT to another service provider?

Don't know 5%
Very unlikely 5%
Fairly unlikely 5%
Fairly likely 23%
Very likely 62%
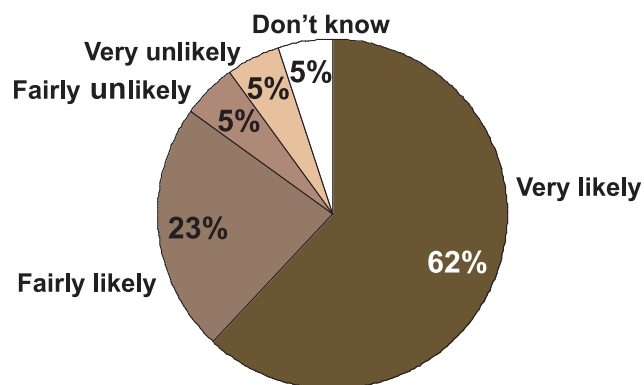
Base: All who use a cell phone (1,454)   Source: MORI

It is important to note however that this is not a prediction of what will happen in the future, as much will depend on the choice of alternative service providers and the exact nature of the rival offerings. Nevertheless, it does show that a high proportion of TSTT's existing customers are open to trying a new service provider.

When considering what factors are important to people in deciding whether to choose a different cellular service provider, financial considerations emerge as the most important factor, with the **cost of local calls** being the most important (see table 9). Out of all the TSTT provided service areas asked about, the highest levels of dissatisfaction are reported with **the cost of local calls** (71% dissatisfied). The **cost of international calls** is also mentioned as one of the most important factors by over half of people (54%). Thus, competition for customers between TSTT and other telecom service providers will most likely be driven largely by cost considerations.

Almost two in five (37%) say that the **quality of the voice calls** are most important, placing this feature fifth highest on this list of considerations. However, there are much greater sub-group variations with regard to the importance of call quality than for the other aspects of the service, with men and younger people placing particular emphasis on voice quality. As such, 41% of men say this is one of the most important factors compared to 32% of women saying this; and 43% of 18-24 year olds compared to 24% of those aged over 55 years.

Table 9: Important f actors in deciding to switch cell phone provider

Q) What would be the most important factors in deciding to use a different serv ice pro vider for your ce llular phone? What else?

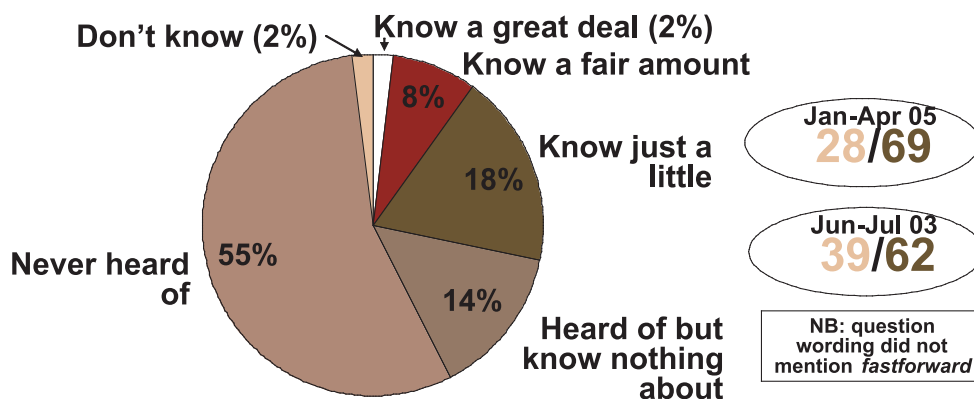| Base: All who are fairly or very l ikely to swi tch to another service pro vider (1,238)	%
The cost of l ocal c alls	78
The cost of i ntern atio nal calls	54
The qua lity of cust omer care	44
The cost of re ntal	40
The qua lity of the voi ce calls	37
The cost to buy the cell pho ne	33
The ab ility to keep my	15
The cost to rent the cell pho ne	10
The len gth of cont ract	6
The servi ce provi ded by TSTT ta ken as a who le	2
Cost of overall packa ge	1
Other	9
Don't know	1

Source: MORI

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7. *fastforward*

7.1. Awareness

Fewer than one in three people (28%) say they know at least a little about *fastworward*. Over half (55%) say they have not heard of the initiative, and a further one in seven (14%) say they have heard of it, but know nothing about it. Only one in fifty (2%) are confident they know a great deal about it.

Chart 14: Awareness of *fastforward*

Q   *How much, if anything, do you feel you know about the Government 's new National Information and Communication Technology initiative , fastforward?*

Don't know (2%)
Know a great deal (2%)
Know a fair amount
8%
Know just a little
18%
Never heard of 55%
14%
Heard of but know nothing about

Jan-Apr 05
28/69

Jun-Jul 03
39/62

NB: question wording did not mention *fastforward*

Base: 2,426 TT adults, 29 Jan – 1 Apr 2005

Source: MORI

While knowledge of *fastforward* differs little by age and gender, those in the lower social classes are least likely to have ever heard of the initiative (60% of C2DEs have never heard of it compared to 49% of ABC1).[7]

There is some evidence that awareness of *fastforward* has decreased over the past two years. In June-July 2003, two in five people (39%) said they knew at least "just a little" about the Government's new National Information and Communication Technology initiative, compared with 28% now. However, it should be noted that in 2003, the question did not explicitly mention *fastforward*, only the initiative, and therefore these are not strict trend questions.

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[7] In this report professional/non-manual workers refer to those residents in social grades ABC1. Residents in social grades C2DE are referred to as working class and unemployed/not working. Please see the appendix for further details.

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7.2. Impact

While knowledge about *fastforward* is low, the initiative is strongly supported by those who do know about it. Of those who say they know at least a little about *fastforward*, nine in ten (90%) think that the initiative will be either very beneficial (52%) or fairly beneficial (38%) to the citizens of Trinidad and Tobago. Only one in twenty five people (4%) do not think the initiative will be beneficial. Again, this finding is in line with the high proportion of people who think that it is important that the Government provides information and services on the Internet.

Chart 15: Benefits of *fastforward*

Q How beneficial, if at all, do you think the National Information and Communication Technology initiative, fastforward, will be to citizens of Trinidad and Tobago?

Not at all beneficial (1%)   Don't know

Not very beneficial   6%   Very beneficial

3%

90/4

Fairly beneficial   38%   52%
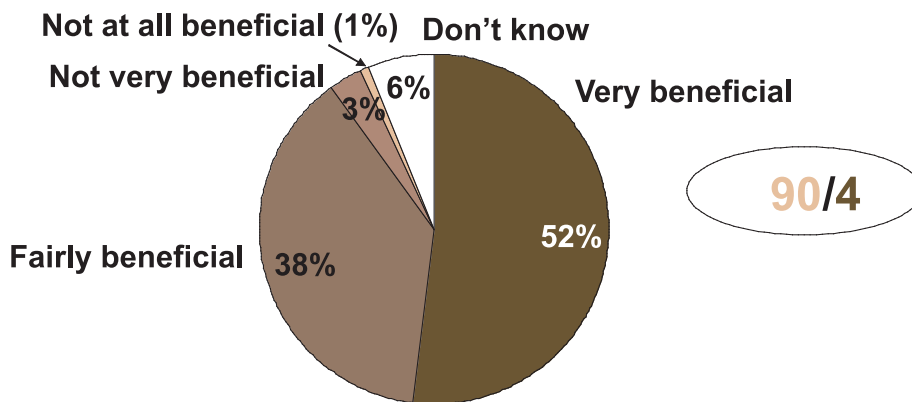
Base: All who know at least a little about *fastforward* (677)   Source: MORI

