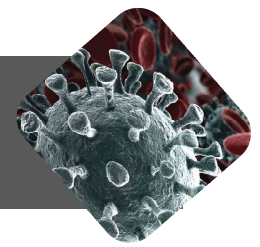




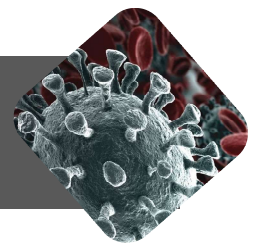
FINAL REPORT COVID-19 Business Outlook Study 2020

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April 22, 2020

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THE LOCAL BUSINESS CONTEXT

Navigating the COVID-19 pandemic has presented challenges to businesses around the globe. After the recording of our first case of COVID-19 on March 12, 2020, the Government began taking steps to mitigate the spread. The period March 16 to March 18, saw businesses, within the private and public sectors, taking their first hit with the closure of schools, bars and dine-in services.

There were announcements of a Pandemic Leave (March 15) as well as a Salary Relief Grant (March 23). The national borders were closed on March 23.

Practicing of social distancing and staying at home as a means of flattening the curve continue to be the resonating messages of the Government.

On March 30, further stringent 'stay at home' measures were put in place with the closure of non-essential businesses initially until April 15 and eventually extended to April 30.

Businesses deemed 'essential' were required to adjust their staff and work arrangements to have only their 'core' employees report for work. The decision was also taken for transportation services to operate at 50% capacity.

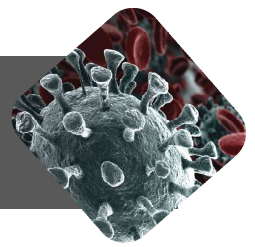
On April 7, all food services were closed while the operating hours of supermarkets and pharmacies were shortened.

RESEARCH OBJECTIVES

This study is the first of two planned studies by MFO to gauge the national perceptions and sentiments about the impact of the disease. This report covers the first study which deals with the business community. The second report will detail the sentiments of the general public.

The main objectives of the business study are to determine:

- The perceptions of the economic and health concerns of the COVID-19.
- The level of confidence in the Government to treat with COVID-19 and to mitigate its spread.
- The concerns of and the challenges and measures taken by the business community in response to the possible impact of COVID-19.



COVID-19 AT A GLANCE

NUMBER OF CASES



CASES OF COVID-19: WORLDWIDE

Approximately 2,555,760 cases as of April 21st, 2020.



CASES OF COVID-19: CARICOM

Approximately 740 cases as of April 21st, 2020.



CASES OF COVID-19: TRINIDAD & TOBAGO

Approximately 115 as of April 21st, 2020.

RELATED GOVERNMENT MEASURES



CLOSURE OF SCHOOLS, BARS AND DINE-IN SERVICES

Schools closed from March 16th. Bars and dine-in services closed from March 18th. Closure of all food services took place from April 7th.



CLOSURE OF BORDER

Took effect from March 23rd.



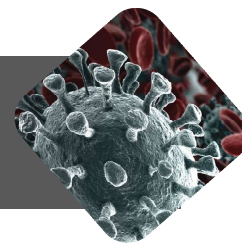
PANDEMIC LEAVE AND COVID-19 SOCIAL ASSISTANCE GRANTS (Rent, Food Card and Public Assistance)

Proposed on March 15th and 23rd respectively.



CLOSURE OF NON- ESSENTIAL SERVICES

Took effect on March 30th.



RESEARCH METHODOLOGY

Market Facts & Opinions (2000) Ltd, in collaboration with the Trinidad and Tobago Chamber of Industry and Commerce, conducted the COVID-19 Business Outlook Study over a two-week period (March 24 to April 8) via an online platform.

MFO provided a unique link to the businesses within its database and a universal link to the Chamber of Commerce for its members. A total of 168 surveys were completed (71 via MFO's unique link and 97 via the universal link).

MFO considers this sample size with its characteristics to be adequate in providing a reliable indicative understanding of business sentiment at the time of the survey. It is expected that this sentiment will be subject to change as events unfold. It is possible that different results may be possible, should a complete census of the business community be done.

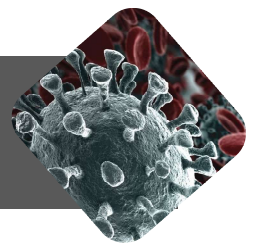
UNDERSTANDING THE SCORES

The **Mean** is the average score calculated based on the five (5) points of each scale and reports the results as a score out of the maximum of 5.

The **Standard Deviation** measures the spread of the data about the mean value. A low standard deviation means that most observations cluster around the mean. A high standard deviation means that there is a lot of variation in the answers. Applied to this study, the higher the standard deviation the more variability was present in the responses from the mean or the more inconsistent the persons' views are from each other.

The **Net Score (NS)** measures respondents' ratings on their satisfaction with the Government's performance. The calculation is based on an examination of the Two Top Box scores against the Two Bottom Box scores. Using this metric allows for an examination of both ends of the scale which enables a better appreciation of the wider perception of businesses' views.

Note: Numbers are subject to rounding therefore calculations may not reflect manual calculations.

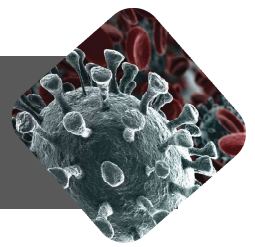


GENERAL COMMENTS

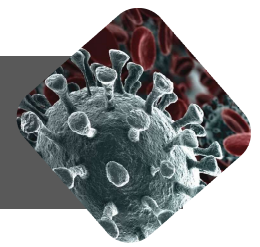
This report gives the full result details for a more in-depth view of business perceptions during the COVID-19 pandemic.

We thank all the participants of this study for their contribution to make this study a success.

KEY FINDINGS



- With the arrival of the novel Coronavirus (SARS-CoV-19) to the borders of Trinidad & Tobago, there have been **3 major business challenges** to be faced: maintaining **Financial Sustainability**, addressing staff's **Fears and Concerns** and adjusting **Business Operations**.
- While our respondents are uncertain about the survival of their businesses or their ability to keep the current employment levels, the **larger concern is the overall impact on the local economy**.
- **Curbing the spread of COVID-19 and keeping employees safe are their top priorities.** Measures put in place by companies include purchasing extra hygiene products, limiting meetings and the cancellation of business-related trips along with the implementation of work-at-home options.
- **Businesspersons have acknowledged the seriousness of COVID-19.** A vast majority are uncomfortable with using public transportation and/or attending a meeting of 10 or 5 people.
- Most respondents are of the view that their **employees are productive. At least a third** of the participating businesses indicated that they **have a committed workforce** and that they **can adopt remote work**. More than half of these businesses which hold this view are within the finance, retail, manufacturing and construction industries or are more likely to be categorized as those who have "Essential Workers".
- There is a **high level of satisfaction with the government's performance** in handling the pandemic as at the time of the fieldwork. 9 in 10 participants say they are either 'very satisfied' or 'satisfied'.
- While satisfaction in the Government's performance is high, there is apprehension about the Government's ability to contain the spread of COVID-19. This is reflective of the strong view that **collective and personal social responsibility (the national effort to stay at home) affects the success of the Government efforts**.



