NIHERST
NATIONAL INSTITUTE
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RESEARCH SCIENCE AND TECHNOLOGY
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Republic of Trinidad and Tobago

Innovation in the Tourism Sector

2009

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1.0 Background and Overview

1.1 Definition

The World Tourism Organisation (WTO) defines tourism as: "The activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business or other purposes." This definition recognises tourism as comprising a broad range of activities, and goes beyond the common perception of tourism as being limited to holiday activity.

Efforts to define the tourism sector have been complicated by the fact that the tourism product consists of a bundle of services. It therefore becomes difficult to isolate "tourism producers" and to define all industry players.

For the purposes of this survey, we will include enterprises in the traditional activities in the tourism value chain in the following sub-sectors:

- Lodging and accommodation- hotels and guest houses.
- Leisure and recreation- enterprises that facilitate leisure and recreation activities to tourists.

1.2 Tourism Sector

World Tourism

The World Tourism and Travel Council's (WTTC) Report entitled, "Progress and Priorities 2008-2009", indicates that World Travel and Tourism was expected to contribute nearly US$5,890 billion to global gross domestics product (GDP) in 2008, rising to approximately US$10,855 billion over the next ten years. Long-term forecasts point to a mature but steady growth between 2009-2018, averaging 4.4% per annum over the period, supporting 10.5% of global GDP.

The contribution of the travel and tourism economy to employment is expected to rise from 283 million jobs or 8.4% of total employment in 2008 to 296.3 million jobs or 9.2% of employment in 2018.

Expenditure by international visitors on goods and services within an economy can have a significant impact on the country's exports. Of total world exports, travel and tourism is forecast to generate US $2103 billion or 11% in 2008, increasing to US$4,174 billion or 10.3% in 2018.

Tourism Sector in Trinidad and Tobago

The tourism sector has been identified as an important component of the diversification strategy of the Government of Trinidad and Tobago.

The Government's vision, as articulated in the National Tourism Development Policy is, "to facilitate the development of a responsible, sustainable and competitive tourism industry as a means of social and economic transformation of Trinidad and Tobago and the edification of its people."

The mission statement is: "To fully develop Trinidad and Tobago's tourism industry by the sustainable development and aggressive promotion of an innovative, differentiated, high value, internationally competitive visitor experience, supported by strong brand recognition, public and private sector partnerships and a positive cultural transformation."

It is estimated by the World Travel and Tourism Council that the direct and indirect contribution of travel and tourism to GDP was 12.8% for Trinidad and 39.8% for Tobago in 2008. Travel and tourism contributes, directly and indirectly to more than half (58.6%) of the jobs in Tobago.

1.3 Innovation in the Services Sector

Historically, innovation theory and methodology have been mainly developed for the analysis of technological innovation in the manufacturing sector; hence the peculiarities of the services sector were not sufficiently taken into account.

The main peculiarities of the services sector identified in the literature, which will have direct implications for the definition and analysis of innovation in services, are as follows:

i. Close interaction between production and consumption or co-terminality of services production and consumption. This makes it more difficult to distinguish between product and process innovation and leads to a greater focus of innovative activity on customisation of services to consumer needs.
ii. Intensive information-intangible content of services product and processes. The high information content gives information technology a central role in the innovation activities of services enterprises and makes it difficult to protect innovations with traditional methods such as patents.
iii. The key role of human resources as a critical factor for competitiveness.
iv. The critical role of organisational factors for the enterprises' performance.

Taking into account the peculiarities of services, four types of innovations in services have been identified (Sundbo and Galloug 1998):

1. Product innovations: They consist of new or significantly improved services to customers.
2. Process innovations: They are novelties or improvements in service production and delivery processes. These innovations can be of two types: innovations in production processes or innovation in distribution and delivery processes.
3. Organisational innovations: new forms of enterprise organisation or management.
4. Market innovations: New market behaviours such as finding a new market segment or introducing the enterprise into a new industry and its market.

   The importance of environmental factors has also been identified in developing a sustainable tourism sector.

2.0 Methodology

2.1 Objectives of the Survey

The objective of this survey was to obtain information with respect to the innovative activities of establishments in the tourism sector including:

- the types of innovative activities undertaken and the reasons for undertaking such activities,
- the impact of innovation on key performance indicators,
- the role of linkages for the acquisition of information and collaboration leading to innovation,
- the role of technology in the innovation proces and
- the obstacles/hindrances to innovative activities.

The results of the study are intended to provide insights into the innovation process and to assist decision - makers in developing policies to create the environment and incentives to catalyse innovation in the sector.

2.2 Coverage

The frame of establishments in the tourism sector in Trinidad and Tobago was obtained from the yellow pages of the telephone directory and a sample was chosen representing the tourism sub-sectors of:

- Lodging and accommodation-hotels and guest houses
- Leisure and recreation

The survey was administered to sixty (60) establishments, comprising forty-one (41) in Trinidad and nineteen (19) in Tobago. Thirty-six establishments, 17 in Trinidad and 19 in Tobago, or 60% overall responded to the survey.

There was a significant difference in the response rate in Trinidad of 41.5% compared to 100% in Tobago. The survey was carried out by field officers during the period November, 2009 – February, 2010.

2.3 Establishment Profiles

The questionnaire sought to elicit a profile of the establishments surveyed. Elements of the profile included:

- Age
- Ownership structure
- Main activity (classification by sub-sector)
- Employment
- Sales
- Licensing/franchising arrangements
- Purchases of new machinery

Analysis of Survey Results

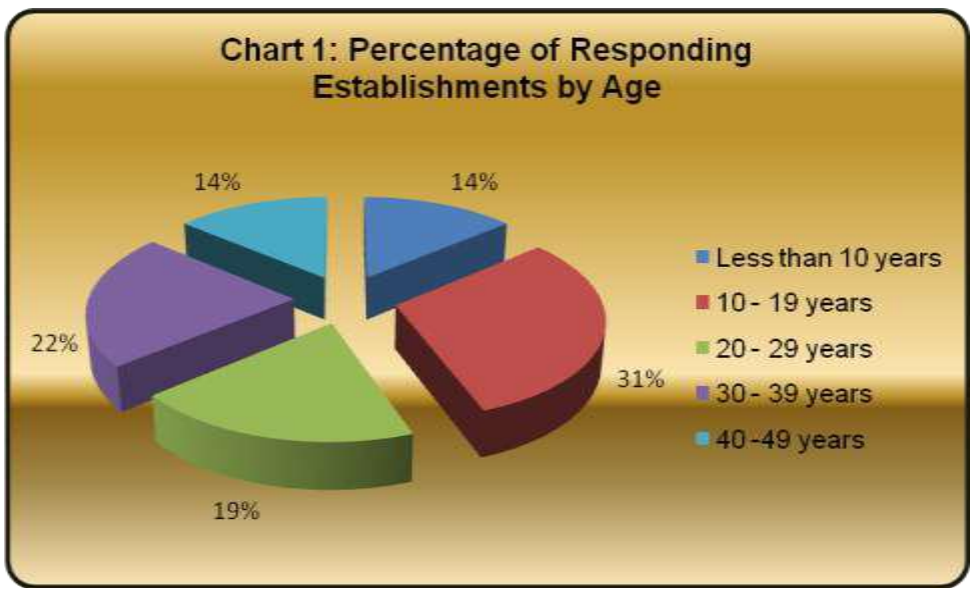
3.0 Charactertics of Establishments

Age

Overall, 5 establishments (14%) were less than 10 years old with 11 establishments (31%) between 10-19 years old. Cumulatively 45% of the establishments were under 20 years old, while the remaining 20 establishments (55%) were 20-49 years old. Fifty-three (53%) percent of the responding establishments in Trinidad were under 20 years, compared to 37% of the establishments in Tobago (Table 1).

Table 1: Age of Establishments by Territory

Age Group (years)	Territory					
	Total		Trinidad		Tobago	
	No.	%	No.	%	No.	%
Total	36	100.0	17	100.0	19	100.0
Less than 10	5	13.9	3	17.6	2	10.5
10 - 19	11	30.6	6	35.3	5	26.3
20 - 29	7	19.4	2	11.8	5	26.3
30 - 39	8	22.2	2	11.8	6	31.6
40 -49	5	13.9	4	23.5	1	5.3

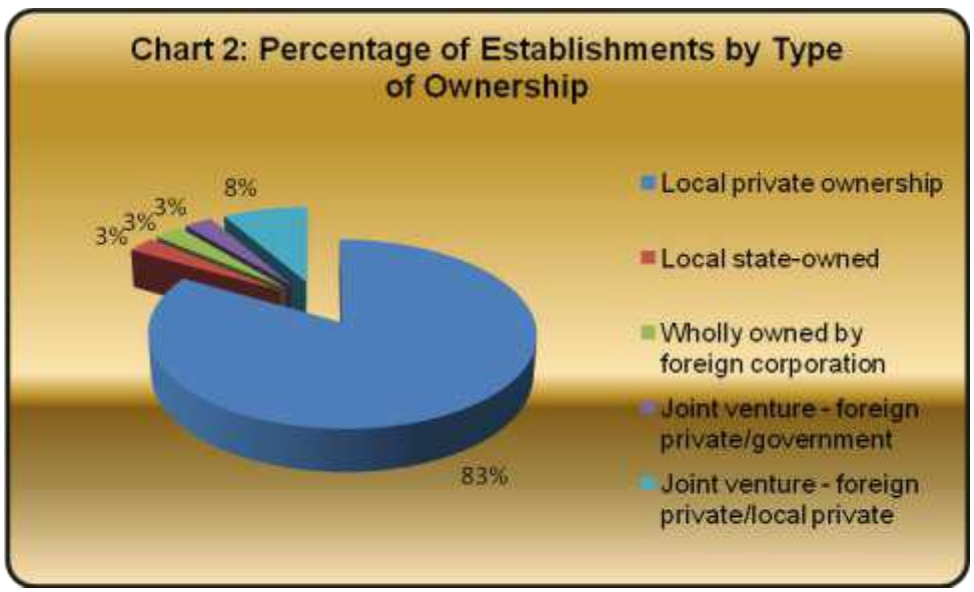


Ownership Structure

The sample survey revealed that the majority of establishments, 30 or 83%, were local and privately owned while one was locally state-owned. One establishment was wholly owned by a foreign corporation and 3 establishments were foreign private/local private joint venture arrangements, while one establishment was a foreign private/government joint venture. Locally owned establishments were prevalent in Trinidad (88%) and in Tobago (79%) (Table 2).

Table 2: Distribution of Establishments by Territory and Type of Ownership

Type of Ownership	Territory					
	Total		Trinidad		Tobago	
	No.	%	No.	%	No.	%
Total	36	100.0	17	100.0	19	100.0
Local private ownership	30	83.3	15	88.2	15	78.9
Local state-owned	1	2.8	0	0.0	1	5.3
Wholly owned by foreign corporation	1	2.8	0	0.0	1	5.3
Joint venture - foreign private/government	1	2.8	1	5.9	0	0.0
Joint venture - foreign private/local private	3	8.3	1	5.9	2	10.5



Main Activity

The activities of the establishments were distributed over 2two sub-sectors (Table 3), namely:

- Lodging and accommodation-hotels and guest houses (89%)
- Leisure and recreation (11%)

Seventy-six percent (76%) of the establishments in Trinidad were in the lodging and accommodation sub-sector with twenty-four percent (24%) in leisure and recreation. All the establishments in Tobago were in the lodging and accommodation sub-sector (Table 3).

Table 3: Distribution of Establishments by Sub-sector and Territory

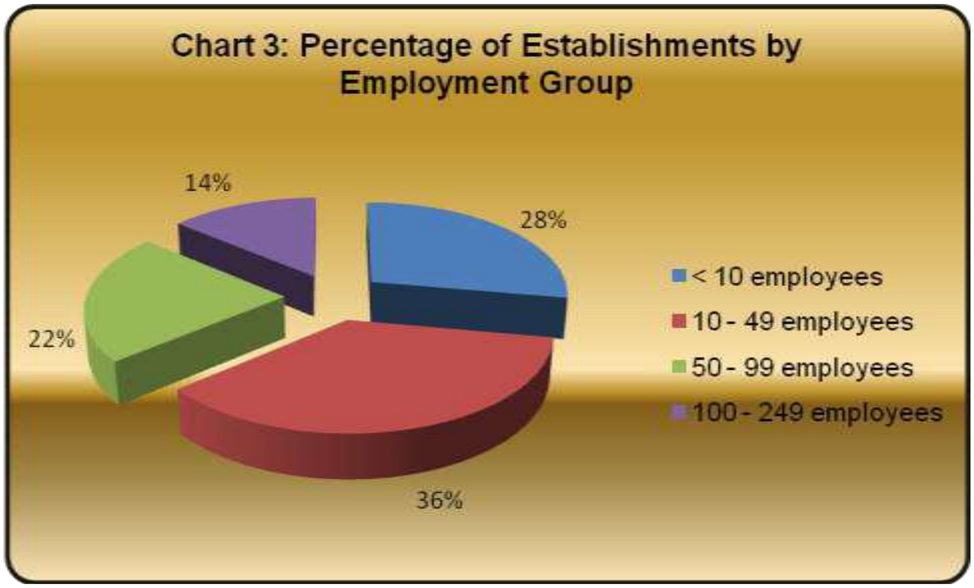
Sub-sector	Territory					
	Total		Trinidad		Tobago	
	No.	%	No.	%	No.	%
Total	36	100.0	17	100.0	19	100.0
Lodging and Accommodation-hotel and guest house	32	88.9	13	76.5	19	100.0
Leisure and recreation	4	11.1	4	23.5	0	0.0

Employment

Twenty-three (23) establishments representing 64% of the respondents employed less than 50 persons. Of this, 10 establishments (28%) employed less than 10 persons. Of the remainder, 8 establishments (22%) employed between 50-99 persons, while 5 establishments (14%) employed 100 persons and over. Seventy-four percent (74%) of the establishments in Tobago employed under 50 persons compared to 53% of the respondents in Trinidad (Table 4).

Table 4: Distribution of Establishments by Employment and Territory

Employment group	Territory					
	Total		Trinidad		Tobago	
	No.	%	No.	%	No.	%
Total	36	100.0	17	100.0	19	100.0
< 10 employees	10	27.8	5	29.4	5	26.3
10 - 49 employees	13	36.1	4	23.5	9	47.4
50 - 99 employees	8	22.2	5	29.4	3	15.8
100 - 249 employees	5	13.9	3	17.6	2	10.5



Overall, 7 establishments (19%) reported increases in the number of persons employed between 2007-2008, while eleven establishments (31%) showed decreases, and 18 establishments (50%) indicated that employment remained the same over the period. Establishments (29%) in Trinidad reported a higher percentage of increased employment than in Tobago (11%) over the period (Table 5b).

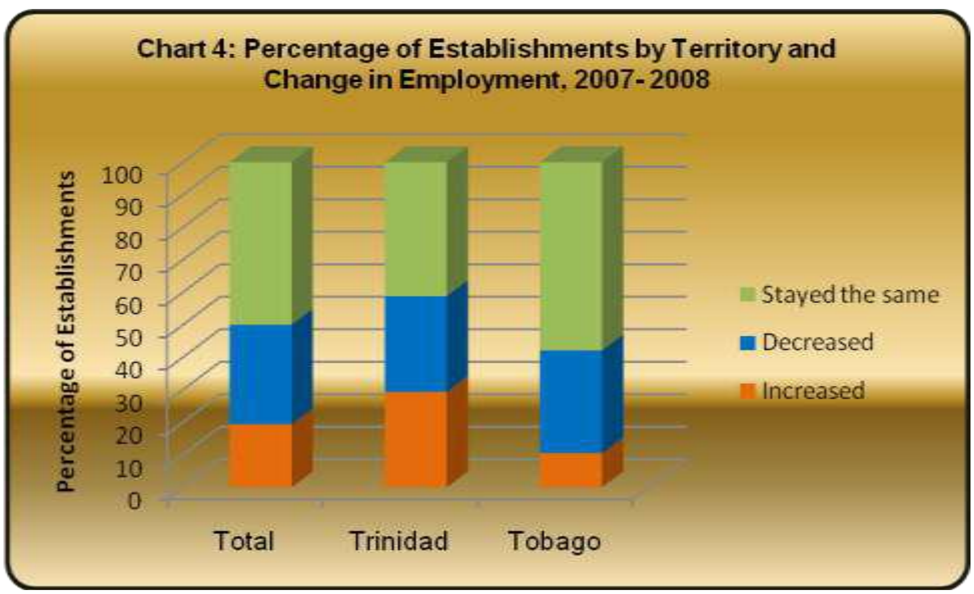
Table 5a: Distribution of Establishments by Change in Employment 2007-2008

Employment group	Change in employment							
	Total		Increased		Decreased		Stayed the same	
	No.	%	No.	%	No.	%	No.	%
Total	36	100.0	7	19.4	11	30.6	18	50.0
< 10 employees	10	100.0	2	20.0	1	10.0	7	70.0
10 - 49 employees	13	100.0	3	23.1	4	30.8	6	46.2
50 - 99 employees	8	100.0	2	25.0	3	37.5	3	37.5
100 - 249 employees	5	100.0	0	0.0	3	60.0	2	40.0

Table 5b: Distribution of Establishments by Territory and Change in Employment 2007-2008

Territory	Employment group	Change in employment							
		Total		Increased		Decreased		Stayed the same	
		No.	%	No.	%	No.	%	No.	%
Trinidad	Total	17	100.0	5	29.4	5	29.4	7	41.2
	< 10 employees	5	100.0	2	40.0			3	60.0
	10 - 49 employees	4	100.0	2	50.0	1	25.0	1	25.0
	50 - 99 employees	5	100.0	1	20.0	2	40.0	2	40.0
	100 - 249 employees	3	100.0			2	66.7	1	33.3
Tobago	Total	19	100.0	2	10.5	6	31.6	11	57.9
	< 10 employees	5	100.0			1	20.0	4	80.0
	10 - 49 employees	9	100.0	1	11.1	3	33.3	5	55.6
	50 - 99 employees	3	100.0	1	33.3	1	33.3	1	33.3
	100 - 249 employees	2	100.0			1	50.0	1	50.0

The growth in employment was observed over establishments employing less than 100 persons. In Tobago establishments employing fewer than ten employees recorded no increase in employment over the 2007-2008 period.

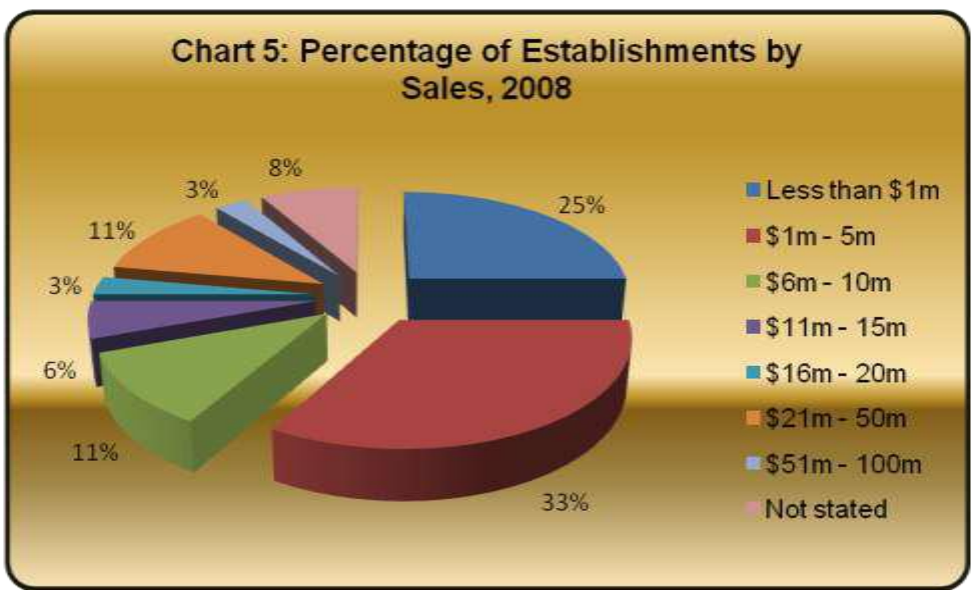


Sales

Twenty-one (21) establishments (58%) reported sales of $5m and under while 7 establishments (20%) recorded sales of between $6-20m and 5 establishments (14%) reported sales of between $21-100m in 2008. Three (3) establishments (8%) from Tobago did not respond (Tables 6 and 8).

Table 6: Distribution of Establishments by Territory and Sales, 2008

Value of sales	Territory					
	Total		Trinidad		Tobago	
	No.	%	No.	%	No.	%
Total	36	100.0	17	100.0	19	100.0
Less than $1m	9	25.0	5	29.4	4	21.1
$1m - 5m	12	33.3	5	29.4	7	36.8
$6m - 10m	4	11.1	2	11.8	2	10.5
$11m - 15m	2	5.6	1	5.9	1	5.3
$16m - 20m	1	2.8	1	5.9	0	0.0
$21m - 50m	4	11.1	3	17.6	1	5.3
$51m - 100m	1	2.8	0	0.0	1	5.3
Not stated	3	8.3	0	0.0	3	15.8



Twenty-eight percent (28%) of the establishments registered increases in sales between 2007-2008, while 44% reported decreases and 22% indicated that sales remained the same (Table, 7b). Sixty percent (60%) of the establishments that reported increases had sales values of $5 million and under (Table 7c). Establishments in Tobago registered a higher percentage of increased sales (32%) than in Trinidad (24%) over the period (Table 8).