The high proportion of people who believe that *fastforward* will be beneficial is constant across demographic groups, and across areas of the country.
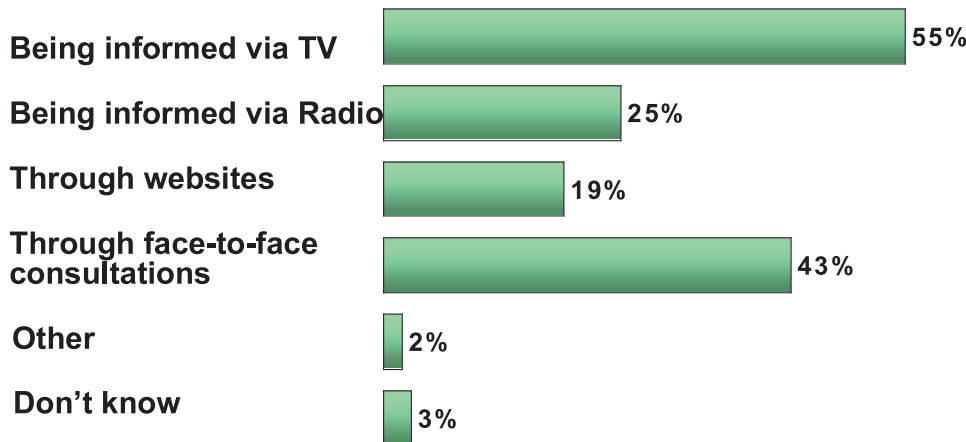
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7.3. Getting involved

Among those people who know of *fastforward*, over half say they would like to be involved in it through **television** (55%). This probably means that they feel that TV is the most effective medium for keeping them informed about what is happening. Those in the South are particularly likely to want to be involved through TV (61%).

There is also evidence that some people want more of a collaborative involvement than what TV can provide, as 43% say they would prefer **face-to-face consultations**. Those in the Central area are most likely to say they would prefer this method of involvement (56%).

Chart 16: Getting involved in *fastforward*

Q   Which, if any, of the following ways would you like to get involved in the initiative?

Being informed via TV	55%
Being informed via Radio	25%
Through websites	19%
Through face-to-face consultations	43%
Other	2%
Don't know	3%

Base: All who know at least a little about *fastforward* (677)   Source: MORI

Overall, one in four (25%) would like to be informed by **radio**, and this medium is more popular among older people (33% of those aged 55 and over vs. 27% of those aged 18-34). In contrast, **websites** are preferred by younger individuals – while one in five (19%) mention websites overall, among those aged 18-34 years old this rises to 24% compared to 11% of those aged 55 and over).

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Appendices

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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.

Table 10: Approximate sampling tolerances applicable to percentages at or near these levels

Size of sample on which Survey result is based	10% or 90% ±	30% or 70% ±	50% ±
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
710 interviews	2	3	4
2,426 interviews	1	2	2

Source: MORI

For example, on a question where 50% of the people in a sample of 2,426 respond with a particular answer, the chances are 95 in 100 that this result would not vary by more than 2 percentage points, plus or minus, from a complete coverage of the entire population using the same procedures.

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Tolerances are also involved in the comparison of results from different parts of the sample, or when comparing results 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.

Table 11:   Differences required for significance at or near these percentages

Size of sample on which Survey result is based	10% or 90% ±	30% or 70% ±	50% ±
100 a nd 100	8	13	14
100 a nd 200	7	11	12
100 a nd 300	7	10	11
100 a nd 400	7	10	11
100 a nd 500	7	10	11
200 a nd 200	7	10	11
200 a nd 300	5	8	9
1,085 a nd 1,341 (Me n v. Women)	2	4	4
866 a nd 1,05 6 (Afro-Tr inidad ians vs. Indo-Tr inidad ians)	3	4	5
710 a nd 2,426	3	4	4
2,747 a nd 2,426	1	2	2

Source: MORI

The table above also shows that when comparing full results from the baseline survey with Wave 4 findings, differences need to be around ±4% at the 50% level to be significant.

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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.

Table 12: 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

[8] In this report professional/non-manual workers refer to those residents in social grades ABC1. Residents in social grades C2DE are referred to as working class and unemployed/not working. Please see the appendix for further details.

III. Sample Profile

Table 13	Unweighted		Weighted	
	N	*%*	*n*	*%*
Total	**2,426**	**100**	**2,426**	**100**
Gender				
Male	*1,085*	45	*1,213*	50
Female	*1,341*	55	*1,213*	50
Age				
18-34	*1,065*	44	*1,044*	43
35-54	*905*	37	*922*	38
55+	*456*	19	*461*	19
Work Status				
Full/Part-time/Self-employed	*1,483*	60	*1,431*	59
Not working	*943*	40	*995*	41
Ethnicity				
Afro-Trinidadian	*866*	36	*931*	38
Indo-Trinidadian	*1,056*	44	*1,005*	42
Other	*504*	21	*490*	20
Regional area				
North	*234*	10	*278*	11
South	*720*	30	*669*	28
Central	482	20	467	19
East	956	39	918	37
Tobago	34	1	94	4

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Wave 1 – 5 weighted profiles

Table 14	Wave 1		Wave 2		Wave 3		Wave 4		Wave 5	
	N	%	N	%	N	%	N	%	N	%
Total	2,772	100	693	100	700	100	710	100	2,426	100
Gender										
Male	1,335	48	333	48	336	48	355	50	1,213	50
Female	1,437	52	360	52	364	52	355	50	1,213	50
Age										
18-34	1,392	51	350	51	353	50	305	43	1,044	43
35-54	835	30	210	30	212	30	270	38	922	38
55+	533	19	133	19	135	19	135	19	461	19
Work Status										
Full/Part-time/Self-employed	1,638	59	409	59	413	59	419	59	1,431	59
Not working	1,499	41	284	41	287	41	291	41	995	41
Ethnicity										
Afro-Trinidadian	1,105	40	277	40	280	40	270	38	931	38
Indo-Trinidadian	1,130	41	284	41	287	41	298	42	1,005	42
Other	522	19	132	19	133	19	142	20	490	20

IV. Detailed Information on Response Rates

The 'universe' for wave 5 of this research was all the remaining 2,023 members of the Opinion Leaders Panel and 1,152 other people newly sampled to take part. The new baseline Panel, now updated to take into account Panel decay since the original Panel was recruited in 2002 and more recent census information now consists of 2,426 members.

The profile and weighting details for wave 4 onwards was updated to reflect the new profile information available from the 2000 Census. This data differed from the 1990 Census data in several respects – see below.

At the start of fieldwork for wave 5 there were 2,023 members still on the Panel. The total number of non-respondents was 485, which can be broken down as follows:

Table 15: Profile 1990 vs. .2000 Census Data

	2000	1990
18-24	21	24
25-34	22	26
35-44	22	18
45-54	16	12
55-64	9	9
65+	10	10
Male	50	48
Female	50	52
Afro	38	40
Indo	42	41
Others	20	19

i)	32 Panel members deceased;
ii)	17 Panel member too ill to take part;
iii)	44 Panel members had migrated;
iv)	73 Panel members had moved;
v)	159 Panel members were not located after three attempts;
vi)	77 Panel members could not be located;
vii)	68 Panel members refused to take part in the survey; and
viii)	15 Panel members did not take part for other reasons.

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For the recruitment of the new Panel members, HHB & Associates initially sampled 1,152 people. The new members were selected to join the panel in the following way: Firstly, the required demographic characteristics of the new members were determined to bring the overall panel in line with the population characteristics of the 2000 census. This was determined with respect to race, gender, age and location (regional corporations).

Enumeration district (ED) maps for the selected regional corporation locations were selected and the relevant quota was assigned to each map. Each map had marked on it a random walk (arrows showing how the interviewer should proceed) and a start position. Interviewers were instructed to follow the arrows and to select every "nth" house. A listing of eligible members of the household was made and any person fitting one of the quotas was selected and interviewed. Only one person per household was allowed. Interviewers proceeded in this way until the required quotas were obtained.