EXECUTIVE SUMMARY

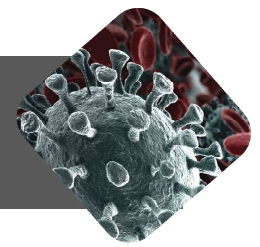
The business landscape is plagued by uncertainty as COVID-19 shapes the new normal. Financial sustainability is a top of mind of concern, as the measures put forward by the Government to contain the spread of the virus have had adverse effects on business operations. Despite this, there is a core understanding within the business community that these are necessary to weather the challenges ahead if the virus is not properly managed. This is reflected in high satisfaction levels (9 in 10) in the Government's response to treating with COVID-19.

The business community started feeling the pinch of the pandemic from its arrival to the borders of Trinidad and Tobago with the closure of schools, bars and dine-in services. Business continuity has meant the restructuring of operations and adopting relevant measures to curb the spread of the virus. By purchasing extra hygiene products, virtually all business have made efforts to enable a safe environment where good hygiene can be practiced.

In adherence with the calls to maintain social distancing many businesses opted to limit the amount of staff required in office as well as creating shorter shift systems. Some businesses even tailored their operations around COVID-19 by providing more online advertising and services. In other cases, businesses waived fees and utilized payment plans as a means of relief in this time of economic strain.

The closure of non-essential businesses was another major hit, which happened during the survey period and saw a spike in concern levels for the local economy. Another spike was observed with the closure of all food services.

Nevertheless, many businesses have reported to successfully manage their productivity by employing remote work as a key solution, while having committed staff who understand their role has also proven to enable greater productivity. However, there remains high anxiety surrounding job security. Managing these fears is another challenge with which businesses have been grappling. This fear extends to social responsibility, which lies in the hands of the people of Trinidad and Tobago. It is felt that the Government is doing their part, but there is need for the support of the people to heed the advice of the Government in order to contain the spread of COVID-19.



IMPLICATIONS

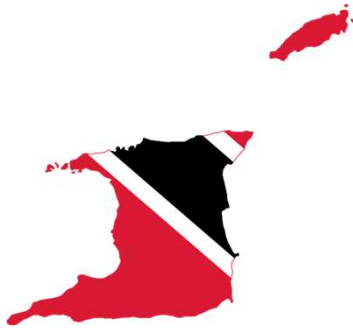
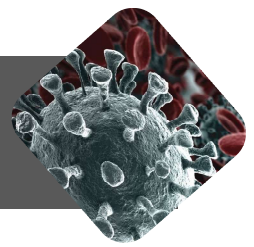
The study reveals that the business community is very aware of the dangers that lurk and believes that this is a matter that is weightier than the fate of their individual businesses. They perceive the major challenge as that of the survival of the overall economy. Their high level of satisfaction with the Government's actions confirms their willingness to accept that their interests represent only one piece in the larger picture. This augurs well for the preparation of life beyond the 'curve'.

While productivity is a more complex and nuanced concept than 'working remotely', it is refreshing to note that the business leaders are generally of the view that their employees are productive. This can remove the potential tensions of adversarial posture in the tough period in the immediate future. Business and labour leaders will need to negotiate the joint future but this report gives an encouraging outlook.

The times ahead, by the account of these business leaders, are filled with uncertainty. They are worried that it is possible that the potential economic consequences may be more damaging than the physical toll exacted. They are concerned whether the general public will be compliant with the protocols introduced to limit the effects of the COVID-19 virus. These leaders are of the view that should there be compliance, the country may be able to go back to work sooner. It is imperative that these business leaders do not, by their actions, separate themselves from the sacrifice needed to go through the pain that lies ahead. Navigating the uncertain shoals requires the conviction that should all the parties work together the pain would be shortened.

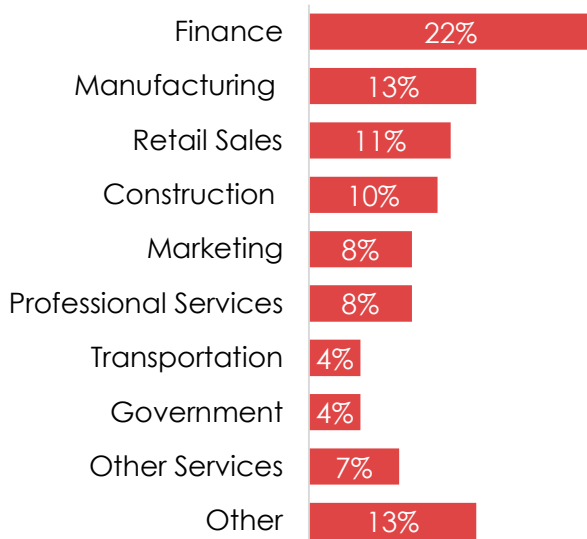
It is living out this conviction that will determine in large measure the attitude and productivity of the workers, on the other side of the 'curve'. It may well be that short-term thinking, in attempting to manage the economic risks, may create long-term negative effects. There is no obvious play book, these business leaders will need to create their own.

DEMOGRAPHICS



BASE: 168

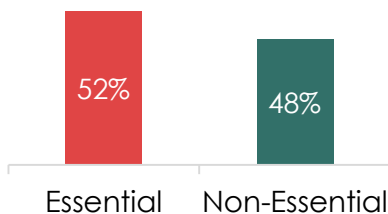
TYPE OF ORGANIZATION



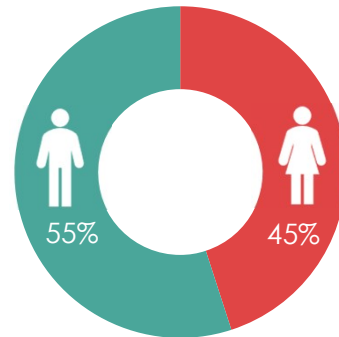
*2 persons did not answer

Other includes: Education/Childcare, Gas/Oil/Energy, Utilities, IT, Protective Services and Culture/Arts/Entertainment.