Table 7a: No. of Establishments by Value and Comparison of Sales, 2007-2008

Value of sales	Comparison of sales				
	Total	Increased	Decreased	Stayed the same	Not stated
Total	36	10	16	8	2
Less than $1m	9	1	4	4	0
$1m - 5m	12	5	4	3	0
$6m - 10m	4	1	3	0	0
$11m - 15m	2	1	1	0	0
$16m - 20m	1	0	1	0	0
$21m - 50m	4	0	3	1	0
$51m - 100m	1	1	0	0	0
Not stated	3	1	0	0	2

Table 7b: Comparison of Sales, 2007 – 2008
(row percentage)

Value of sales	Comparison of sales				
	Total	Increased	Decreased	Stayed the same	Not stated
Total	100.0	27.8	44.4	22.2	5.6
Less than $1m	100.0	11.1	44.4	44.4	0.0
$1m - 5m	100.0	41.7	33.3	25.0	0.0
$6m - 10m	100.0	25.0	75.0	0.0	0.0
$11m - 15m	100.0	50.0	50.0	0.0	0.0
$16m - 20m	100.0	0.0	100.0	0.0	0.0
$21m - 50m	100.0	0.0	75.0	25.0	0.0
$51m - 100m	100.0	100.0	0.0	0.0	0.0
Not stated	100.0	33.3	0.0	0.0	66.7

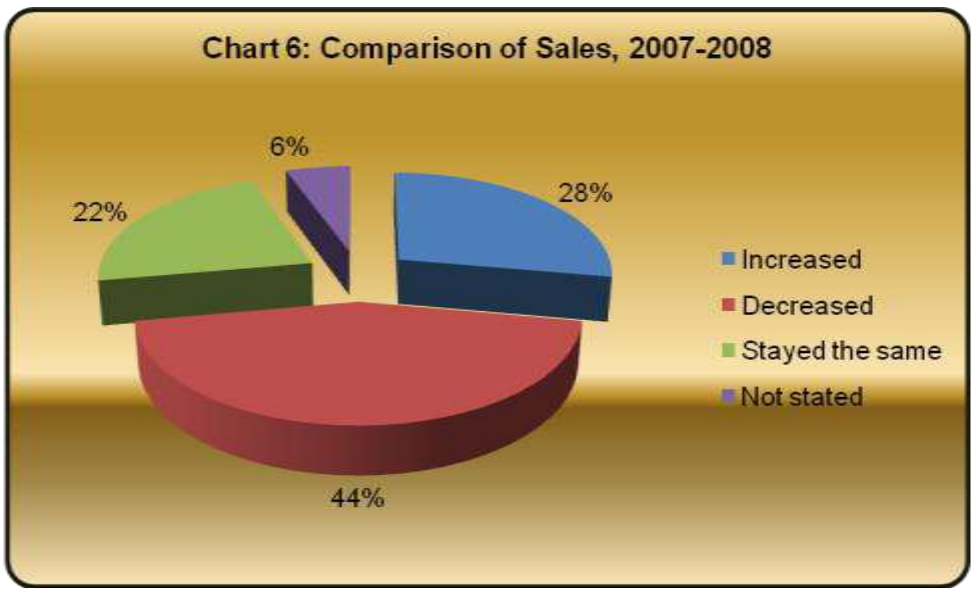


Table 7c: Comparison of Sales, 2007-2008
(column percentage)

Value of sales	Comparison of sales				
	Total	Increased	Decreased	Stayed the same	Not stated
Total	100.0	100.0	100.0	100.0	100.0
Less than $1m	25.0	10.0	25.0	50.0	0.0
$1m - 5m	33.3	50.0	25.0	37.5	0.0
$6m - 10m	11.1	10.0	18.8	0.0	0.0
$11m - 15m	5.6	10.0	6.3	0.0	0.0
$16m - 20m	2.8	0.0	6.3	0.0	0.0
$21m - 50m	11.1	0.0	18.8	12.5	0.0
$51m - 100m	2.8	10.0	0.0	0.0	0.0
Not stated	8.3	10.0	0.0	100.0	0.0

Table 8: Comparison of Sales by Territory, 2007-2008

Territory	Value of sales	Comparison of sales									
		Total		Increased		Decreased		Stayed the same		Not stated	
		No.	%	No.	%	No.	%	No.	%	No.	%
Trinidad	Total	17	100.0	4	23.5	8	47.1	5	29.4	0	0.0
	Less than $1m	5	100.0	0	0.0	3	60.0	2	40.0	0	0.0
	$1m - 5m	5	100.0	2	40.0	1	20.0	2	40.0	0	0.0
	$6m - 10m	2	100.0	1	50.0	1	50.0	0	0.0	0	0.0
	$11m - 15m	1	100.0	1	100.0	0	0.0	0	0.0	0	0.0
	$16m - 20m	1	100.0	0	0.0	1	100.0	0	0.0	0	0.0
	$21m - 50m	3	100.0	0	0.0	2	66.7	1	33.3	0	0.0
Tobago	Total	19	100.0	6	31.6	8	42.1	3	15.8	2	10.5
	Less than $1m	4	100.0	1	25.0	1	25.0	2	50.0	0	0.0
	$1m - 5m	7	100.0	3	42.9	3	42.9	1	14.3	0	0.0
	$6m - 10m	2	100.0	0	0.0	2	100.0	0	0.0	0	0.0
	$11m - 15m	1	100.0	0	0.0	1	100.0	0	0.0	0	0.0
	$21m - 50m	1	100.0	0	0.0	1	100.0	0	0.0	0	0.0
	$51m - 100m	1	100.0	1	100.0	0	0.0	0	0.0	0	0.0
	Not stated	3	100.0	1	33.3	0	0.0	0	0.0	2	66.7

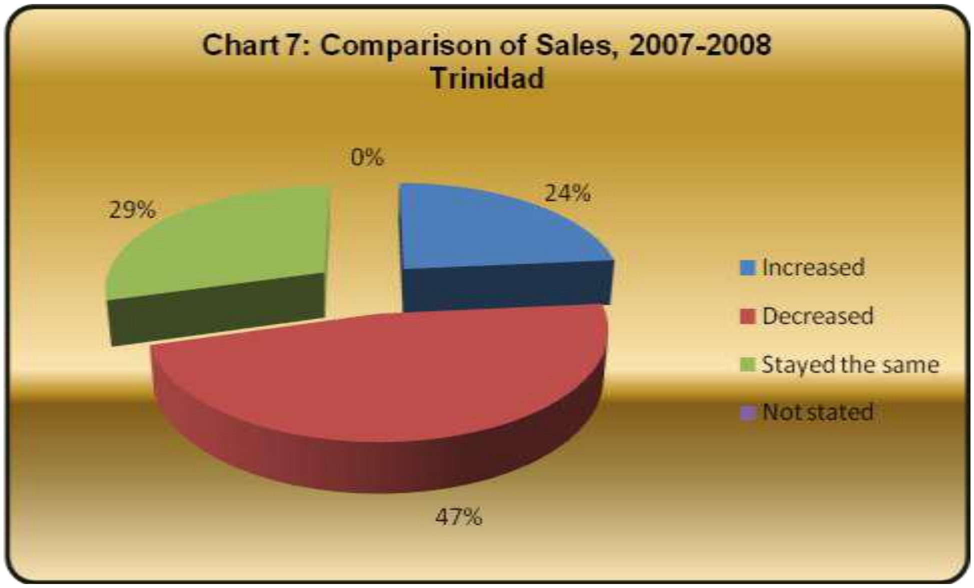


Chart 7: Comparison of Sales, 2007-2008
Trinidad
0%
24%
29%
47%
Increased
Decreased
Stayed the same
Not stated

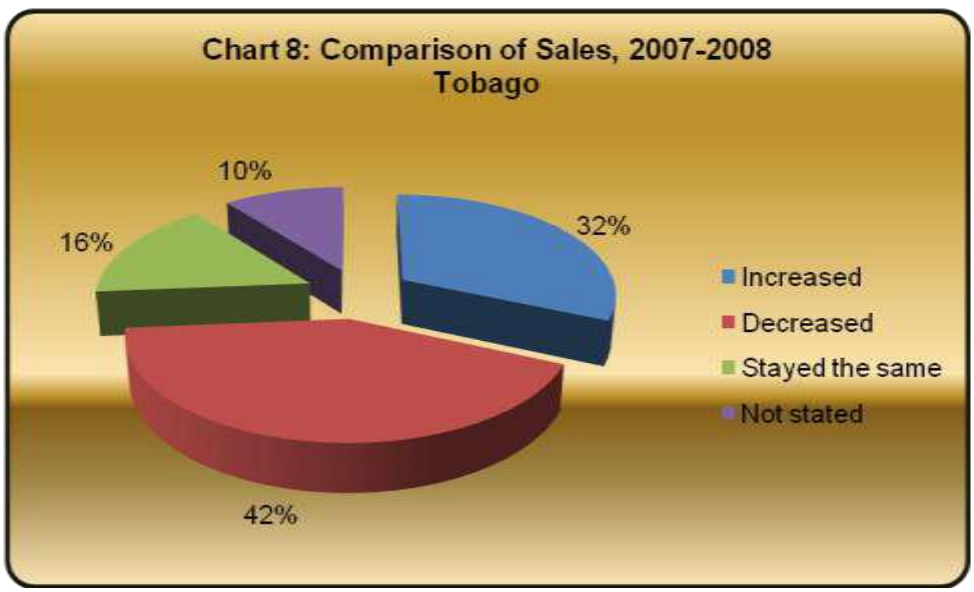


Chart 8: Comparison of Sales, 2007-2008
Tobago
10%
32%
16%
42%
Increased
Decreased
Stayed the same
Not stated

Licensing Arrangements

The majority of establishments (89%) had no licensing/franchise arrangement or management contract, thus nullifying this form of technology transfer for these establishments. However, 4 establishments (11%) reported that they had entered into such contracts (Table 9). Three (3) of these establishments were in Tobago (Table 9).

Table 9: Licensing Contract for Product or Process Technology by Territory

Licensing Contract	Territory					
	Total		Tobago		Trinidad	
	No.	%	No.	%	No.	%
Total	19	100.0	17	100.0	36	100.0
Yes	3	15.8	1	5.9	4	11.1
No	16	84.2	16	94.1	32	88.9

Purchase of New Machinery and Equipment

Twenty-six (26) establishments (72%) reported that they had purchased new machinery during 2007-2008. Ninety-five percent (95%) of the establishments in Tobago purchased new equipment compared to 47% in Trinidad over the period (Table 10). Forty–four percent (44%) of the establishments purchased equipment locally (Table 11).

Table 10: Purchase of New Machinery and Equipment 2007-2008

Purchased new machinery	Territory					
	Total		Trinidad		Tobago	
	No.	%	No.	%	No.	%
Total	36	100.0	17	100.0	19	100.0
Yes	26	72.2	8	47.1	18	94.7
No	10	27.8	9	52.9	1	5.3

Table 11: Purchase of New Machinery and Equipment, Locally or Abroad 2007-2008

Purchased new machinery	Where machinery purchased									
	Total		Locally		Abroad		Both		Not applicable	
	No.	%	No.	%	No.	%	No.	%	No.	%
Total	36	100.0	16	44.4	2	5.6	8	22.2	10	27.8
Yes	26	100.0	16	0.0	2	7.7	8	30.8	0	0.0
No	10	100.0	0	0.0	0	0.0	0	0.0	10	100.0

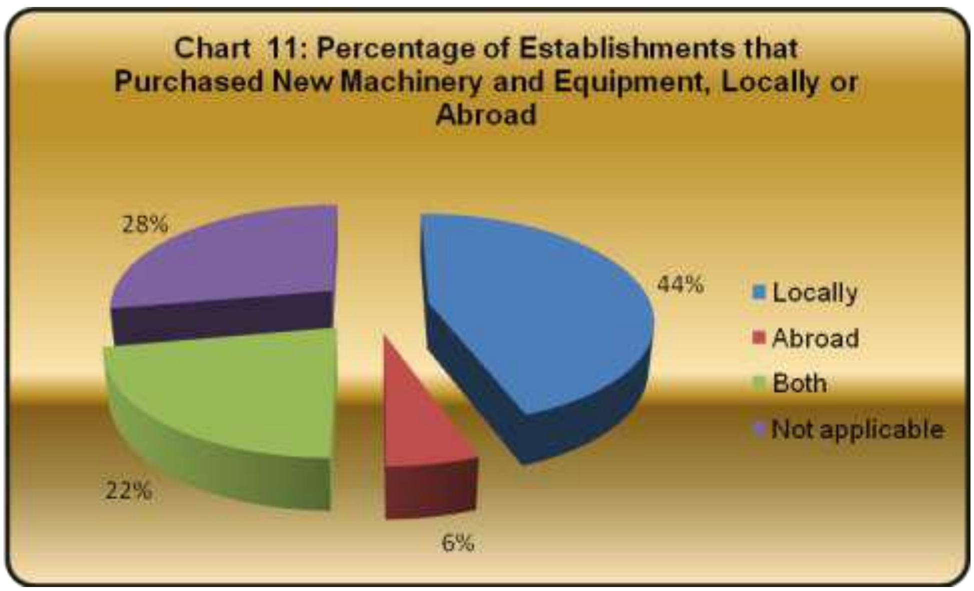


Table 12a: Change in Sales by Purchase of New Machinery 2007-2008 (column percentage)

Change in sales	Purchase new machinery					
	Total		Yes		No	
	No.	%	No.	%	No.	%
Total	36	100.0	26	100.0	10	100.0
Increased	10	27.8	7	26.9	3	30.0
Decreased	16	44.4	11	42.3	5	50.0
Stayed the same	8	22.2	6	23.1	2	20.0
Not stated	2	5.6	2	7.7	0	0.0

Table 12b: Change in Sales by Purchase of New Machinery, 2007-2008 (row percentage)

Change in sales	Purchase new machinery					
	Total		Yes		No	
	No.	%	No.	%	No.	%
Total	36	100.0	26	72.2	10	27.8
Increased	10	100.0	7	70.0	3	30.0
Decreased	16	100.0	11	68.8	5	31.3
Stayed the same	8	100.0	6	75.0	2	25.0
Not stated	2	100.0	2	100.0	0	0.0

Only twenty-seven percent (27%) of the establishments which purchased new machinery and equipment indicated that sales had increased in 2007-2008, while 42% reported decreases in sales and 23% reported that sales had remained the same. Thirty percent (30%) of the establishments which did not purchase machinery and equipment during this period reported increased sales (Table 12a). Overall, the purchase of new machinery and equipment therefore had limited impact on sales. This was less pronounced in Tobago where 33% of the establishments that purchased new equipment reported increases in sales, compared to 13% in Trinidad (Tables 13a and 13b).

Table 13a: Change in Sales by Purchase of New Machinery 2007-2008
Trinidad

Change in sales	Purchased new machinery					
	Total		Yes		No	
	No.	%	No.	%	No.	%
Total	17	100.0	8	100.0	9	100.0
Increased	4	23.5	1	12.5	3	33.3
Decreased	8	47.1	4	50.0	4	44.4
Stayed the same	5	29.4	3	37.5	2	22.2

Table 13b: Change in Sales by Purchase of New Machinery 2007-2008
Tobago

Change in sales	Purchased new machinery					
	Total		Yes		No	
	No.	%	No.	%	No.	%
Total	19	100.0	18	100.0	1	100.0
Increased	6	31.6	6	33.3	0	0.0
Decreased	8	42.1	7	38.9	1	100.0
Stayed the same	3	15.8	3	16.7	0	0.0
Not stated	2	10.5	2	11.1	0	0.0

4.0 Innovation Activities

Innovation activities were been evaluated under five main categories as follows:

- Product
- Process
- Organisational
- Marketing
- Environmental

4.1 *Product Innovation*

Product innovation was analysed under two headings as follows:

- Introduced/developed a new good/service
- Improved an existing good/service

Product innovation was defined in the questionnaire as follows:

A product innovation is the market introduction of a new or significantly improved good or service with respect to its characteristics or intended uses. Product innovation (new or improved) must be new to your establishment, but not need to be new to your market.

Introduced/developed a new good/service

Of the respondents, nineteen (53%) indicated that they had introduced/developed a new good/service, while 64% reported that they had improved an existing good/service (Table 14a). More establishments were engaged in product innovation in Trinidad than in Tobago. In Trinidad, 65% of the establishments indicated that they had introduced/developed a new good/service compared to 42% in Tobago. Similarly, 77% of the establishments in Trinidad improved an existing good/service compared to 53% in Tobago (Tables 14b and 14c).

Table 14a: Distribution of Establishments by Type of Product Innovation 2007 and 2008

Type of product innovation	Total		Yes		No		Not stated	
	No.	%	No.	%	No.	%	No.	%
Introduced/developed a new good/service	36	100.0	19	52.8	15	41.7	2	5.6
Improved an existing good/service	36	100.0	23	63.9	13	36.1	0	0.0

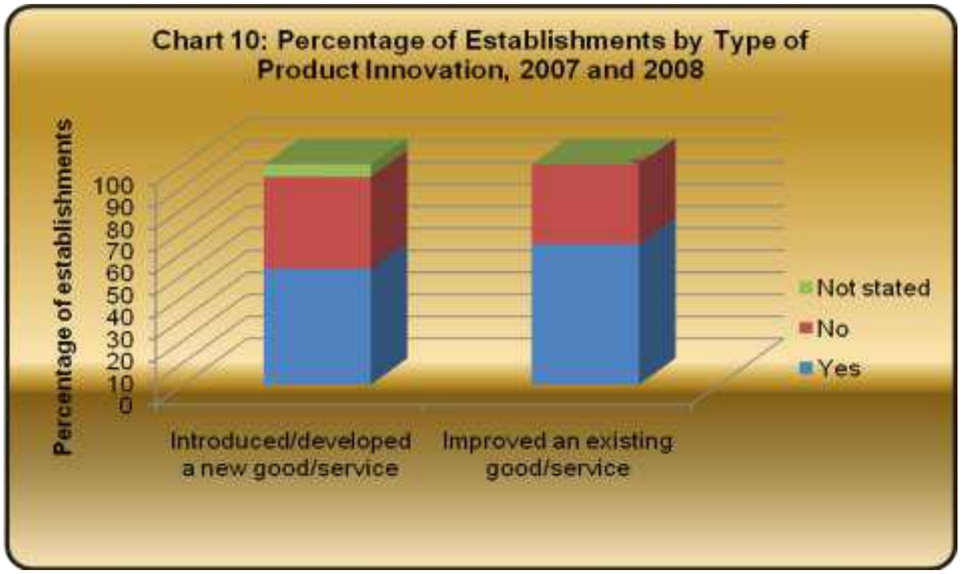


Table 14b: Distribution of Establishments by Type of Product Innovation
2007 and 2008
Trinidad

Type of product innovation	Total		Yes		No		Not stated	
	No.	%	No.	%	No.	%	No.	%
Introduced/developed a new good/service	17	100.0	11	64.7	15	23.5	2	11.8
Improved an existing good/service	17	100.0	13	76.5	4	23.5	0	0.0

Table 14c: Distribution of Establishments by Type of Product Innovation
2007 and 2008
Tobago

Type of product innovation	Total		Yes		No	
	No.	%	No.	%	No.	%
Introduced/developed a new good/service	19	100.0	8	42.1	11	57.9
Improved an existing good/service	19	100.0	10	52.6	9	47.4

Thirty-seven percent (37%) of establishments that introduced/developed a new good/service stated that sales increased between 2007 and 2008, while the same percentage indicated that sales remained the same, and 21% recorded a decrease in sales (Table15a). However, 70% of the establishments that reported increases in sales indicated that they had introduced/developed a new good/service (Table 15b). In Trinidad, 100% of the establishments that reported increases in sales indicated that they had introduced/developed a new good/service compared to 50% in Tobago (Table 15d).

Table15a: Distribution of Establishments that Introduced/Developed a New Good/Service by Change in Sales, 2007-2008 (column percentage)

Change in sales	Introduced/developed a new good/service							
	Total		Yes		No		Not stated	
	No.	%	No.	%	No.	%	No.	%
Total	36	100.0	19	100.0	15	100.0	2	100.0
Increased	10	27.8	7	36.8	3	20.0	0	0.0
Decreased	16	44.4	4	21.1	10	66.7	2	100.0
Stayed the same	8	22.2	7	36.8	1	6.7	0	0.0
Not stated	2	5.6	1	5.3	1	6.7	0	0.0

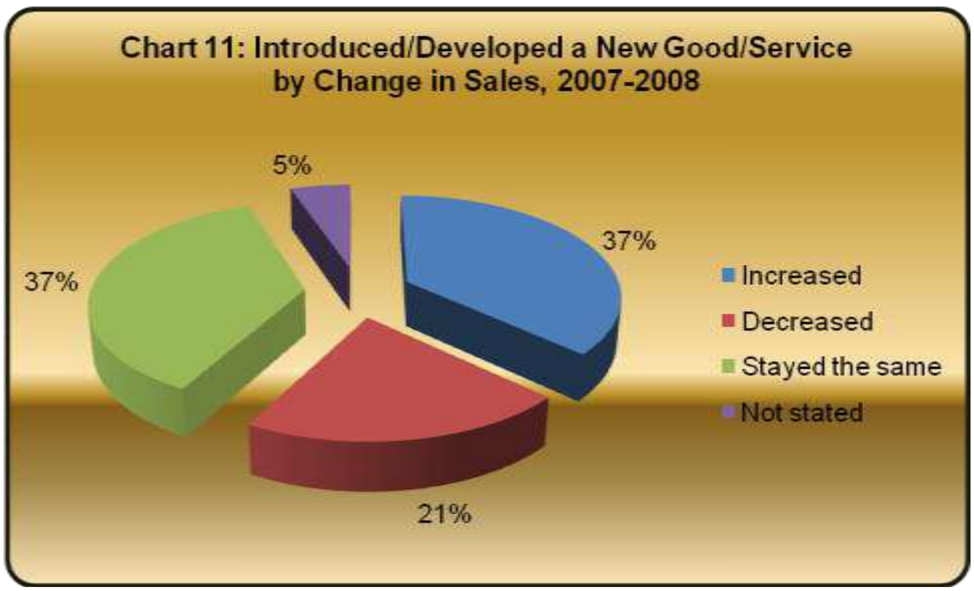


Table 15b: Percentage of Establishments that Introduced/Developed a New Good/Service by Change in Sales, 2007-2008 (row percentage)

Change in sales	Introduced/developed a new good/service			
	Total	Yes	No	Not stated
Total	100.0	52.8	41.7	5.6
Increased	100.0	70.0	30.0	0.0
Decreased	100.0	25.0	62.5	12.5
Stayed the same	100.0	87.5	12.5	0.0
Not stated	100.0	50.0	50.0	0.0

Table 15c: Distribution of Establishments that Introduced/Developed a New Good/Service by Territory and Change in Sales, 2007-2008 (column percentage)

Territory	Change in sales	Introduced/developed a new good/service							
		Total		Yes		No		Not stated	
		No.	%	No.	%	No.	%	No.	%
Trinidad	Total	17	100.0	11	100.0	4	100.0	2	100.0
	Increased	4	23.5	4	36.4	0	0.0	0	0.0
	Decreased	8	47.1	3	27.3	3	75.0	2	100.0
	Stayed the same	5	29.4	4	36.4	1	25.0	0	0.0
Tobago	Total	19	100.0	8	100.0	11	100.0	0	0.0
	Increased	6	31.6	3	37.5	3	27.3	0	0.0
	Decreased	8	42.1	1	12.5	7	63.6	0	0.0
	Stayed the same	3	15.8	3	37.5	0	0.0	0	0.0
	Not stated	2	10.5	1	12.5	1	9.1	0	0.0

Table 15d: Percentage of Establishments that Introduced/Developed a New Good/Service by Territory and Change in Sales, 2007-2008
(row percentage)

Territory	Change in sales	Introduced/developed a new good/service			
		Total	Yes	No	Not stated
Trinidad	Total	100.0	64.7	23.5	11.8
	Increased	100.0	100.0	0.0	0.0
	Decreased	100.0	37.5	37.5	25.0
	Stayed the same	100.0	80.0	20.0	0.0
Tobago	Total	100.0	42.1	57.9	0.0
	Increased	100.0	50.0	50.0	0.0
	Decreased	100.0	12.5	87.5	0.0
	Stayed the same	100.0	100.0	0.0	0.0
	Not stated	100.0	50.0	50.0	0.0

Fifty percent (50%) of the establishments in the lodging and accommodation sub-sector were involved in product innovation compared to 75% in the leisure and recreation sub-sector (Table 16a). All the establishments surveyed in the leisure and recreation sub-sector were situated in Trinidad. In the lodging and accommodation sub-sector 62% of the establishments in Trinidad introduced/developed a new good/service compared to 42% in Tobago (Table 16b).

Table 16a: Distribution of Establishments that Introduced/Developed a New Good/Service by Sub-sector

Sub-sector	Introduced/developed a new good/service							
	Total		Yes		No		Not stated	
	No.	%	No.	%	No.	%	No.	%
Total	36	100.0	19	52.7	15	41.7	2	6.3
Lodging and accommodation-hotel and guest house	32	100.0	16	50.0	14	43.8	2	5.6
Leisure and recreation	4	100.0	3	75.0	1	25.0	0	0.0

Table 16b: Distribution of Establishments that Introduced/Developed a New Good/Service by Sub-sector and Territory

Territory	Sub-sector	Introduced/developed a new good/service							
		Total		Yes		No		Not stated	
		No.	%	No.	%	No.	%	No.	%
Trinidad	Total	17	100.0	11	64.7	4	23.5	2	11.80
	Lodging and accommodation-hotel and guest house	13	100.0	8	61.5	3	23.12	2	15.415.4
	Leisure and recreation	4	100.0	3	75.0	1	25.0	0	0.0
Tobago	Total	19	100.0	8	42.1	11	57.9	0	0.0
	Lodging and accommodation-hotel and guest house	19	100.0	8	42.1	11	57.9	0	0.0

Table 17a: Distribution of Establishments that Introduced/Developed a New Good/Service by Employment (row percentage)

Employment group	Introduced/developed a new good/service							
	Total		Yes		No		Not stated	
	No.	%	No.	%	No.	%	No.	%
Total	36	100.0	19	52.8	15	41.7	2	5.6
< 10 employees	10	100.0	6	60.0	4	40.0	0	0.0
10 - 49 employees	13	100.0	5	38.5	7	53.8	1	7.7
50 - 99 employees	8	100.0	5	62.5	2	25.0	1	12.5
100 - 249 employees	5	100.0	3	60.0	2	40.0	0	0.0

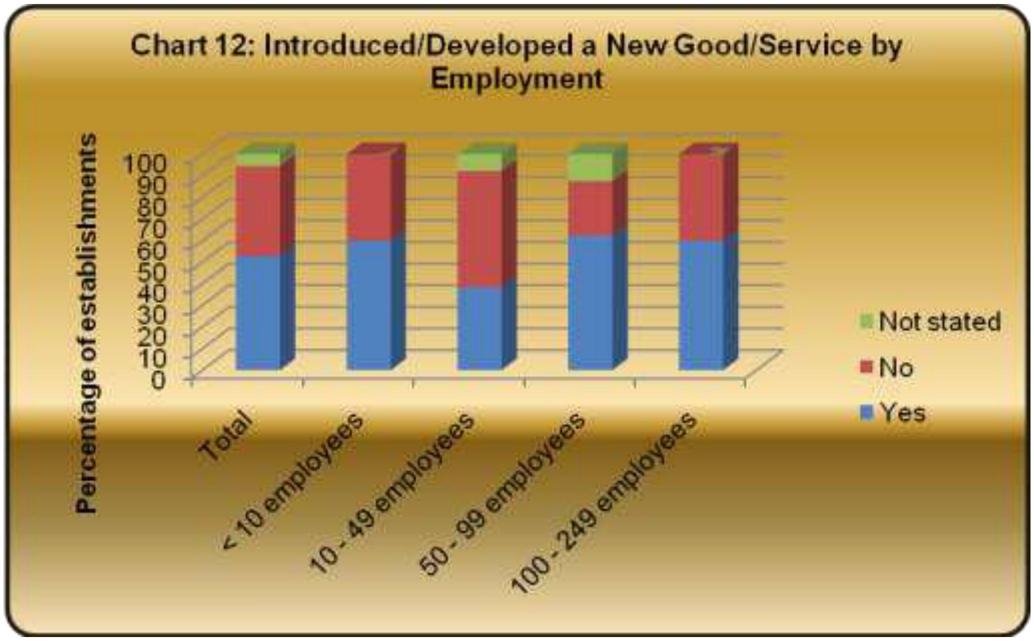


Table 17b: Percentage of Establishments that Introduced/Developed a new Good/Service by Employment (column percentage)

Employment group	Introduced/developed a new good/service			
	Total	Yes	No	Not stated
Total	100.0	100.0	100.0	100.0
< 10 employees	27.8	31.6	26.7	0.0
10 - 49 employees	36.1	26.3	46.7	50.0
50 - 99 employees	22.2	26.3	13.3	50.0
100 - 249 employees	13.9	15.8	13.3	0.0

In terms of employment characteristics, product innovation was fairly evenly distributed amongst the establishments (Table 17a). Overall, 58% of the establishments that introduced/developed a new good/service had less than 50 employees (Table 17b). However, 80% of establishments with less than ten employees in Trinidad reported that they had introduced/developed a new good/service compared to 40% in Tobago (Table 17c).