Of these 888 were successfully interviewed

V. Validation Checks

HHB & Associates carried out a series of validation checks to monitor the quality of interviewing. A summary of the validation process outcome is shown below.

Validation checks were done continuously while in the field by a special team which had been set up to locate the names and addresses of panel members in an effort to speed up fieldwork. The major concern at this time was to determine if each member of the Wave 5 sub sample was "eligible" in the sense that:

- they were a valid member of the panel and willing to participate; and

- they fit the quotas required to bring the sample in line with the newly available census data.

Checks by supervisors

In the field by the Supervisors and the Co-ordinator:

i)   6 people were incorrectly interviewed (action – the correct persons were identified and re-interviewed);

ii)   11 respondents reported the interviewer did not ask all the questions (action – the questionnaires were completed by phone); and

iii)   2,409 questionnaires completed properly.

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VI. Marked up Questionnaire

- Results are based on 2,426 face-to-face interviews with residents of Trinidad & Tobago who are members of the Opinion Leaders' Panel

- Data are weighted to the known population profile using the 2000 census data

- Fieldwork conducted between 29 January – 1 April 2005

- Where results do not sum to 100, this may be due to multiple responses, computer rounding or the exclusion of don't knows/not stateds

- Results are based on all respondents unless otherwise stated. "Not stateds" have been included as "don't know"

- An asterisk (*) represents a value of less than half of one percent, but greater than zero

- Trend data from previous Opinion Leaders' Panel waves are shown where appropriate:
  Wave 1 survey, 15 July to 29 August 2002, base size 2,747
  Wave 2 survey, 28 June to 16 July 2003, base size 693
  Wave 3 survey, 6-22 December 2003, base size 700
  Wave 4 survey, 17 July – 6 August 2004, base size 710

FASTFORWARD

ASK ALL

SHOWCARD 15 (R)
Q48.   **How much, if anything, do you feel you know about the Government's new National Information and Communication Technology initiative, commonly know as *fastforward*?**
SINGLE CODE ONLY

	%	
Know a great deal	2	
Know a fair amount	8	ASK Q49
Know just a little	18	
Heard of but know nothing about	14	
Never heard of	55	GO TO Q51
Don't know	3	

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ASK ALL WHO KNOW A LEAST A LITTLE ABOUT FASTFORWARD (CODES 1-3 AT Q48).
OTHERS GO TO Q51

Q49.   SHOWCARD 16 (R)
        **How beneficial, if at all, do you think the National Information and Communication Technology
        initiative, *fastforward*, will be to citizens of Trinidad and Tobago?** SINGLE CODE ONLY

	%
Very beneficial	52
Fairly beneficial	38
Not very beneficial	3
Not at all beneficial	1
Don't know	6

Base: All who know at least a little about fastforward (677)

ASK ALL WHO KNOW A LEAST A LITTLE ABOUT FASTFORWARD (CODES 1-3 AT Q48)
SHOWCARD 17 (R)

Q50.   **Which, if any, of the following ways would you like to get involved in the initiative?** MULTICOE
        OK

	%
Being informed via TV	55
Being informed via Radio	25
Through Websites	19
Through face-to-face consultations	43
Other	2
Don't know	3

Base: All who know at least a little about fastforward (677)

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e-GOVERNMENT

ASK ALL
SHOWCARD 18 (R)
How safe or unsafe would you feel about providing personal information, such as your home address and credit card details, to the Government when contacting it in the following ways…?
ROTATE ORD ER Q51 – Q55 SINGLE CODE ONLY FOR EACH QUESTION

Q51.   **…By telephone**

Q52.   **…In a letter/application form**

Q53.   **…During a personal visit to an office**

Q54.   **…Through a Government website**

Q55.   **… By Email**

	Q51 Telephone	**Q52 Letter/ application**	**Q53 Personal visit**	**Q54 Website**	**Q55 Email**
	%	%	%	%	%
Very safe	7	11	43	6	5
Fairly safe	17	35	35	16	18
Fairly unsafe	13	14	6	11	10
Very unsafe	59	37	13	41	41
Don't know	1	1	1	14	14
Would never contact the Government this way	3	2	1	12	12

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SHOWCARD 19 (R)
If you were to contact the Government, which two or three of the following ways, if any, would you prefer to contact it to conduct the following... ROTATE ORDER Q56 – Q64
MULTICODE UP TO 3 CODES FOR EACH QUESTION

		By telephone %	By letter %	Personal visit to office %	Government website %	By Email %	Through a library %	Other/Don know/No applicabl %
Q56.	To register a company	21	24	88	8	7	1	2
Q57.	To find out who owns a property or a piece of land	32	15	84	9	5	2	1
Q58.	To register a trade mark	15	16	79	7	6	1	7
Q59.	To apply for or renew a passport	10	7	96	4	3	1	1
Q60.	To register a vehicle	11	6	94	4	4	*	2
Q61.	To apply for or renew a driving licence	10	6	94	4	3	*	2
Q62.	To register a birth/death/marriage	12	7	95	4	4	*	1
Q63.	To pay a Government tax or bill	11	8	93	5	4	*	1
Q64.	To apply for low income housing	13	16	89	6	4	*	4

SHOWCARD 20 (R)
Q65. **How important, if at all, is it to you personally that the Government provides information and services on the Internet?** SINGLE CODE ONLY

	%
Very important	49
Fairly important	20
Not very important	13
Not at all important	14
Don't know	4

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SHO WCARD 21 (R)

Q66.   **Which of thes e types of informati on, if any, wo uld you mo st like to have acce ss to on a Go vernme nt web site? Please just read o ut the letters that apply.** PROBE FULLY   **W hat else?** MULTICODE   OK

		%
A	Changes to serv ices that will affect me	32
B	Fac ilities for peop le with spec ial needs	35
C	Ho w to make a compliment, comm ent or complaint	27
D	Ho w to obta in the benef its/s erv ices	38
E	Improv ements planned for serv ices	20
F	The cost of serv ices	29
G	The ir standa rds of service	19
H	The sta tus of my case or an enqu iry I have made	19
I	What my money is spen t on	38
J	Where serv ice s are based	21
K	All the serv ices the Gover nment prov ides	50
	Other	1
	None of the se	11
	Don't want any infor mation from the Gove rnment	2
	Don't Kno w	4

e-COMMERCE ISSUES

Q   ASK ALL
SHOWCARD 22 (R)
I am now going to read out some statements about the role of the Government and the Internet.
To what extent do you agree or disagree with the following statements? SINGLE CODE ONLY
FOR EACH. ROTATE ORDER Q67 – Q70

		Strongly agree	Tend to agree	Neither agree nor disagree	Tend to disagree	Strongly disagree	Don't know
		%	%	%	%	%	%
Q67.	**The Government should protect people who buy goods on the Internet in the same way as it protects people who buy goods by other means**	59	24	4	5	3	5
Q68.	**The Government should provide extra protection for people who buy goods on the Internet using foreign websites**	40	26	9	13	7	5
Q69.	**The Government should not have a role in regulating the types of goods and services people can buy over the Internet**	14	15	8	25	34	4
Q70.	**Tax on goods bought over the Internet should be the same as the tax on goods bought by other means**	32	25	8	18	12	5

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ASK ALL
SHOWCARD 23 (R)

Q71. **Which, if any, of the following applies to you and your household? Please just read out the letters that apply.** PROBE FULLY **Which others?** MULTICODE OK

		%
A	I/We have a personal computer (PC) at home with access to the Internet	17
B	I/We have a personal computer (PC) at home without Internet access	14
C	I personally use a personal computer or laptop at work or at my place of study	9
D	I personally use the Internet at work or at my place of study	11
E	I personally use the Internet at home (via 'dial up' modem)	9
F	I personally use broadband Internet at home via a high speed, always-on connection (e.g. via ADSL or cable modem)	1
G	I personally use the Internet at libraries or other public access facilities	7
H	I personally use the Internet at Internet cafes	12
I	I have my own external email address either at home, at work, or at my place of study	10
	None	56
	Don't know	*

ASK ALL WHO DO <u>NOT</u> HAVE A PC AT HOME (ANY WHO DO <u>NOT</u> CODE 1 OR 2 AT Q71).