ESSENTIAL VS. NON-ESSENTIAL

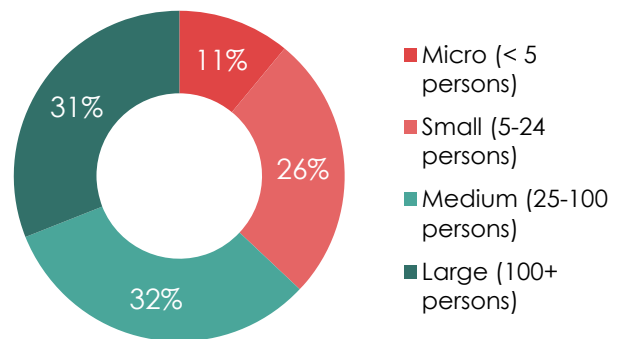


GENDER



*5 persons did not answer

SIZE OF COMPANY



*2 persons did not answer

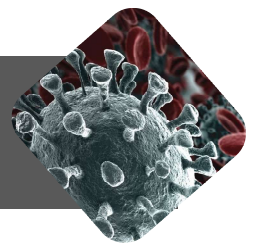
EMPLOYEE GRADE

Employee Grade	%
Executive/Senior Management	70%
Manager	17%
Professional	6%
Supervisor	4%
Admin/Secretarial/Clerical	2%
Technical/Operations	1%

*7 persons did not answer

01

Economic Impact



ECONOMIC IMPACT

Almost **three-quarters** (71%) of all respondents are extremely concerned about the impact of COVID-19 on the local economy.

While a super-majority (**85%**) express concern about the impact on their business and/or their ability to maintain employment levels, it should be noted that a quarter are 'extremely concerned'.

As can be expected, those more likely to express concern about the local economy are also more likely to show concern about the survival of their business/ place of employment.



RESPONDENT COMMENTS

"My real concern is when this is all over and the economy is ravaged and people are not working, how will we maneuver?"

"This is going to have a huge financial impact, especially on the more vulnerable members of society. I see the need for the government having to borrow money to help the economy."

CHART 1.0: LOCAL ECONOMIC CONCERN

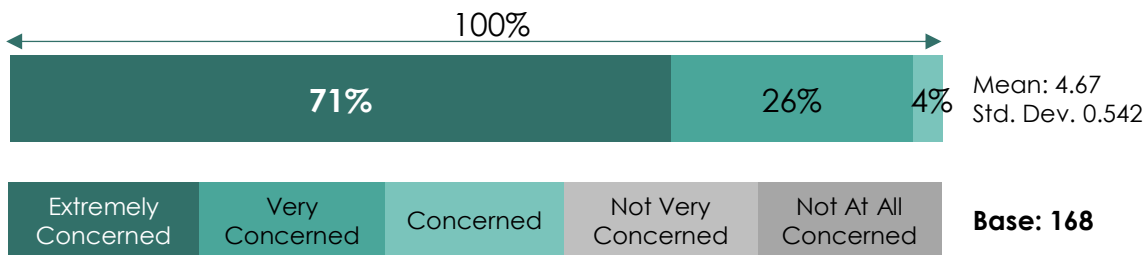
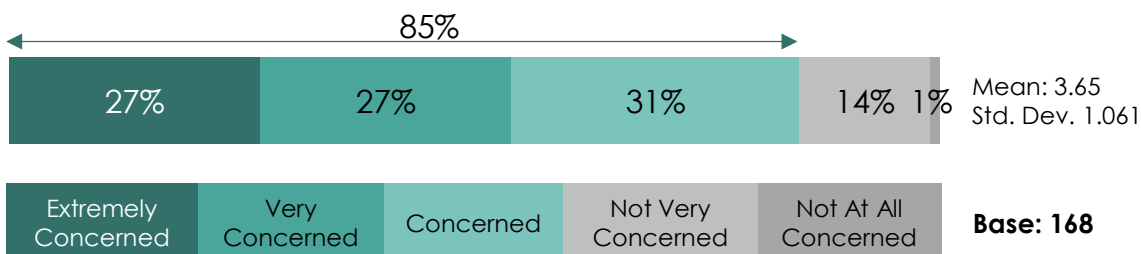
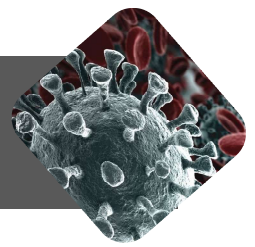


CHART 1.1: BUSINESS/EMPLOYMENT CONCERN



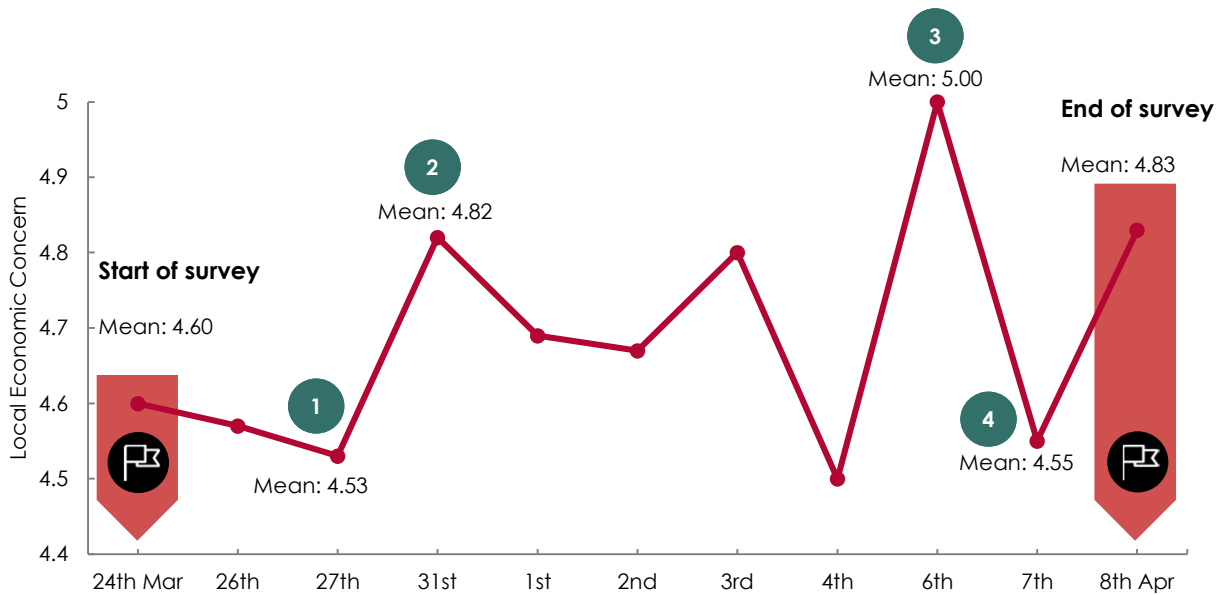
ECONOMIC IMPACT



Key fluctuations in concern levels are noted over the survey period with the announcement and implementation of new policy measures that had direct effects on business operations. Concern levels spiked after it was announced that all 'non-essential' businesses were to be closed and further reductions made to the size of public gatherings.