Table 17c: Distribution of Establishments that Introduced/Developed a New Good/Service by Employment and Territory
(row percentage)

Territory	Employment group	Introduced/developed a new good/service							
		Total		Yes		No		Not stated	
		No.	%	No.	%	No.	%	No.	%
Trinidad	Total	17	100.0	11	64.7	4	23.5	2	11.8
	< 10 employees	5	100.0	4	80.0	1	20.0	0	0.0
	10 - 49 employees	4	100.0	2	50.0	1	25.0	1	25.0
	50 - 99 employees	5	100.0	3	60.0	1	20.0	1	20.0
	100 - 249 employees	3	100.0	2	66.7	1	33.3	0	0.0
Tobago	Total	19	100.0	8	42.1	11	57.9	0	0.0
	< 10 employees	5	100.0	2	40.0	3	60.0	0	0.0
	10 - 49 employees	9	100.0	3	33.3	6	66.7	0	0.0
	50 - 99 employees	3	100.0	2	66.7	1	33.3	0	0.0
	100 - 249 employees	2	100.0	1	50.0	1	50.0	0	0.0

Table 17d: Percentage of Establishments that Introduced/Developed a New Good/Service by Employment and Territory
(column percentage)

Territory	Employment group	Introduced/developed a new good/service			
		Total	Yes	No	Not stated
Trinidad	Total	100.0	100.0	100.0	100.0
	< 10 employees	29.4	36.4	25.0	0.0
	10 - 49 employees	23.5	18.2	25.0	50.0
	50 - 99 employees	29.4	27.3	25.0	50.0
	100 - 249 employees	17.6	18.2	25.0	0.0
Tobago	Total	100.0	100.0	100.0	0.0
	< 10 employees	26.3	25.0	27.3	0.0
	10 - 49 employees	47.4	37.5	54.5	0.0
	50 - 99 employees	15.8	25.0	9.1	0.0
	100 - 249 employees	10.5	12.5	9.1	0.0

New product introductions were reported in all sales categories, with the exception of establishments with sales between $16-20m and $51-100m (Table 18a). Fifty-eight percent (58%) of the establishments that introduced/developed a new good/service had sales of five million and less (Table 18b). Establishments with sales of $15m and under were responsible for the majority of product innovations in Trinidad as well as in Tobago (Table 18d).

Table18a: Distribution of Establishments that Introduced/Developed a New Good/Service by Sales, 2008 (row percentage)

Value of sales	Introduced/developed a new good/service							
	Total		Yes		No		Not stated	
	No.	%	No.	%	No.	%	No.	%
Total	36	100.0	19	52.8	15	41.7	2	5.6
Less than $1m	9	100.0	5	55.6	3	33.3	1	11.1
$1m - 5m	12	100.0	6	50.0	6	50.0	0	0.0
$6m - 10m	4	100.0	2	50.0	2	50.0	0	0.0
$11m - 15m	2	100.0	2	100.0	0	0.0	0	0.0
$16m - 20m	1	100.0	0	0.0	0	0.0	1	100.0
$21m - 50m	4	100.0	2	50.0	2	50.0	0	0.0
$51m - 100m	1	100.0	0	0.0	1	100.0	0	0.0
Not stated	3	100.0	2	66.7	1	33.3	0	0.0

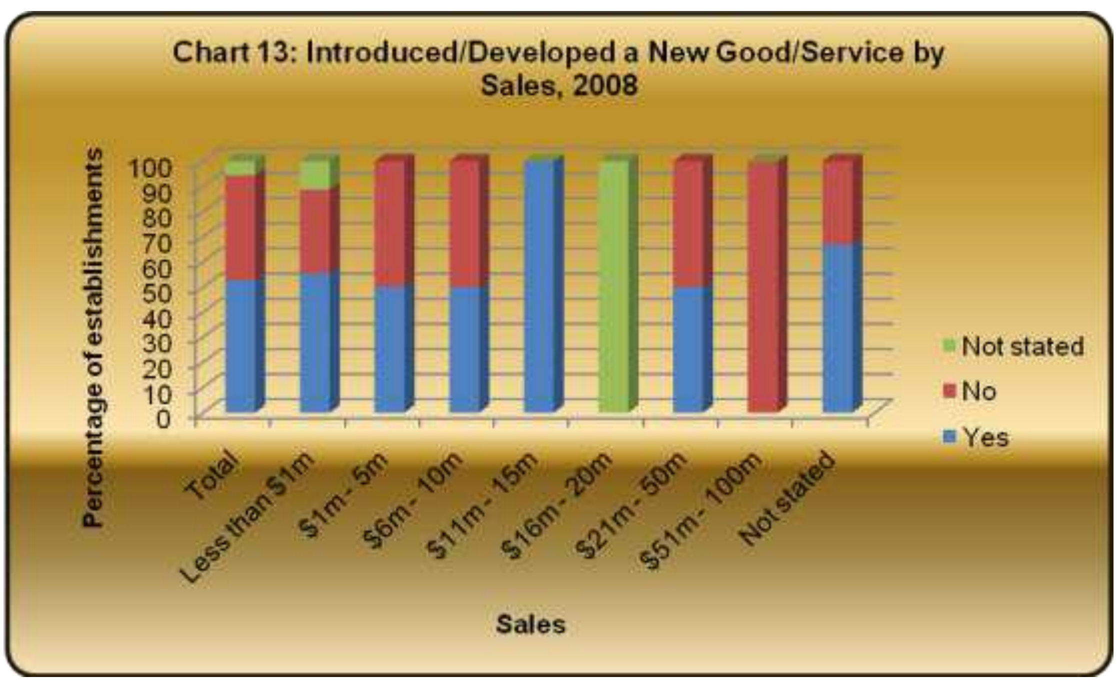


Table 18b: Percentage of Establishments that Introduced/Developed a New Good/Service by Sales, 2008 (column percentage)

Value of sales	Introduced/developed a new good/service			
	Total	Yes	No	Not stated
Total	100.0	100.0	100.0	100.0
Less than $1m	25.0	26.3	20.0	50.0
$1m - 5m	33.3	31.6	40.0	0.0
$6m - 10m	11.1	10.5	13.3	0.0
$11m - 15m	5.6	10.5	0.0	0.0
$16m - 20m	2.8	0.0	0.0	50.0
$21m - 50m	11.1	10.5	13.3	0.0
$51m - 100m	2.8	0.0	6.7	0.0
Not stated	8.3	10.5	6.7	0.0

Table 18c: Distribution of Establishments that Introduced/Developed a New Good/Service by Territory and Sales, 2008 (row percentage)

Territory	Value of sales	Introduced/developed a new good/service							
		Total		Yes		No		Not stated	
		No.	%	No.	%	No.	%	No.	%
Trinidad	Total	17	100.0	11	64.7	4	23.5	2	11.8
	Less than $1m	5	100.0	2	40.0	2	40.0	1	20.0
	$1m - 5m	5	100.0	4	80.0	1	20.0	0	0.0.
	$6m - 10m	2	100.0	2	100.0	0	0.0	0	0.0
	$11m - 15m	1	100.0	1	100.0	0	0.0	0	0.0
	$16m - 20m	1	100.0	0	0.0	0	0.0	1	100.0
	$21m - 50m	3	100.0	2	66.7	1	33.3	0	0.0
Tobago	Total	19	100.0	8	42.1	11	57.9	0	0.0
	Less than $1m	4	100.0	3	75.0	1	25.0	0	0.0
	$1m - 5m	7	100.0	2	28.6	5	71.4	0	0.0
	$6m - 10m	2	100.0	0	0.0	2	100.0	0	0.0
	$11m - 15m	1	100.0	1	100.0	0	0.0	0	0.0
	$21m - 50m	1	100.0	0	0.0	1	100.0	0	0.0
	$51m - 100m	1	100.0	0	0.0	1	100.0	0	0.0
	Not stated	3	100.0	2	66.7	1	33.3	0	0.0

Table 18d: Percentage of Establishments that Introduced/Developed a New Good/Service by Territory and Sales, 2008 (column percentage)

Territory	Value of sales	Introduced/developed a new good/service			
		Total	Yes	No	Not stated
Trinidad	Total	100.0	100.0	100.0	100.0
	Less than $1m	29.4	18.2	50.0	50.0
	$1m - 5m	29.4	36.4	25.0	0.0
	$6m - 10m	11.8	18.2	0.0	0.0
	$11m - 15m	5.9	9.1	0.0	0.0
	$16m - 20m	5.9	0.0	0.0	50.0
	$21m - 50m	17.6	18.2	25.0	0.0
Tobago	Total	100.0	100.0	100.0	0.0
	Less than $1m	21.1	37.5	9.1	0.0
	$1m - 5m	36.8	25.0	45.5	0.0
	$6m - 10m	10.5	0.0	18.2	0.0
	$11m - 15m	5.3	12.5	0.0	0.0
	$21m - 50m	5.3	0.0	9.1	0.0
	$51m - 100m	5.3	0.0	9.1	0.0
	Not stated	15.8	25.0	9.1	0.0

Table 19a: Distribution of Establishments that Introduced/Developed a New Good/Service by Age

Age group (years)	Introduced/developed a new good/service							
	Total		Yes		No		Not stated	
	No.	%	No.	%	No.	%	No.	%
Total	36	100.0	19	52.8	15	41.7	2	5.6
Less than 10	5	100.0	4	80.0	1	20.0	0	0.0
10 - 19	11	100.0	5	45.5	5	45.5	1	9.1
20 - 29	7	100.0	4	57.1	2	28.6	1	14.3
30 - 39	8	100.0	2	25.0	6	75.0	0	0.0
40 -49	5	100.0	4	80.0	1	20.0	0	0.0

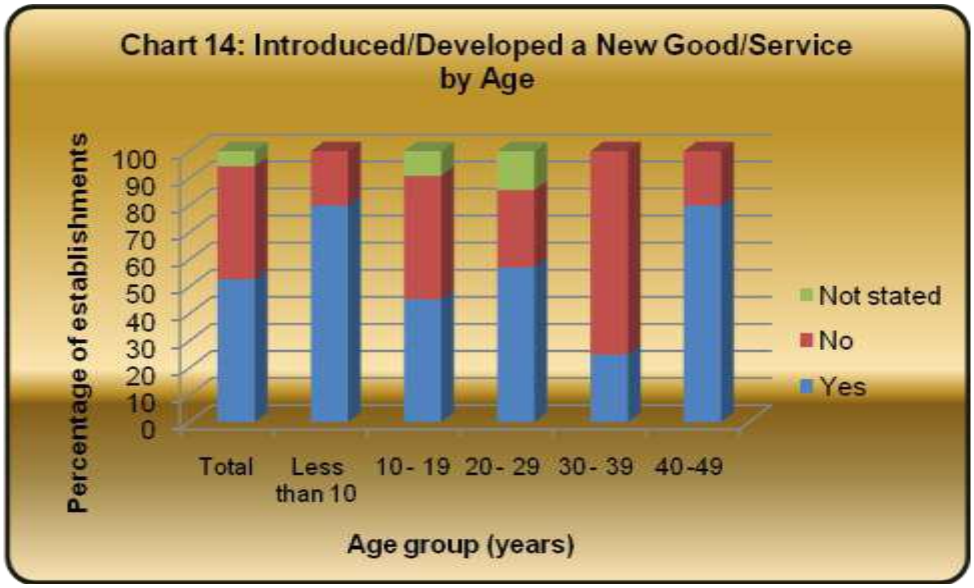


Table 19b: Distribution of Establishments that Introduced/Developed a New Good/Service by Age and Territory (row percentage)

Territory	Age group (years)	Total		Introduced/developed a new good/service					
				Yes		No		Not stated	
		No.	%	No.	%	No.	%	No.	%
Trinidad	Total	17	100.0	11	64.7	4	23.5	2	11.8
	Less than 10	3	100.0	3	100.0	0	0.0	0	0.0
	10 - 19	6	100.0	4	66.7	1	16.7	1	16.7
	20 - 29	2	100.0	1	50.0	0	0.0	1	50.0
	30 - 39	2	100.0		0.0	2	100.0	0	0.0
	40 -49	4	100.0	3	75.0	1	25.0	0	0.0
Tobago	Total	19	100.0	8	42.1	11	57.9	0	0.0
	Less than 10	2	100.0	1	50.0	1	50.0	0	0.0
	10 - 19	5	100.0	1	20.0	4	80.0	0	0.0
	20 - 29	5	100.0	3	60.0	2	40.0	0	0.0
	30 - 39	6	100.0	2	33.3	4	66.7	0	0.0
	40 -49	1	100.0	1	100.0	0	0.0	0	0.0

Table 19c: Percentage of Establishments that Introduced/Developed a New Good/Service by Age and Territory
(column percentage)

Territory	Age group (years)	Introduced/developed a new good/service			
		Total	Yes	No	Not stated
Trinidad	Total	100	100	100	100
	Less than 10	18	27	0	0
	10 - 19	35	36	25	50
	20 - 29	12	9	0	50
	30 - 39	12		50	0
	40 -49	24	27	25	0
Tobago	Total	100	100	100	0
	Less than 10	11	13	9	0
	10 - 19	26	13	36	0
	20 - 29	26	38	18	0
	30 - 39	32	25	36	0
	40 -49	5	13	0	0

Improved an existing good/service

Twenty-three (23) establishments (64%) indicated that they had improved an existing good/service (Table 14a). Thirteen of these establishments were in Trinidad while ten were in Tobago (Tables 14b and 14c).

Thirty-five percent (35%) of establishments that improved an existing good/service reported increased sales in 2007-2008, while 39% indicated that sales had decreased and 17% showed no movement (Table 20a). Overall, 80% of the establishments that reported increased sales had improved an existing good/service (Table 20c). In Trinidad, 24% of the establishments that improved an existing good/product reported increased sales, compared to 32% in Tobago (Table 20b). Further, 100% of the establishments in Trinidad that reported increased sales had improved an existing good/service compared to 67% in Tobago (Table 20d).

Table 20a: Distribution of Establishments that Improved an Existing Good/Service by Change in Sales, 2007-2008 (column percentage)

Change in sales	Improved an existing good/service					
	Total		Yes		No	
	No.	%	No.	%	No.	%
Total	36	100.0	23	100.0	13	100.0
Increased	10	27.8	8	34.8	2	15.4
Decreased	16	44.4	9	39.1	7	53.8
Stayed the same	8	22.2	4	17.4	4	30.8
Not stated	2	5.6	2	8.7	0	0.0

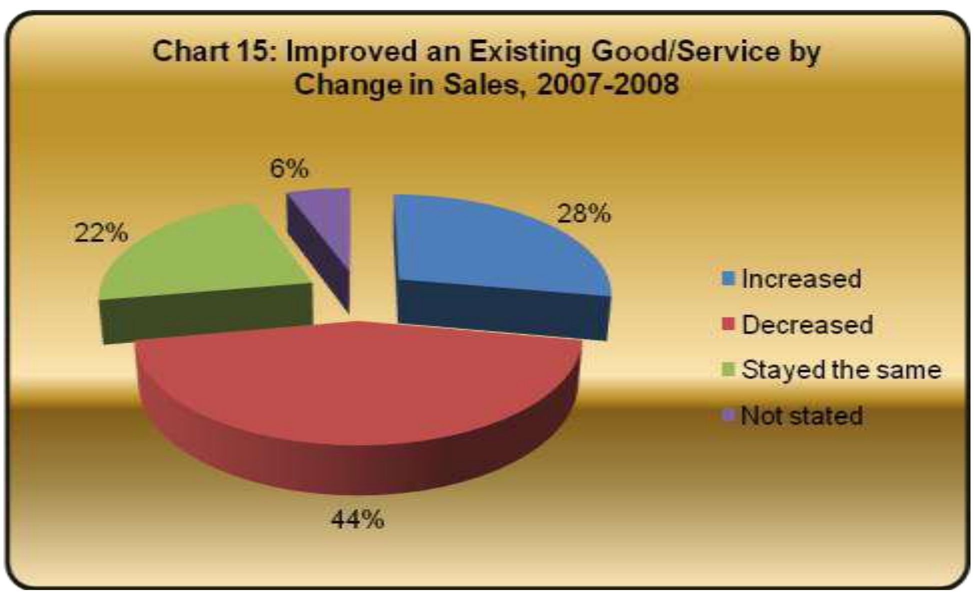


Table 20b: Percentage of Establishments that Improved an Existing Good/Service by Change in Sales, 2007-2008 (row percentage)

Change in sales	Improved an existing good/service		
	Total	Yes	No
Total	100.0	63.9	36.1
Increased	100.0	80.0	20.0
Decreased	100.0	56.3	43.8
Stayed the same	100.0	50.0	50.0
Not stated	100.0	100.0	0.0

Table 20c: Distribution of Establishments that Improved an Existing Good/Service by Territory and Change in Sales, 2007-2008 (column percentage)

Territory	Change in sales	Improved an existing good/service					
		Total		Yes		No	
		No.	%	No.	%	No.	%
Trinidad	Total	17	100.0	13	100.0	4	100.0
	Increased	4	23.5	4	23.5	0	0.0
	Decreased	8	47.1	5	47.1	3	75.0
	Stayed the same	5	29.4	4	29.4	1	25.0
Tobago	Total	19	100.0	10	100.0	9	100.0
	Increased	6	31.6	4	31.6	2	22.2
	Decreased	8	42.1	4	42.1	4	44.4
	Stayed the same	3	15.8	0	15.8	3	33.3
	Not stated	2	10.5	2	10.5	0	0.0

Table 20d: Percentage of Establishments that Improved an Existing Good/Service by Territory and Change in Sales, 2007-2008
(row percentage)

Territory	Change in sales	Improved an existing good/service		
		Total	Yes	No
Trinidad	Total	100.0	76.5	23.5
	Increased	100.0	100.0	0.0
	Decreased	100.0	62.5	37.5
	Stayed the same	100.0	80.0	20.0
Tobago	Total	100.0	52.6	47.4
	Increased	100.0	66.7	33.3
	Decreased	100.0	50.0	50.0
	Stayed the same	100.0	0.0	100.0
	Not stated	100.0	100.0	0.0

Table 21a: Distribution of Establishments that Improved an Existing Good/Service by Sub-sectors

Sub-sector	Improved an existing good/service					
	Total		Yes		No	
	No.	%	No.	%	No.	%
Total	36	100	23	64	13	36
Lodging and accommodation	32	100	20	63	12	38
Leisure and recreation	4	100	3	75	1	25

Table 21b: Distribution of Establishments that Improved an Existing Good/Service by Sub-sectors and Territory

Territory	Sub-sector	Improved an existing good/service					
		Total		Yes		No	
		No.	%	No.	%	No.	%
Trinidad	Total	17	100	13	76	4	24
	Lodging and accommodation	13	100	10	77	3	23
	Leisure and recreation	4	100	3	75	1	25
Tobago	Total	19	100	10	53	9	47
	Lodging and accommodation	19	100	10	53	9	47

Table 22a: Distribution of Establishments that Improved an Existing Good/Service by Employment (row percentage)

Employment group	Improved an existing good/service					
	Total		Yes		No	
	No.	%	No.	%	No.	%
Total	36	100	23	64	13	36
Less than 10	10	100	5	50	5	50
10 - 49	13	100	10	77	3	23
50 - 99	8	100	5	63	3	38
100 - 249	5	100	3	60	2	40

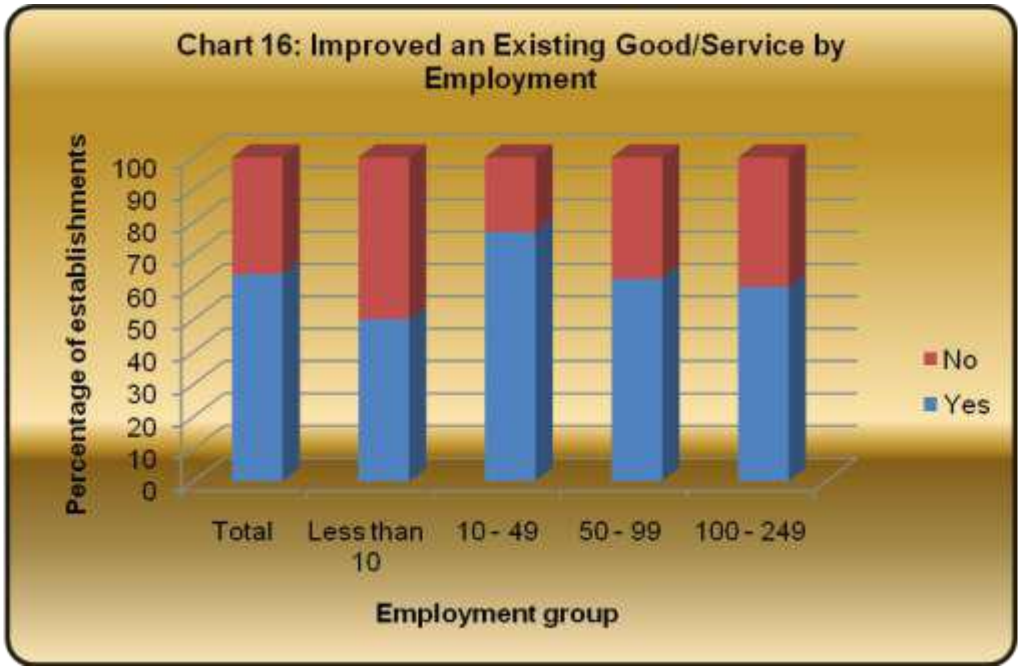


Table 22b: Percentage of Establishments that Improved an Existing Good/Service by Employment (column percentage)

Employment group	Improved an existing good/service		
	Total	Yes	No
Total	100	100	100
Less than 10	28	22	38
10 - 49	36	43	23
50 - 99	22	22	23
100 - 249	14	13	15

Table 22c: Distribution of Establishments that Improved an Existing Good/Service by Employment and Territory
(row percentage)

Territory	Employment group	Total		Improved an existing good/service			
				Yes		No	
		No.	%	No.	%	No.	%
Trinidad	Total	17	100	13	76	4	24
	Less than 10	5	100	4	80	1	20
	10 - 49	4	100	3	75	1	25
	50 - 99	5	100	4	80	1	20
	100 - 249	3	100	2	67	1	33
Tobago	Total	19	100	10	53	9	47
	Less than 10	5	100	1	20	4	80
	10 - 49	9	100	7	78	2	22
	50 - 99	3	100	1	33	2	67
	100 - 249	2	100	1	50	1	50

Table 22d: Percentage of Establishments that Improved an Existing Good/Service by Employment and Territory
(column percentage)

Territory	Employment group	Improved an existing good/service		
		Total	Yes	No
Trinidad	Total	100	100	100
	Less than 10	31	25	29
	10 - 49	23	25	24
	50 - 99	31	25	29
	100 - 249	15	25	18
Tobago	Total	100	100	100
	Less than 10	10	44	26
	10 - 49	70	22	47
	50 - 99	10	22	16
	100 - 249	10	11	11

Establishments in all sales categories, with the exception of $6m-10m and $21m-50m in Tobago, reported varying levels of improvements in existing goods/services with the majority being in the sales category of $15m and under (Tables 23a and 23c). Fifty-two percent (52%) of the establishments that improved an existing good/service had $5m and less in sales.