Q72. OTHERS GO TO Q73

What are the main reasons why you do not have a PC at your home? PROBE FULLY. DO NOT PROMPT. MULTICODE OK

	%
Too expensive/can't afford	54
Not interested/don't need to use	22
Don't know how to use	15
I have other priorities	1
Use elsewhere (e.g. school or work)	1
No electricity/wiring faulty	1
Still thinking it over/in the process of acquiring/when children are older	1
Living conditions/inconvenient to locate	*
Old age	*
Away from home often	*
Last computer has malfunctioned	*
Other	5
Don't know	4

Base: All who do not have a PC at home (1,674)

ASK ALL WHO USE THE INTERNET ANYWHERE (CODES 4, 5, 6, 7 OR 8 AT Q71)

SHOWCARD 24 (R) OTHERS GO TO Q81

Q73. **On average, how often do you usually access the Internet?** SINGLE CODE ONLY

	%
Every day	28
At least once a week	40
At least once a month	18
Within the last 6 months	8
Within the 12 months	3
Longer than 12 months ago	2
Don't know	1

Base: All who use the internet anywhere (657)

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ASK ALL WHO USE THE INTERNET AYWHERE (CODES 4, 5, 6, 7 OR 8 AT Q71).

Q74. **On average, how many hours per week do you normally use the Internet (this includes time at work, home or study)?** WRITE IN AND CODE RANGE

	%
Less than 1 hour per week	19
Between 1 and 5 hours per week	52
Between 6 and 10 hours per week	12
Between 11 and 20 hours per week	6
Between 21 and 30 hours per week	4
Between 31 and 40 hours per week	1
Between 41 and 50 hours per week	1
51 hours or more per week	2
Don't know	3

Base: All who use the internet anywhere (657)

ASK ALL WHO USE THE INTERNET ANYWHERE (CODES 4, 5, 6, 7 OR 8 AT Q71)
SHOWCARD 25 (R)

Q75. **Over the last three months, which, if any, have you done on the Internet? Please just read out the letters that apply** MULTICODE OK

		%
A	Education, research and related activities	65
B	Emailed	51
C	Health related activities	20
D	Interacted/got in touch with public authorities	4
E	Looked for information about goods or services	39
F	Made a telephone call using the Internet	9
G	Played or downloaded games, music or software	40
H	Purchased goods or services	10
I	Read or downloaded online magazines or newspapers	24
J	Used a chatroom	23
K	Used electronic banking or other financial services	5
	Other	3
	None	1
	Don't know	3

Base: All who use the internet anywhere (657)

MORI

ASK ALL WHO HAVE ACCESS TO AND/OR USE THE INTERNET AT HOME (CODES 1, 5 OR 6 AT
Q76.   Q71). OTHERS GO TO Q81
**Which company provides the Internet service to your home (i.e. to which company do you pay
your internet bills to)?** DO NOT PROMPT. SINGLE CODE ONLY

	%
TSTT	87
Interserve	1
Cariblink	1
Rave	-
Cableline	*
Lisa	-
Efreenet	-
Wow	1
Cablenet	2
Opus	-
Other	-
Don't know	8

Base: All who have access to and/or use the internet at home (432)

MORI

ASK ALL WHO USE THE INTERNET AT HOME VIA DIAL UP (CODE 5 AT Q71). OTHERS GO TO Q81

SHOWCARD 26 (R)

How satisfied or dissatisfied are you with the following factors that relate to your use of the Internet at home (via dial-up)…? ROTATE ORDER Q77-Q80 SINGLE CODE ONLY FOR EACH QUESTION

Q77. **…The connection speed**

Q78. **…The cost of the service**

Q79. **… The stability of the connection (i.e. how stable the service is once you are connected to the Internet)**

Q80. **… The ability to connect to the Internet at all times of the day or night (i.e being able to connect to the Internet every time you try)**

	Q77 Connection speed %	Q78 Cost %	Q79 Stability %	Q80 Ability to connect %
Very satisfied	15	6	13	16
Fairly satisfied	39	38	39	34
Neither satisfied nor dissatisfied	5	8	9	7
Fairly dissatisfied	14	18	17	19
Very dissatisfied	24	24	19	21
Don't know	3	6	3	3

Base: All who use the Internet at home via dial-up (223)

ASK ALL WHO DO <u>NOT</u> CURRENTLY HAVE BROADBAND INTERNET ACCESS (ALL WHO DO <u>NOT</u> CODE 6 AT Q71). OTHERS GO TO Q83

SHOWCARD 27 (R)

Q81. **How interested, if at all, would you be is using high speed, broadband Internet services at home? By high-speed Internet services I mean a connection other than dial-up, such as though a dedicated modem or telephone line which provides faster access than regular dial-up.** SINGLE CODE ONLY

	%	
Very interested	43	ASK Q82
Fairly interested	13	
Not very interested	11	
Not at all interested	20	GO TO Q83
Don't know	13	

Base: All who do not currently have Broadband Internet access (2,396)

52

ASK ALL WHO WOULD BE INTERESTED IN HIGH SPEED INTERNET ACCESS AT HOME (CODES 1 OR 2 AT Q81). OTHERS GO TO Q83

Q82.   **When thinking about whether to use high speed Internet access, what is more important to you – the speed of the connection or the overall cost, or are they equally important?** SINGLE CODE ONLY

	%
Speed of connection more important	7
Cost more important	13
Equally important	77
Don't know	3

Base: All who would be interested in high speed Internet access at home (1,343)

ASK ALL WHO USE THE INTERNET AT LIBRARY/PUBLIC ACCESS POINT OR AT AN INTERNET CAFÉ (CODES 7 OR 8 AT Q71). OTHERS GO TO Q84

Q83.   **What factors are most important when deciding to use the Internet at a library, Internet café or public access point?** DO NOT PROMPT MULTICODE OK

	%
Cost of service	49
Location	35
Safety in getting to place	12
Speed of Internet connection	34
Security when online	23
Customer service	19
Reliability of the Internet service	24
Cost of printing documents from the Internet	11
Privacy	2
Accessibility	3
Other	9
Don't know	10

Base: All who use the Internet at a library/public access point/Internet café (366)

MORI

e-COMMERCE

ASK ALL WHO USE THE INTERNET ANYWHERE (CODES 4, 5, 6, 7 9 OR 9 AT Q71). OTHERS GO TO Q89
SHOWCARD 28 (R)

Q84. **How frequently, if at all, do you buy any products or services over the Internet?** SINGLE CODE ONLY

	%	
Every day	*	
At least once a week	1	
At least once a month	4	ASK Q85
Within the last 6 months	7	
Within the 12 months	3	
Longer than 12 months ago	3	
Never purchased anything over the Internet	76	GO TO Q89
Don't know	5	

Base: All who use the Internet anywhere (657)

ASK ALL WHO HAVE USED THE INTERNET TO PURCHASE SOMETHING IN THE LAST 12 MONTHS (CODES 1 TO 5 AT Q84). OTHERS GO TO Q89
SHOWCARD 29 (R) **Which, if any, of the following products or services have you purchased on the Internet in the last 12 months? Just read out the letters that apply** MULTICODE OK

Q85.