Concern levels peaked to its highest on April 6 when all food/restaurant operations were ordered to be closed and the operating hours for supermarkets and pharmacies shortened, effective as of April 7. By the end of the survey period concern levels were above the overall mean (4.67).

CHART 1.2: LOCAL ECONOMIC CONCERN DURING SURVEY PERIOD



Base: 168

1 Mar 27

Announcement of the categories of services deemed 'essential'

2 Mar 30

Official closure of all 'Non-Essential Services'

Public gatherings reduced from 10 to 5

**No surveys completed on Mar 30 (public holiday)

3 Apr 6

Announcement of the closure of all food services.

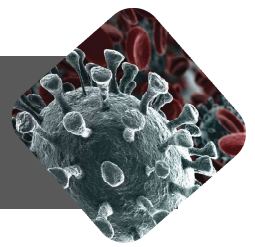
Shortened hours of operation for supermarkets and pharmacies

4 Apr 7

Official closure of all food services

02

Business Challenges and Workplace Measures



1. Financial Sustainability

Six in ten respondents cited lost income or economic slowdown as a major financial challenge. **2 in 10** reported the struggles with business adaptation to ensure continuity are the major financial issue.

RESPONDENT COMMENTS

"Persons need to be more serious about this pandemic and understand that they are not only risking their lives but others as well when they do not practice social distancing or staying at home."

2. Fears and Concerns

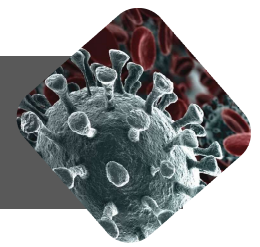
At least **4 in 10** respondents are concerned about personal and collective social responsibility. They are fearful whether the public is adhering to the protocols put in place. **2 in 10** reported the need to manage their staff's fears and uncertainty about their employment. **One in ten** also reported 'Uncertainty of the pandemic's duration and 'Political concerns' as other challenges.



3. Business Operations

At least **2 in 10** persons noted the uncertainty around planning and events, the possible cessation of trading, closure of sites/businesses, organizing/monitoring people for remote work and reduced productivity or uncertainty of staff's productivity.





WORKPLACE MEASURES

Just over **9 in 10** respondents reported 'Purchasing of extra hygiene products' while at least **8 in 10** noted having to 'Minimize/cancel client meetings', 'Postpone or cancel work trips' and 'Implement work-at-home options where possible' as workplace measures taken. **Six in ten** indicated having to 'Minimize/ cancel internal meetings' and/or 'Rostering of the employees'.

Other measures included: 'Shortening of work shifts or hours', 'Changing messaging and advertising of the business', and offering paid sick leave to those who require it.



94%

Purchasing of extra hygiene products



85%

Minimization/cancellation of client meetings



84%

Postpone/cancel work trips



80%

Work-at-home

CHART 2.0: WORKPLACE MEASURES

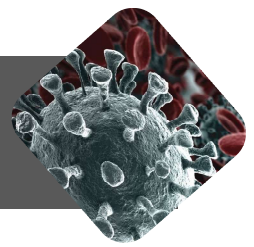
	%
Minimize/cancelled internal meetings	62%
Rostering of employees/having fewer employees in office	62%
Shortening of work shifts/fewer work hours	40%
Changing of messaging and advertising of the business	42%
Offering paid sick leave to staff who require it	36%
Temporary closure of outlets	28%
Alternating meal times to promote social distancing	25%
BASE	168

*Total may exceed 100% due to multiple responses.

03

COVID-19 Perceptions

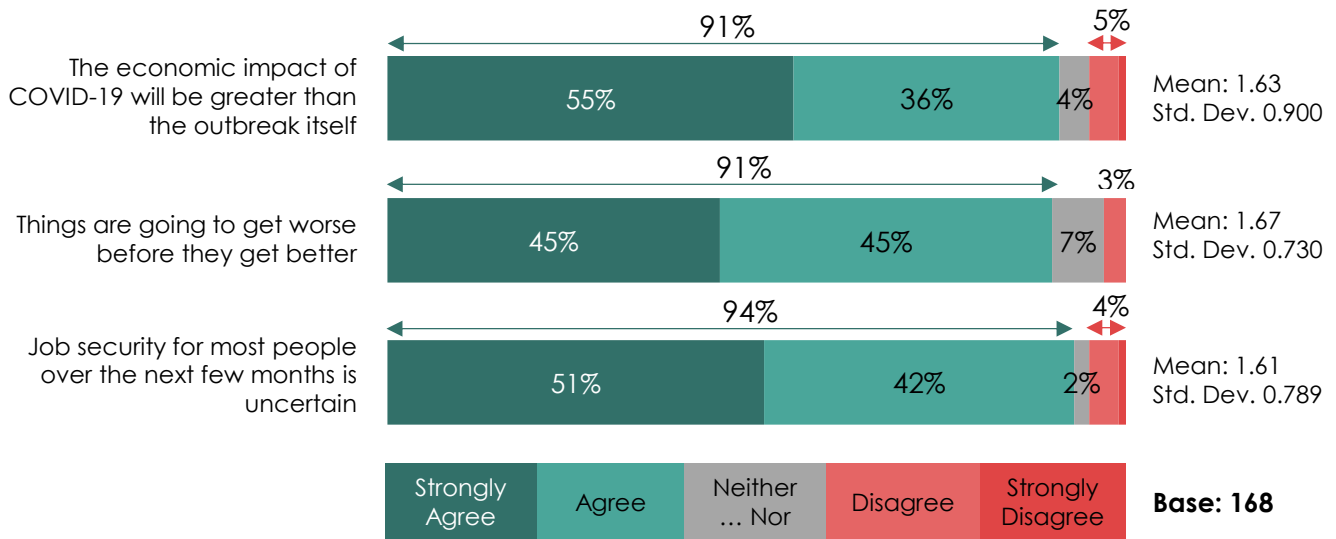
COVID-19 PERCEPTIONS



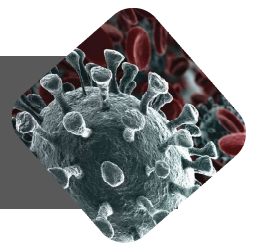
Most respondents (**9 in 10**) believe that the economic impact will be greater than the outbreak itself, that things are going to get worse before they get better and job security is uncertain.

Persons who tend to believe that things will get worse before they get better, are more likely to believe that job security for most people over the next few months is uncertain and that the economic impact of COVID-19 will be greater than the outbreak itself.