Table 23a: Distribution of Establishments that Improved an Existing Good/Service by Sales, 2008
(row percentage)

Value of sales in 2008	Improved an existing good/service					
	Total		Yes		No	
	No.	%	No.	%	No.	%
Total	36	100.0	23	63.9	13	36.1
Less than $1m	9	100.0	5	55.6	4	44.4
$1m - 5m	12	100.0	7	58.3	5	41.7
$6m - 10m	4	100.0	2	50.0	2	50.0
$11m - 15m	2	100.0	2	100.0	0	0.0
$16m - 20m	1	100.0	1	100.0	0	0.0
$21m - 50m	4	100.0	2	50.0	2	50.0
$51m - 100m	1	100.0	1	100.0	0	0.0
Not stated	3	100.0	3	100.0	0	0.0

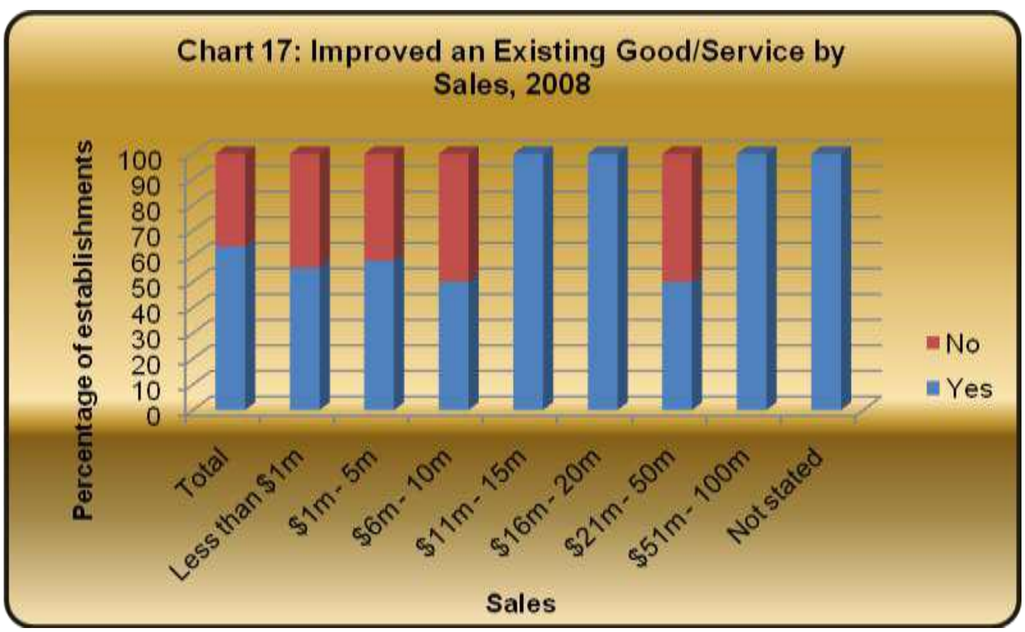


Table 23b: Percentage of Establishments that Improved an Existing Good/Service by Sales, 2008
(column percentage)

Value of sales in 2008	Improved an existing good/service		
	Total	Yes	No
Total	100.0	100.0	100.0
Less than $1m	25.0	21.7	30.8
$1m - 5m	33.3	30.4	38.5
$6m - 10m	11.1	8.7	15.4
$11m - 15m	5.6	8.7	0.0
$16m - 20m	2.8	4.3	0.0
$21m - 50m	11.1	8.7	15.4
$51m - 100m	2.8	4.3	0.0
Not stated	8.3	13.0	0.0

Table 23c: Distribution of Establishments that Improved an Existing Good/Service by Territory and Sales, 2008
(row percentage)

Territory	Value of sales	Improved an existing good/service							
		Total		Yes		No		Not stated	
		No.	%	No.	%	No.	%	No.	%
Trinidad	Total	17	100.0	13	76.5	4	23.5	2	11.8
	Less than $1m	5	100.0	3	60.0	2	40.0	1	20.0
	$1m - 5m	5	100.0	4	80.0	1	20.0	0	0.0
	$6m - 10m	2	100.0	2	100.0	0	0.0	0	0.0
	$11m - 15m	1	100.0	1	100.0	0	0.0	0	0.0
	$16m - 20m	1	100.0	1	100.0	0	0.0	1	100.0
	$21m - 50m	3	100.0	2	66.7	1	33.3	0	0.0
Tobago	Total	19	100.0	10	52.6	9	47.4	0	0.0
	Less than $1m	4	100.0	2	50.0	2	50.0	0	0.0
	$1m - 5m	7	100.0	3	42.9	4	57.1	0	0.0
	$6m - 10m	2	100.0	0	0.0	2	100.0	0	0.0
	$11m - 15m	1	100.0	1	100.0	0	0.0	0	0.0
	$21m - 50m	1	100.0	0	0.0	1	100.0	0	0.0
	$51m - 100m	1	100.0	1	100.0	0	0.0	0	0.0
	Not stated	3	100.0	3	100.0	0	0.0	0	0.0

Table 23d: Percentage of Establishments that Improved an Existing Good/Service by Territory and Sales, 2008
(column percentage)

Territory	Value of sales	Improved an existing good/service		
		Total	Yes	No
Trinidad	Total	100.0	100.0	100.0
	Less than $1m	29.4	23.1	50.0
	$1m - 5m	29.4	30.8	25.0
	$6m - 10m	11.8	15.4	0.0
	$11m - 15m	5.9	7.7	0.0
	$16m - 20m	5.9	7.7	0.0
	$21m - 50m	17.6	15.4	25.0
Tobago	Total	100.0	100.0	100.0
	Less than $1m	21.1	20.0	22.2
	$1m - 5m	36.8	30.0	44.4
	$6m - 10m	10.5	0.0	22.2
	$11m - 15m	5.3	10.0	0.0
	$21m - 50m	5.3	0.0	11.1
	$51m - 100m	5.3	10.0	0.0
	Not stated	15.8	30.0	0.0

Table 24a: Distribution of Establishments that Improved an Existing Good/Service by Age

Age group (years)	Improved an existing good/service					
	Total		Yes		No	
	No.	%	No.	%	No.	%
Total	36	100	23	64	13	36
Less than 10	5	100	3	60	2	40
10 - 19	11	100	9	82	2	18
20 - 29	7	100	5	71	2	29
30 - 39	8	100	3	38	5	63
40 -49	5	100	3	60	2	40

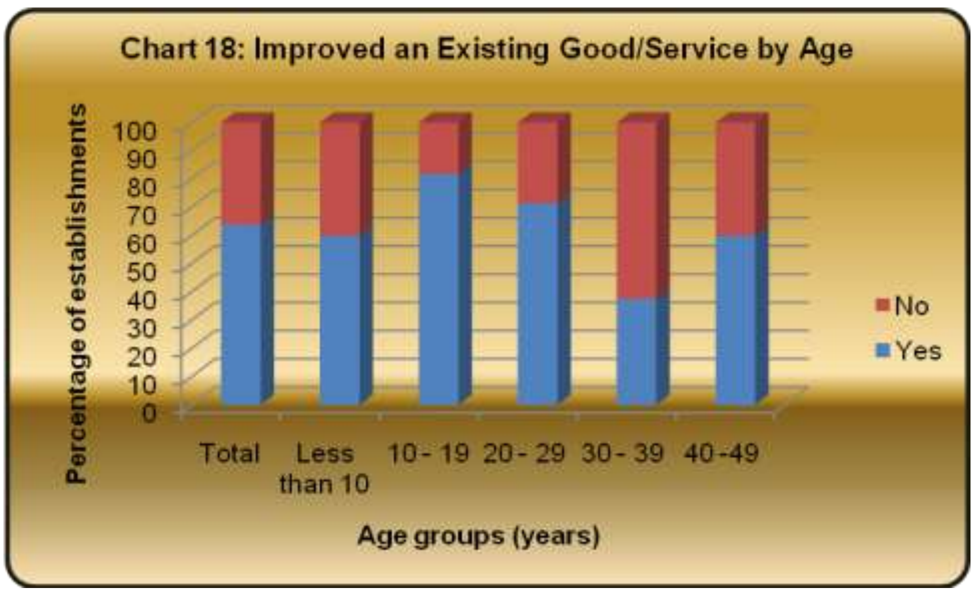


Table 24b: Distribution of Establishments that Improved an Existing Good/Service by Age and Territory

Territory	Age group (years)	Improved an existing good/service					
		Total		Yes		No	
		No.	%	No.	%	No.	%
Trinidad	Total	17	100	13	76	4	24
	Less than 10	3	100	3	100		
	10 - 19	6	100	5	83	1	17
	20 - 29	2	100	2	100	0	0
	30 - 39	2	100	0	0	2	100
	40 -49	4	100	3	75	1	25
Tobago	Total	19	100	10	53	9	47
	Less than 10	2	100	0	0	2	100
	10 - 19	5	100	4	80	1	20
	20 - 29	5	100	3	60	2	40
	30 - 39	6	100	3	50	3	50
	40 -49	1	100	0	0	1	100

Table 24c: Percentage of Establishments that Improved an Existing Good/Service by Age and Territory

Territory	Age group (years)	Improved an existing good/service		
		Total	Yes	No
Trinidad	Total	100	100	100
	Less than 10	18	23	0
	10 - 19	35	38	25
	20 - 29	12	15	0
	30 - 39	12	0	50
	40 -49	24	23	25
Tobago	Total	100	100	100
	Less than 10	11	0	22
	10 - 19	26	40	11
	20 - 29	26	30	22
	30 - 39	32	30	33
	40 -49	5	0	11

4.2 Process Innovation

Process innovation encompassed the following:

- Introduced new/ significantly improved methods for the production of goods/services
- Introduced new/significantly improved delivery or distribution methods for goods/services
- Introduced new/significantly improved support activities for your processes.

Process innovation was defined in the questionnaire as follows:

A process innovation is the implementation of a new or significantly improved production process, delivery or distribution method, or support processes for your goods and services.

Introduced new/significantly improved methods for production of goods/services

Overall, 16 establishments (44%) introduced new/significantly improved methods for production. This comprised of 8 or 47% of the respondents in Trinidad and 8 or 42% of the respondents in Tobago (Tables 25a, 25b and 25c).

Table 25a: Distribution of Establishments by Type of Process Innovation, 2007 and 2008

	Type of process innovation	Total		Yes		No	
		No.	%	No.	%	No.	%
1	Introduced new/significantly improved methods for production of goods/services	36	100	16	44.4	20	55.6
2	Introduced new/significantly improved delivery or distribution methods for goods/services	36	100	12	33.3	24	66.7
3	Introduced new/significantly improved support activities for your processes (e.g. maintenance systems, accounting systems, purchasing systems)	36	100	16	44.4	20	55.6

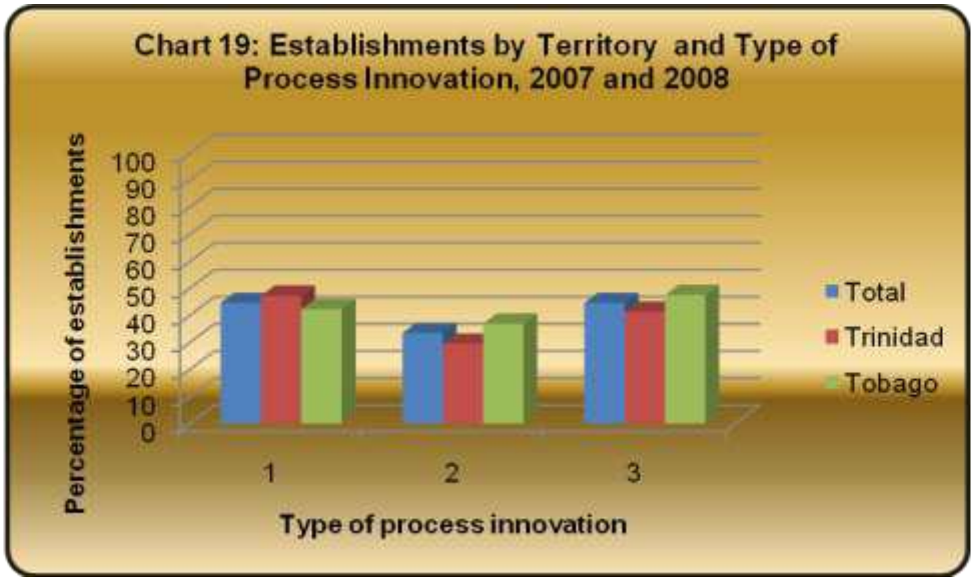


Table 25b: Distribution of Establishments by Type of Process Innovation, 2007 and 2008
Trinidad

Type of process innovation		Total		Yes		No	
		No.	%	No.	%	No.	%
1	Introduced new/significantly improved methods for production of goods/services	17	100.0	8	47.1	9	52.9
2	Introduced new/significantly improved delivery or distribution methods for goods/services	17	100.0	5	29.4	12	70.6
3	Introduced new/significantly improved support activities for your processes (e.g. maintenance systems, accounting systems, purchasing systems)	17	100.0	7	41.2	10	58.8

Table 25c: Distribution of Establishments by Type of Process Innovation, 2007 and 2008
Tobago

	Type of process innovation	Total		Yes		No	
		No.	%	No.	%	No.	%
1	Introduced new/significantly improved methods for production of goods/services	19	100	8	42.1	11	57.9
2	Introduced new/significantly improved delivery or distribution methods for goods/services	19	100	7	36.8	12	63.2
3	Introduced new/significantly improved support activities for your processes (e.g. maintenance systems, accounting systems, purchasing systems)	19	100	9	47.4	10	52.6

Overall, establishments that introduced new/significantly improved methods for production were represented in all sales categories with the exception of $11m-15m (Table 26a). However, in Tobago, establishments within the sales range of $6m - $50m recorded no introductions of new/improved methods for production (Table 26c). In addition, of the 16 establishments that introduced new/significantly improved methods for production, only five (31%) reported increased sales between 2007 and 2008, compared to 11 (69%) that stated that sales had declined or remained the same (Table 27a). Of the 5 establishments that reported sales increases, 4 were from Tobago and one from Trinidad (Table 27b).

Table 26a: Distribution of Establishments that Introduced New/Improved Production Methods by Sales, 2008

Value of sales	Introduced new/significantly improved methods for production of goods/services					
	Total		Yes		No	
	No.	%	No.	%	No.	%
Total	36	100.0	16	44.4	20	55.6
Less than $1m	9	100.0	5	55.6	4	44.4
$1m - 5m	12	100.0	4	33.3	8	66.7
$6m - 10m	4	100.0	2	50.0	2	50.0
$11m - 15m	2	100.0	0	0.0	2	100.0
$16m - 20m	1	100.0	1	100.0	0	0.0
$21m - 50m	4	100.0	2	50.0	2	50.0
$51m - 100m	1	100.0	1	100.0	0	0.0
Not stated	3	100.0	1	33.3	2	66.7

Table 26b: Percentage of Establishments that Introduced New/Improved Production Methods by Sales, 2008

Value of sales	Introduced new/significantly improved methods for production of goods/services		
	Total	Yes	No
Total	100.0	100.0	100.0
Less than $1m	25.0	31.3	20.0
$1m - 5m	33.3	25.0	40.0
$6m - 10m	11.1	12.5	10.0
$11m - 15m	5.6	0.0	10.0
$16m - 20m	2.8	6.3	0.0
$21m - 50m	11.1	12.5	10.0
$51m - 100m	2.8	6.3	0.0
Not stated	8.3	6.3	10.0

Table 26c: Distribution of Establishments that Introduced New/Improved Production Methods by Territory and Sales, 2008

Territory	Value of sales	Introduced new/significantly improved methods for production of goods/services					
		Total		Yes		No	
		No.	%	No.	%	No.	%
Trinidad	Total	17	100.0	8	47.1	9	52.9
	Less than $1m	5	100.0	1	20.0	4	80.0
	$1m - 5m	5	100.0	2	40.0	3	60.0
	$6m - 10m	2	100.0	2	100.0	0	0.0
	$11m - 15m	1	100.0	0	0.0	1	100.0
	$16m - 20m	1	100.0	1	100.0	0	0.0
	$21m - 50m	3	100.0	2	66.7	1	33.3
Tobago	Total	19	100.0	8	42.1	11	57.9
	Less than $1m	4	100.0	4	100.0	0	0.0
	$1m - 5m	7	100.0	2	28.6	5	71.4
	$6m - 10m	2	100.0	0	0.0	2	100.0
	$11m - 15m	1	100.0	0	0.0	1	100.0
	$21m - 50m	1	100.0	0	0.0	1	100.0
	$51m - 100m	1	100.0	1	100.0	0	0.0
	Not stated	3	100.0	1	33.3	2	66.7

Table 26d: Percentage of Establishments that Introduced New/Improved Production Methods by Territory and Sales, 2008

Territory	Value of sales	Introduced new/significantly improved methods for production of goods/services		
		Total	Yes	No
Trinidad	Total	100.0	100.0	100.0
	Less than $1m	29.4	12.5	44.4
	$1m - 5m	29.4	25.0	33.3
	$6m - 10m	11.8	25.0	0.0
	$11m - 15m	5.9	0.0	11.1
	$16m - 20m	5.9	12.5	0.0
	$21m - 50m	17.6	25.0	11.1
Tobago	Total	100.0	100.0	100.0
	Less than $1m	21.1	50.0	0.0
	$1m - 5m	36.8	25.0	45.5
	$6m - 10m	10.5	0.0	18.2
	$11m - 15m	5.3	0.0	9.1
	$21m - 50m	5.3	0.0	9.1
	$51m - 100m	5.3	12.5	0.0
	Not stated	15.8	12.5	18.2

Table 27a: Distribution of Establishments that Introduced New/Improved Production Methods by Change in Sales, 2007-2008 (column percentage)

Change in sales	Introduced new/significantly improved production methods for goods/services					
	Total		Yes		No	
	No.	%	No.	%	No.	%
Total	36	100.0	16	100.0	20	100.0
Increased	10	27.8	5	31.3	5	25.0
Decreased	16	44.4	6	37.5	10	50.0
Stayed the same	8	22.2	5	31.3	3	15.0
Not stated	2	5.6	0	0.0	2	10.0

Table 27b: Distribution of Establishments that Introduced New/Improved Production Methods by Change in Sales, 2007-2008 (row percentage)

Change in sales	Introduced new/significantly improved production methods for goods/services		
	Total	Yes	No
Total	100.0	44.4	55.6
Increased	100.0	50.0	50.0
Decreased	100.0	37.5	62.5
Stayed the same	100.0	62.5	37.5
Not stated	100.0	0.0	100.0

Table 27c: Distribution of Establishments that Introduced New/Improved Production Methods by Territory and Change in Sales 2007-2008
(row percentage)

Territory	Change in sales	Introduced new/significantly improved production methods for goods/services					
		Total		Yes		No	
		No.	%	No.	%	No.	%
Trinidad	Total	17	100.0	8	47.1	9	52.9
	Increased	4	100.0	1	25.0	3	75.0
	Decreased	8	100.0	4	50.0	4	50.0
	Stayed the same	5	100.0	3	60.0	2	40.0
Tobago	Total	19	100.0	8	42.1	11	57.9
	Increased	6	100.0	4	66.7	2	33.3
	Decreased	8	100.0	2	25.0	6	75.0
	Stayed the same	3	100.0	2	66.7	1	33.3
	Not stated	2	100.0	0	0.0	2	100.0

Table 27d: Percentage of Establishments that Introduced New/Improved Production Methods by Territory and Change in Sales 2007-2008
(column percentage)

Territory	Change in sales	Introduced new/significantly improved production methods for goods/services		
		Total	Yes	No
Trinidad	Total	100.0	100.0	100.0
	Increased	23.5	12.5	33.3
	Decreased	47.1	50.0	44.4
	Stayed the same	29.4	37.5	22.2
Tobago	Total	100.0	100.0	100.0
	Increased	31.6	50.0	18.2
	Decreased	42.1	25.0	54.5
	Stayed the same	15.8	25.0	9.1
	Not stated	10.5	0.0	18.2

Table 28: Distribution of Establishments that Introduced New/Improved Production Methods by Sub-sectors and Territory

Territory	Sub-sector	Introduced new/significantly improved methods for production of goods/services					
		Total		Yes		No	
		No.	%	No.	%	No.	%
Both territories	Total	36	100	16	44	20	56
	Lodging and accommodation	32	100	13	41	19	59
	Leisure and recreation	4	100	3	75	1	25
Trinidad	Total	17	100	8	47	9	53
	Lodging and accommodation	13	100	5	38	8	62
	Leisure and recreation	4	100	3	75	1	25
Tobago	Total	19	100	8	42	11	58
	Lodging and accommodation	19	100	8	42	11	58

With respect to sub-sector activity, process innovation in terms of the introduction of new/improved production methods, was proportionately greater (75%) in the leisure and recreation sub-sector than in lodging and accommodation (41%) (Table 28).

Table 29a: Distribution of Establishments that Introduced New/Improved Production Methods by Employment

Employment group	Introduced new/significantly improved production methods for goods/services					
	Total		Yes		No	
	No.	%	No.	%	No.	%
Total	36	100.0	16	44.4	20	55.6
Less than 10 employees	10	100.0	6	60.0	4	40.0
10 - 49 employees	13	100.0	4	30.8	9	69.2
50 - 99 employees	8	100.0	4	50.0	4	50.0
100 - 249 employees	5	100.0	2	40.0	3	60.0

Process innovation was more prevalent in establishments with less than 10 and between 50-99 employees. Establishments with less than 10 employees introduced the highest percentage of new/significantly improved production methods (60%) (Table 29a).

Table 29b: Distribution of Establishments that Introduced New/Improved Production Methods by Employment and Territory

Territory	Employment group	Introduced new/significantly improved production methods for goods/services					
		Total		Yes		No	
		No.	%	No.	%	No.	%
Trinidad	Total	17	100.0	8	47.1	9	52.9
	Less than 10 employees	5	100.0	2	40.0	3	60.0
	10 - 49 employees	4	100.0	1	25.0	3	75.0
	50 - 99 employees	5	100.0	3	60.0	2	40.0
	100 - 249 employees	3	100.0	2	66.7	1	33.3
Tobago	Total	19	100.0	8	42.1	11	57.9
	Less than 10 employees	5	100.0	4	80.0	1	20.0
	10 - 49 employees	9	100.0	3	33.3	6	66.7
	50 - 99 employees	3	100.0	1	33.3	2	66.7
	100 - 249 employees	2	100.0	0	0.0	2	100.0

Table 30a: Distribution of Establishments that Introduced New/Improved Production Methods by Age

Age group (years)	Introduced new/improved methods for production of goods/services					
	Total		Yes		No	
	No.	%	No.	%	No.	%
Total	36	100.0	16	44.4	20	55.6
Less than 10	5	100.0	2	40.0	3	60.0
10 - 19	11	100.0	6	54.5	5	45.5
20 - 29	7	100.0	3	42.9	4	57.1
30 - 39	8	100.0	2	25.0	6	75.0
40 -49	5	100.0	3	60.0	2	40.0

Table 30b: Distribution of Establishments that Introduced New/Improved Production Methods by Age and Territory (row percentage)

Territory	Age group (years)	Total		Introduced new/improved methods for production of goods/services			
				Yes		No	
		No.	%	No.	%	No.	%
Trinidad	Total	17	100.0	8	47.1	9	52.9
	Less than 10	3	100.0	1	33.3	2	66.7
	10 - 19	6	100.0	3	50.0	3	50.0
	20 - 29	2	100.0	1	50.0	1	50.0
	30 - 39	2	100.0	0	0.0	2	100.0
	40 -49	4	100.0	3	75.0	1	25.0
Tobago	Total	19	100.0	8	42.1	11	57.9
	Less than 10	2	100.0	1	50.0	1	50.0
	10 - 19	5	100.0	3	60.0	2	40.0
	20 - 29	5	100.0	2	40.0	3	60.0
	30 - 39	6	100.0	2	33.3	4	66.7
	40 -49	1	100.0	0	0.0	1	100.0

Table 30c: Percentage of Establishments that Introduced New/Improved Production Methods by Age and Territory (column percentage)

Territory	Age group (years)	Introduced new/improved methods for production of goods/services		
		Total	Yes	No
Trinidad	Total	100.0	100.0	100.0
	Less than 10	17.6	12.5	22.2
	10 - 19	35.3	37.5	33.3
	20 - 29	11.8	12.5	11.1
	30 - 39	11.8	0.0	22.2
	40 -49	23.5	37.5	11.1
Tobago	Total	100.0	100.0	100.0
	Less than 10	10.5	12.5	9.1
	10 - 19	26.3	37.5	18.2
	20 - 29	26.3	25.0	27.3
	30 - 39	31.6	25.0	36.4
	40 -49	5.3	0.0	9.1

Introduced New/Significantly Improved Delivery or Distribution Methods for Goods/Services

Overall, 12 establishments (33%) introduced new/significantly improved methods for delivery or distribution of goods and services. Five (5) of these establishments were in Trinidad and seven in Tobago (Tables 31a and 31c).

