Business Community Impacts of Covid-19 in the Turks and Caicos Islands

Technical Report

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Project Summary:

This report has been produced as part of the Resilient Community Recovery from COVID-19 in the Turks and Caicos Islands project, delivered in partnership between the Joint Nature Conservation Committee (JNCC), the Turks and Caicos Islands Government Department of Environment and Coastal Resources (DECR), the Turks and Caicos Islands Fishing Cooperative, the Turks and Caicos National Trust, and Invest Turks and Caicos.

By asking how communities and businesses have been impacted by COVID-19, this project provides insights into how the Turks and Caicos Islands can build resilience to future shocks by identifying new economic activities and opportunities for skills development that support the natural environment and deliver widespread benefits to communities across the islands.

Report details:

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Evidence Quality Assurance:

This document is compliant with JNCC's Evidence Quality Assurance Policy
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Executive Summary

The Resembid-supported project: *Defining a Post-COVID-19 Resilient Recovery in the Turks and Caicos Islands (TCI): Sustainable Investment in the Future of the Island's People and Environment* was designed to assess how TCI can enhance economic, social and environmental resilience against future disruptions as it recovers from the global COVID-19 pandemic. The project aims to identify new job opportunities in the islands' blue and green economies, identify opportunities for diversifying existing sectors, and reveal opportunities to invest in the skills development of the island's people.

This report includes the results of a COVID-19 Business Attitudes survey. The survey was developed to understand how the COVID-19 pandemic has affected businesses in TCI and to identify opportunities for sustainable economic growth which benefits nature and people.

The COVID-19 Business Attitudes survey was conducted virtually in 2023 by the Joint Nature Conservation Committee (JNCC) with support from on-island data collectors. Twenty-four businesses operating in TCI responded, with the majority from the hospitality and tourism sector. Whilst a small sample size, results are only considered illustrative of the views and perspective of individual sectors and are not necessarily representative of the TCI private sector in its entirety.

Impact of COVID-19 on business operations

The majority of businesses reported suffering loss of earnings arising from business closure in the short term. The long-term implications of the global pandemic were however more varied. Whilst some businesses continued to report negative impacts, many businesses did report a recovery in revenue to pre-pandemic levels. The results also provide some evidence of the variation in impacts between and within sectors, which is an expected finding given the differences in the type of business activity in key sectors (e.g., fisheries, tourism) across the Turks and Caicos Islands.

The increase in tourist numbers post-COVID-19, in comparison with pre-COVID-19, was cited as a key reason for positive long-term business impacts. This influx directly improved business fortunes in the tourism sector, which suffered significant closures due to travel and other restrictions in the short term. Other sectors indicated positive spillover effects on their businesses. However, an increase in tourism post-restrictions was also cited as impacting the condition of the natural environment in TCI, both in this survey and the JNCC Socio-economic and Environmental Impacts survey (Robinson and Irving, 2023).

In aggregate, these findings emphasise the deep linkages between business activity and community wellbeing, as well as evidence of the trade-offs for people and nature created by the tourism sector, and exacerbated by the global pandemic, on TCI. These findings highlight the need to develop business and community resilience to adapt to future similar events, which upcoming work in the programme aims to address (e.g., the natural capital investment plan (Finance Earth and eftec, 2024).

Dependencies and impacts on nature and ecosystem services

Many businesses reported both their dependencies and impacts on both the terrestrial and the marine environments. These businesses reported a good understanding of how their businesses are supported by specific aspects of nature, and the linkages between terrestrial and marine habitats, in particular how human pressures upstream/on-land (e.g., water, air or noise pollution) have negative impacts on the marine environment and business activities.

The majority of responses to private sector impact on the environment was 'neither negative nor positive' across all possible options (excluding 'other'). Businesses appeared able, or willing, to describe the dependencies of their activity upon the natural environment better than the impacts. This may be because impacts are difficult to identify, arise slowly, are difficult to attribute to specific activities, or because businesses don't perceive their actions as damaging to nature if they are compliant with local legislation. Better understanding of the impacts of TCI business on nature will be developed through further engagement for the natural capital investment plan.

Private sector support of investment in the natural environment

Suggestions for private sector action included educating tourists, islanders and other businesses on environmentally friendly practices, and participating in public sector programmes for cleanup, research, and conservation activities. Businesses also highlighted enforcement of existing environmental regulations and management standards (e.g., littering, waste collection regulations, reef inspections), as well as resourcing constraints (both use of existing funds, and capacity to raise more funds) to support improving capacity. Respondents therefore suggested that more resources channelled to undertaking enforcement, as well as the creation of additional standards to support environmental improvements, would best support private sector action and environmental change.

Respondents suggested that the ability to educate and communicate business and community impacts on nature is the primary skill needed to better support investment in, or maintenance and improvement of, the natural environment in TCI. Environmental management actions are likely to be mutually reinforcing, for example education and outreach initiatives would hope to promote greater up-take or investment in clean-up and sustainability initiatives.

Whilst a perceived lack of education is regularly mentioned, further research is necessary to determine to the relative importance of other economic issues which deter wider environmental action by those businesses which report dependencies on the benefits from nature. These may include a lack of finance, high costs of actions, insufficient enforcement to deter illegal or unsustainable practices. This will be explored further during the development of the natural capital investment plan (Finance Earth and eftec, 2024b).

Next steps

This draft report compliments the Socio-economic and Environmental Impacts Survey report prepared by JNCC (Robinson and Irving, 2023). In particular, the study supports their findings that the impacts of COVID-19 across business types were uneven across the islands and business sectors. Further work, and a larger survey sample would be needed to understand the extent to which views expressed relate to the size and location of the businesses, as well as their primary activity.

The results will inform the development of a Turks and Caicos Natural Capital Investment Plan (Finance Earth and eftec, 2024a), principally through informing the interview and engagement stage of the programme (Finance Earth and eftec, 2024b). The learnings will also be used to tailor training activities to support business perspectives and with the aim of promoting sustainable livelihoods and a resilient economy.

Contents

1. Introduction

This report form part of the RESEMBID-supported project: *Defining a Post-COVID-19 Resilient Recovery in the Turks and Caicos Islands (TCI): Sustainable Investment in the Future of the Island's People and Environment*. The overarching goal of the project is to better ensure 'TCI has the long-term skills and investment streams to support a post-COVID-19 recovery that is economically, socially, and environmentally resilient'. This report fits into the first project output, which are as follows:

- Output 1: A technical report and executive summary detailing the key findings of a socioeconomic monitoring survey, environmental impacts survey and business attitudes survey is presented to TCI Government.
- Output 2: The Turks and Caicos Islands Natural Capital Investment Plan is published and launched.
- Output 3: A Community Hub is established, run by a full-time Coordinator, that delivers two phases of training and professional development programmes.
- Output 4: Revenue sources for reinstating the Conservation Fund are identified and a business case is submitted to TCI Government on its use and reinstatement.