	%
Books and magazines	42
Computer hardware/software	30
Electronic equipment (e.g. cameras)	30
Clothing	26
Music and movies	24
Motor car / accessories	11
Airline tickets/other travel related products	7
Adult entertainment	5
Financial products/services	4
Other	17
None	3
Don't know	-

Base: All who have used the Internet to purchase something in the last 12 months (108)

ASK ALL WHO HAVE USED THE INTERNET TO PURCHASE SOMETHING IN THE LAST 12 MONTHS (CODES 1 TO 5 AT Q84)

SHOWCARD 30 (R)

Q86. **Thinking about the <u>last</u> product you bought on the Internet, when you received the product how closely did it match the description shown on the Internet?** SINGLE CODE ONLY

	%
Very closely	76
Fairly closely	16
Not very closely	5
Not closely at all	-
Don't know/can't remember	3

Base: All who have used the Internet to purchase something in the last 12 months (108)

ASK ALL WHO HAVE USED THE INTERNET TO PURCHASE SOMETHING IN THE LAST 12 MONTHS (CODES 1 TO 5 AT Q84)

SHOWCARD 31 (R)

Q87. **Approximately, how much have you spent in the last 12 months on purchases made over the Internet? Please just read out the letter that applies** SINGLE CODE ONLY

		%
A	Less than $500 TT	15
B	Between $501 TT and $1000TT	33
C	Between $1001TT and $3000TT	21
D	Between $3001TT and $5000TT	15
E	Between $5001TT and $10,000TT	8
F	More than $10,000TT	6
	Don't know/can't remember	2

Base: All who have used the Internet to purchase something in the last 12 months (108)

ASK ALL WHO HAVE USED THE INTERNET TO PURCHASE SOMETHING IN THE LAST 12 MONTHS (CODES 1 TO 5 AT Q84)

SHOWCARD 32 (R)

Q88. **Which, if any, of the following methods of payment have you used to buy products or services on the Internet in the last 12 months?** MULTICODE OK

	%
Cash on delivery	13
Check / Money order	12
Wire transfer	4
Visa / Mastercard	54
Other credit card	15
Pre payment	5
Someone else paid	7
Other	1
Don't know	1

Base: All who have used the Internet to purchase something in the last 12 months (108)

MORI

LOCAL AND INTERNATIONAL CALLING

ASK ALL
SHOWCARD 33 (R)

Q89. **Which, if any, of the following applies to you and your household? Please just read out the letters that apply.** PROBE FULLY **Which others?** MULTICODE OK

%

A	I/we have a television at home	97
B	I/we have a landline telephone at home	72
C	I personally use a cellular phone	60
D	I personally use text messaging (SMS) on my cellular phone	36
E	I personally use picture messaging (MMS) on my cellular phone	8
	None	2
	Don't know	*

ASK ALL WHO HAVE A TELEPHONE IN THEIR HOME (CODE 2 AT Q89) AND USE A CELL PHONE (CODE 3 AT Q89) AND USE INTERNET ANYWHERE (CODES 4, 5, 6, 7 OR 8 AT Q71). OTHERS GO TO Q92

Q90. SHOWCARD 34 (R)

How interested, if at all, would you be in being able to view an integrated phone and Internet bill on the Internet? By an integrated bill, I mean a bill showing how much you are being charged for your home phone, you cell phone and your Internet service. SINGLE CODE ONLY

	%	
Very interested	72	ASK Q91
Fairly interested	13	
Not very interested	5	
Not at all interested	7	GO TO Q92
Don't know	3	

Base: All who have a telephone and a cell phone and use the Internet (408)

ASK ALL WHO ARE VERY OR FAIRLY INTERESTED IN VIEWING AN INTEGRATED BILL ON THE INTERNET (CODE 1 OR 2 AT Q90). OTHERS GO TO Q92

Q91. **How much, if anything, would you be wiling to pay per month in order to view an integrated telephone bill on the Internet?** SINGLE CODE ONLY

	%
Nothing – it should be free	57
Under $5TT per month	8
Between $6TT and $10TT per month	11
Between $11TT and $20TT per month	6
Between $21TT and $30TT per month	4
More than $31TT per month	10
Don't know	4

Base: All who are very/fairly interested in viewing an integrated bill on the Internet (343)

ASK ALL WHO HAVE A TELEPHONE IN THEIR HOME (CODE 2 AT Q89). OTHERS GO TO Q98
SHOWCARD 35 (R)
How satisfied or dissatisfied are you with the following aspects of the home telephone service provided by TSTT…? ROTATE ORDER Q92-Q96 SINGLE CODE ONLY FOR EACH QUESTION

Q92. **…The cost of making local calls**

Q93. **...The cost of making international calls**

Q94. **…The cost of making calls to cell phones**

Q95. **…The cost of the line rental**

Q96. **…The overall service provided by TSTT**

	Q92 Local calls %	Q93 International calls %	Q94 Cell calls %	Q95 Line rental %	Q96 Overall %
Very satisfied	16	6	3	8	8
Fairly satisfied	30	26	12	32	29
Neither satisfied nor dissatisfied	2	5	3	4	4
Fairly dissatisfied	13	16	14	15	13
Very dissatisfied	38	38	60	39	45
Don't know/not applicable	1	9	8	2	1

Base: All who have a telephone at home (1,746)

MORI

ASK ALL WHO HAVE A TELEPHONE IN THEIR HOME (CODE 2 AT Q89)

Q97. **When thinking about the cost of telephone calls, is it more important that TSTT keeps the cost of local calls down or keeps the cost of international calls down, or are they equally important?** SINGLE CODE ONLY

	%
More important to keep cost of local calls down	20
More important to keep costs of international calls down	4
Equally important	75
Don't know	1

Base: All who have a telephone at home (1,746)

ASK ALL WHO USE A CELLULAR PHONE (CODE 3 AT Q89). OTHERS GO TO Q102
SHOWCARD 35 AGAIN (R)

How satisfied or dissatisfied are you with the following aspects of the cellular phone service provided by TSTT…? ROTATE ORDER Q98-Q101 SINGLE CODE ONLY FOR EACH QUESTION

Q98. **…The cost of making local calls**

Q99. **...The cost of making international calls**

Q100. **…The quality of customer care**

Q101. **… The quality of the call connections**

	Q98 Local calls %	Q99 International calls %	Q100 Customer care %	Q101 Call connections %
Very satisfied	6	4	8	10
Fairly satisfied	19	18	27	23
Neither satisfied nor dissatisfied	2	5	7	3
Fairly dissatisfied	19	14	16	15
Very dissatisfied	52	44	38	47
Don't know	2	15	4	2

Base: All who use a cell phone (1,454)

MORI

ASK ALL
SHOWCARD 36 (R)

Q102. **How frequently, if at all, do you use International Call Centres?** SINGLE CODE ONLY

	%	
Every day	*	ASK Q103
At least once a week	6	
At least once a month	8	
Within the last 6 months	7	
Within the last 12 months	3	
More than 12 months ago	2	GO TO Q104
Never used	70	
Don't know	3	

ASK ALL WHO HAVE USED AN INTERNATIONAL CALL CENTRE IN LAST 12 MONTHS (CODE 1-5 AT Q102). OTHERS GO TO Q104
SHOWCARD 37 (R)

Q103. **How satisfied or dissatisfied are you with the cost of making international calls at International Call Centres?** SINGLE CODE ONLY

	%
Very satisfied	69
Fairly satisfied	24
Neither satisfied nor dissatisfied	2
Fairly dissatisfied	2
Very dissatisfied	3
Don't know	*

Base: All who have used an international call centre in the last 12 months (613)

COMPETITION AND TELEPHONE NUMBERS

ASK ALL WITH CELLULAR PHONE (CODE 3 AT Q89). OTHERS GO TO Q108
SHOWCARD 38 (R)