Improved delivery or distribution methods were employed in both the lodging and accommodation, and leisure and recreation sub-sectors (Table 33). Establishments under 10 years old introduced no new delivery or distribution methods while eighty percent (80%) of those 40 years old and over were engaged in the activity (Table 35a).

Table 31a: Distribution of Establishments that Introduced Improved Delivery or Distribution Methods by Sales, 2008

Value of sales	Introduced new/significantly improved delivery or distribution methods for goods/services					
	Total		Yes		No	
	No.	%	No.	%	No.	%
Total	36	100.0	12	33.3	24	66.7
Less than $1m	9	100.0	3	33.3	6	66.7
$1m - 5m	12	100.0	5	41.7	7	58.3
$6m - 10m	4	100.0	1	25.0	3	75.0
$11m - 15m	2	100.0	1	50.0	1	50.0
$16m - 20m	1	100.0	0	0.0	1	100.0
$21m - 50m	4	100.0	1	25.0	3	75.0
$51m - 100m	1	100.0	0	0.0	1	100.0
Not stated	3	100.0	1	33.3	2	66.7

A larger porportion (75%) of the establishments in the lower sale ranges of $5m and under reported improvements to distribution or delivery methods (Table 31a).

Table 31b: Percentage of Establishments that Introduced Improved Delivery or Distribution Methods by Sales, 2008

Value of sales in 2008	Introduced new/significantly improved delivery or distribution methods for goods/services		
	Total	Yes	No
Total	100.0	100.0	100.0
Less than $1m	25.0	25.0	25.0
$1m - 5m	33.3	41.7	29.2
$6m - 10m	11.1	8.3	12.5
$11m - 15m	5.6	8.3	4.2
$16m - 20m	2.8	0.0	4.2
$21m - 50m	11.1	8.3	12.5
$51m - 100m	2.8	0.0	4.2
Not stated	8.3	8.3	8.3

Table 31c: Distribution of Establishments that Introduced Improved Delivery or Distribution Methods by Territory and Sales, 2008

Territory	Value of sales	Introduced new/significantly improved delivery or distribution methods for goods/services					
		Total		Yes		No	
		No.	%	No.	%	No.	%
Trinidad	Total	17	100.0	5	29.4	12	70.6
	Less than $1m	5	100.0	1	20.0	4	80.0
	$1m - 5m	5	100.0	2	40.0	3	60.0
	$6m - 10m	2	100.0	1	50.0	1	50.0
	$11m - 15m	1	100.0	0	0.0	1	100.0
	$16m - 20m	1	100.0	0	0.0	1	100.0
	$21m - 50m	3	100.0	1	33.3	2	66.7
Tobago	Total	19	100.0	7	36.8	12	63.2
	Less than $1m	4	100.0	2	50.0	2	50.0
	$1m - 5m	7	100.0	3	42.9	4	57.1
	$6m - 10m	2	100.0	0	0.0	2	100.0
	$11m - 15m	1	100.0	1	100.0	0	0.0
	$21m - 50m	1	100.0	0	0.0	1	100.0
	$51m - 100m	1	100.0	0	0.0	1	100.0
	Not stated	3	100.0	1	33.3	2	66.7

Table 32a: Distribution of Establishments that Introduced Improved Delivery or Distribution Methods by Change in Sales, 2007-2008

Change in sales	Introduced new/significantly improved delivery or distribution methods for goods/services					
	Total		Yes		No	
	No.	%	No.	%	No.	%
Total	36	100.0	12	100.0	24	100.0
Increased	10	27.8	3	25.0	7	29.2
Decreased	16	44.4	5	41.7	11	45.8
Stayed the same	8	22.2	4	33.3	4	16.7
Not stated	2	5.6	0	0.0	2	8.3

Table 32b: Percentage of Establishments that Introduced Improved Delivery or Distribution Methods by Change in Sales 2007-2008

Change in sales	Introduced new/significantly improved delivery or distribution methods for goods/services		
	Total	Yes	No
Total	100.0	33.3	66.7
Increased	100.0	30.0	70.0
Decreased	100.0	31.3	68.8
Stayed the same	100.0	50.0	50.0
Not stated	100.0	0.0	100.0

Only 3 (25%) of the establishments which introduced improved delivery or distribution methods reported sales increases between 2007-2008, compared to 9 establishments (75%) which showed decreases or no change in sales (Table 32a). The 3 establishments that reported increased sales over the period were from Tobago (Table 32c). Approximately one-third (30%) of the establishments that reported increased sales had introduced new/improved delivery or distribution methods (Table 32b). The data reveal that the introduction of improved delivery or distribution methods had limited impact on sales performance.

Table 32c: Distribution of Establishments that Introduced Improved Delivery or Distribution Methods by Territory and Change in Sales 2007-2008

Territory	Change in sales	Introduced new/significantly improved delivery or distribution methods for goods/services					
		Total		Yes		No	
		No.	%	No.	%	No.	%
Trinidad	Total	17	100.0	5	100.0	12	100.0
	Increased	4	23.5	0	0.0	4	33.3
	Decreased	8	47.1	3	60.0	5	41.7
	Stayed the same	5	29.4	2	40.0	3	25.0
Tobago	Total	19	100.0	7	100.0	12	100.0
	Increased	6	31.6	3	42.9	3	25.0
	Decreased	8	42.1	2	28.6	6	50.0
	Stayed the same	3	15.8	2	28.6	1	8.3
	Not stated	2	10.5	0	0.0	2	16.7

Table 32d: Percentage of Establishments that Introduced Improved Delivery or Distribution Methods by Territory and Change in Sales, 2007-2008

Territory	Change in sales	Introduced new/significantly improved delivery or distribution methods for goods/services		
		Total	Yes	No
Trinidad	Total	100.0	29.4	70.6
	Increased	100.0	0.0	100.0
	Decreased	100.0	37.5	62.5
	Stayed the same	100.0	40.0	60.0
Tobago	Total	100.0	36.8	63.2
	Increased	100.0	50.0	50.0
	Decreased	100.0	25.0	75.0
	Stayed the same	100.0	66.7	33.3
	Not stated	100.0	0.0	100.0

Table 33: Distribution of Establishments that Introduced Improved Delivery or Distribution Methods by Sub-sector and Territory

Territory	Subsector	Introduced new/significantly improved delivery or distribution methods for goods/services					
		Total		Yes		No	
		No.	%	No.	%	No.	%
Both territories	Total	36	100.0	12	33.3	24	66.7
	Lodging and Accommodation-hotel and guest house	32	100.0	10	31.3	22	68.8
	Leisure and recreation	4	100.0	2	50.0	2	50.0
Trinidad	Total	17	100.0	5	29.4	12	70.6
	Lodging and Accommodation-hotel and guest house	13	100.0	3	23.1	10	76.9
	Leisure and recreation	4	100.0	2	50.0	2	50.0
Tobago	Total	19	100.0	7	36.8	12	63.2
	Lodging and Accommodation-hotel and guest house	19	100.0	7	36.8	12	63.2

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Table 34a: Distribution of Establishments that Introduced Improved Delivery or Distribution Methods by Employment

Employment group	Introduced new/significantly improved delivery or distribution methods for goods/services					
	Total		Yes		No	
	No.	%	No.	%	No.	%
Total	36	100.0	12	33.3	24	66.7
Less than 10 employees	10	100.0	3	30.0	7	70.0
10 - 49 employees	13	100.0	4	30.8	9	69.2
50 - 99 employees	8	100.0	3	37.5	5	62.5
100 - 249 employees	5	100.0	2	40.0	3	60.0

Table 34b: Distribution of Establishments that Introduced Improved Delivery or Distribution Methods by Territory and Employment

Territory	Employment group	Introduced new/significantly improved delivery or distribution methods for goods/services					
		Total		Yes		No	
		No.	%	No.	%	No.	%
Trinidad	Total	17	100.0	5	29.4	12	70.6
	Less than 10 employees	5	100.0	1	20.0	4	80.0
	10 - 49 employees	4	100.0	1	25.0	3	75.0
	50 - 99 employees	5	100.0	2	40.0	3	60.0
	100 - 249 employees	3	100.0	1	33.3	2	66.7
Tobago	Total	19	100.0	7	36.8	12	63.2
	Less than 10 employees	5	100.0	2	40.0	3	60.0
	10 - 49 employees	9	100.0	3	33.3	6	66.7
	50 - 99 employees	3	100.0	1	33.3	2	66.7
	100 - 249 employees	2	100.0	1	50.0	1	50.0

Table 35a: Distribution of Establishments that Introduced Improved Delivery or Distribution Methods by Age

Age group (years)	Introduced new/significantly improved delivery or distribution methods for goods/services					
	Total		Yes		No	
	No.	%	No.	%	No.	%
Total	36	100.0	12	33.3	24	66.7
Less than 10	5	100.0	0	0.0	5	100.0
10 - 19	11	100.0	4	36.4	7	63.6
20 - 29	7	100.0	3	42.9	4	57.1
30 - 39	8	100.0	1	12.5	7	87.5
40 -49	5	100.0	4	80.0	1	20.0

Table 35b: Distribution of Establishments that Introduced Improved Delivery or Distribution Methods by Territory and Age

Territory	Age group (years)	Introduced new/significantly improved delivery or distribution methods for goods/services					
		Total		Yes		No	
		No.	%	No.	%	No.	%
Trinidad	Total	17	100.0	5	29.4	12	70.6
	Less than 10	3	100.0	0	0.0	3	100.0
	10 - 19	6	100.0	2	33.3	4	66.7
	20 - 29	2	100.0	0	0.0	2	100.0
	30 - 39	2	100.0	0	0.0	2	100.0
	40 -49	4	100.0	3	75.0	1	25.0
Tobago	Total	19	100.0	7	36.8	12	63.2
	Less than 10	2	100.0	0	0.0	2	100.0
	10 - 19	5	100.0	2	40.0	3	60.0
	20 - 29	5	100.0	3	60.0	2	40.0
	30 - 39	6	100.0	1	16.7	5	83.3
	40 -49	1	100.0	1	100.0	0	0.0

Introduced New/Significantly Improved Support Activities for Processes

Overall, 16 establishments (44%) introduced new/significantly improved support activities for processes. Seven (7) of these establishments were in Trinidad and 9 in Tobago (Tables 36a and 36b).

The largest number of establishments reporting improvement in support activities was in the lower sale ranges of $10m and under (Table 36a).

Table 36a: Distribution of Establishments that Introduced Improved Support Activities for Processes by Sales, 2008

Value of sales	Introduced new/significantly improved support activities for processes					
	Total		Yes		No	
	No.	%	No.	%	No.	%
Total	36	100.0	16	44.4	20	55.6
Less than $1m	9	100.0	4	44.4	5	55.6
$1m - 5m	12	100.0	5	41.7	7	58.3
$6m - 10m	4	100.0	3	75.0	1	25.0
$11m - 15m	2	100.0	1	50.0	1	50.0
$16m - 20m	1	100.0	1	100.0	0	0.0
$21m - 50m	4	100.0	1	25.0	3	75.0
$51m - 100m	1	100.0	0	0.0	1	100.0
Not stated	3	100.0	1	33.3	2	66.7

Table 36b: Percentage of Establishments that Introduced Improved Support Activities for Processes by Sales, 2008

Value of sales	Introduced new/significantly improved support activities for processes		
	Total	Yes	No
Total	100.0	100.0	100.0
Less than $1m	25.0	25.0	25.0
$1m - 5m	33.3	31.3	35.0
$6m - 10m	11.1	18.8	5.0
$11m - 15m	5.6	6.3	5.0
$16m - 20m	2.8	6.3	0.0
$21m - 50m	11.1	6.3	15.0
$51m - 100m	2.8	0.0	5.0
Not stated	8.3	6.3	10.0

Table 36c: Distribution of Establishments that Introduced Improved Support Activities for Processes by Territory and Sales, 2008

Territory	Value of sales	Introduced new/significantly improved support activities for processes					
		Total		Yes		No	
		No.	%	No.	%	No.	%
Trinidad	Total	17	100.0	7	41.2	10	58.8
	Less than $1m	5	100.0	1	20.0	4	80.0
	$1m - 5m	5	100.0	2	40.0	3	60.0
	$6m - 10m	2	100.0	2	100.0	0	0.0
	$11m - 15m	1	100.0	0	0.0	1	100.0
	$16m - 20m	1	100.0	1	100.0	0	0.0
	$21m - 50m	3	100.0	1	33.3	2	66.7
Tobago	Total	19	100.0	9	47.4	10	52.6
	Less than $1m	4	100.0	3	75.0	1	25.0
	$1m - 5m	7	100.0	3	42.9	4	57.1
	$6m - 10m	2	100.0	1	50.0	1	50.0
	$11m - 15m	1	100.0	1	100.0	0	0.0
	$21m - 50m	1	100.0	0	0.0	1	100.0
	$51m - 100m	1	100.0	0	0.0	1	100.0
	Not stated	3	100.0	1	33.3	2	66.7

Table 37a: Distribution of Establishments that Introduced Improved Support Activities for Processes by Change in Sales, 2007-2008

Change in sales	Introduced new/significantly improved support activities for processes					
	Total		Yes		No	
	No.	%	No.	%	No.	%
Total	36	100.0	16	44.4	20	55.6
Increased	10	100.0	4	40.0	6	60.0
Decreased	16	100.0	9	56.3	7	43.8
Stayed the same	8	100.0	3	37.5	5	62.5
Not stated	2	100.0	0	0.0	2	100.0

Table 37b: Percentage of Establishments that Introduced Improved Support Activities for Processes by Change in Sales, 2007-2008

Change in sales	Introduced new/significantly improved support activities for processes		
	Total	Yes	No
Total	100.0	100.0	100.0
Increased	27.8	25.0	30.0
Decreased	44.4	56.3	35.0
Stayed the same	22.2	18.8	25.0
Not stated	5.6	0.0	10.0

Of the 16 establishments which introduced improved support activities, only 4 (25%) recorded sales increases over the period 2007-2008, compared to 12 establishments (75%) which showed declines or no change in sales (Tables 37a and 37b). Three (3) of the 4 establishments that reported increased sales over the period were from Tobago (Table 37c).

Table 37c: Distribution of Establishments that Introduced Improved Support Activities for Processes by Territory and Change in Sales 2007-2008

Territory	Change in sales	Introduced new/significantly improved support activities for processes					
		Total		Yes		No	
		No.	%	No.	%	No.	%
Trinidad	Total	17	100.0	7	41.2	10	58.8
	Increased	4	100.0	1	25.0	3	75.0
	Decreased	8	100.0	4	50.0	4	50.0
	Stayed the same	5	100.0	2	40.0	3	60.0
Tobago	Total	19	100.0	9	47.4	10	52.6
	Increased	6	100.0	3	50.0	3	50.0
	Decreased	8	100.0	5	62.5	3	37.5
	Stayed the same	3	100.0	1	33.3	2	66.7
	Not stated	2	100.0	0	0.0	2	100.0

Table 37d: Percentage of Establishments that Introduced Improved Support Activities for Processes by Territory and Change in Sales, 2007-2008

Territory	Change in sales	Introduced new/significantly improved support activities for processes		
		Total	Yes	No
Trinidad	Total	100.0	100.0	100.0
	Increased	23.5	14.3	30.0
	Decreased	47.1	57.1	40.0
	Stayed the same	29.4	28.6	30.0
Tobago	Total	100.0	100.0	100.0
	Increased	31.6	33.3	30.0
	Decreased	42.1	55.6	30.0
	Stayed the same	15.8	11.1	20.0
	Not stated	10.5	0.0	20.0

Table 38: Distribution of Establishmentys that Introduced Improved Support Activities for Processes by Sub-sector and Territory

Territory	Sub-sector	Introduced new/significantly improved support activities for your processes					
		Total		Yes		No	
		No.	%	No.	%	No.	%
Both territories	Total	36	100.0	16	44.4	20	55.6
	Lodging and Accommodation-hotel and guest house	32	100.0	13	40.6	19	59.4
	Leisure and recreation	4	100.0	3	75.0	1	25.0
Trinidad	Total	17	100.0	7	41.2	10	58.8
	Lodging and Accommodation-hotel and guest house	13	100.0	4	30.8	9	69.2
	Leisure and recreation	4	100.0	3	75.0	1	25.0
Tobago	Lodging and Accommodation-hotel and guest house	19	100.0	9	47.4	10	52.6

Table 39a: Distribution of Establishments that Introduced Improved Support Activities for Processes by Employment

Employment group	Introduced new/significantly improved support activities for processes					
	Total		Yes		No	
	No.	%	No.	%	No.	%
Total	36	100.0	16	44.4	20	55.6
Less than 10 employees	10	100.0	5	50.0	5	50.0
10 - 49 employees	13	100.0	5	38.5	8	61.5
50 - 99 employees	8	100.0	4	50.0	4	50.0
100 - 249 employees	5	100.0	2	40.0	3	60.0

In the employment groups, 10 establishments, comprising 3 from Trinidad and 7 from Tobago that introduced improved support activities, employed less than 50 persons (Tables 39a and 39b).

Table 39b: Distribution of Establishments that Introduced Improved Support Activities for Processes by Territory and Employment

Territory	Employment group	Introduced new/significantly improved support activities for processes					
		Total		Yes		No	
		No.	%	No.	%	No.	%
Trinidad	Total	17	100.0	7	41.2	10	58.8
	Less than10 employees	5	100.0	2	40.0	3	60.0
	10 - 49 employees	4	100.0	1	25.0	3	75.0
	50 - 99 employees	5	100.0	3	60.0	2	40.0
	100 - 249 employees	3	100.0	1	33.3	2	66.7
Tobago	Total	19	100.0	9	47.4	10	52.6
	Less than 10 employees	5	100.0	3	60.0	2	40.0
	10 - 49 employees	9	100.0	4	44.4	5	55.6
	50 - 99 employees	3	100.0	1	33.3	2	66.7
	100 - 249 employees	2	100.0	1	50.0	1	50.0

Table 39c: Percentage of Establishments that Introduced Improved Support Activities for Processes by Territory and Employment

Territory	Employment group	Introduced new/significantly improved support activities for processes		
		Total	Yes	No
Trinidad	Total	100.0	100.0	100.0
	Less than 10 employees	29.4	28.6	30.0
	10 - 49 employees	23.5	14.3	30.0
	50 - 99 employees	29.4	42.9	20.0
	100 - 249 employees	17.6	14.3	20.0
Tobago	Total	100.0	100.0	100.0
	Less than 10 employees	26.3	33.3	20.0
	10 - 49 employees	47.4	44.4	50.0
	50 - 99 employees	15.8	11.1	20.0
	100 - 249 employees	10.5	11.1	10.0

Establishments 20 years old and over were more innovative in this regard than the younger establishments. Improved support activities were recorded in the lodging and accommodation and leisure and recreation sub-sectors (Table 38).

Table 40a: Distribution of Establishments that Introduced Improved Support Activities for Processes by Age

Age group (years)	Introduced new/significantly improved support activities for processes					
	Total		Yes		No	
	No.	%	No.	%	No.	%
Total	36	100.0	16	44.4	20	55.6
Less than 10	5	100.0	1	20.0	4	80.0
10 - 19	11	100.0	3	27.3	8	72.7
20 - 29	7	100.0	4	57.1	3	42.9
30 - 39	8	100.0	5	62.5	3	37.5
40 -49	5	100.0	3	60.0	2	40.0

Table 40b: Distribution of Establishments that Introduced Improved Support Activities for Processes by Territory and Age

Territory	Age group (years)	Introduced new/significantly improved support activities for processes					
		Total		Yes		No	
		No.	%	No.	%	No.	%
Trinidad	Total	17	100.0	7	41.2	10	58.8
	Less than 10	3	100.0	1	33.3	2	66.7
	10 - 19	6	100.0	2	33.3	4	66.7
	20 - 29	2	100.0	1	50.0	1	50.0
	30 - 39	2	100.0	0	0.0	2	100.0
	40 -49	4	100.0	3	75.0	1	25.0
Tobago	Total	19	100.0	9	47.4	10	52.6
	Less than 10	2	100.0	0	0.0	2	100.0
	10 - 19	5	100.0	1	20.0	4	80.0
	20 - 29	5	100.0	3	60.0	2	40.0
	30 - 39	6	100.0	5	83.3	1	16.7
	40 -49	1	100.0	0	0.0	1	100.0

Table 40c: Percentage of Establishments that Introduced Improved Support Activities for Processes by Territory and Age

Territory	Age group (years)	Introduced new/significantly improved support activities for processes		
		Total	Yes	No
Trinidad	Total	100.0	100.0	100.0
	Less than 10	17.6	14.3	20.0
	10 - 19	35.3	28.6	40.0
	20 - 29	11.8	14.3	10.0
	30 - 39	11.8	0.0	20.0
	40 -49	23.5	42.9	10.0
Tobago	Total	100.0	100.0	100.0
	Less than 10	10.5	0.0	20.0
	10 - 19	26.3	11.1	40.0
	20 - 29	26.3	33.3	20.0
	30 - 39	31.6	55.6	10.0
	40 -49	5.3	0.0	10.0

4.3 Organisational Innovation

In relation to organisational innovation, five different areas of activities were highlighted as follows:

- Introduced new business practices for organisational procedures
- Introduced major changes in organisational structure
- Introduced new management systems and techniques
- Improved/expanded education and training
- Established new relationships with external organisations

Overall, 50% of the respondents indicated that they had introduced new business practices for organisational procedures and 44% had improved/expanded education and training. Thirty-three percent (33%) of the establishments in each case had introduced major changes in organisational structure and new management systems and techniques, while 25% had established new relationships with external organisations (Table 41a).