This report presents and analyses the results of a COVID-19 Business Attitudes survey conducted in 2023 by JNCC. It describes the views and perspectives of businesses in TCI about COVID-19 impacts on business activity and the environment, and reviews respondents' perception of business dependence on the environment. It also presents respondents' suggestions for ways to mitigate the negative impacts and promote the positive impacts from both COVID-19 and business activity on the environment.

The COVID-19 Business Attitudes survey was conducted concurrently with a Socio-economic and Environmental Impacts survey. This draft report compliments JNCC's (Robinson and Irving, 2023) report of the latter survey results. The results from both surveys have informed a Natural Capital Investment Plan survey (eftec, 2024), which was designed to directly feed into Output 2: The Turks and Caicos Islands Natural Capital Investment Plan (NCIP) (Finance Earth and eftec, 2024). The NCIP will scope new natural capital income opportunities and capabilities to mobilise additional investment to protect and restore ecosystems and benefit local communities in TCI.

This report is structured as follows:

- **Section 2** presents the method used to conduct the Business Attitudes survey and subsequent analysis.
- **Section 3** presents the results of the Business Attitudes survey.
- **Section 4** presents the analysis findings in context of other natural capital evidence in TCI and provides recommendations and next steps.

2. Methods

2.1. Sampling strategy and survey distribution

The survey was released in the TCI at the project launch press conference on 23 January 2023 which invited stakeholders and the press to find out more about the project. The survey questionnaire was distributed and promoted digitally through the projects' webpage (www.jncc.gov.uk/community-resilience-tc), QR codes, local radio, press and media, and project partners' social media platforms, including the Community Resilience Hub Facebook page and Instagram account. WhatsApp was used as a key platform to support distribution.

In order to boost representation, and mitigate biases associated with online survey distribution (those with access to the internet, social media etc), a distribution plan for on-island data collectors was developed. Data collectors were instructed to distribute the survey to as many business owners/representatives as possible.

2.1.1 The survey questionnaire

The COVID-19 Business Attitudes survey was deployed on the online platform Smart Survey between January and April 2023, to explore the impacts of COVID-19 on business activities and explore business dependence on the natural environment.

The survey questionnaire (Appendix 1) was developed by JNCC, in collaboration with the Project Steering Group, and peer-reviewed by members of the James Hutton Institute, Social, Economic and Geographical Sciences department, by external contract. It was then piloted with members of the JNCC International Implementation Team and TCI-based Project Steering Group members. The questionnaire was professionally translated into Dominican, Spanish and Creole and sent to TCI-based Project Steering Group members to check for any issues with the phrasing or language used in the translated versions. The questionnaire was then posted online in all three languages (including English).

The survey questionnaire was split into three sections: impacts of COVID-19 on business; natural environment; and demographics. The first section explored the impacts of COVID-19 on business activity, including impacts on income, supply chain, and staff. The second section explored business dependence on the natural environment, including provisioning, regulating, and cultural ecosystem services, and the impact of business activity on the natural environment. The third section collected demographic data, including the business sector, respondent's professional role, location, years of operation, employee numbers, and annual turnover.

Respondent names were not recorded, and respondents could leave the survey at any point. A tick box was included at the beginning of the survey for respondents to provide their consent to taking part in the survey. Respondents were asked if they would be interested in being contacted for further discussion on the topics covered in the survey. They could voluntarily provide the name of their business, their name, and contact information. The survey was reviewed, and the privacy notice was approved, by the JNCC Data Protection Manager.

As the survey was shared with external consultants eftec and Finance earth, information that could be used to identify respondents was redacted. Therefore, some demographic information is not covered in this report. Additionally, any identifying information has been redacted from qualitative data/quotes

2.1.2 Analysis

Data were downloaded into an Excel spreadsheet for cleaning and coding. Text entered into the 'other box' was coded with pre-existing or new categories where possible, and, where relevant, is noted throughout the results section. Simple descriptive data analysis was conducted in Microsoft Excel.

The total number of respondents was 24 and therefore may not be statistically representative of TCI's private sector. The results of this survey, although small, may be illustrative of industry views in TCI, but should be considered as qualitative evidence only. Insights will support the upcoming NCIP.

3. Results

This section presents the main findings from the COVID-19 Business Attitudes survey. The results are presented in the following order:

- **Section 3.1:** Business Profile
- **Section 3.2:** Impacts of COVID-19 on business
- **Section 3.3:** Natural Environment

3.1. Business profile

Respondent business sector and role

The most reported business sector represented in the survey was 'hotels/ tourism/ catering' (n=12, 50% of respondents). The second most reported business sectors were 'retail' and 'fisheries' (n=3, 13%). Sectors that were not represented in this survey are outlined in Appendix I.

Some professional role options were combined for ease of analysis. Respondents that reported 'Real estate, land requisitions' or 'construction' were categorised as 'real estate/development'. One respondent who chose 'food; drink; tobacco' was categorised as 'retail'.

Three respondents who reported 'other' for their sector were categorised as 'hotels/ tourism/ catering' based on additional information provided. The remaining two respondents who reported 'other' were kept classified as 'other' because neither clearly fit into a provided sector option.

Two respondents, both in the tourism sector, provided qualitative information on their role:

"Sales & Marketing Executive".[1]

"I own a small business which has about 6 employees, myself being one of the main ones. I work as an event planner/destination management company so as well as doing the owner/administration duties I also work hands on along side my team."

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[1] Quotations are taken as written in the survey. Some corrective edits may be made to ensure clarity, and all effort has been made to retain original meaning.

Sector representation is not statistically significant but does reflect the importance of tourism to the TCI economy. Therefore, **results should be considered as indicative only of realities for both individual sectors and the private sector in TCI overall**.