Q104. **The Government will soon allow companies other than TSTT to provide telecoms services in Trinidad and Tobago. This will start with cellular phone networks and then move on to all forms of telecoms, including home phones. When you do get a choice of service provider for your <u>cellular phone</u>, how likely or unlikely are you <u>to switch</u> from TSTT to another service provider?** SINGLE CODE ONLY

	%	
Very likely	62	ASK Q105
Fairly likely	23	
Fairly unlikely	5	
Very unlikely	5	GO TO Q108
Don't know	5	

Base: All with a cell phone (1,454)

MORI

ASK ALL WHO ARE FAIRLY OR VERY LIKELY TO SWITCH TO ANOTHER SERVICE PROVIDER (CODES 1 OR 2 AT Q104). OTHERS GO TO Q108

Q105. **What would be the most important factors in deciding to use a different service provider for your cellular phone?** DO NOT PROMPT. PROBE FULLY. **What else?** MULTICODE OK

	%
The cost of local calls	78
The cost of international calls	54
The quality of customer care	44
The cost of rental	40
The quality of the voice calls	37
The cost to buy the cell phone	33
The ability to keep my number	15
The cost to rent the cell phone	10
The length of contract required	6
The service provided by TSTT taken as a whole	2
Cost of overall package	1
Other	9
Don't know	1

Base: All who are fairly or very likely to switch to another service provider (1,238)

ASK ALL WHO ARE FAIRLY OR VERY LIKELY TO SWITCH TO ANOTHER SERVICE PROVIDER (CODES 1 OR 2 AT Q104)
SHOWCARD 39 (R)

Q106. **If you do switch to another service provider for your cellular phone, how important, if at all, is it to be able to keep your existing telephone number?** SINGLE CODE ONLY

	%	
Very important	59	ASK Q107
Fairly important	13	
Not very important	19	
Not important at all	9	GO TO Q108
Don't know	*	

Base: All who are fairly or very likely to switch to another service provider (1,238)

ASK ALL WHO FEEL IT IS FAIRLY OR VERY IMPORTANT TO KEEP THEIR EXISTING PHONE NUMBER (CODE 1 OR 2 AT Q106). OTHERS GO TO Q108

Q107. **How much, if anything, would you be wiling to pay, as a one-off payment, to keep your existing telephone number if you switch to a new service provider?** DO NOT PROMPT. SINGLE CODE ONLY

	%
Nothing – it should be free	52
Under $10TT	10
Between $11TT and $20TT	8
Between $21TT and $50TT	11
Between $51TT and $100TT	11
More than $101TT	4
Don't know	4

Base: All who feel it is fairly or very important to keep their existing phone number (1,894)

MORI

VII. Reports from each Focus Group

MORI

TRINIDAD & TOBAGO
OPINION LEADERS – WAVE 5

ICT & E-Commerce and Telecommunications.

GROUP 1 – North Trinidad

Conducted: Monday 11th October, 2004

Start Time: 4:45pm

End Time: 6:30pm

Group Composition:

Urban North Trinidad

ABC1 Class

40 – 50 years

Mixed

5 Males, 5 Females

ICT & E-Commerce:

All participants with the exception of one male participant use a computer. The computers were used mainly for work. The gentle man who does not use the computer does not because of *"I have a computer home, but to tell you the truth I don't use it because of lack of focus".* (Male)

The nine of the participants that use the internet use it from both home and work. They use the internet a minimum of once daily and it is extremely important to their daily life. It is used for checking email and researching information.

They dislike the internet because of the slow speed and the fact that they get bumped off sometimes.

They like the internet because of the vast amount of knowledge that they can acquire from using it.

The internet will definitely become more important to their life in the next few years. Mainly because of the information it provides, the ability to conduct transactions on the internet.

Three of the participants purchased items over the internet. These were airline tickets, computers and books. The participant that chose to purchase the airline tickets using the internet did this because of the bonus miles he received and the ability to get it done from home without having to interact with anyone. *"It's more convenient and more affordable"* (Male)

They would use the internet more because of its convenience, *"you don't have to leave home and deal with those crazy drivers on the road."* (Female)

None of the participants would use a public facility to access the internet, mainly because they have their own access.

They do not feel very safe regards their privacy being protected on the internet. *"Heard about too much credit card fraud."* (Female)

Two of the participants attempted to visit a Government website. One female was successful in visiting the Central Bank website. She needed to do some research for a paper that she was doing and she got the information from the website.

MORI

The other participant tried to access the website for the NHA. *"I had a problem, it could not be accessed."* (Female)

All participants would feel comfortable providing and accessing personal information to interact with the Government using the internet.

The participants were of the view that the Government should provide all the services that they offer on the internet, they noted that they would prefer to deal with the internet rather than a clerk. They would personally use all the services offered by the Registrar General's Office on the internet. *"Anything that will allow us to not go on the roads and in the traffic."* (Male)

They were of the view that it was a bad idea for the Government to provide a free email account to all citizens. *"There is no need for them to do that, so many are available on the internet such as yahoo and hotmail."* (Female)
"There are far more important things for them to offer than a free email account." (Male)

Fastforward:

The participants had never heard about Fast Forward when asked initially. However when the term was explained five of the participants remembered seeing some advertisements recently.

They were all of the view that it was a good idea. *"We have no choice now if we want to be fully developed. If we don't have this we will not move forward."* (Male)

The all agreed that they can personally benefit from Fast forward in the following ways:
Will save a lot of time by accessing information faster
Remove interactions with the counter clerks with attitudes

They were all interested in finding out more about fast forward. They would like to receive the information via the newspapers, radio, pamphlets, television.

Fast forward will definitely help T & T achieve Vision 2020. *"It's an integral part of it."* (Male)
"It's a step forward towards Vision 2020." (Female)

Telecommunications:

The participants were all aware of the impending entrance of companies to offer telecommunication services. They had heard about this from a speech made by Mr. Henry – Communications Manager at TSTT and through the grapevine.

It is a good idea for more that one company to offer these services, this based on:
Competition
Standards
Improved service
Consumers stand to gain when there is competition

Nine participants will consider changing to another service provider. *"Maybe this service provider will have our interests at heart, because TSTT never did all the years that they were here."* (Male)

One participant will not consider changing service provider. *"I will stick with my TSTT and be patriotic."* (Female)

Quality of service and customer service along with the cost of service will encourage these participants to move to another service provider. *"Once we getting better service at a good price, we gone to another provider. That's the bottom line of it."* (Male)

The need to keep their existing telephone number was not very important to this group of participants.

They expressed a concern whether they would have to pay a rental for the telephone as is done with TSTT. The idea of signing a contract did not matter to this group. *"You sign a contract with TSTT for three years."* (Male) A reasonable minimum period was 12 months to 18 months.

Making Local Calls from Home Telephone:

This group with the exception of one male was of the view that the cost of making local calls from their home telephone was too expensive. They were not getting value for their money. They thought that calls within their area should be free. *"In the other Caribbean islands, it's one standard monthly rental for local calls."* (Male). *"The local phone bills are relatively high."* (Male)

MORI

The group was totally against the provider ceasing the fixed rate for calls in the area and charging on a per minute basis. There was no suitable per/minute rate that was suggested by this group, they were of the view that the rate should be on a per call basis for calls made within the area.

Making International Calls from Home Telephone:

"Since the implementation of the dollar phones, that helped me because I have a son studying outside and my wife's family lives abroad. So I have no cause to make the international calls from my home phone. So now we just go in the dollar booth and talk how long we want to talk for and it is convenient. But now as they lower the rate to $2.00 on the home phone you think about just staying at home and making the call." (Male)

They were of the view that they are getting value for their money, especially after paying $4.00 previously.

Making Calls from your Cell/Mobile Phone:

Cost for making calls from cell phones noted as being "too expensive". This group was of the view that they were definitely NOT getting value for money.

This group was of the view that it was more important to keep the cost down for local calls rather than international calls. The reason being that more local calls are made.