Table 41a: Distribution of Establishments Engaged in Organisational Innovation

Type of organisational innovation	Total		Yes		No		Not stated	
	No.	%	No.	%	No.	%	No.	%
Introduced new business practices for organisational procedures	36	100.0	18	50.0	17	47.2	1	2.8
Introduced major changes in organisational structure	36	100.0	12	33.3	24	66.7	0	0.0
Introduced new management systems and techniques	36	100.0	12	33.3	23	63.8	1	2..8
Improved/expanded education and training	36	100.0	16	44.4	20	55.6	0	0.0
Established new relationships with external organisations (e.g. alliances, partnerships)	36	100.0	9	25.0	27	75.0	0	0.0

Table 41b: Distribution of Establishments Engaged in Organisational Innovation
Trinidad

Type of organisational innovation	Total		Yes		No		Not stated	
	No.	%	No.	%	No.	%	No.	%
Introduced new business practices for organisational procedures	17	100.0	9	52.9	7	41.2	1	5.9
Introduced major changes in organisational structure	17	100.0	6	35.3	11	64.7	0	0.0
Introduced new management systems and techniques	17	100.0	5	29.4	11	64.7	1	5.9
Improved/expanded education and training	17	100.0	6	35.3	11	64.7	0	0.0
Established new relationships with external organisations (e.g. alliances, partnerships)	17	100.0	5	29.4	12	70.6	0	0.0

Table 41c: Distribution of Establishments Engaged in Organisational Innovation - Tobago

Type of organisational innovation	Total		Yes		No	
	No.	%	No.	%	No.	%
Introduced new business practices for organisational procedures	19	100.0	9	47.4	10	52.6
Introduced major changes in organisational structure	19	100.0	6	31.6	13	68.4
Introduced new management systems and techniques	19	100.0	7	36.8	12	63.2
Improved/expanded education and training	19	100.0	10	52.6	9	47.4
Established new relationships with external organisations (e.g. alliances, partnerships)	19	100.0	4	21.1	15	78.9

No clear patterns emerged with respect to age, employment and levels of sales. However, establishments reported relatively low impacts of organisational innovation on increased sales. For example, only 17% of the establishments which introduced new business practices for organisational procedures, introduced major changes in organisational structure, or introduced new management systems and techniques, reported increased sales in 2007-2008 (Tables 42a, 43a and 44a). However, 38% of the establishments which had expanded education and training, and 33% of those that established external alliances, reported increases in sales over the period (Tables 45a and 46a). Some differences emerged between establishments in Trinidad and Tobago. Establishments in Trinidad which introduced new management systems and techniques reported no increases in sales over the period compared to 29% in Tobago (Table 44b). Fifty percent (50%) of the establishments in Tobago that improved/expanded education and training reported increased sales compared to 17% of the establishments in Trinidad (Table 45b). Likewise, 50% of the establishments in Tobago which established new relationships with external alliances reported increases in sales, compared to 20% of the establishments in Trinidad over the period, 2007-2008 (Table 46b).

Table 42a: Distribution of Establishments that Introduced New Business Practices for Organisational Procedures by Change in Sales, 2007-2008

Change in sales in 2007	Introduced new business practices for organisational procedures							
	Total		Yes		No		Not stated	
	No.	%	No.	%	No.	%	No.	%
Total	36	100.0	18	100.0	17	100.0	1	100.0
Increased	10	27.8	3	16.7	6	35.3	1	100.0
Decreased	16	44.4	11	61.1	5	29.4	0	0.0
Stayed the same	8	22.2	3	16.7	5	29.4	0	0.0
Not stated	2	5.6	1	5.6	1	5.9	0	0.0

Table 42b: Distribution of Establishments that Introduced New Business Practices for Organisational Procedures by Territory and Change in Sales, 2007-2008

Territory	Sales in 2007	Introduced new business practices for organisational procedures							
		Total		Yes		No		Not stated	
		No.	%	No.	%	No.	%	No.	%
Trinidad	Total	17	100.0	9	52.9	7	41.2	1	5.9
	Increased	4	100.0	1	25.0	2	50.0	1	25.0
	Decreased	8	100.0	6	75.0	2	25.0	0	0.0
	Stayed the same	5	100.0	2	40.0	3	60.0	0	0.0
Tobago	Total	19	100.0	9	47.4	10	52.6	0	0.0
	Increased	6	100.0	2	33.3	4	66.7	0	0.0
	Decreased	8	100.0	5	62.5	3	37.5	0	0.0
	Stayed the same	3	100.0	1	33.3	2	66.7	0	0.0
	Not stated	2	100.0	1	50.0	1	50.0	0	0.0

Table 43a: Distribution of Establishments that Introduced Major Changes in Organisational Structure by Change in Sales 2007-2008

Change in sales	Introduced major changes in organisational structure					
	Total		Yes		No	
	No.	%	No.	%	No.	%
Total	36	100.0	12	100.0	24	100.0
Increased	10	27.8	2	16.7	8	33.3
Decreased	16	44.4	8	66.7	8	33.3
Stayed the same	8	22.2	2	16.7	6	25.0
Not stated	2	5.6	0	0.0	2	8.3

Table 43b: Distribution of Establishments that Introduced Major Changes in Organisational Structure by Territory and Change in Sales 2007-2008

Territory	Change in sales	Introduced major changes in organisational structure					
		Total		Yes		No	
		No.	%	No.	%	No.	%
Trinidad	Total	17	100.0	6	100.0	11	100.0
	Increased	4	23.5	1	16.7	3	27.3
	Decreased	8	47.1	4	66.7	4	36.4
	Stayed the same	5	29.4	1	16.7	4	36.4
Tobago	Total	19	100.0	6	100.0	13	100.0
	Increased	6	31.6	1	16.7	5	38.5
	Decreased	8	42.1	4	66.7	4	30.8
	Stayed the same	3	15.8	1	16.7	2	15.4
	Not stated	2	10.5	0	0.0	2	15.4

Table 44a: Distribution of Establishments that Introduced New Management Systems and Techniques by Change in Sales, 2007- 2008

Change in sales	Introduced new management systems and techniques							
	Total		Yes		No		Not stated	
	No.	%	No.	%	No.	%	No	%
Total	36	100.0	12	100.0	23	100.0	1	100.0
Increased	10	27.8	2	16.7	8	33.3	0	0.0
Decreased	16	44.4	9	66.7	6	33.3	1	100.0
Stayed the same	8	22.2	1	16.7	7	25.0	0	0.0
Not stated	2	5.6	0	0.0	2	8.3	0	0.0

Table 44b: Distribution of Establishments that Introduced New Management Systems and Techniques by Territory and Change in Sales, 2007-2008

Territory	Change in sales	Introduced new management systems and techniques							
		Total		Yes		No		Not stated	
		No.	%	No.	%	No.	%	No.	%
Trinidad	Total	17	100.0	5	100.0	11	100.0	1	100.0
	Increased	4	23.5	0	0.0	4	36.4	0	0.0
	Decreased	8	47.1	4	80.0	3	27.3	1	100.0
	Stayed the same	5	29.4	1	20.0	4	36.4	0	0.0
Tobago	Total	19	100.0	7	100.0	12	100.0	0	0.0
	Increased	6	31.6	2	28.6	4	33.3	0	0.0
	Decreased	8	42.1	5	71.4	3	25.0	0	0.0
	Stayed the same	3	15.8	0	0.0	3	25.0	0	0.0
	Not stated	2	10.5	0	0.0	2	16.7	0	0.0

Table 45a: Distribution of Establishments that Improved Education and Training by Change in Sales, 2007-2008

Change in sales	Improved/expanded education and training					
	Total		Yes		No	
	No.	%	No.	%	No.	%
Total	36	100.0	16	100.0	20	100.0
Increased	10	27.8	6	37.5	4	20.0
Decreased	16	44.4	9	56.3	7	35.0
Stayed the same	8	22.2	1	6.3	7	35.0
Not stated	2	5.6	0	0.0	2	10.0

Table 45b: Distribution of Establishments that Improved Education and Training by Territory and Change in Sales, 2007-2008

Territory	Change in sales	Improved/expanded education and training					
		Total		Yes		No	
		No.	%	No.	%	No.	%
Trinidad	Total	17	100.0	6	100.0	11	100.0
	Increased	4	23.5	1	16.7	3	27.3
	Decreased	8	47.1	5	83.3	3	27.3
	Stayed the same	5	29.4	0	0.0	5	45.5
Tobago	Total	19	100.0	10	100.0	9	100.0
	Increased	6	31.6	5	50.0	1	11.1
	Decreased	8	42.1	4	40.0	4	44.4
	Stayed the same	3	15.8	1	10.0	2	22.2
	Not stated	2	10.5	0	0.0	2	22.2

Table 46a: Distribution of Establishments that Established New Relationships with External Organisations by Change in Sales, 2007-2008

Change in sales	Established new relationships with external alliances					
	Total		Yes		No	
	No.	%	No.	%	No.	%
Total	36	100.0	9	100.0	27	100.0
Increased	10	27.8	3	33.3	7	25.9
Decreased	16	44.4	4	44.4	12	44.4
Stayed the same	8	22.2	2	22.2	6	22.2
Not stated	2	5.6	0	0.0	2	7.4

Table 46b: Distribution of Establishments in New Relationships with External Organisations by Territory and Change in Sales, 2007-2008

Territory	Change in sales	Established new relationships with external alliances					
		Total		Yes		No	
		No.	%	No.	%	No.	%
Trinidad	Total	17	100.0	5	100.0	12	100.0
	Increased	4	23.5	1	20.0	3	25.0
	Decreased	8	47.1	2	40.0	6	50.0
	Stayed the same	5	29.4	2	40.0	3	25.0
Tobago	Total	19	100.0	4	100.0	15	100.0
	Increased	6	31.6	2	50.0	4	26.7
	Decreased	8	42.1	2	50.0	6	40.0
	Stayed the same	3	15.8	0	0.0	3	20.0
	Not stated	2	10.5	0	0.0	2	13.3

4.4 Marketing Innovation

Marketing innovation encompassed the following five activities:

- Introduced new marketing strategies
- Introduced new media or techniques for promotion of goods and services
- Introduced new methods for utilising new sales/marketing channels
- Introduced new methods for the pricing of goods and services
- Developed/accessed new market segments

Sixty-nine percent (69%) of the establishments stated that they had introduced new marketing strategies, while 53% introduced new media/techniques for promotion of goods and services, 44% introduced new methods for utilising new sales/marketing channels, 36% introduced new methods for the pricing of goods and services, and 39% developed/ accessed new market segments (Table 47a). A relatively larger percentage of establishments in Tobago introduced new marketing strategies (79%) and new promotional techniques (58%) compared to 59% and 47% respectively in Trinidad (Tables 47b and 47c). However, with respect to the introduction of new methods for utilising sales/marketing channel, and the development/accessing of new market segments, 47% of the establishments in Trinidad recorded positive responses to these indicators, compared to 42% and 32%, respectively, for Tobago. The percentage of establishments that introduced new pricing methods was similar for both territories.

Table 47a: Distribution of Establishments Engaged in Marketing Innovation

Type of marketing innovation	Total		Yes		No		Not Stated	
	No.	%	No.	%	No.	%	No.	%
Introduced new marketing strategies	36	100.0	25	69.4	11	30.6	0	0.0
Introduced new media or techniques for promotion of goods and services	36	100.0	19	52.8	17	47.2	0	0.0
Introduced new methods for utilising new sales/marketing channels	36	100.0	16	44.4	20	55.6	0	0.0
Introduced new methods for pricing of goods and services	36	100.0	13	36.1	23	63.9	0	0.0
Developed/accessed new market segments	36	100.0	14	38.9	21	58.3	1	2.8

Table 47b: Distribution of Establishments Engaged in Marketing Innovation
Trinidad

Type of marketing innovation	Total		Yes		No	
	No.	%	No.	%	No.	%
Introduced new marketing strategies	17	100.0	10	58.8	7	41.2
Introduced new media or techniques for promotion of goods and services	17	100.0	8	47.1	9	52.9
Introduced new methods for utilising new sales/marketing channels	17	100.0	8	47.1	9	52.9
Introduced new methods for pricing of goods and services	17	100.0	6	35.3	11	64.7
Developed/accessed new market segments	17	100.0	8	47.1	9	52.9

Table 47c: Distribution of Establishments Engaged in Marketing Innovation Tobago

Type of marketing innovation	Total		Yes		No		Not Stated	
	No.	%	No.	%	No.	%	No.	%
Introduced new marketing strategies	19	100.0	15	78.9	4	21.1	0	0.0
Introduced new media or techniques for promotion of goods and services	19	100.0	11	57.9	8	42.1	0	0.0
Introduced new methods for utilising new sales/marketing channels	19	100.0	8	42.1	11	57.9	0	0.0
Introduced new methods for pricing of goods and services	19	100.0	7	36.8	12	63.2	0	0.0
Developed/accessed new market segments	19	100.0	6	31.6	12	63.2	1	5.3

Establishments in both sub-sectors and territories introduced new marketing strategies (Tables 48a and 48b). Thirty-six percent (36%) of the establishments that introduced new marketing strategies also indicated an increase in sales between 2007-2008 (Table 49a). Similarly, 21% of establishments that introduced new media techniques for the promotion of goods and services; 25% of the establishments that introduced new methods for utilising new sales/marketing channels; 23% of the establishments that introduced new methods for pricing goods and services; and 14% of the establishments that developed/accessed new market segments, recorded increases in sales between 2007-2008 (Tables 50a, 51a, 52a and 53a).

Table 48a: Distribution of Establishments that Introduced New Marketing Strategies by Sub-sector

Sub-sector	Introduced new marketing strategies					
	Total		Yes		No	
	No.	%	No.	%	No.	%
Total	36	100.0	25	69.4	11	30.6
Lodging and accommodation-hotels and guest houses	32	100.0	23	71.9	9	28.1
Leisure and recreation	4	100.0	2	50.0	2	50.0

Table 48b: Distribution of Establishments that Introduced New Marketing Strategies by Territory and Sub-sector

Territory	Sub-sector	Introduced new marketing strategies					
		Total		Yes		No	
		No.	%	No.	%	No.	%
Trinidad	Total	17	100.0	10	58.8	7	41.2
	Lodging and accommodation-hotel and guest house	13	100.0	8	61.5	5	38.5
	Leisure and recreation	4	100.0	2	50.0	2	50.0
Tobago	Total	19	100.0	15	78.9	4	21.1
	Lodging and accommodation-hotel and guest house	19	100.0	15	78.9	4	21.1

Table 49a: Distribution of Establishments that Introduced New Marketing Strategies by Change in Sales, 2007-2008

Change in sales	Introduced new marketing strategies					
	Total		Yes		No	
	No.	%	No.	%	No.	%
Total	36	100.0	25	100.0	11	100.0
Increased	10	27.8	9	36.0	1	9.1
Decreased	16	44.4	9	36.0	7	63.6
Stayed the same	8	22.2	6	24.0	2	18.8
Not stated	2	5.6	1	4.0	1	9.1

Table 49b: Distribution of Establishments that Introduced New Marketing Strategies by Territory and Change in Sales, 2007-2008

Territory	Change in sales	Introduced new marketing strategies					
		Total		Yes		No	
		No.	%	No.	%	No.	%
Trinidad	Total	17	100.0	10	100.0	7	100.0
	Increased	4	23.5	4	40.0	0	0.0
	Decreased	8	47.1	3	30.0	5	71.4
	Stayed the same	5	29.4	3	30.0	2	28.6
Tobago	Total	19	100.0	15	100.0	4	100.0
	Increased	6	31.6	5	33.3	1	25.0
	Decreased	8	42.1	6	40.0	2	50.0
	Stayed the same	3	15.8	3	20.0	0	0.0
	Not stated	2	10.5	1	6.7	1	25.0

Table 50a: Distribution of Establishments that Introduced New Media or Techniques for Promotion of Goods and Services by Change in Sales, 2007-2008

Change in sales	Introduced new media or techniques for promotion of goods and services					
	Total		Yes		No	
	No.	%	No.	%	No.	%
Total	36	100.0	19	100.0	17	100.0
Increased	10	27.8	4	21.1	6	35.3
Decreased	16	44.4	10	52.6	6	35.3
Stayed the same	8	22.2	5	26.3	3	17.6
Not stated	2	5.6	0	0.0	2	11.8

Table 50b: Distribution of Establishments that Introduced New Media or Techniques for Promotion of Goods and Services by Territory and Change in Sales, 2007-2008

Territory	Change in sales	Introduced new media or techniques for promotion of goods and services					
		Total		Yes		No	
		No.	%	No.	%	No.	%
Trinidad	Total	17	100.0	8	100.0	9	100.0
	Increased	4	23.5	2	25.0	2	22.2
	Decreased	8	47.1	4	50.0	4	44.4
	Stayed the same	5	29.4	2	25.0	3	33.3
Tobago	Total	19	100.0	11	100.0	8	100.0
	Increased	6	31.6	2	18.2	4	50.0
	Decreased	8	42.1	6	54.5	2	25.0
	Stayed the same	3	15.8	3	27.3	0	0.0
	Not stated	2	10.5	0	0.0	2	25.0

Table 51a: Distribution of Establishments that Introduced New Methods for Utilising New Sales/Marketing Channels by Change in Sales, 2007-2008

Change in sales	Introduced new methods for utilising new sales/marketing channels					
	Total		Yes		No	
	No.	%	No.	%	No.	%
Total	36	100.0	16	100.0	20	100.0
Increased	10	27.8	4	25.0	6	30.0
Decreased	16	44.4	9	56.3	7	35.0
Stayed the same	8	22.2	3	18.8	5	25.0
Not stated	2	5.6	0	0.0	2	10.0

Table 51b: Distribution of Establishments that Introduced New Methods for Utilising New Sales/Marketing Channels by Territory and Change in Sales, 2007-2008

Territory	Change in sales	Introduced new methods for utilising new sales/marketing channels					
		Total		Yes		No	
		No.	%	No.	%	No.	%
Trinidad	Total	17	100.0	8	100.0	9	100.0
	Increased	4	23.5	2	25.0	2	22.2
	Decreased	8	47.1	4	50.0	4	44.4
	Stayed the same	5	29.4	2	25.0	3	33.3
Tobago	Total	19	100.0	8	100.0	11	100.0
	Increased	6	31.6	2	25.0	4	36.4
	Decreased	8	42.1	5	62.5	3	27.3
	Stayed the same	3	15.8	1	12.5	2	18.2
	Not stated	2	10.5	0	0.0	2	18.2

Table 52a: Distribution of Establishments that Introduced New Methods for the Pricing of Goods and Services by Change in Sales, 2007-2008

Change in sales	Introduced new methods for pricing of goods and services					
	Total		Yes		No	
	No.	%	No.	%	No.	%
Total	36	100.0	13	100.0	23	100.0
Increased	10	27.8	3	23.1	7	30.4
Decreased	16	44.4	8	61.5	8	34.8
Stayed the same	8	22.2	2	15.4	6	26.1
Not stated	2	5.6	0	0.0	2	8.7

Table 52b: Distribution of Establishments that Introduced New Methods for the Pricing of Goods and Services by Territory and Change in Sales 2007-2008

Territory	Change in sales	Introduced new methods for pricing of goods and services					
		Total		Yes		No	
		No.	%	No.	%	No.	%
Trinidad	Total	17	100.0	6	100.0	11	100.0
	Increased	4	23.5	2	33.3	2	18.2
	Decreased	8	47.1	2	33.3	6	54.5
	Stayed the same	5	29.4	2	33.3	3	27.3
Tobago	Total	19	100.0	7	100.0	12	100.0
	Increased	6	31.6	1	14.3	5	41.7
	Decreased	8	42.1	6	85.7	2	16.7
	Stayed the same	3	15.8	0	0.0	3	25.0
	Not stated	2	10.5	0	0.0	2	16.7

Table 53a: Distribution of Establishments that Developed/Accessed New Market Segments by Change in Sales, 2007-2008

Change in sales	Developed/accessed new market segments							
	Total		Yes		No		Not stated	
	No.	%	No.	%	No.	%	No.	%
Total	36	100.0	14	100.0	21	100.0	1	100.0
Increased	10	27.8	2	14.3	7	33.3	1	100.0
Decreased	16	44.4	10	71.4	6	28.6	0	0.0
Stayed the same	8	22.2	2	14.3	6	28.6	0	0.0
Not stated	2	5.6	0	0.0	2	9.5	0	0.0

Table 53b: Distribution of Establishments that Developed/Accessed New Market Segments by Territory and Change in Sales, 2007-2008

Territory	Change in sales	Developed/accessed new market segments							
		Total		Yes		No		Not stated	
		No.	%	No.	%	No.	%	No.	%
Trinidad	Total	17	100.0	8	100.0	9	100.0	0	0.0
	Increased	4	23.5	2	25.0	2	22.2	0	0.0
	Decreased	8	47.1	4	50.0	4	44.4	0	0.0
	Stayed the same	5	29.4	2	25.0	3	33.3	0	0.0
Tobago	Total	19	100.0	6	100.0	12	100.0	1	100.0
	Increased	6	31.6	0	0.0	5	41.7	1	100.0
	Decreased	8	42.1	6	100.0	2	16.7	0	0.0
	Stayed the same	3	15.8	0	0.0	3	25.0	0	0.0
	Not stated	2	10.5	0	0.0	2	16.7	0	0.0

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4.5 Environmental Innovation

Innovations with environmental benefits are defined in the questionnaire as follows:

An environmental innovation is a new or significantly improved product (good or service), process, organisational method, or marketing method that creates environmental benefits compared to alternatives.

Environmental innovation focussed on the following four activities:

- Introduced/improved practices related to energy efficiency/conservation/management
- Introduced /improved procedures for minimizing the amount of wastewater effluent, solid wastes and hazardous materials associated with your operations,
- Introduced /improved procedures for reducing water, noise or air pollution
- Introduced/improved compliance with environmental regulations

Sixty-nine percent (69%) of the establishments stated that they introduced/improved practices related to energy efficiency/conservation/management, while 50% had introduced/improved procedures for minimising the amount of wastewater effluent, solid wastes and hazardous materials associated with their operations, and introduced /improved compliance with environmental regulations (Table 54a). Thirty-six percent (36%) of the establishments introduced/improved procedures for reducing water, noise or air pollution. A relatively larger proportion of establishments in Tobago (68%), compared to Trinidad (29%) introduced/improved compliance with environmental regulations (Tables 54b and 54c).

Table 54a: Distribution of Establishments Engaged in Environmental Innovation

Type of environmental innovation	Total		Yes		No	
	No.	%	No.	%	No.	%
Introduced/improved practices related to energy efficiency/conservation/management	36	100.0	25	69.4	11	30.6
Introduced/improved procedures for minimising the amount of wastewater effluent, solid wastes and hazardous materials associated with your operations	36	100.0	18	50.0	18	50.0
Introduced/improved procedures for reducing water, noise or air pollution	36	100.0	13	36.1	23	63.9
Introduced/improved compliance with environmental regulations	36	100.0	18	50.0	18	50.0

Table 54b: Distribution of Establishments Engaged in Environmental Innovation
Trinidad

Type of environmental innovation	Total		Yes		No	
	No.	%	No.	%	No.	%
Introduced/improved practices related to energy efficiency/conservation/management	17	100.0	11	64.7	6	35.3
Introduced/improved procedures for minimising the amount of wastewater effluent, solid wastes and hazardous materials associated with your operations	17	100.0	9	52.9	8	47.1
Introduced/improved procedures for reducing water, noise or air pollution	17	100.0	4	23.5	13	76.5
Introduced/improved compliance with environmental regulations	17	100.0	5	29.4	12	70.6

Table 54c: Distribution of Establishments Engaged in Environmental Innovation Tobago

Type of environmental innovation	Total		Yes		No	
	No.	%	No.	%	No.	%
Introduced/improved practices related to energy efficiency/conservation/management	19	100.0	14	73.7	5	26.3
Introduced/improved procedures for minimising the amount of wastewater effluent, solid wastes and hazardous materials associated with your operations	19	100.0	9	47.4	10	52.6
Introduced/improved procedures for reducing water, noise or air pollution	19	100.0	9	47.4	10	52.6
Introduced/improved compliance with environmental regulations	19	100.0	13	68.4	6	31.6

Overall, between 22-33% of the establishments that were engaged in environmental innovations experienced increases in sales in the period 2007-2008 (Tables 55a, 56a, 57a and 58a).