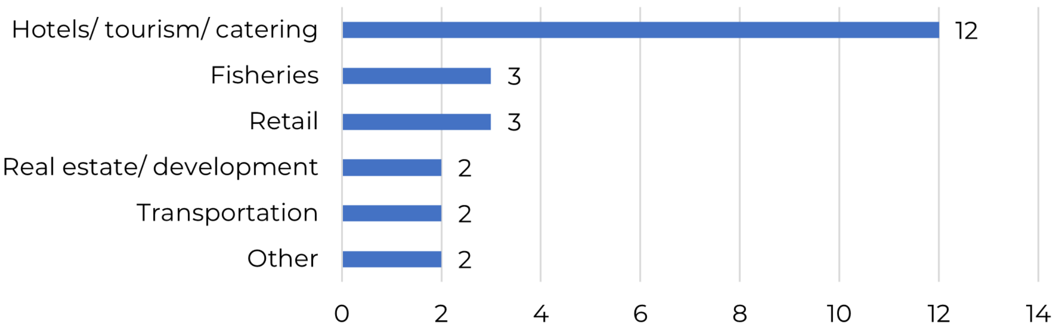

Figure 1. Respondents' reported business sectors

Professional role

Most respondents reported their professional role to be ‘owner/CEO’ (n=19, 79%). An equal number of respondents identified as either ‘other professionals, administrators and officials’ or ‘small proprietors with employees’ (n=2). Professional roles not represented in this survey are outlined in the Appendix (question 15).

Three respondents chose ‘other’ as their professional role. These were categorized into ‘other professionals, administrators and officials’, ‘small proprietors with employees’ and ‘undisclosed’.

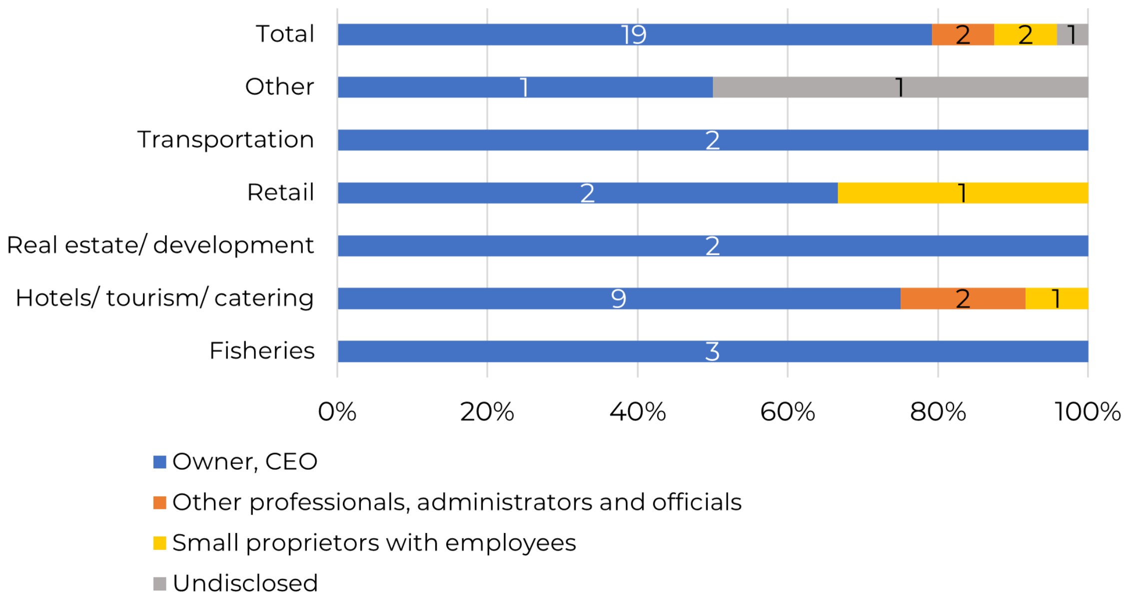

Figure 2. Respondents' reported professional role

Length of business activity

Respondents were asked about the total time their business has been in operation, both generally and in TCI specifically.

The most reported category for time trading spent by respondents' business in general was 'over 20 years' (n=10, 42% (n=24)). Most respondents reported a length of time between 3 and 20 years (n=12, 50%). Two respondents reported '1-2 years'.

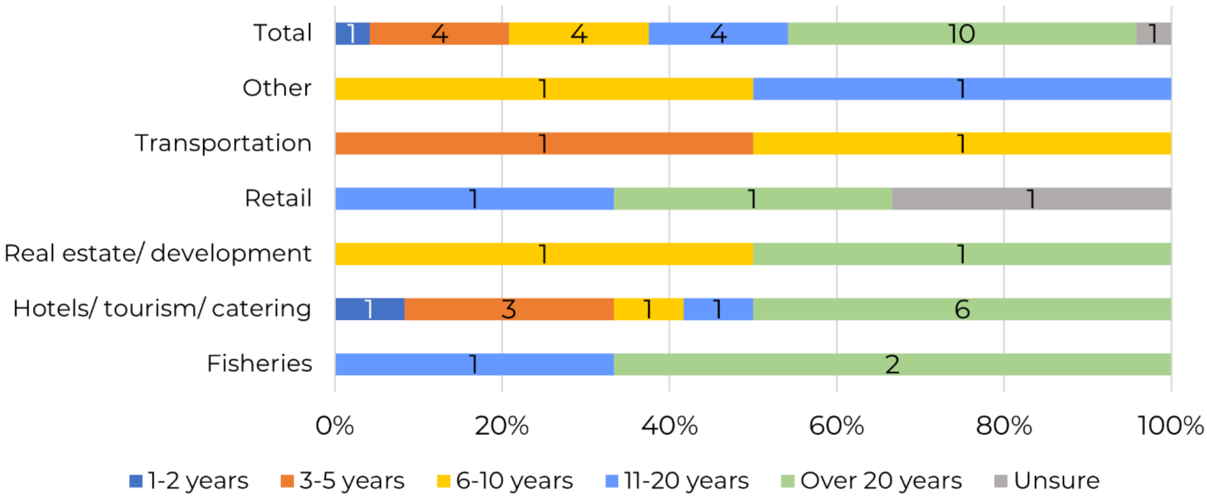

Figure 3. Length of respondents' business' time trading (n=24)

The most reported category for length of business operation <u>in TCI</u> was 'over 20 years' (n=10, 42%). Most respondents reported a length of time between 3 and 20 years (n=12, 50%). Two respondents reported '1-2 years'. That is, the results of this question align with the results of length of business operation in general.

Number of employees in respondents' businesses

The majority of respondents reported that their business employed '1 - 10' employees (n=20, 83% ()). The second most reported category was '11 – 25' employees (n=3, 13%).