CHART 3.0: ECONOMIC CONCERN



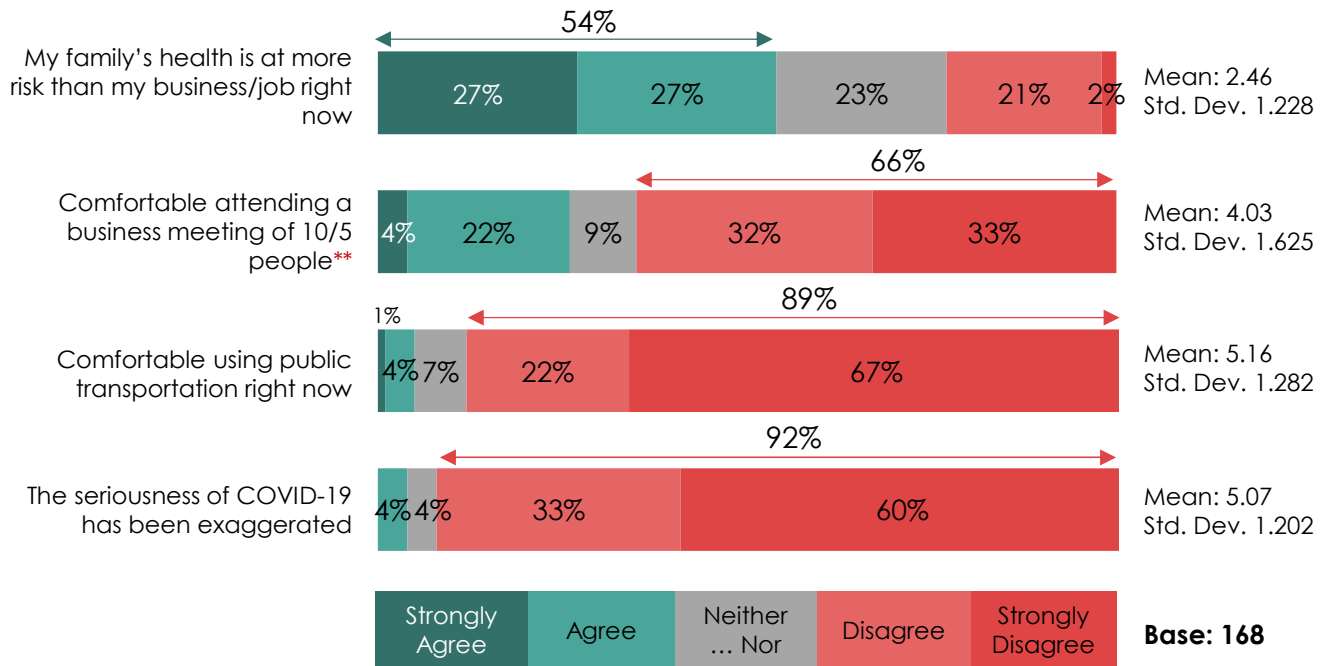
COVID-19 PERCEPTIONS



Only about **a half** of the respondents believe that their family's health is at more risk than their business/job. While **9 in 10** persons noted that they are uncomfortable using public transport and acknowledged the seriousness of the COVID-19 pandemic, just under **7 in 10** are uncomfortable attending a meeting of 10 or 5 people. It should be noted that the change in the size of gatherings from 10 to 5, led to an increase in persons' comfort in meeting in smaller sized groups.

The minority of persons who are more comfortable attending business meetings and using public transportation, are more likely they are to believe that the seriousness of COVID-19 has been exaggerated.

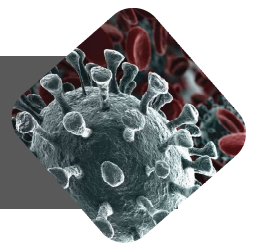
CHART 3.1: HEALTH CONCERN



****NOTE:** At mid-study, this statement was adjusted to reflect the Government's new recommended gathering size of 5 persons.

04

Employee Productivity



EMPLOYEE PRODUCTIVITY

Just about **6 in 10** respondents believe that their company's employees are productive. On the other hand, almost **2 in 10** persons believe this not to be true.

RESPONDENT COMMENTS

"The company has a robust remote working infrastructure which has assisted in allowing staff to remain productive."

"While those who are able to work-from-home are very productive and have been adapting very well and being innovative and engaged, those unable to deliver work from home are less productive."

REASONS FOR POSITIVE RATING



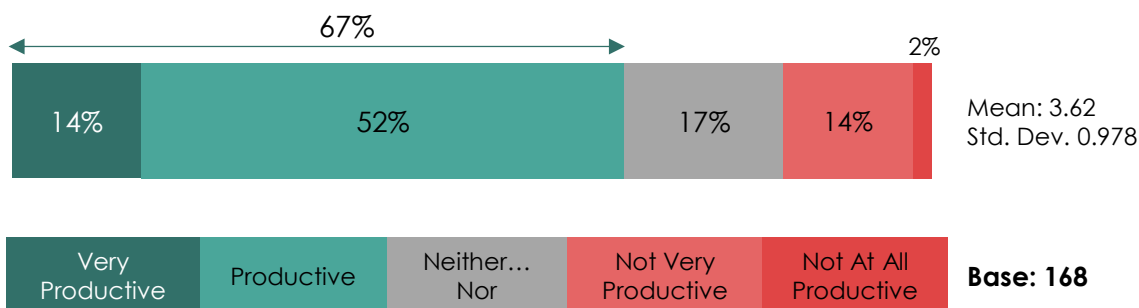
About **4 in 10** of the business community believe that 'Staff understands the importance of their role in the company and remain productive' while **a third** noted that 'Having the ability to work remotely' enables their staff to be productive.

REASONS FOR NEGATIVE RATING



The business respondents that do not believe their employees are productive noted that the main reason for this is due to the lack of business during this time. **Half of these persons** noted that their business was closed at the time of the survey.

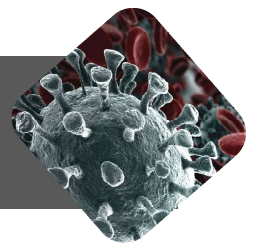
CHART 4.0 EMPLOYEES' PRODUCTIVITY RATINGS



05

Government Performance

GOVERNMENT PERFORMANCE



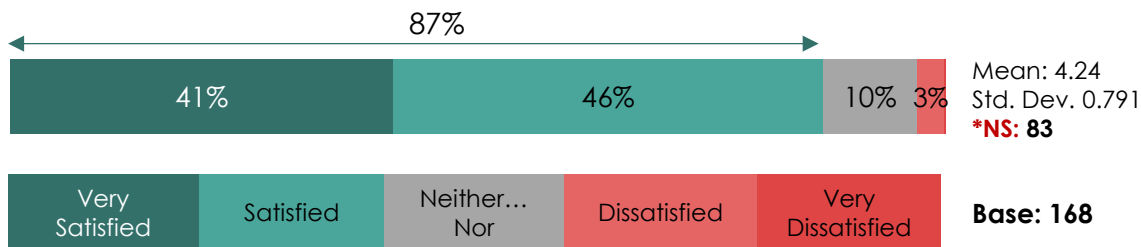
About **9 in 10** persons noted their satisfaction ('Very satisfied' or 'Satisfied') with the Government's response to treating with COVID-19 in T&T. 4 in 10 are very satisfied.