Table 55a: Distribution of Establishments that Introduced/Improved Practices Related to Energy Efficiency/Conservation/Management by Change in Sales, 2007-2008

Change in sales	Introduced/improved practices related to energy efficiency/conservation/management					
	Total		Yes		No	
	No.	%	No.	%	No.	%
Total	36	100.0	25	100.0	11	100.0
Increased	10	27.8	7	28.0	3	27.3
Decreased	16	44.4	11	44.0	5	45.5
Stayed the same	8	22.2	6	24.0	2	18.2
Not stated	2	5.6	1	4.0	1	9.1

Table 55b: Distribution of Establishments that Introduced/Improved Practices Related to Energy Efficiency/Conservation/Management by Territory and Change in Sales, 2007-2008

Territory	Change in sales	Introduced/improved practices related to energy efficiency/conservation/management					
		Total		Yes		No	
		No.	%	No.	%	No.	%
Trinidad	Total	17	100.0	11	100.0	6	100.0
	Increased	4	23.5	3	27.3	1	16.7
	Decreased	8	47.1	5	45.5	3	50.0
	Stayed the same	5	29.4	3	27.3	2	33.3
Tobago	Total	19	100.0	14	100.0	5	100.0
	Increased	6	31.6	4	28.6	2	40.0
	Decreased	8	42.1	6	42.9	2	40.0
	Stayed the same	3	15.8	3	21.4	0	0.0
	Not stated	2	10.5	1	7.1	1	20.0

Table 56a: Distribution of Establishments that Introduced/Improved Procedures for Minimising the Amount of Wastewater Effluent, Solid Wastes and Hazardous Materials by Change in Sales, 2007-2008

Change in sales	Introduced/improved procedures for minimising the amount of wastewater effluent, solid wastes and hazardous materials associated with your operations					
	Total		Yes		No	
	No.	%	No.	%	No.	%
Total	36	100.0	18	100.0	18	100.0
Increased	10	27.8	6	33.3	4	22.2
Decreased	16	44.4	9	50.0	7	38.9
Stayed the same	8	22.2	3	16.7	5	27.8
Not stated	2	5.6	0	0.0	2	11.1

Table 56b: Distribution of Establishments that Introduced/Improved Procedures for Minimising the Amount of Wastewater Effluent, Solid Wastes and Hazardous Materials by Territory and Change in Sales 2007-2008

Territory	Value of sales	Introduced/improved procedures for minimising the amount of wastewater effluent, solid wastes and hazardous materials associated with your operations					
		Total		Yes		No	
		No.	%	No.	%	No.	%
Trinidad	Total	17	100.0	9	100.0	8	100.0
	Increased	4	23.5	3	33.3	1	12.5
	Decreased	8	47.1	5	55.6	3	37.5
	Stayed the same	5	29.4	1	11.1	4	50.0
Tobago	Total	19	100.0	9	100.0	10	100.0
	Increased	6	31.6	3	33.3	3	30.0
	Decreased	8	42.1	4	44.4	4	40.0
	Stayed the same	3	15.8	2	22.2	1	10.0
	Not stated	2	10.5	0	0.0	2	20.0

Table 57a: Distribution of Establishments that Introduced/Improved Procedures for Reducing Water, Noise or Air Pollution by Change in Sales, 2007-2008

Change in sales	Introduced/improved procedures for reducing water, noise or air pollution					
	Total		Yes		No	
	No.	%	No.	%	No.	%
Total	36	100.0	13	100.0	23	100.0
Increased	10	27.8	3	23.1	7	30.4
Decreased	16	44.4	8	61.5	8	34.8
Stayed the same	8	22.2	2	15.4	6	26.1
Not stated	2	5.6	0	0.0	2	8.7

Table 57b: Distribution of Establishments that Introduced/Improved Procedures for Reducing Water, Noise or Air Pollution by Territory and Change in Sales, 2007-2008

Territory	Change in sales	Introduced/improved procedures for reducing water, noise or air pollution					
		Total		Yes		No	
		No.	%	No.	%	No.	%
Trinidad	Total	17	100.0	4	100.0	13	100.0
	Increased	4	23.5	1	25.0	3	23.1
	Decreased	8	47.1	3	75.0	5	38.5
	Stayed the same	5	29.4	0	0.0	5	38.5
Tobago	Total	19	100.0	9	100.0	10	100.0
	Increased	6	31.6	2	22.2	4	40.0
	Decreased	8	42.1	5	55.6	3	30.0
	Stayed the same	3	15.8	2	22.2	1	10.0
	Not stated	2	10.5	0	0.0	2	20.0

Table 58a: Distribution of Establishments that Introduced/Improved Compliance with Environmental Regulations by Change in Sales 2007-2008

Change in sales	Introduced/improved compliance with environmental regulations					
	Total		Yes		No	
	No.	%	No.	%	No.	%
Total	36	100.0	18	100.0	18	100.0
Increased	10	27.8	4	22.2	6	33.3
Decreased	16	44.4	11	61.1	5	27.8
Stayed the same	8	22.2	2	11.1	6	33.3
Not stated	2	5.6	1	5.6	1	5.6

Table 58b: Distribution of Establishments that Introduced/Improved Compliance with Environmental Regulations by Territory and Change in Sales, 2007-2008

Territory	Change in sales	Introduced/improved compliance with environmental regulations					
		Total		Yes		No	
		No.	%	No.	%	No.	%
Trinidad	Total	17	100.0	5	100.0	12	100.0
	Increased	4	23.5	1	20.0	3	25.0
	Decreased	8	47.1	4	80.0	4	33.3
	Stayed the same	5	29.4	0	0.0	5	41.7
Tobago	Total	19	100.0	13	100.0	6	100.0
	Increased	6	31.6	3	23.1	3	50.0
	Decreased	8	42.1	7	53.8	1	16.7
	Stayed the same	3	15.8	2	15.4	1	16.7
	Not stated	2	10.5	1	7.7	1	16.7

4.6 Driving Forces and Obstacles of Innovation

Reasons for innovating

Eleven reasons were adduced for innovating as shown in Table 59a:

- Improve profitability
- Improve productivity
- Extend range of services
- Improve service quality
- Increase market share
- Improve customer satisfaction
- Improve the establishment's image
- Improve competitiveness
- Improve working conditions
- Develop more environmentally friendly, products and services
- Comply with local laws and standards

The survey revealed that the major reasons for innovating were improving customer satisfaction, profitability, service quality, and productivity, which were rated as very important by 89%, 83% and 81% of the establishments respectively (Table 59a). Improving the establishment's image, increasing market share, improving competitiveness, complying with local laws and standards and extending the range of services were similarly rated by 75**%,** 67%, 67%, 61% and 58% respectively. Fifty percent (50%) of the respondents considered the development of more environmentally-riendly products and processes to be very important and 22% moderately important. This is fairly consistent with the findings with respect to environmental innovation. However, 11% considered it not important or slightly important.

The lowest ranking was accorded to improving working conditions, in that 47% of respondents recorded it as very important, 6% not important and 8% slightly important.

Table 59a: Percentage of Establishment Rating of Reasons for Innovating

Reason	Total	Not important	Slightly important	Moderately important	Very important	Not applicable	Not stated
Improve profitability	100.0	2.8	2.8	5.6	83.3	5.6	0.0
Improve productivity	100.0	2.8	0.0	11.1	80.6	5.6	0.0
Extend range of services	100.0	5.6	8.3	22.2	58.3	5.6	0.0
Improve service quality	100.0	0.0	0.0	13.9	80.6	5.6	0.0
Increase market share	100.0	5.6	8.3	13.9	66.7	5.6	0.0
Improve customer satisfaction	100.0	0.0	0.0	5.6	88.9	5.6	0.0
Improve the establishment's image	100.0	2.8	5.6	11.1	75.0	5.6	0.0
Improve competitiveness	100.0	2.8	0.0	25.0	66.7	5.6	0.0
Improve working conditions	100.0	5.6	8.3	33.3	47.2	5.6	0.0
Develop more environmental-friendly products and processes	100.0	11.1	11.1	22.2	50.0	5.6	0.0
Comply with local laws or standards	100.0	11.1	11.1	8.3	61.1	5.6	2.8

Table 59b: Percentage Rating of Reasons for Innovating - Trinidad

Reason	Total	Not important	Slightly important	Moderately important	Very important	Not applicable
Improve profitability	100.0	0.0	5.9	0.0	82.4	11.8
Improve productivity	100.0	0.0	0.0	5.9	82.4	11.8
Extend range of services	100.0	0.0	5.9	29.4	52.9	11.8
Improve service quality	100.0	0.0	0.0	5.9	82.4	11.8
Increase market share	100.0	5.9	5.9	11.8	64.7	11.8
Improve customer satisfaction	100.0	0.0	0.0	5.9	82.4	11.8
Improve the establishment's image	100.0	0.0	5.9	11.8	70.6	11.8
Improve competitiveness	100.0	0.0	0.0	29.4	58.8	11.8
Improve working conditions	100.0	5.9	11.8	23.5	47.1	11.8
Develop more environmental-friendly products and processes	100.0	5.9	11.8	23.5	47.1	11.8
Comply with local laws or standards	100.0	0.0	17.6	5.9	64.7	11.8

Table 59c: Percentage Rating of Reasons for Innovating - Tobago

Reason	Total	Not important	Slightly important	Moderately important	Very important	Not applicable	Not stated
Improve profitability	100.0	5.3	0.0	10.5	84.2	0.0	0.0
Improve productivity	100.0	5.3	0.0	15.8	78.9	0.0	0.0
Extend range of services	100.0	10.5	10.5	15.8	63.2	0.0	0.0
Improve service quality	100.0	0.0	0.0	21.1	78.9	0.0	0.0
Increase market share	100.0	5.3	10.5	15.8	68.4	0.0	0.0
Improve customer satisfaction	100.0	0.0	0.0	5.3	94.7	0.0	0.0
Improve the establishment's image	100.0	5.3	5.3	10.5	78.9	0.0	0.0
Improve competitiveness	100.0	5.3	0.0	21.1	73.7	0.0	0.0
Improve working conditions	100.0	10.5	10.5	31.6	47.4	0.0	0.0
Develop more environmental-friendly products and processes	100.0	15.8	10.5	21.1	52.6	0.0	0.0
Comply with local laws or standards	100.0	21.1	5.3	10.5	57.9	0.0	5.3

Obstacles to Innovation

Eleven obstacles to innovation were identified as shown in Table 60a:

- High cost of innovation project
- Lack of financing
- Lack of skilled/qualified personnel
- Resistance to change within the establishment
- Lack of information on technology
- Lack of information on markets
- Domestic economic conditions
- Legislation/legal restrictions/administrative procedures affecting the innovation
- Weak customer demand
- Lack of marketing capability
- Lack of external technical support services

Overall, the main obstacles to innovation were identified as the high cost of the innovation project and the lack of financing which 44% of establishments in each case stated were very significant. The survey results also showed domestic economic conditions (36%) and lack of skilled/qualified personnel (33%) to be very significant. On the other hand, 42% of respondents indicated that lack of information on technology, lack of marketing capability and lack of external technical support were not relevant/appropriate. Twenty-two percent (22%) of respondents indicated weak customer demand to be very significant and 31% moderately significant, while 22% recorded it as not relevant/appropriate (Table 60a).

Table 60a: Percentage Rating of Obstacles to Innovation

Obstacle	Total	Not relevant/ appropriate	Slightly significant	Moderately significant	Very significant	Not stated
High cost of innovation project	100.0	8.3	13.9	16.7	44.4	16.7
Lack of financing	100.0	11.1	19.4	11.1	44.4	13.9
Lack of skilled qualified personnel	100.0	16.7	13.9	19.4	33.3	16.7
Resistance to change within the establishment	100.0	30.6	19.4	13.9	19.4	16.7
Lack of information on technology	100.0	41.7	16.7	8.3	11.1	22.2
Lack of information on markets	100.0	33.3	27.8	16.7	11.1	11.1
Domestic economic conditions	100.0	5.6	19.4	30.6	36.1	8.3
Legislation/legal restrictions/administrative procedures affecting the innovation	100.0	27.8	11.1	25.0	16.7	19.4
Weak customer demand	100.0	22.2	19.4	30.6	22.2	5.6
Lack of marketing capability	100.0	41.7	13.9	13.9	8.3	22.2
Lack of external technical support services	100.0	41.7	13.9	16.7	5.6	22.2

Table 60b: Percentage Rating of Obstacles to Innovation – Trinidad

Obstacle	Total	Not relevant/ appropriate	Slightly significant	Moderately significant	Very significant	Not stated
High cost of innovation project	100.0	12	6	24	24	35
Lack of financing	100.0	18	12	18	24	29
Lack of skilled qualified personnel	100.0	6	12	18	29	35
Resistance to change within the establishment	100.0	6	24	12	24	35
Lack of information on technology	100.0	18	18	6	12	47
Lack of information on markets	100.0	0	41	24	18	18
Domestic economic conditions	100.0	6	35	18	24	18
Legislation/legal restrictions/administrative procedures affecting the innovation	100.0	12	18	18	12	41
Weak customer demand	100.0	18	24	29	18	12
Lack of marketing capability	100.0	12	29	12	0	47
Lack of external technical support services	100.0	18	18	18	0	47

Table 60c: Percentage Rating of Obstacles to Innovation – Tobago

Obstacle	Total	Not relevant/ appropriate	Slightly significant	Moderately significant	Very significant	Not stated
High cost of innovation project	100.0	5.3	21.1	10.5	63.2	0.0
Lack of financing	100.0	5.3	26.3	5.3	63.2	0.0
Lack of skilled qualified personnel	100.0	26.3	15.8	21.1	36.8	0.0
Resistance to change within the establishment	100.0	52.6	15.8	15.8	15.8	0.0
Lack of information on technology	100.0	63.2	15.8	10.5	10.5	0.0
Lack of information on markets	100.0	63.2	15.8	10.5	5.3	5.3
Domestic economic conditions	100.0	5.3	5.3	42.1	47.4	0.0
Legislation/legal restrictions/administrative procedures affecting the innovation	100.0	42.1	5.3	31.6	21.1	0.0
Weak customer demand	100.0	26.3	15.8	31.6	26.3	0.0
Lack of marketing capability	100.0	68.4	0.0	15.8	15.8	0.0
Lack of external technical support services	100.0	63.2	10.5	15.8	10.5	0.0

4.7 Linkages and Learning

The importance of the role of linkages and collaboration for innovation was examined. Some linkages may involve a specific flow of information and knowledge, for example, ownership linkages. Based on the results of the survey, however, ownership was of minimal importance in this regard (Section 3.0). The use of other linkages as sources of information, types of information obtained from these sources, co-operative and collaborative arrangements, and reasons for collaboration were addressed in the survey:

Sources of Information

Ten sources of information were identified as shown in Table 61a.

- Within your establishment
- Parent firm
- Customers
- Suppliers of equipment, material and components or software
- Consultancy establishments
- Government or public research institutes
- Fairs, exhibitions and conferences
- Business and industry associations
- Professional journals and trade publications
- Education and research institutes

Information from within the establishment was identified as very important by 78 % of the establishments, while 72% gave a similar rating to information from customers (Table 61a). Business and industry associations were viewed as very important by 33% of respondents, compared to 25% for professional journals and trade publications, and education and research institutions. However, 56% of respondents indicated that they did not use education and research institutes as sources of information for innovation.

Nineteen percent (19%) of respondents viewed suppliers of equipment, material and components of software as very important, while 33% stated that they were moderately important and 42% did not use them. Likewise, government or public research institutions were rated as very important by 19% of respondents, while 22% stated that they were moderately important and 53% did not use them. Fairs, exhibitions and conferences were considered very or moderately important by 14% and 28% of respondents, respectively, while 53% did not use them. Similarly, consultancy services were considered very or moderately important by 11% and 19% respectively, while they were not used by 64% of the establishments.

Table 61a: Percentage Rating of Sources of Information

Source	Total	Not used	Moderately important	Very important	Not applicable
Within your establishment	100.0	2.8	13.9	77.8	5.6
Parent establishment	100.0	30.6	2.8	22.2	44.4
Customers	100.0	0.0	22.2	72.2	5.6
Suppliers of equipment, material and components or software	100.0	41.7	33.3	19.4	5.6
Consultancy establishments	100.0	63.9	19.4	11.1	5.6
Government or public research institutes	100.0	52.8	22.2	19.4	5.6
Fairs, exhibitions and conferences	100.0	52.8	27.8	13.9	5.6
Business and Industry associations	100.0	36.1	25.0	33.3	5.6
Professional journals and trade publications	100.0	38.9	30.6	25.0	5.6
Education and research institutes	100.0	55.6	13.9	25.0	5.6

Table 61b: Percentage Rating of Sources of Information - Trinidad

Source	Total	Not used	Moderately important	Very important	Not applicable
Within your establishment	100.0	0.0	17.6	70.6	11.8
Parent establishment	100.0	50.0	5.6	16.7	27.8
Customers	100.0	0.0	23.5	64.7	11.8
Suppliers of equipment, material and components or software	100.0	35.3	29.4	23.5	11.8
Consultancy establishments	100.0	58.8	11.8	17.6	11.8
Government or public research institutes	100.0	47.1	23.5	17.6	11.8
Fairs, exhibitions and conferences	100.0	47.1	23.5	17.6	11.8
Business and Industry associations	100.0	35.3	17.6	35.3	11.8
Professional journals and trade publications	100.0	29.4	35.3	23.5	11.8
Education and research institutes	100.0	52.9	11.8	23.5	11.8

Table 61c: Percentage Rating of Sources of Information - Tobago

Source	Total	Not used	Moderately important	Very important	Not applicable
Within your establishment	100.0	5.3	10.5	84.2	0.0
Parent establishment	100.0	10.5	0.0	31.6	57.9
Customers	100.0	0.0	21.1	78.9	0.0
Suppliers of equipment, material and components or software	100.0	47.4	36.8	15.8	0.0
Consultancy establishments	100.0	68.4	26.3	5.3	0.0
Government or public research institutes	100.0	57.9	21.1	21.1	0.0
Fairs, exhibitions and conferences	100.0	57.9	31.6	10.5	0.0
Business and Industry associations	100.0	36.8	31.6	31.6	0.0
Professional journals and trade publications	100.0	47.4	26.3	26.3	0.0
Education and research institutes	100.0	57.9	15.8	26.3	0.0

Types of Information

Customers were identified as the major source of product related information by 61% of respondents, followed by information within the establishment (53%) and by suppliers of equipment, material and components of software (31%) (Table 62a).

Table 62a: Sources of Product Related Information
(percentage)

Source	Total	Yes	No	Not applicable
Within your establishment	100.0	52.8	41.7	5.6
Parent establishment	100.0	2.8	91.7	5.6
Customers	100.0	61.1	33.3	5.6
Suppliers of equipment, material and components or software	100.0	30.6	63.9	5.6
Consultancy establishments	100.0	11.1	83.3	5.6
Government ministries or public research institutions	100.0	22.2	72.2	5.6
Fairs, exhibitions and conferences	100.0	22.2	72.2	5.6
Business and industry associations	100.0	19.4	75.0	5.6
Professional journals and trade publications	100.0	22.2	72.2	5.6
Education and research institutes	100.0	8.3	86.1	5.6
Other	100.0	0.0	94.4	5.6

Table 62b: Sources of Product Related Information – Trinidad
(percentage)

Source	Total	Yes	No	Not applicable
Within your establishment	100.0	52.9	35.3	11.8
Parent establishment	100.0	0.0	88.2	11.8
Customers	100.0	64.7	23.5	11.8
Suppliers of equipment, material and components or software	100.0	23.5	64.7	11.8
Consultancy establishments	100.0	11.8	76.5	11.8
Government ministries or public research institutions	100.0	11.8	76.5	11.8
Fairs, exhibitions and conferences	100.0	29.4	58.8	11.8
Business and industry associations	100.0	17.6	70.6	11.8
Professional journals and trade publications	100.0	23.5	64.7	11.8
Education and research institutes	100.0	0.0	88.2	11.8
Other	100.0	0.0	88.2	11.8

Table 62c: Sources of Product Related Information Tobago
(percentage)

Source	Total	Yes	No
Within your establishment	100.0	52.6	47.4
Parent establishment	100.0	5.3	94.7
Customers	100.0	57.9	42.1
Suppliers of equipment, material and components or software	100.0	36.8	63.2
Consultancy establishments	100.0	10.5	89.5
Government ministries or public research institutions	100.0	31.6	68.4
Fairs, exhibitions and conferences	100.0	15.8	84.2
Business and industry associations	100.0	21.1	78.9
Professional journals and trade publications	100.0	21.1	78.9
Education and research institutes	100.0	15.8	84.2
Other	100.0	0.0	100.0

The survey results show in-house sources (47%), suppliers of equipment material and components of software (22%), and professional journals and trade publications (19%), as major sources of process related information (Table 63a).

Table 63a: Sources of Process Related Information
(percentage)

Source	Total	Yes	No	Not applicable
Within your establishment	100.0	47.2	47.2	5.6
Parent establishment	100.0	8.3	86.1	5.6
Customers	100.0	16.7	77.8	5.6
Suppliers of equipment, material and components or software	100.0	22.2	72.2	5.6
Consultancy establishments	100.0	16.7	77.8	5.6
Government ministries or public research institutions	100.0	11.1	83.3	5.6
Fairs, exhibitions and conferences	100.0	13.9	80.6	5.6
Business and industry associations	100.0	13.9	80.6	5.6
Professional journals and trade publications	100.0	19.4	75.0	5.6
Education and research institutes	100.0	16.7	77.8	5.6
Other	100.0	0.0	94.4	5.6

Table 63b: Sources of Process Related Information – Trinidad
(percentage)

Source	Total	Yes	No	Not applicable
Within your establishment	100.0	29.4	58.8	11.8
Parent establishment	100.0	0.0	88.2	11.8
Customers	100.0	41.2	47.1	11.8
Suppliers of equipment, material and components or software	100.0	5.9	82.4	11.8
Consultancy establishments	100.0	11.8	76.5	11.8
Government ministries or public research institutions	100.0	17.6	70.6	11.8
Fairs, exhibitions and conferences	100.0	23.5	64.7	11.8
Business and industry associations	100.0	23.5	64.7	11.8
Professional journals and trade publications	100.0	47.1	41.2	11.8
Education and research institutes	100.0	11.8	76.5	11.8
Other	100.0	5.9	82.4	11.8

Table 63c: Sources of Process Related Information – Tobago
(percentage)

Source	Total	Yes	No
Within your establishment	100.0	78.9	21.1
Parent establishment	100.0	10.5	89.5
Customers	100.0	52.6	47.4
Suppliers of equipment, material and components or software	100.0	10.5	89.5
Consultancy establishments	100.0	15.8	84.2
Government ministries or public research institutions	100.0	15.8	84.2
Fairs, exhibitions and conferences	100.0	36.8	63.2
Business and industry associations	100.0	52.6	47.4
Professional journals and trade publications	100.0	36.8	63.2
Education and research institutes	100.0	26.3	73.7
Other	100.0	0.0	100.0

Overall, respondents stated that the main sources of marketing related information were within the establishment (56%) and customers (47%) (Table 64a). The major sources of marketing related information were identified as customers (41%) and professional and trade publications (47%) in Trinidad compared to information within the establishment (79%), customers (53%) and business and industry associations (53%) in Tobago (Tables 64b and 64c).

Table 64a: Sources of Marketing Information
(percentage)

Source	Total	Yes	No	Not applicable
Within your establishment	100.0	55.6	38.9	5.6
Parent establishment	100.0	5.6	88.9	5.6
Customers	100.0	47.2	47.2	5.6
Suppliers of equipment, material and components or software	100.0	8.3	86.1	5.6
Consultancy establishments	100.0	13.9	80.6	5.6
Government ministries or public research institutions	100.0	16.7	77.8	5.6
Fairs, exhibitions and conferences	100.0	30.6	63.9	5.6
Business and industry associations	100.0	38.9	55.6	5.6
Professional journals and trade publications	100.0	41.7	52.8	5.6
Education and research institutes	100.0	19.4	75.0	5.6
Other	100.0	2.8	91.7	5.6

Table 64b: Sources of Marketing Information – Trinidad
(percentage)

Source	Total	Yes	No	Not applicable
Within your establishment	100.0	29.4	58.8	11.8
Parent establishment	100.0	0.0	88.2	11.8
Customers	100.0	41.2	47.1	11.8
Suppliers of equipment, material and components or software	100.0	5.9	82.4	11.8
Consultancy establishments	100.0	11.8	76.5	11.8
Government ministries or public research institutions	100.0	17.6	70.6	11.8
Fairs, exhibitions and conferences	100.0	23.5	64.7	11.8
Business and industry associations	100.0	23.5	64.7	11.8
Professional journals and trade publications	100.0	47.1	41.2	11.8
Education and research institutes	100.0	11.8	76.5	11.8
Other	100.0	5.9	82.4	11.8

Table 64c: Sources of Marketing Information - Tobago
(percentage)

Source	Total	Yes	No	Not applicable
Within your establishment	100.0	78.9	21.1	0.0
Parent establishment	100.0	10.5	89.5	0.0
Customers	100.0	52.6	47.4	0.0
Suppliers of equipment, material and components or software	100.0	10.5	89.5	0.0
Consultancy establishments	100.0	15.8	84.2	0.0
Government ministries or public research institutions	100.0	15.8	84.2	0.0
Fairs, exhibitions and conferences	100.0	36.8	63.2	0.0
Business and industry associations	100.0	52.6	47.4	0.0
Professional journals and trade publications	100.0	36.8	63.2	0.0
Education and research institutes	100.0	26.3	73.7	0.0
Other	100.0	0.0	100.0	0.0

Table 65a: Sources of Management Related Information
(percentage)

Source	Total	Yes	No	Not applicable
Within your establishment	100.0	33.3	61.1	5.6
Parent establishment	100.0	11.1	83.3	5.6
Customers	100.0	22.2	72.2	5.6
Suppliers of equipment, material and components or software	100.0	8.3	86.1	5.6
Consultancy establishments	100.0	19.4	75.0	5.6
Government ministries or public research institutions	100.0	16.7	77.8	5.6
Fairs, exhibitions and conferences	100.0	16.7	77.8	5.6
Business and industry associations	100.0	13.9	80.6	5.6
Professional journals and trade publications	100.0	22.2	72.2	5.6
Education and research institutes	100.0	19.4	75.0	5.6
Other	100.0	0.0	94.4	5.6

The establishment was identified as the key source of management related information (33%) (Table 65a).