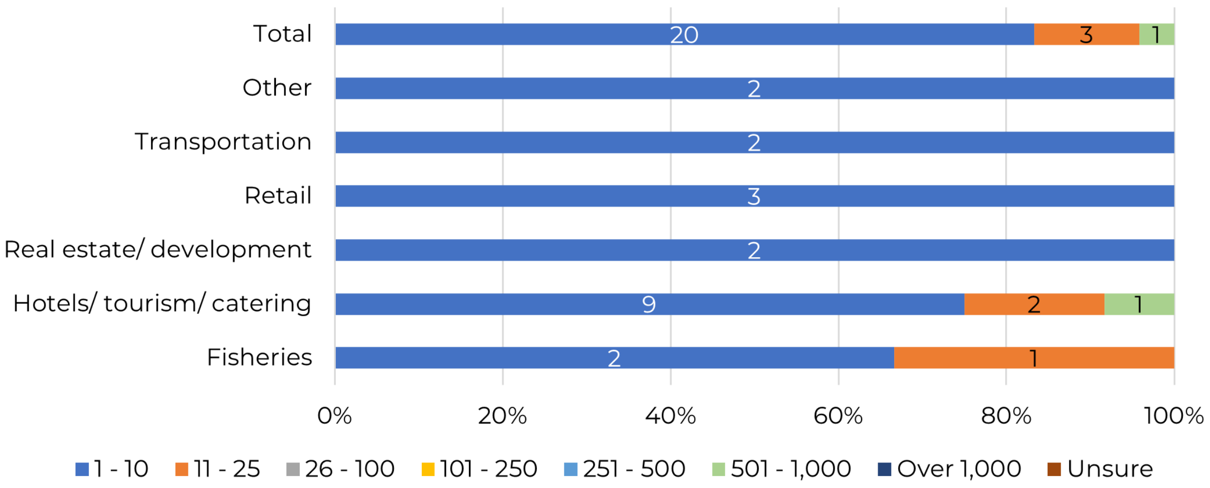

Figure 4. Number of employees at respondents' businesses (n=24)

Business earnings

The majority of respondents (n=7, 29%) chose 'prefer not to say' rather than report their business earnings, reported as annual company turnover. Of those that reported business earnings, the majority chose '$10,000 - $50,000' (n=4, 17%). The second highest reported amounts were '$50,001 – $100,000' (n=3, 13%) and '$100,001 - $500,000' (n=3, 13%).

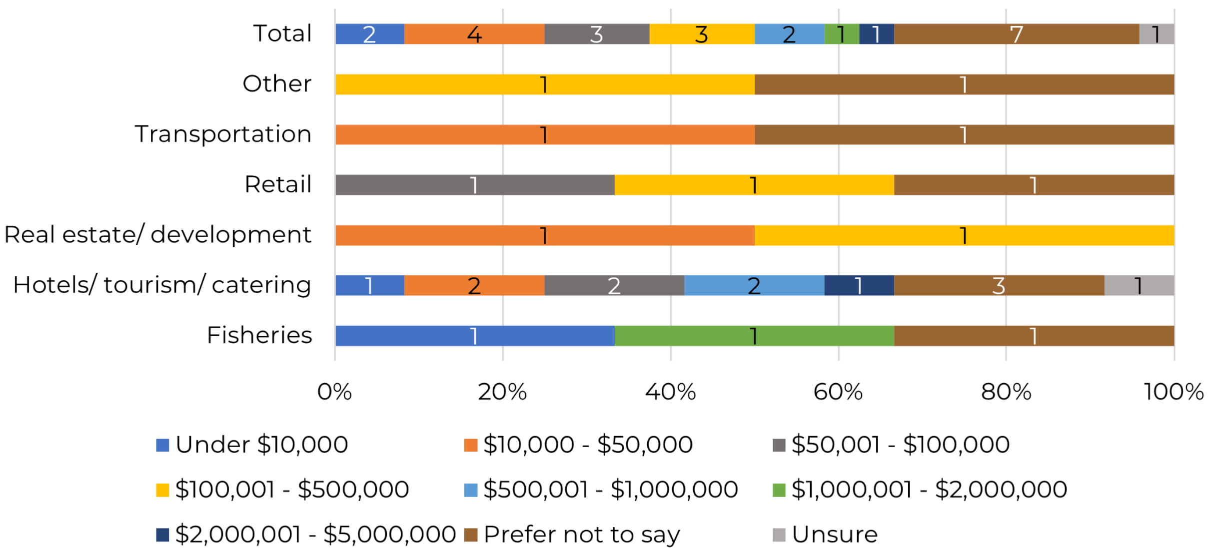

Figure 5. Annual company turnover (2023 USD) as indicated by respondents (n=24)

3.2. Part 1: Impacts of COVID-19 on business

3.2.1 Short-term impacts of COVID-19 on business activity

Short-term impact was defined as occurring from '1 March to 22 July 2020, during initial lockdown and closure of ports/businesses/schools'. Respondents were able to choose more than one impact. The total number of short-term impacts reported was 54.

The majority of respondents indicated at least one negative impact due to COVID-19 in the short term. The most reported short-term impact was 'total closure' (n=16, 67% of respondents) and the second most reported impact was 'reduced income / cashflow / revenue' (n=10, 42%). Only one respondent indicated that COVID-19 had a positive impact on their business (increased cash flow / income / revenue) in the short term.

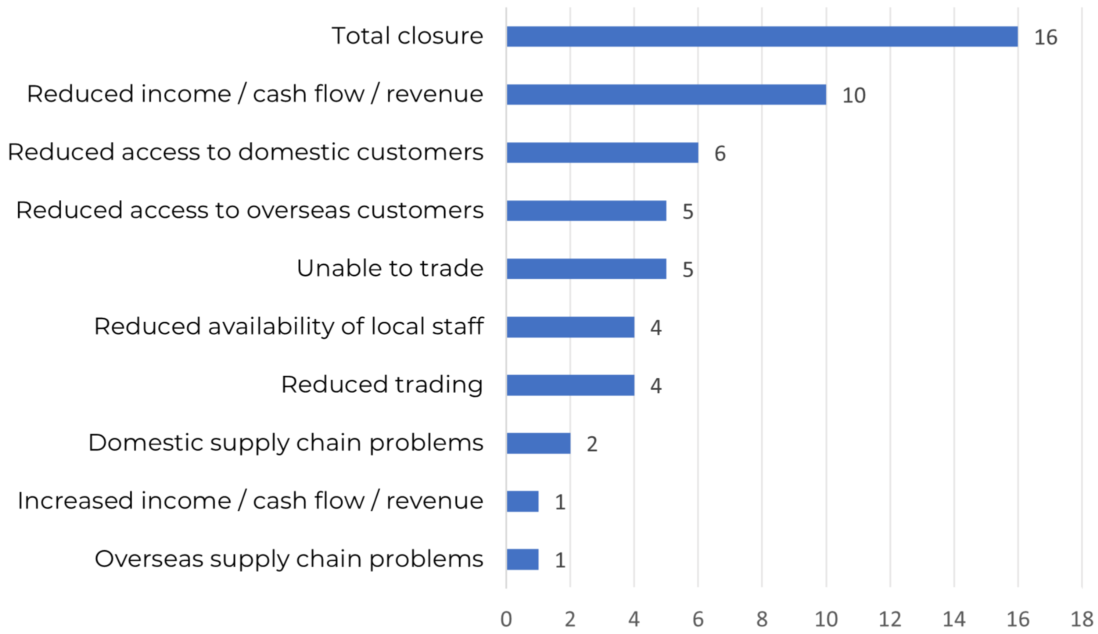

Figure 6. Short-term impacts of COVID-19 on business activity as reported by respondents (n=54 of reported impacts)

Only response options with a minimum of one response are included in the above figure. Response options that were not selected are outlined in the Appendix (question 2).