Persons who express satisfaction with the Government's response to COVID-19 are more likely to express confidence in the Government's ability to contain the spread of the virus.

RESPONDENT COMMENTS

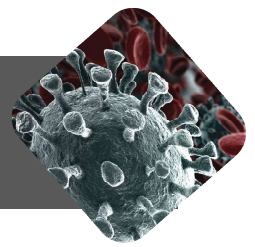
"I commend the Government of T&T for implementing precautionary measures to be ahead of the curve in a decisive, calm and communicative manner to keep citizens of this country safe."

CHART 5.0: GOVERNMENT PERFORMANCE - SATISFACTION



***NOTE:** NS is the Net Score. This is a metric used to examine both ends of the scale (Two Top Box – Two Bottom Box) to give a more complete picture of respondents' views.

GOVERNMENT PERFORMANCE



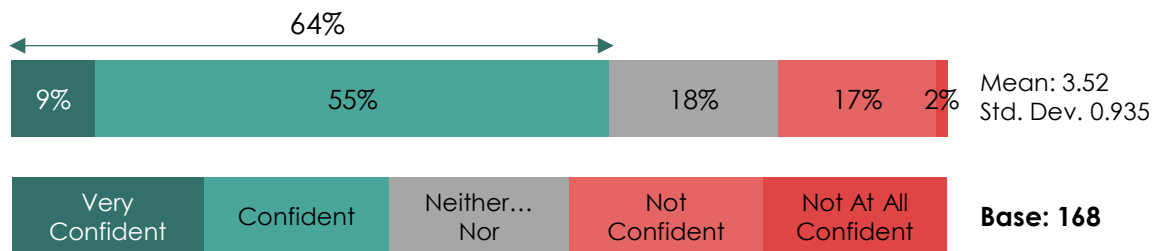
Just about **two thirds** expressed confidence ('Very confident' or 'Confident') in the Government's ability to keep the spread of COVID-19 under control. It appears to be limited confidence that the population will be responsible.

This is further echoed whereby persons who have a more pessimistic outlook of the economic impact of COVID-19 are yet more likely to express confidence in the Government's ability to contain the spread of COVID-19.

RESPONDENT COMMENTS

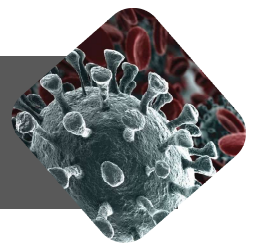
"The Government is doing all that it can. It is up to the citizens to listen and heed the call for social distancing and as businesses to start planning post COVID-19."

CHART 5.1: GOVERNMENT PERFORMANCE - CONFIDENCE



06

General Comments



OPEN-ENDED RESPONSES

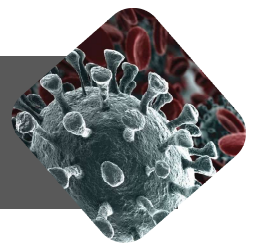
The final question of the survey invited participants to provide general comments on COVID-19.

The free-text comments are useful for allowing persons the opportunity to give a more in-depth response on their own thoughts and feelings as they relate to the current situation.

A coding framework was developed to carry out a thematic analysis of the open-ended responses. These were analyzed and coded into four (4) categories:

1. Social Responsibility
2. Optimism
3. Future Concerns- Economic
4. Recommendations- Government measures

The bases for these categories are relatively small and therefore the results are indicative.



GENERAL COMMENTS

SOCIAL RESPONSIBILITY

(Base: 50)

Thirty-six persons noted that the public has a social responsibility of adhering to the stay at home and social distancing protocols.



OPTIMISM

(Base: 19*)

Thirteen persons reported that the Government is doing a good job.



FUTURE CONCERNS – ECONOMIC

(Base: 14*)

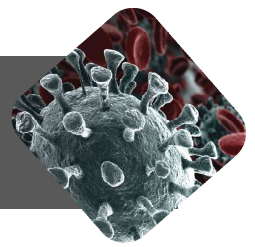
Four persons noted that this is the worse economic challenge being faced and there is much uncertainty on how we can recover from this crisis.

On the other hand, **three** respondents stated that it is too early to gauge the effects and outcome of this crisis.



*Analysis should be viewed with caution where bases are small
**Counts used due to small bases

RECOMMENDED GOVERNMENT MEASURES



RECOMMENDATIONS

(Base: 18*)



Four respondents reported that the Government should provide grants/loans to business owners, while **three** persons noted that a State of Emergency and more testing/screening should be carried out.

RESPONDENT COMMENT



“Although the Government is taking initiatives to flatten the curve, I think every country should implement mandatory testing, where results can be accessed in minutes and quarantine those who are positive.”



Two persons each, believe that the Government should have closed all borders sooner, that more measures should be implemented to limit non-essential persons in public spaces and that the Government should relinquish tax on items and services.

*Analysis should be viewed with caution where bases are small

**Counts used due to small bases

07

Appendices

APPENDIX I

'Demographics by Concern for Local Economy'

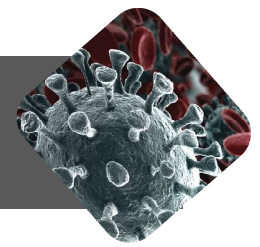


Table 1.0: Gender by Concern for Local Economy

	Base	Overall	Extremely Concerned	Very Concerned	Concerned
Male	74	45%	72%	23%	5%
Female	89	55%	70%	28%	2%

Table 1.1: Company Size by Concern for Local Economy

	Base	Overall	Extremely Concerned	Very Concerned	Concerned
Micro	18*	11%	67%	22%	11%
Small	43	26%	58%	40%	2%
Medium	53	32%	79%	21%	-
Large	52	31%	75%	19%	6%

Table 1.2: Organization Type by Concern for Local Economy

	Base	Overall	Extremely Concerned	Very Concerned	Concerned
Finance	37	22%	76%	22%	3%
Manufacturing	22*	13%	64%	27%	9%
Retail Sales	19*	11%	74%	21%	5%
Construction	16*	10%	88%	13%	-
Marketing	13*	8%	62%	31%	8%
Professional	13*	8%	69%	31%	-
Transportation	7*	4%	57%	43%	-
Government	6*	4%	67%	33%	-
Other Services	12*	7%	100%	-	-
Other	21*	13%	54%	42%	4%

**Analysis should be viewed with caution where bases are small*

APPENDIX I

'Demographics by Concern for Survival of Business/Employment'