The quality of the voice service is more important than the cost of the service. The participants will not subscribe to a provider that provides a lower quality of voice service even if it was at a lower cost.

All of the participants would be interested in viewing their phone bill over the internet. *"It will allow you to keep check of the calls and monitor your phone bill. Recently one of my extended family got a phone will with local calls for $900.00. When they asked TSTT for a print out, they told them that they must pay the bill before any queries could be made. Once the queries are checked they will be able to get a refund. These people were in the process of moving where they live so they needed to get their phone transferred. TSTT was not transferring the phone unless they paid the $900.00."* (Male)

"It is proven that TSTT technicians climb the poles and make calls from your line. Nowadays they don't climb again. They going by the box and clipping." (Female)

"I got on my bill recently a call to Brazil. Who I know in Brazil? And you still have to pay it." (Male)

The group will be willing to pay no extra to be able to view their phone bill over the internet. *"Free."* (Male)

MORI   66

"When you go to the company and request a print out you have to pay 25 cents per page, so if you view it over the internet and have to print it, you will be using your own paper and printer." (Female)

The group would like to be able to pay for their telephone bill using a credit card over the internet. *"Then you would not have to drive in the hot sun and look for parking."* (Female)

"You will no longer have to deal with those line and the cashiers." (Male)

Competition:

The erecting of towers to accommodate the competition's base stations will not change the views of these participants regards the introduction of the competition.

The only concerns regards the location of a base station in close proximity to their home is that of radiation or a health risk of any kind. *"If it emits radiation, I don't want it near me."* (Female)

The only area that there should have no base stations is in residential areas.

MORI

TRINIDAD & TOBAGO
OPINION LEADERS – WAVE 5

ICT & E-Commerce and Telecommunications.

GROUP 2 – South Trinidad

Conducted: Tuesday 12th October, 2004

Start Time: 4:45pm

End Time: 6:30pm

Group Composition:

Urban South Trinidad

C1 C2 Class

18 - 34 years

Mixed

4 Males, 4 Females

MORI

ICT & E-Commerce:

All of these participants used computers. They stated that it was very important for their daily life and used them both at home and work.

"It is an integral part of my life. I cannot do without one at work." (Female)

All of the participants that use the internet use it from both home and work. They use the internet a minimum of once daily and it is extremely important to their daily life.

It is used for checking email and researching information. Also used for purchasing things online.

They dislike the internet because of the slow speed and the fact that they get bumped off sometimes. "Even the DSL connection is not that fast." They also noted their dislike for the high cost of the internet.

They like the internet because of the following:
vast amount of knowledge that they can gain from it
communication with friends abroad through MSN Messenger
ability to surf on the internet

The internet will become more important to their life in the next few years. Mainly because of the information it provides, communication capabilities at lower costs, ability to have knowledge at fingertips and the ability to conduct transactions on the internet.

Five of the participants purchased items over the internet. These were airline tickets, clothing, computers and gift items.
The participants that chose to purchase items over the internet did so because of the convenience and also the added savings when purchasing items via this method. Also the convenience of not having to deal with unapproachable sales personnel.

They would use the internet more if the following was in place:
reduced rates
not being bumped off while surfing

None of the participants would use a public facility to access the internet, mainly because they have their own access.

These participants feel safe to some extent regards their privacy on the internet. They noted that they are aware of the issues like credit card fraud, but they have never experienced it. One noted that until he experiences it, he will continue to purchase online.

None of the participants attempted to visit a Government website. The reason being that there was never a need to visit such a website.

All participants would feel comfortable providing and accessing personal information to interact with the Government using the internet.

The participants were of the view that the Government should provide all the services that they offer on the internet, they noted that they would prefer to deal with the internet rather than a clerk. They noted that by using the internet rather than the "sour clerical officers in the Ministries and Government offices" will not only reduce the time taken to get things done but will also be a lot less stressful for them as customers.
They would personally use all the services offered by the Government offices. From renewing a passport or drivers license to ordering a copy of a death or birth certificate.

They were of the view that it was a bad idea for the Government to provide a free email account to all citizens. They thought this unnecessary as it is available by most search engines such as Yahoo, Hotmail and Lycos.

Fastforward:

The participants had never heard about Fast Forward when asked initially. However when the term was explained all of the participants remembered seeing some advertisements recently but could not recall anything but the name.

They were all of the view that it was a good idea, especially in view of Government's aim to achieve Vision 2020 of which information technology is an important part.

They all agreed that they can personally benefit from Fast forward, especially in the case of young people like themselves. They noted that they were versed in internet access, etc. but there were a large number of people their age that never turned on a computer in their life. By the Government doing this it would teach these people that there is another way of life other than crime and drugs.

They were all interested in finding out more about fast forward. They would like to receive the information via the newspapers, radio, pamphlets, television.

Fast forward will definitely help T & T achieve Vision 2020 as it is critical in its development.

Telecommunications:

The participants were all aware of the impending entrance of companies to offer telecommunication services. They had heard about this from a speech made by Mr. Henry – Communications Manager at TSTT and from hear say.

It is a good idea for more that one company to offer these services, this based on:
Competition
Standards
Improved service

All participants will consider changing to another service provider. This based on the fact that they assumed that they will be getting benefits from the new providers that they will not get from TSTT. Also noted that the rates will be more reasonable.

Quality of service and customer service along with the cost of service will encourage these participants to move to another service provider.

The need to keep their existing telephone number was not very important to this group of participants. "It doesn't really matter to me at all."

Again this group expressed a concern whether they would have to pay a rental for the telephone as is done with TSTT.

The idea of signing a contract did not matter to this group since you have to sign contracts with TSTT for everything.

A reasonable minimum period was 18 months to 3 years.

MORI

Making Local Calls from Home Telephone:

This group was of the view that the cost of making local calls from their home telephone was too expensive. They were not getting value for their money. They thought that calls within their area should be free.

The group was totally against the provider ceasing the fixed rate for calls in the area and charging on a per minute basis. There was no suitable per/minute rate that was suggested by this group, they were of the view that the rate should be on a per call basis for calls made within the area.

Making International Calls from Home Telephone:

The group agreed that as of recently the rates for making international calls have been reduced significantly when compared to the past. However, they were still of the view that the rates could be lower. Four participants noted that they find it more reasonable to use the dollar phones to make their calls.

They were of the view that they are getting value for their money, especially after paying $4.00 previously.

Making Calls from your Cell/Mobile Phone:

Cost for making calls from cell phones noted as being "too expensive". This group was of the view that they were definitely NOT getting value for money.

This group was of the view that it was more important to keep the cost down for local calls rather than international calls. The reason being that more local calls are made.

The quality of the voice service is more important than the cost of the service. The participants will not subscribe to a provider that provides a lower quality of voice service even if it was at a lower cost.

All of the participants would be interested in viewing their phone bill over the internet.

The group will be willing to pay no extra to be able to view their phone bill over the internet since they will be using their printer to print the bill.

The group would like to be able to pay for their telephone bill using a credit card over the internet. There is always a line in the bank and TSTT outlets to pay bills so that would save them time. They noted that they did not trust TTPOST to send payments through the mail.

Competition:

The erecting of towers to accommodate the competition's base stations will not change the views of these participants regards the introduction of the competition.

The only concerns regards the location of a base station in close proximity to their home is that of radiation or a health risk of any kind.

The only areas that should have no base stations are in residential areas and school zones.

MORI

TRINIDAD & TOBAGO
OPINION LEADERS – WAVE 5

ICT, E-Commerce and Telecommunications.

GROUP3 - Tobago

Conducted: Wednesday 13th October, 2004

Start Time: 4:45pm

End Time: 6:05pm

<u>Group Composition:</u>

Urban Tobago

DE Class

$\geq$ 65 years

Mixed

5 Males, 6 Females

ICT & E-Commerce:

None of these participants used computers. The reason being that they were either not interested or they were opposed to it and they also could not afford it. One participant stated that he was too old to learn about computers.