Respondents were asked to provide further qualitative descriptions of the short-term impacts on their business sector. Responses varied depending on the economic sector as COVID-19 regulations impacted business activities differently. For example, all three respondents from the fisheries sector experienced total closure.

"My Seafood plant was completely closed down due to no income and I had to lay workers off. Some of my product got spoiled due to the lockdown part of it. Still had power bill to be paid but no income to pay it."

The two respondents from the real estate / development sector primarily experienced lessening trade activity.

"Business reduced due to clients and associated businesses reducing their operations."

Short-term impacts in the hotels / tourism / catering (Henceforth, tourism) sector (n=12) also consistently reported a period of total closure. The reason for closure was due to a significant loss of foreign tourists due to COVID-19 restrictions in TCI and/or in tourists' home countries.

"I operate short term rentals and when the country was closed there were zero renters and has still not recovered since the pandemic due to lack of travel options."

"No tourists. Restaurant business was destroyed".

"Tourism driven business. Total closure with no regular income. Laid off 3 out of 5 employees and 1 left the islands leaving only 1 employee."

Other sectors reliant on the tourism sector were negatively impacted, e.g., reduced business activity or closure, by reduced activity in the tourism sector, lack of tourists coming to the islands, and/or COVID-19 regulation.

"My business is primarily one that provides service. During this period, no one was travelling, and as such, my business was completely closed."

"Under the local guidelines that were imposed during covid, our business was not able to be open. The beaches were closed, and we do a lot of our work there."

3.2.2 Long-term impacts of COVID-19 on business activity

This subsection is split into long-term impacts of COVID-19 on respondents' businesses and on TCI businesses in general.

Long-term impacts on respondents' business

Respondents were asked to report the long-term impacts of COVID-19 on their business. Long-term impact was defined as 'from when airports, seaports, beaches, schools, restaurants and business were re-opened on 22 July 2020 until present'. Respondents were able to choose more than one impact, and so gave a total of 55 responses identifying different impacts.

Like the short-term impacts, the majority of respondents reported at least 1 negative long-term impact due to COVID-19. The most reported impact was 'reduced income / cashflow / revenue' (n=9, 34% of respondents) and the second most reported impact was 'reduced trading (n=7, 29% of respondents).

Respondents also indicated positive long-term impacts, although significantly less often than negative impacts. The most reported positive impact was 'Increased income / cash flow / revenue' (n=6, 25% of respondents) and the second most reported positive impact was 'increased trading' (n=4, 17% of respondents). Two respondents indicated 'no impact'. Of particular note, is that reduced cashflow was the most regularly cited negative impact, and increased cashflow the most regularly cited positive impact.

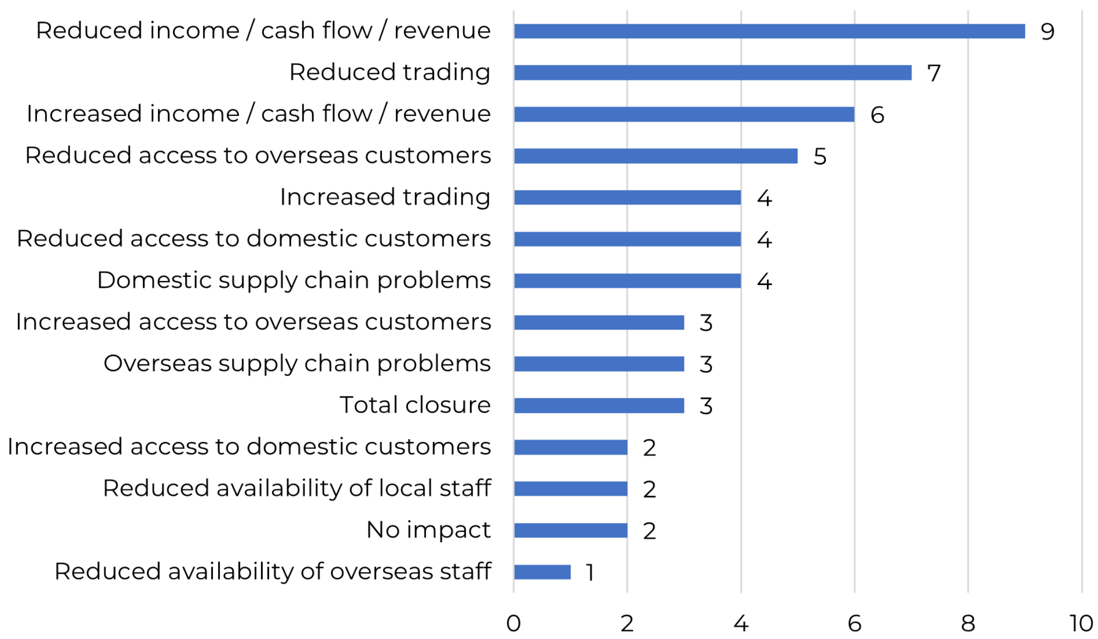

Figure 7. Long-term impacts COVID-19 on business activity as reported by respondents (n=55 of reported impacts)

Figure note: the following three options were not chosen by respondents: 'increased availability of overseas staff', 'increased availability of local staff', and 'unable to trade'.

Long term impacts on business sectors

Respondents provided further qualitative information on the reported long-term impacts on their business sector.

Both the fisheries and tourism sectors indicated that they were able to recover their business as COVID-19 restrictions were lifted, but the recovery was slow. The reasons provided were supply chain issues, delayed regulatory function (e.g., permit approvals) and the timing of the return of tourists to the islands.

> *"Although it took until Feb 2021 when we started feeling like business was returning as the US & Canada started to allow travel… Lots of supply chain delays. Labour shortages appear to affect custom clearance of goods as we see our goods have arrived but do not get cleared in a timely fashion. Government services are also very slow, permit renewals & licenses delays impede us when we need to provide these documents for insurance, business etc. Labour shortages impede us as we cannot find sufficient quality qualified people."*

> *"We are still having major problems obtaining goods from overseas."*

Post COVID-19 recovery growth in these sectors was not consistent across the islands as some islands are more reliant on certain business activities than others.