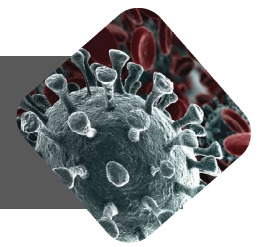


Table 1.3: Gender by Concern for Survival of Business/Employment

	Base	Overall	Extremely Concerned	Very Concerned	Concerned	Not Very Concerned	Not At All Concerned
Male	74	45%	26%	22%	32%	19%	1%
Female	89	55%	28%	33%	29%	9%	1%

Table 1.4: Company Size by Concern for Survival of Business/Employment

	Base	Overall	Extremely Concerned	Very Concerned	Concerned	Not Very Concerned	Not At All Concerned
Micro	18*	11%	44%	22%	28%	6%	-
Small	43	26%	28%	30%	26%	16%	-
Medium	53	32%	26%	32%	32%	8%	2%
Large	52	31%	23%	21%	35%	19%	2%

Table 1.5: Organization Type by Concern for Survival of Business/Employment

	Base	Overall	Extremely Concerned	Very Concerned	Concerned	Not Very Concerned	Not At All Concerned
Finance	37	22%	8%	22%	43%	24%	3%
Manufacturing	22*	13%	36%	18%	32%	9%	5%
Retail Sales	19*	11%	32%	32%	21%	16%	-
Construction	16*	10%	50%	31%	13%	6%	-
Marketing	13*	8%	23%	31%	39%	8%	-
Professional	13*	8%	15%	31%	46%	8%	-
Transportation	7*	4%	29%	29%	43%	-	-
Government	6*	4%	33%	17%	-	50%	-
Other Services	12*	7%	42%	33%	17%	8%	-
Other	21*	13%	23%	27%	43%	7%	-

*Analysis should be viewed with caution where bases are small

APPENDIX I

'Demographics by Employee Productivity'

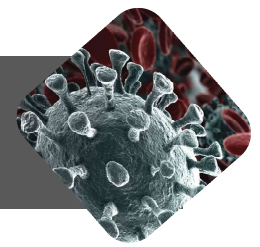


Table 2.0: Gender by Employee Productivity

	Base	Overall	Very Productive	Productive	Neither... Nor	Not Very Productive	Not At All Productive
Male	74	45%	16%	46%	19%	16%	3%
Female	89	55%	12%	57%	15%	14%	2%

Table 2.1: Company Size by Employee Productivity

	Base	Overall	Very Productive	Productive	Neither... Nor	Not Very Productive	Not At All Productive
Micro	18*	11%	17%	39%	22%	22%	-
Small	43	26%	23%	47%	12%	14%	5%
Medium	53	32%	11%	43%	23%	19%	4%
Large	52	31%	10%	69%	14%	8%	-

Table 2.2: Organization Type by Employee Productivity

	Base	Overall	Very Productive	Productive	Neither... Nor	Not Very Productive	Not At All Productive
Finance	37	22%	11%	62%	14%	14%	-
Manufacturing	22*	13%	27%	59%	9%	5%	-
Retail Sales	19*	11%	16%	58%	16%	11%	-
Construction	16*	10%	13%	31%	25%	25%	6%
Marketing	13*	8%	15%	62%	8%	15%	-
Professional	13*	8%	15%	39%	31%	8%	8%
Transportation	7*	4%	-	43%	14%	43%	-
Government	6*	4%	-	67%	17%	-	17%
Other Services	12*	7%	25%	33%	17%	17%	8%
Other	21*	13%	7%	67%	12%	15%	-

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APPENDIX I

'Demographics by Government Performance-Satisfaction'

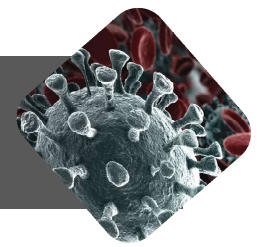


Table 3.0: Gender by Government Performance-Satisfaction

	Base	Overall	Very Satisfied	Satisfied	Neither... Nor	Dissatisfied	Very Dissatisfied
Male	74	45%	39%	45%	10%	5%	1%
Female	89	55%	43%	47%	9%	1%	-

Table 3.1: Company Size by Government Performance-Satisfaction

	Base	Overall	Very Satisfied	Satisfied	Neither... Nor	Dissatisfied	Very Dissatisfied
Micro	18*	11%	61%	22%	11%	6%	-
Small	43	26%	44%	44%	9%	2%	-
Medium	53	32%	34%	47%	13%	4%	2%
Large	52	31%	39%	54%	6%	2%	-

Table 3.2: Organization Type by Government Performance-Satisfaction

	Base	Overall	Very Satisfied	Satisfied	Neither... Nor	Dissatisfied	Very Dissatisfied
Finance	37	22%	35%	57%	5%	3%	-
Manufacturing	22*	13%	36%	46%	18%	-	-
Retail Sales	19*	11%	32%	47%	11%	5%	5%
Construction	16*	10%	63%	31%	-	6%	-
Marketing	13*	8%	54%	31%	15%	-	-
Professional	13*	8%	31%	62%	-	8%	-
Transportation	7*	4%	43%	57%	-	-	-
Government	6*	4%	50%	33%	-	17%	-
Other Services	12*	7%	42%	42%	17%	-	-
Other	21*	13%	49%	35%	16%	-	-

**Analysis should be viewed with caution where bases are small*

APPENDIX I

'Demographics by Government Performance-Confidence'

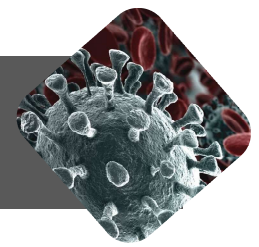


Table 3.3: Gender by Government Performance- Confidence

	Base	Overall	Very Confident	Confident	Neither... Nor	Not Confident	Not At All Confident
Male	74	45%	7%	51%	22%	16%	4%
Female	89	55%	11%	56%	16%	17%	-

Table 3.4: Company Size by Government Performance- Confidence

	Base	Overall	Very Confident	Confident	Neither... Nor	Not Confident	Not At All Confident
Micro	18*	11%	17%	67%	6%	6%	6%
Small	43	26%	9%	56%	21%	12%	2%
Medium	53	32%	6%	53%	21%	19%	2%
Large	52	31%	10%	50%	17%	23%	-

Table 3.5: Organization Type by Government Performance- Confidence

	Base	Overall	Very Confident	Confident	Neither... Nor	Not Confident	Not At All Confident
Finance	37	22%	8%	57%	16%	19%	-
Manufacturing	22*	13%	5%	59%	14%	23%	-
Retail Sales	19*	11%	5%	42%	26%	16%	11%
Construction	16*	10%	13%	63%	13%	13%	-
Marketing	13*	8%	8%	54%	31%	8%	-
Professional	13*	8%	8%	62%	15%	8%	8%
Transportation	7*	4%	29%	43%	14%	14%	-
Government	6*	4%	17%	33%	17%	33%	-
Other Services	12*	7%	8%	50%	25%	17%	-
Other	21*	13%	20%	52%	17%	12%	-