Table 65b: Sources of Management Related Information – Trinidad
(percentage)

Source	Total	Yes	No	Not applicable
Within your establishment	100.0	35.3	52.9	11.8
Parent establishment	100.0	5.9	82.4	11.8
Customers	100.0	23.5	64.7	11.8
Suppliers of equipment, material and components or software	100.0	5.9	82.4	11.8
Consultancy establishments	100.0	23.5	64.7	11.8
Government ministries or public research institutions	100.0	11.8	76.5	11.8
Fairs, exhibitions and conferences	100.0	17.6	70.6	11.8
Business and industry associations	100.0	11.8	76.5	11.8
Professional journals and trade publications	100.0	17.6	70.6	11.8
Education and research institutes	100.0	17.6	70.6	11.8
Other	100.0	0.0	88.2	11.8

Table 65c: Sources of Management Related information – Tobago
(percentage)

Source	Total	Yes	No	Not applicable
Within your establishment	100.0	31.6	68.4	0.0
Parent establishment	100.0	21.1	78.9	0.0
Customers	100.0	21.1	78.9	0.0
Suppliers of equipment, material and components or software	100.0	10.5	89.5	0.0
Consultancy establishments	100.0	15.8	84.2	0.0
Government ministries or public research institutions	100.0	21.1	78.9	0.0
Fairs, exhibitions and conferences	100.0	15.8	84.2	0.0
Business and industry associations	100.0	15.8	84.2	0.0
Professional journals and trade publications	100.0	26.3	73.7	0.0
Education and research institutes	100.0	21.1	78.9	0.0
Other	100.0	0.0	100.0	0.0

Co-operative and Collaborative Arrangement

Co-operative and collaborative arrangement involved the active participation in joint projects between the respondent establishment and other establishments or organisations.

Twenty-five percent (25%) of the responding establishments stated that they had collaborative arrangements with customers and associated companies while 19% had such arrangements with suppliers (Table 66a). Co-operative arrangements were also entered into with government ministries (17%), universities or higher education institutes (14%), consulting and marketing establishments (14%), and competitors (14%). Only 3% of establishments entered into such arrangements with private and public research institutions. The findings with respect to organisational innovation indicated that 25% of respondents established new relationships with external organisations.

Table 66a: Sources of Co-operative and Collaborative Arrangements (percentage)

Source	Total	Yes	No	Do not know	Not applicable
Competitors	100.0	13.9	80.6	0.0	5.6
Customers	100.0	25.0	69.4	0.0	5.6
Suppliers	100.0	19.4	75.0	0.0	5.6
Associated companies within your corporate group	100.0	25.0	66.7	2.8	5.6
Consulting and marketing establishments	100.0	13.9	75.0	5.6	5.6
Private research institutes	100.0	2.8	86.1	5.6	5.6
Public research institutes	100.0	2.8	86.1	5.6	5.6
Universities or higher education institutes	100.0	13.9	77.8	2.8	5.6
Government ministry	100.0	16.7	75.0	2.8	5.6

Table 66b: Sources of Co-operative and Collaborative Arrangements
Trinidad
(percentage)

Source	Total	Yes	No	Not applicable
Competitors	100.0	17.6	70.6	11.8
Customers	100.0	35.3	52.9	11.8
Suppliers	100.0	23.5	64.7	11.8
Associated companies within your corporate group	100.0	35.3	52.9	11.8
Consulting and marketing establishments	100.0	17.6	70.6	11.8
Private research institutes	100.0	5.9	82.4	11.8
Public research institutes	100.0	5.9	82.4	11.8
Universities or higher education institutes	100.0	23.5	64.7	11.8
Government ministry	100.0	23.5	64.7	11.8

Table 66c: Sources of Co-operative and Collaborative Arrangements
Tobago
(percentage)

Source	Total	Yes	No	Do not know
Competitors	100.0	15.8	84.2	0.0
Customers	100.0	15.8	84.2	0.0
Suppliers	100.0	15.8	84.2	0.0
Associated companies within your corporate group	100.0	15.8	78.9	5.3
Consulting and marketing establishments	100.0	15.8	73.7	10.5
Private research institutes	100.0	0.0	89.5	10.5
Public research institutes	100.0	0.0	89.5	10.5
Universities or higher education institutes	100.0	5.3	89.5	5.3
Government ministry	100.0	10.5	84.2	5.3

Reasons for Collaboration

Table 67a shows that 33% of the establishments cited accessing new markets, 31% sharing of costs, 28% accessing distribution channels, 25% accessing critical expertise, and 22% accessing technology and spreading risks as reasons for collaboration in innovation.

In Trinidad, the key reason for collaboration was that of accessing new markets (41%) compared to sharing costs (32%) in case of Tobago (Tables 67b and 67c).

Table 67a: Reasons for Collaboration
(percentage)

Reason	Total	Yes	No	Not stated	Not applicable
Sharing costs	100.0	30.6	8.3	2.8	58.3
Spreading risks	100.0	22.2	16.7	2.8	58.3
Accessing technology	100.0	22.2	16.7	2.8	58.3
Accessing critical expertise	100.0	25.0	13.9	2.8	58.3
Accessing new markets	100.0	33.3	5.6	2.8	58.3
Accessing new distribution channels	100.0	27.8	11.1	2.8	58.3
Other	100.0	0.0	38.9	2.8	58.3

Table 67b: Reasons for Collaboration -Trinidad (percentage)

Reason	Total	Yes	No	Not stated	Not applicable
Sharing costs	100.0	29.4	17.6	5.9	47.1
Spreading risks	100.0	29.4	17.6	5.9	47.1
Accessing technology	100.0	29.4	17.6	5.9	47.1
Accessing critical expertise	100.0	35.3	11.8	5.9	47.1
Accessing new markets	100.0	41.2	5.9	5.9	47.1
Accessing new distribution channels	100.0	29.4	17.6	5.9	47.1
Other	100.0	0.0	47.1	5.9	47.1

Table 67c: Reasons for Collaboration - Tobago (percentage)

Reason	Total	Yes	No	Not applicable
Sharing costs	100.0	31.6	0.0	68.4
Spreading risks	100.0	15.8	15.8	68.4
Accessing technology	100.0	15.8	15.8	68.4
Accessing critical expertise	100.0	15.8	15.8	68.4
Accessing new markets	100.0	26.3	5.3	68.4
Accessing new distribution channels	100.0	26.3	5.3	68.4
Other	100.0	0.0	31.6	68.4

4.8 Impact of Innovation

The establishments were requested to state the impact of innovation on key performance indicators. Eighty-one percent (81%) of respondents indicated that innovation resulted in increased customer satisfaction while 75% reported improvements in the image of the establishment and 69% increased competitiveness. Fifty-eight percent (58%) and 56% reported productivity and a positive environmental impact respectively, while between 44-50% recorded increases in profitability, market share, good/service differentiation and compliance with regulations. Only 39% and 31% of respondents reported that innovation increased cash flow and employment, respectively (Table 68a).

In Trinidad, the largest proportion (77%) of establishments rated image as the key indicator on which innovation impacted compared to customer satisfaction (95%) in Tobago (Tables 68b and 68c). Also of significance was competitiveness (71%) in Trinidad and the establishment's image (74%) in Tobago.

Table 68a: Rating of Impact of Innovation on Performance Indicators (percentage)

Indicator	Total	Increase	Decrease	No change	Do not know	Not stated	Not applicable
Profitability	100.0	44.4	13.9	19.4	13.9	2.8	5.6
Market share	100.0	47.2	5.6	16.7	19.4	5.6	5.6
Customer satisfaction	100.0	80.6	0.0	5.6	2.8	5.6	5.6
Productivity	100.0	58.3	2.8	22.2	5.6	5.6	5.6
Competitiveness	100.0	69.4	0.0	13.9	8.3	2.8	5.6
Cash flow	100.0	38.9	13.9	19.4	16.7	5.6	5.6
Image	100.0	75.0	2.8	2.8	11.1	2.8	5.6
Good/Service differentiation	100.0	50.0	0.0	30.6	8.3	5.6	5.6
Positive environmental impact	100.0	55.6	0.0	19.4	8.3	11.1	5.6
Compliance with regulations	100.0	50.0	0.0	33.3	0.0	11.1	5.6
Employment	100.0	30.6	11.1	47.2	2.8	2.8	5.6

Table 68b: Rating of Impact of Innovation on Performance Indicators – Trinidad
(percentage)

Indicator	Total	Increase	Decrease	No change	Do not know	Not stated	Not applicable
Profitability	100.0	52.9	11.8	11.8	5.9	11.8	5.9
Market share	100.0	47.1	5.9	5.9	17.6	11.8	11.8
Customer satisfaction	100.0	64.7	0.0	5.9	5.9	11.8	11.8
Productivity	100.0	58.8	0.0	23.5	0.0	11.8	5.9
Competitiveness	100.0	70.6	0.0	11.8	0.0	11.8	5.9
Cash flow	100.0	47.1	11.8	11.8	11.8	11.8	5.9
Image	100.0	76.5	0.0	0.0	5.9	11.8	5.9
Good/Service differentiation	100.0	41.2	0.0	29.4	11.8	11.8	5.9
Positive environmental impact	100.0	41.2	0.0	29.4	5.9	11.8	11.8
Compliance with regulations	100.0	35.3	0.0	41.2	0.0	11.8	11.8
Employment	100.0	35.3	11.8	35.3	0.0	11.8	5.9

Table 68c: Percentage Rating of Impact of Innovation on Performance Indicators
Tobago
(percentage)

Indicator	Total	Increase	Decrease	No change	Do not know	Not stated	Not applicable
Profitability	100.0	36.8	15.8	26.3	21.1	0.0	0.0
Market share	100.0	47.4	5.3	26.3	21.1	0.0	0.0
Customer satisfaction	100.0	94.7	0.0	5.3	0.0	0.0	0.0
Productivity	100.0	57.9	5.3	21.1	10.5	0.0	5.3
Competitiveness	100.0	68.4	0.0	15.8	15.8	0.0	0.0
Cash flow	100.0	31.6	15.8	26.3	21.1	0.0	5.3
Image	100.0	73.7	5.3	5.3	15.8	0.0	0.0
Good/Service differentiation	100.0	57.9	0.0	31.6	5.3	0.0	5.3
Positive environmental impact	100.0	68.4	0.0	10.5	10.5	5.3	5.3
Compliance with regulations	100.0	63.2	0.0	26.3	0.0	5.3	5.3
Employment	100.0	26.3	10.5	57.9	5.3	0.0	0.0

5.0 Policy Related Issues

Questions drawn from various elements of the survey attempted to determine how the responding establishments perceived government's role with respect to innovation.

Sixty-one percent (61%) of respondents indicated that complying with local laws or standards was a very important reason for innovation (Table 59a). Forty-two percent (42%) stated that government or public research institutions were very important/moderately important sources of information for innovation (Table 61a). Seventeen percent (17%) had been involved in collaborative activity with government ministries, while only 3% indicated any involvement with public research institutions (Table 66a).

Fifty percent (50%) of respondents signaled that innovative activity impacted positively on their compliance with regulations, while 56% stated that innovation activity had a positive environmental impact (Table 68a). However, 42% of respondents indicated that legislation/legal procedures were very/moderately significant hindrances to innovation activity (Table 60a).

With respect to government support programmes, 30 establishments (83%) did not use state support or assistance in their innovative activity, while only 5 establishments (14%) utilised these programmes (Table 69).

Table 69: Distribution of Establishments that Used Government Support by Country

Government support	Country					
	Total		Trinidad		Tobago	
	No.	%	No.	%	No.	%
Total	36.0	100.0	17.0	100.0	19.0	100.0
Yes	5.0	13.9	3.0	17.6	2.0	10.5
No	30.0	83.3	13.0	76.5	17.0	89.5
Do not know	1.0	2.8	1.0	5.9	0.0	0.0

Government support programmes for innovation were viewed as not applicable by an overwhelming 86% of respondents (Table 70a).

In response to an open question in relation to how government can encourage innovation in establishments there was a range of responses including: help with marketing; financial support; improve the general condition of Trinidad and Tobago; improve the technology infrastructure; provide advice and programmes on research and development and reduce taxes.

Table 70a: Rating of Government Support Programmes for Innovation (percentage)

Programme	Total	Not important	Slightly important	Important	Very Important	Not applicable
Research funding	100.0	8.3	0.0	0.0	5.6	86.1
Training	100.0	2.8	2.8	2.8	5.6	86.1
Subsidies	100.0	8.3	2.8	0.0	2.8	86.1
Tax rebates	100.0	5.6	2.8	0.0	5.6	86.1
Technical support/advice	100.0	2.8	5.6	2.8	2.8	86.1
Infrastructure support	100.0	5.6	2.8	5.6	0.0	86.1
Loans and grants	100.0	8.3	2.8	0.0	2.8	86.1
Venture capital support	100.0	11.1	0.0	0.0	2.8	86.1

Table 70b: Rating of Government Support Programmes for Innovation – Trinidad (percentage)

Programme	Total	Not important	Slightly important	Important	Very Important	Not applicable
Research funding	100.0	5.9	0.0	0.0	11.8	82.4
Training	100.0	0.0	5.9	0.0	11.8	82.4
Subsidies	100.0	5.9	5.9	0.0	5.9	82.4
Tax rebates	100.0	5.9	5.9	0.0	5.9	82.4
Technical support/advice	100.0	5.9	5.9	5.9	0.0	82.4
Infrastructure support	100.0	5.9	5.9	5.9	0.0	82.4
Loans and grants	100.0	5.9	5.9	0.0	5.9	82.4
Venture capital support	100.0	11.8	0.0	0.0	5.9	82.4

Table 70c: Rating of Government Support Programmes for Innovation - Tobago
(percentage)

Programme	Total	Not important	Slightly important	Important	Very Important	Not applicable
Research funding	100.0	10.5	0.0	0.0	0.0	89.5
Training	100.0	5.3	0.0	5.3	0.0	89.5
Subsidies	100.0	10.5	0.0	0.0	0.0	89.5
Tax rebates	100.0	5.3	0.0	0.0	5.3	89.5
Technical support/advice	100.0	0.0	5.3	0.0	5.3	89.5
Infrastructure support	100.0	5.3	0.0	5.3	0.0	89.5
Loans and grants	100.0	10.5	0.0	0.0	0.0	89.5
Venture capital support	100.0	10.5	0.0	0.0	0.0	89.5

6.0 Use of Technology

Seventy-five percent (75%) of the establishments were engaged in innovation requiring the use of technology. Of these, ninety-three percent (93%) indicated that the innovation was related to the use of information and communication technology (ICT) (Tables 71a and 71b).

Table 71a: Distribution of Establishments Engaged in Innovation Requiring Technology

Innovation requiring technology	No.	%
Total	36	100.0
Yes	27	75.0
No	9	25.0

Table 71b: Distribution of Establishments Engaged in Innovation Requiring ICT

Innovation requiring ICT	No.	%
Total	27	100.0
Yes	25	92.6
No	1	3.7
Not stated	1	3.7

Only one establishment (3%) had utilised patents to protect its intellectual property, while 11 establishments (31%) utilised confidentiality agreements, 6 (17%) trademarks, 4 (11%) copyrights and 2 (6%) trade secrets (Table 72a).

Table 72a: Distribution of Establishments by Methods to Protect Intellectual Property

Method to protect intellectual property	Total		Yes		No		Not applicable	
	No.	%	No.	%	No.	%	No.	%
Patents	36	100.0	1	2.8	26	72.2	9	25.0
Trademarks	36	100.0	6	16.7	21	58.3	9	25.0
Copyrights	36	100.0	4	11.1	23	63.9	9	25.0
Confidentiality agreements	36	100.0	11	30.6	16	44.4	9	25.0
Trade secrets	36	100.0	2	5.6	25	69.4	9	25.0

Table 72b: Distribution of Establishments by Methods to Protect Intellectual Property – Trinidad

Method to protect intellectual property	Total		Yes		No		Not applicable	
	No.	%	No.	%	No.	%	No.	%
Patents	17	100.0	0	0.0	11	64.7	6	35.3
Trademarks	17	100.0	3	17.6	8	47.1	6	35.3
Copyrights	17	100.0	2	11.8	9	52.9	6	35.3
Confidentiality agreements	17	100.0	6	35.3	5	29.4	6	35.3
Trade secrets	17	100.0	1	5.9	10	58.8	6	35.3

Table 72c: Distribution of Establishments by Methods to Protect Intellectual Property – Tobago

Method to protect intellectual property	Total		Yes		No		Not applicable	
	No.	%	No.	%	No.	%	No.	%
Patents	19	100.0	1	5.3	15	78.9	3	15.8
Trademarks	19	100.0	3	15.8	13	68.4	3	15.8
Copyrights	19	100.0	2	10.5	14	73.7	3	15.8
Confidentiality agreements	19	100.0	5	26.3	11	57.9	3	15.8
Trade secrets	19	100.0	1	5.3	15	78.9	3	15.8

6.1 Use of the Internet

The vast majority of respondents, 92% utilised the Internet, while the same percentage used it for e-mail. Eighty-nine percent (89%) utilised the Internet for world web searches and to sell products or services to clients, and 83% for advertising through a home page (Tables 73 and 74).

Table 73: Distribution of Establishments by Internet Usage

Use internet	No.	%
Total	36	100.0
Yes	33	91.7
No	3	8.3

Table 74: Distribution of Establishments by Purpose of Internet Usage

Purpose	Total		Yes		No		Not applicable	
	No.	%	No.	%	No.	%	No.	%
For e-mail	36	100.0	33	91.7	0	0.0	3	8.3
For searchers on the world wide web	36	100.0	32	88.9	1	2.8	3	8.3
For selling your products or services to customers or clients	36	100.0	32	88.9	1	2.8	3	8.3
For advertising through a home page	36	100.0	30	83.3	3	8.3	3	8.3

7.0 Summary of Main Findings and Conclusions

7.1 Innovation Activities

(i) The majority of establishments (83%) that responded to the survey were local/privately owned, and licensing/franchising arrangements or management contracts were negligible, thereby nullifying this form of technology transfer for these establishments.

(ii) Product innovation was shown to be more widely practised than process innovation. Of the responding establishments 53-64 % engaged in some form of product innovation, compared to 33-44% of establishments which engaged in process innovation. Production innovation was manifested more in improvements to existing goods and services (64%) than in the introduction/development of new goods and services (53%). Process innovation was more prevalent in improvement in the methods of production for goods and services (44%) than in the improvement of delivery or distribution methods (33%). Process innovation also extended to the improvement of support activities (44%). Product innovation was more prevalent in Trinidad than in Tobago, while the reverse was observed in the case of process innovation. Process and production innovation were reported in both the lodging and accommodation, and the leisure and entertainment sub-sectors.

(iii) The main areas of focus on organisational innovation were the introduction of new business practices for organisational procedures (50%), the improvement/expansion of education and training (44%), the introduction of major changes in organisational structure and new management systems and techniques (33%), and the establishment of new relationships with external organisations (25%).

(iv) With respect to marketing innovation, 69% of the establishments reported the introduction of new marketing strategies, 53% introduced new media techniques for promotion, 44% introduced new methods for utilising new sales/marketing channels, 36% introduced new pricing methods and 39% developed/ accessed new market segments.

(v) Environmental innovation encompassing energy efficiency/ conservation, minimisation of wastes and hazardous and materials, reduction in air, noise and water pollution, was practised by between 36-69% of respondents. Fifty percent (50%) of respondents reported improved compliance with environmental regulations.

(vi) Innovation activities showed only moderate impact on sales over the period 2007-2008. For example, 35-37% of the establishments that engaged in product innovation reported increases in sales over the period. Similarly, 25-33% of the establishments that introduced/ improved process innovations, 14-36% of the establishments that engaged in marketing innovations, and 17-37% of the establishments that practised some form of organisational innovation, experienced sales increases over the period. In addition, between 22-33% of the establishments that introduced/improved environmental innovations recorded increases in sales.

7.2 Driving Forces and Obstacles

The following reasons for innovating were cited by respondents as very important:

- Improve customer satisfaction (89%)
- Improve profitability (83%)
- Improve service quality (81%)
- Improve productivity (81%)

The lowest ranking was given to improving working conditions, rated by 47% of respondents as very important.

The main obstacle to innovation was identified as the lack of financing and the high cost of the innovation project, (44%), followed by domestic economic conditions (36%), and lack of skilled/qualified personnel (33%). On the other hand, 42% of respondents indicated that lack of, information on technology, marketing capability and external technical support was not relevant/appropriate. Twenty-two (22%) percent of respondents indicated that weak customer demand was very significant and 31% moderately significant, while 22% reported it as not relevant/appropriate

7.3 Linkages and Collaboration

Information from within the establishment was identified as very important by 78 % of the respondents, while 72% gave a similar rating to information from customers. Business and industry associations were viewed as very important by 33% of respondents, compared to 25% for professional journals and trade publications and education and research institutions. However, 56% of respondents indicated that they did not use education and research institutes.

Nineteen percent (19%) of respondents viewed suppliers of equipment, material and components of software as very important, while 33% stated that they were moderately important and 42% did not use them. Likewise, government or public research institutions were viewed as very important by 19% of respondents, while 22% stated that they were moderately important and 53% did not use them. Fairs, exhibitions and conferences were considered very or moderately important by 14% and 28% of respondents, respectively, while 53% did not use them. Similarly, consultancy services were considered very or moderately important by 11% and 19% respectively, while they were not used by 64% of the establishments.

Customers and associated companies were identified as the most significant partners with respect to entry into co-operative/collaborative arrangements (25%), followed by suppliers (19%). Co-operative arrangements were also entered into with government ministries (17%), universities or higher education institutes (14%) and consulting and marketing establishments and competitors (14%). Only 3% of establishments entered into such arrangements with private and public research institutions.

7.4 Impact of Innovation

The impact of innovation was reported to be greatest with respect to increased customer satisfaction (81%), improvements in image (75%) and increased competitiveness (69%). Fifty-six percent (56%) reported a positive environmental impact, while between 44-50% recorded increases in profitability, market share, good/service differentiation and compliance with regulations. Only 39% and 31% of respondents reported that innovation increased cash flow and employment, respectively.

7.5 Use of Technology

Seventy-five percent (75%) of establishments were engaged in innovation requiring the use of technology. Of these 93% indicated that the innovation was related to the use of ICT. Only 1 establishment utilised patents to protect its intellectual property. Others, however, utilised trademarks, confidentiality agreements and trade secrets to some extent to protect their intellectual property.

The vast majority of respondents, 92%, utilised the Internet, while the same percentage used it for e-mail. Eighty-nine percent (89%) utilised the Internet for world web searches and to sell products or services to clients, and 83% for advertising through a home page.

7.6 Role of Government

The majority of respondents (83%) had not utilised government support or assistance in their innovation activity. Government support programmes were viewed as non- applicable by an overwhelming 86% of establishments. Compliance with local laws or standards was identified as very important for innovation by 61% of respondents, while 56 % reported that their innovative activity had a positive environmental impact.

Government or public research institutions were rated as very/moderately important sources of information by 41% of respondents. Collaboration with government ministries was acknowledged by 17%, while only 3% indicated any involvement with public research institutions. However, 42% of respondents stated that legislation/legal restrictions/administrative procedures were very/moderately significant obstacles to innovative activity.

Respondents indicated that government could encourage innovation in establishments by, among other concerns: help with marketing; provision of financial support; improve the general condition of Trinidad and Tobago; improve the technology infrastructure; provide advice and programmes on research and development, and reduce taxes.