> *"Grand Turk location - There was no immediate impact until the return of the cruise ships in December of 2021. Between July 2020 to December 2021 very limited income as our business relies heavily on the cruise ships. Provo - remained closed until May of 2021, still operating on limited hours."*

Respondents in the tourism sector indicated some positive impacts since COVID-19 restrictions were lifted in TCI. Primarily, respondents indicated that, although the return of tourism to the country was initially delayed, tourists arrived at a higher rate than prior to the COVID-19 pandemic. This increase in tourism improved business activity for some businesses.

> *"Most, if not all of my corporate groups cancelled or deferred their events until 2022. So 2022 was a crazy busy year while people are making up for 2020 and 2021. Still busy in early 2023!"*

> *"Business was slow to build back up however is stronger than ever now."*

Respondents from the real estate / development, retail, and transportation sectors indicated that the primary negative long-term impacts were slow return to business activity due to COVID-19 regulations and supply chain issues.

“Many of our potential client base could not come due to the vaccine requirement. The requirement stayed in effect for an extended period compared to other countries and that affected our business.”

“It was difficult getting the supplies in quantity.”

The positive long-term impacts reported by these sectors were increased revenue and return to historic business activity. One respondent relocated their business and increased business activity.

“Increase revenue as a result of having the time to rethink my approach to business.”

“Initially the business suffered from minimal income due to lack of tourists, who are the business's sole income stream. However, because TCI ended up being one of the only Caribbean destinations open during Covid, the company was able to get back to business as tourists returned and become profitable again.”

“I relocated from [one island] to [another] and started a convenient store selling a wider variety of dry goods and snacks".

Respondents were asked to expand on what they believed to be the most significant long-term impacts of the COVID-19 pandemic on business activities in general.

‘Labour shortages’ was the most reported long-term impact (n=6, 25% of respondents). This includes employee retention and difficulties hiring new and/or experienced staff.

“Reduce access to workers, as they shifted to government jobs”.

"Labour shortages due to Government protectionism”.

The second most reported long-term impact was closure (n=5, 21% of respondents), which includes temporary or total closure.

“Lack of business, closure of several businesses due to lack of transportation to get to our island”.

"Alot of people lose their business”.

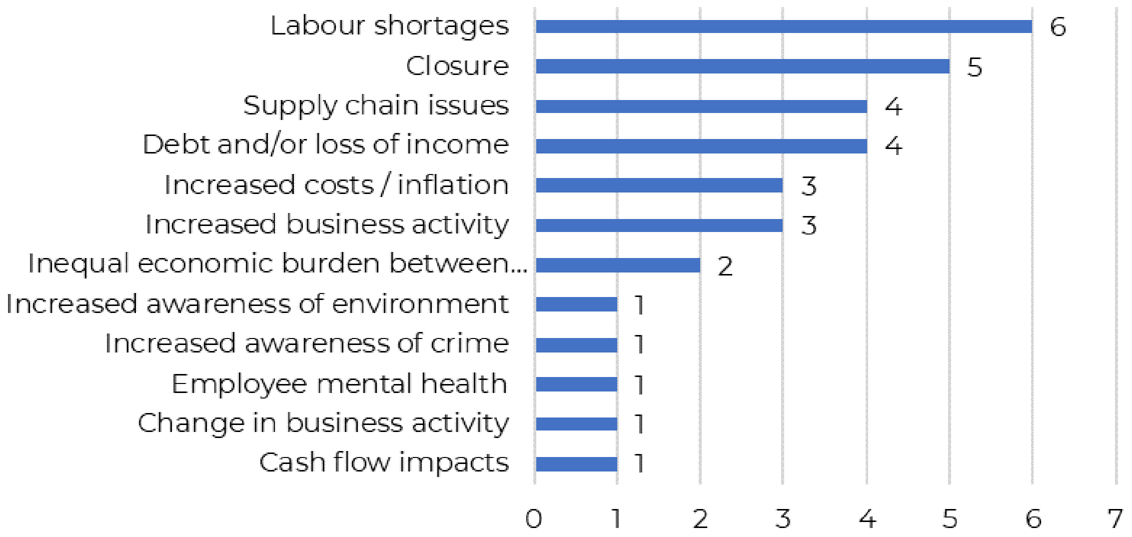

Figure 8. Long-term impacts from COVID-19 for businesses generally as indicated by respondents (n=32)

Impacts with only 2 or 1 responses are outlined in Table 1.

Table 1. Long-term impacts from COVID-19 categorised as 'Other' (n=7)

Impact (frequency)	**Quote example**
Unequal economic burden between small and large businesses (2)	"Many small local businesses suffered while bigger companies... have been given massive duty concessions to reestablish... It seems like the pandemic has allowed the bigger people and companies to monopolise even more, controlling more business and land etc"
Cash flow impacts (1)	"Cash flow"
Change in business activity (1)	"Either had to work for other people or find new business ventures to fit into days world."
Employee mental health (1)	"The mental health of employee's *[sic]*"
Increased awareness of crime (1)	"[COVID-19 has] shown the underbelly of crime on the island."
Increased awareness of environment (1)	"[COVID-19 has] shown the need to clean up the island."

3.3. Part 2: Natural Environment

3.3.1 Dependence on the natural environment

Respondents were asked how dependent their business is on TCI's natural environment.

Respondents indicated business dependence (highly or essential) for all natural environments provided within the survey question except 'pine yards and other forest'. 'Beaches and sand dunes' and 'marine – coral reefs' had the highest number of indicated dependence (n=15, 63% of responses).

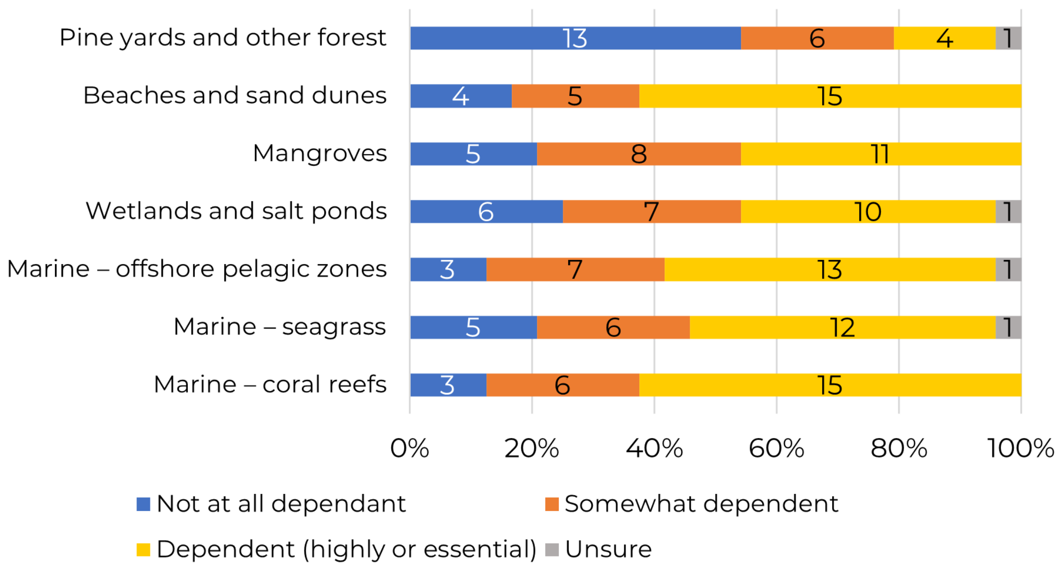

Figure 9. Business dependence on the natural environment as indicated by respondents