They were of the view that the internet would become more important to the lives of people in the next few years, but not necessarily to them, again because they had no need to use it.

They would not access a public facility to access the internet.

The types of information that the government should provide on the internet is the ability for people to make reports on crimes to the police because the police may be able to react quicker than if they were to call them.

Fastforward:

The participants had heard about Fast Forward from some advertisements, but they were not sure what it was about.

They were all of the view that it was a good idea for the young people and children but not really for them. They did not think that they could benefit from fast forward.

They were somewhat interested in finding out more about fast forward. They would like to receive the information via the newspapers, radio, pamphlets, television.

Fast forward will definitely help T & T achieve Vision 2020.

Telecommunications:

The participants were all aware of the impending entrance of companies to offer telecommunication services. They had heard about it from the newspapers and talk around town.

It is a good idea for more that one company to offer these services, this based on:
Competition
Improved service
Consumers stand to gain

All participants will consider changing to another service provider. However it would depend on the benefits they would receive from the new provider.

They would be encouraged to change service provider based on the following:
Cost
Quality of service
Customer service

The need to keep their existing telephone number was not very important to this group of participants. They would not pay extra money to keep their existing telephone number.

They expressed a concern whether they would have to pay a rental for the telephone as is done with TSTT.

The minimum length of time that they would sign a contact for with a new provider is 6 months. The need to sign a contract would not make them less likely to move as they had to sign a contract with TSTT.

Making Local Calls from Home Telephone:
This group was of the view that the cost of making local calls from their home telephone was too expensive. They were not getting value for their money.

The group was totally against the provider ceasing the fixed rate for calls in the area and charging on a per minute basis. There was no suitable per/minute rate that was suggested by this group, they were of the view that the rate should be on a per call basis for calls made within the area.

Making International Calls from Home Telephone:
Again the group was of the view that the rates were too high for making international calls from their house phone. They agreed that the rates did go down, but were still unaffordable.

Making Calls from your Cell/Mobile Phone:
Cost for making calls from cell phones noted as being "too expensive". This group was of the view that they were definitely NOT getting value for money.

This group was of the view that it was more important to keep the cost down for local calls rather than international calls. The reason being that more local calls are made.

The quality of the voice service is more important than the cost of the service. The participants will not subscribe to a provider that provides a lower quality of voice service even if it was at a lower cost.

Competition:

The erecting of towers to accommodate the competition's base stations will not change the views of these participants regards the introduction of the competition. However, they noted a bit of concern.

The only concerns regards the location of a base station in close proximity to their home is that of radiation or a health risk of any kind and the aesthetics..

The only area that there should have no base stations is in residential areas and school zones.

MORI

TRINIDAD & TOBAGO
OPINION LEADERS – WAVE 5

ICT, E-Commerce and Telecommunications.

GROUP 4 – Central Trinidad

Conducted: Thursday 14th October, 2004

Start Time: 5:00pm

End Time: 6:00pm

Group Composition:

Rural Central Trinidad

DE Class

25 - 35 years

Mixed

5 Males, 5 Females

All with Children

ICT & E-Commerce:

Four of the participants use a computer. The computers were used mainly for work, email and music. They were however of the view that computers were not that important to their daily life.

The participants that did not use a computer stated that this was due to the inability to afford one and lack of skills.

The participants that use the internet use it from both home and work. They use the internet approximately once every two days. It is used for checking email, chat rooms and researching information.

They dislike the internet because of the slow speed, pop ups and spam.

They like the internet because of the technology and the ability to see people when chatting with them.

The internet will definitely become more important to their life in the next few years. Mainly because of the information it provides, it will be an avenue for employment and also for studying purposes.

None of the participants used the internet to purchase things. This due to the inability to afford, lack of a credit card and the fact that they would be too scared to use it due to the schemes including credit card fraud.

If the internet was available with cheaper rates, then the participants will contemplate using it more. As it is now, it is expensive.

All would use a Government owned public internet facility. Reasons such as proximity to their home, the opening hours and the cost would determine if they would actually use it.

None of the participants felt safe and their privacy protected when using the internet because of the viruses and the lack of privacy.

No participants attempted to visit a Government website.

All participants would feel comfortable providing and accessing personal information to interact with the Government using the internet.

MORI

The participants were of the view that the Government should provide all the services that they offer on the internet. They should provide the public with information such as bills passed in parliament, immigration information and policies.

They noted that they would like to use the following government services on the internet:
Completing and submitting tax forms
Registrar General's services
Anything that would save them from having to go to Port of Spain

They were of the view that it was a bad idea for the Government to provide a free email account to all citizens. Persons will take advantage of this for the wrong reasons.

Fastforward:

The participants had heard about Fast Forward when asked initially. They were not sure what it was about. They had heard about it on the television.

They were all of the view that it was a good idea. *"If we are attempting to achieve Vision 2020, that is the only way forward. We need to realize that technology is important.."* (Male)

The all agreed that they can personally benefit from Fast forward in the following ways:
Training and development
Education
Access to the global world and how it operates

They were all interested in finding out more about fast forward. They would like to receive the information via the newspapers, radio, pamphlets, television.

Fast forward will definitely help T & T achieve Vision 2020. *"It's necessary part of Vision 2020."* (Female)

Telecommunications:

The participants were all aware of the impending entrance of companies to offer telecommunication services. They had heard about this from the news and via rumours.

It is a good idea for more that one company to offer these services, this based on:
Competition

MORI

Will be cheaper

Tstt is a rip off

Right now with TSTT you have to wait 1 ? - 2 months for a phone

Doubt the competition will charge $34.00/month for the rental of a phone like TSTT does

Don't think they will make us pay for a dial tone like TSTT

All participants will consider changing to another service provider. They were of the view that a new service provider will have cheaper rates and provide better service.

Quality of service and customer service along with the cost of service will encourage these participants to move to another service provider.

The need to keep their existing telephone number was very important to this group of participants. They noted that they will pay the extra to keep their existing number. They thought it essential and critical that they keep their number.

The idea of signing a contract did matter to this group. They noted that they will sign the contract for only six months. However they had they had to read the contract and ensure that it was good for them.

Making Local Calls from Home Telephone:

This group was of the view that the cost of making local calls from their home telephone was too expensive. They were not getting value for their money. They thought that calls within their area should be free. *"It's outrageous." We will like to pay 5 – 10 cents per minute."*

The group was totally against the provider ceasing the fixed rate for calls in the area and charging on a per minute basis. They stated that they will not pay a per/minute rate and wanted Unlimited Calls.

Making International Calls from Home Telephone:

"Even though the rates have dropped, it is still expensive. I prefer to use the dollar booths."

They do not get value for their money and use the call centres when making international calls.

Making Calls from your Cell/Mobile Phone:

Cost for making calls from cell phones noted as being "too expensive". This group was of the view that they were definitely NOT getting value for money.

MORI

This group was of the view that it was more important to keep the cost down for local calls rather than international calls. The reason being that more local calls are made.

The quality of the voice service is more important to three participants whereas the cost of the service was more important to 7 participants. The participants that placed an emphasis on quality of the voice service will not subscribe to voice service at lower cost.

All of the participants would be interested in viewing their phone bill over the internet. Thus being able to monitor their calls. However they noted that they will pay no extra for the facility. "We might as well go to TSTT and request a print out." (Female)

<u>Competition:</u>
The erecting of towers to accommodate the competition's base stations will not change the views of these participants regards the introduction of the competition.

The only concerns regards the location of a base station in close proximity to their home is that of radiation or a health risk of any kind and aesthetics.

The only areas that there should have no base stations are:
Residential
School zones
Health facilities