**Analysis should be viewed with caution where bases are small*

APPENDIX II

'Workplace Challenges'

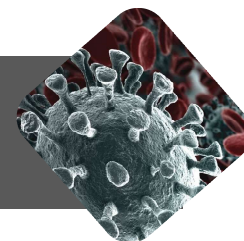


Table 4.0: Biggest challenge since the announcement of COVID-19

	Fears and Concerns	Overall
	Public social responsibility/adhering to health protocols	43%
	Managing staffs fear and uncertainty	21%
	Uncertainty of the pandemic's duration	13%
	Political concerns	11%
	Insufficient essential supplies (e.g. hand sanitizers)	8%
	Food security	4%
	BASE:	52
Business Operations		
	Uncertainty around planning and events	21%
	Possible cessation of trading/cancellation of projects	18%
	Closure of sites/location/business	18%
	Organizing/monitoring people or systems for remote work	18%
	Reduced productivity/uncertainty of productivity	15%
	Maintaining communication with clients	7%
	Changing of physical documents to an online process	2%
	BASE	69

*Analysis should be viewed with caution where bases are small

APPENDIX III

'Workplace Measures'

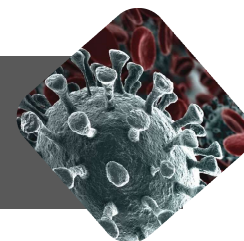


Table 5.0: Workplace Measures

	Overall
Purchase extra hygiene products	94%
Minimize/cancelled meetings with clients	85%
Postponed/cancelled work trips	84%
Offering work-from-home options where possible	80%
Minimize/cancelled internal meetings	62%
Rostering of employees/having fewer employees in office	62%
Shortening of work shifts/fewer work hours	40%
Changing of messaging and advertising of the business	42%
Offering paid sick leave to staff who are ill/caring for the ill and have opted to self-isolate	36%
Temporary closure of outlets	28%
Alternating mealtimes to promote social distancing	25%
Closing on-site facilities	23%
Updated terms, waived fees and or offered discounts to customers	21%
Extended timelines or payment terms to vendors	19%
Sent home employees on 'no-pay' leave	14%
Stockpiling	8%
No contingency measures taken	4%
Other	17%
BASE	168

Other includes: Early pay, Provide transport for essential workers who are required to be at work, Leave provided for persons with children, Provided proper PPE and training to all staff

*Total may exceed 100% due to multiple responses.

APPENDIX IV

'Reasons for Productivity Ratings'

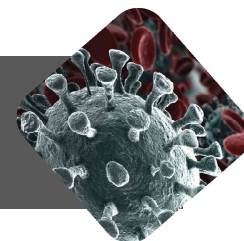


Table 6.0: Reasons for productivity rating

	Positive	Overall
Staff understands the importance of their role and remain productive		37%
Can work remotely		35%
Persons are adjusting and adapting to the changes		11%
Increased business		3%
Fear of loss of job has increased productivity and willingness to work		3%
Have implemented a shift system		2%
Spend less time commuting to work		2%
Staff has been working overtime, so they are productive		2%
Persons are more proactive		2%
Have been investing more time in other aspects of the business		2%
Creating new ways to bring in revenue		1%
	BASE:	101
	Negative	
Lack of business/business is slow		36%
Business is closed		16%
Having to manage the mental impact of the virus		8%
Working at home and having to manage the kids at the same time		7%
Less work hours		5%
Lack of access to certain materials e.g. company printer, phone		5%
Decrease in business/workload		5%
Bombarded/distracted with news and social media		5%
Many are unable to work at home		4%
Only the bare minimal/essential functions are being carried out		3%
Other		4%
	BASE	64
	Neutral	
Unsure of productivity levels		5
Do not have full time employees/hired per job		1
	BASE:	6*

Other includes: Inability to travel to jobs and the risk in travelling, Lack of protective measures put in place for staff, Lack of important interactions, Company is not being proactive against the disease.

*Analysis should be viewed with caution where bases are small

**Counts used due to small bases

APPENDIX V

'General Comments'

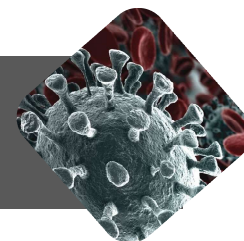


Table 7.0: General Comments

	Social Responsibility	Overall
Public has a social responsibility adhering to stay at home and social distancing protocols/citizens need to do their part		36
People should be unified and offer assistance to each other		7
The general public is not taking the situation as serious/Not disciplined enough		6
Disciplinary measures should be enforced on those who do not comply		1
	BASE	50
	Optimism	
Government is doing a good job		13
Positive change in the way we work that can be adopted post COVID-19		6
	BASE	19*
	Future Concerns- Economic	
Worst economic crisis/biggest challenge		4
COVID will keep coming back/how will we recover		4
Too early to gauge the effect/outcome of the crisis		3
Possibility for social unrest, riots and looting		2
Increased Government debt/may have to borrow money to keep economy on track		1
	BASE	14*
	Communication	
There needs to be more communication between the Government and the public		3
Seek information from reliable and credible sources/avoid sharing of fake news		3
Communication needs to be simplified		1
	BASE	7*

*Analysis should be viewed with caution where bases are small

**Counts used due to small bases

APPENDIX V

'General Comments'

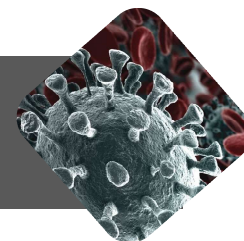


Table 7.1: General Comments

	Future Concerns- Health	Overall
Health care system not equipped to handle massive outbreak		2
A vaccine must be developed quickly		1
	BASE	3*
	Other	
Virus was caused by China/Trinidad should have no affiliation with them		2
Radiation from 5G towers are causing the virus to spread faster		1
Need for risk management/the country is still vulnerable to natural disasters		1
	BASE	4*

*Analysis should be viewed with caution where bases are small

**Counts used due to small bases

Table 7.2: Recommended Government Measures

	Overall
Government should provide grants or loans for business owners	4
Government should call a State of Emergency/full shut down of the country	3
There is insufficient testing and screening being done	3
Borders should have been closed sooner	2
Measures should be put in place to limit non-essential persons in the public	2
Government should relinquish tax on items and services	2
Spread is not controlled and could have been dealt with sooner	1
Better control measures should have been put in place during Carnival time e.g. pre-Carnival warnings or cancellation	1
	BASE
	18*

*Analysis should be viewed with caution where bases are small

**Counts used due to small bases