Respondents provided qualitative information on business dependence on the natural environment. Not all respondents provided qualitative information and some respondents provided information for more than one type of natural environment (n=17). There is no relationship between specific sectors and dependence on certain types of natural environment identifiable in the survey results. Responses not directly naming a type of natural environment are also included in the results (e.g., 'visitor safety'. Some respondents also provided suggestions for management changes to the environment, however these are discussed in Section 4).

The marine environment was indicated by all sectors to have economic importance for businesses. Both terrestrial and marine environments were listed by respondents in sectors which had more than one qualitative response to the question.

Table 2. Other natural environment on which businesses are dependent as indicated by respondents (n=17)

Sector	Responses categorised (frequency)	Quote examples
Fisheries	Reef (1)	"Need to invest in reef protection! It is VITAL!!"
Hotels/ tourism/ catering	Coastal and marine habitats, including animal and plant species abundance (8)	"Beaches, water quality, safety of our visitors, water sports Operators need to be better regulated". "Marine life abundance especially sharks". "On islands all aspects of the natural environment are important to any business involved in tourism, even land based such as the museum."
	Terrestrial and marine habitats healthy in unison (2)	
	Visitor safety (1)	
Real estate/ development	Recreation in nature (1)	"Accessibility to the natural environment for recreation". "Dust, surface water drainage, ground water resources."
	Dust, surface water drainage, ground water resources. (1)	
Retail	Sea, land, climate change, weather, and pollution (1)	"Sea, land, climate change, weather, and pollution Availability of non-renewable goods".
	Availability of non-renewable goods (1)	
Transportation	Terrestrial and Marine healthy in unison (1)	"The health of the marine environment and the land are both important because they are codependent. Although we are a marine business, the ecosystem has to be in balance regardless of being on land or sea for both to be healthy."

3.3.2 Dependence on ecosystem services

This subsection reviews the results of business dependence on provisioning, regulating and cultural services from TCI's natural environment, and business' impacts on the environment.

Provisioning services

Respondents indicated that the two provisioning services on which business dependence is highest (either highly dependent or essential) are 'food-seafood' (n=11) and 'energy production (n=10). Business dependence is also high for 'freshwater' (n=9) and 'genetic resources' (n=8), but respondents also indicated that their businesses were 'not at all dependent' on these two services to an equal degree (n=9 for both). Similarly, 'food - terrestrial sources' has a nearly even split between 'not at all dependent', 'somewhat dependent', and 'dependent' (n=8, 6, and 6, respectively).

The provisioning services on which business is least dependent are 'biochemical or other natural pharmaceuticals' (n=15) and 'wood and timber products' (n=15).

One respondent provided qualitative information on 'other' provisioning services:

> "*Labour, Reef, Fish, all other items are imported, but if there was a reasonable costing local product would gladly switch.*"

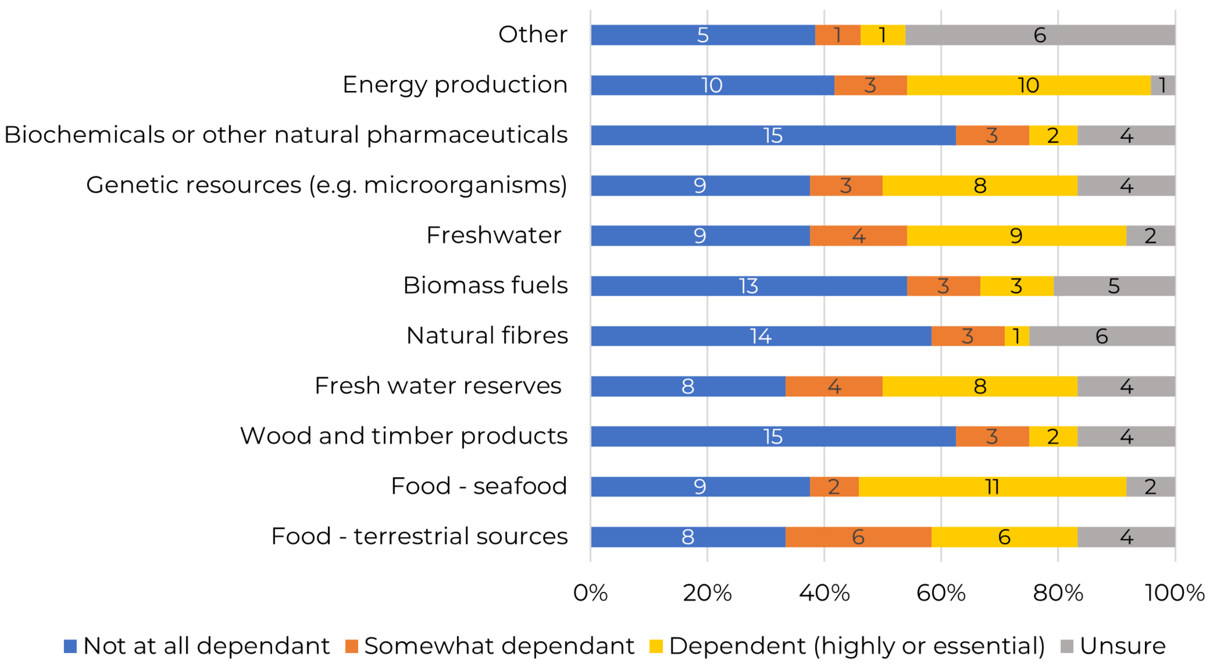

Figure 10. Business dependence on provisioning services as indicated by respondents (n=24)

Regulating services

Respondents indicated that businesses are most dependent on 'natural hazard protection and mitigation' (n=16) and 'erosion protection and control' (n=16).

Regulating services were generally indicated as having more importance for businesses than provisioning services as the ratio of 'dependent' to other responses (not including 'other') is higher for regulating services compared to provisioning services (46% compared to 25%).

Business dependence is lowest for 'soil productivity' as indicated by respondents (n=10 for 'not at all dependent').

No respondents provided qualitative information regarding business dependence on 'other' regulating services.

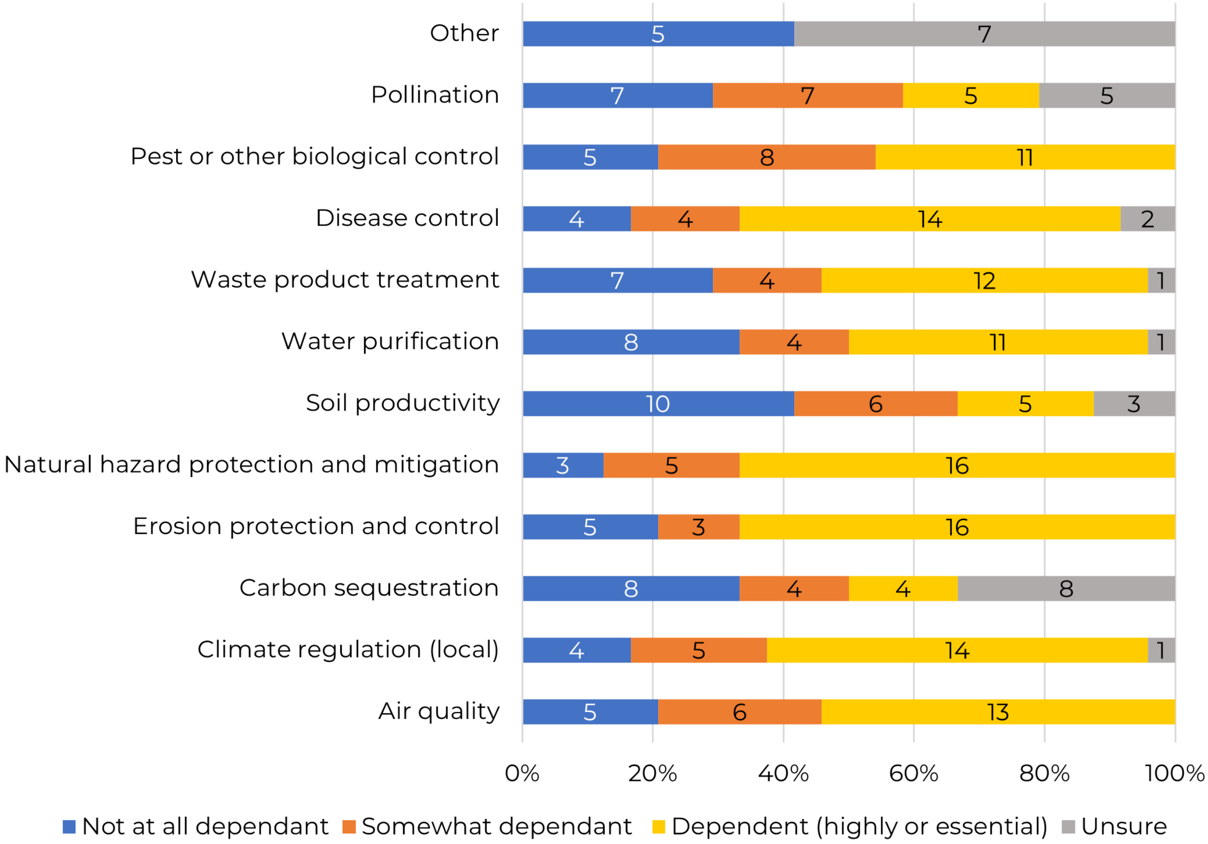

Figure 11. Business dependence on regulating services as indicated by respondents (n=24)

Cultural services

Respondents indicated that their business is most dependent (highly or essential) on 'aesthetic values' (n=18), 'ecotourism' (n=15) and 'recreation' (n=15). Business is least dependent on 'spiritual use' (n=9 for 'not at all dependent'), although respondents reported 'somewhat dependent' (n=7) and 'dependent' (n=6) at similar numbers.

Of the responses on 'other' cultural services, one respondent wrote that 'marine protection' was essential to business.

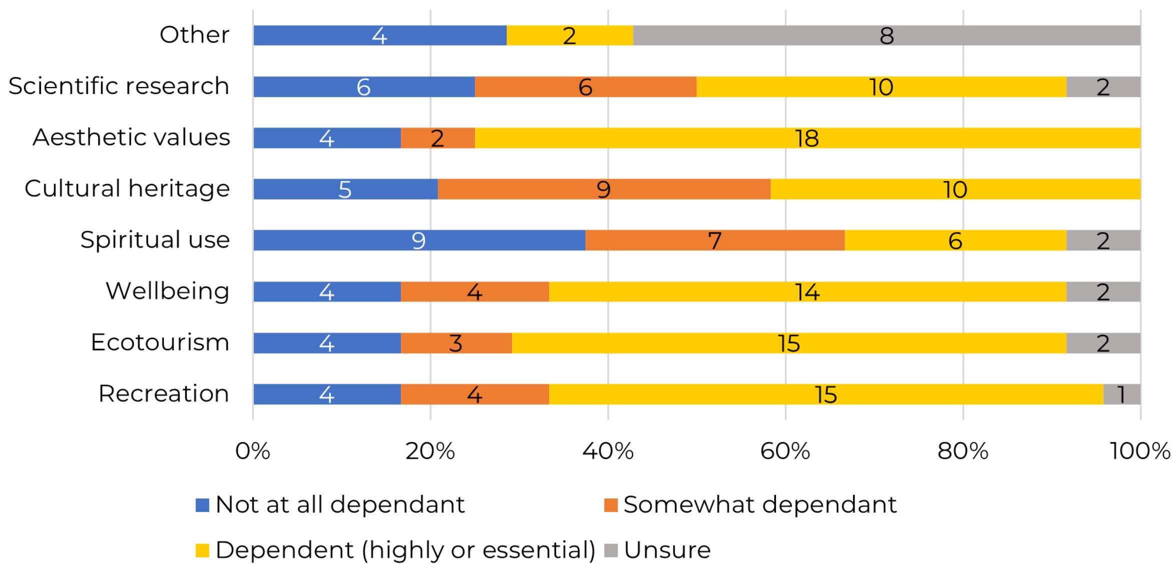

Figure 12. Business dependence on cultural services as indicated by respondents (n=24)

Impacts on environment from business sectors

The majority of responses to business sector impact on the environment was 'neither negative nor positive' across all possible options (excluding 'other') (35% of responses (n=288) (respondents were able to give more than one response)). This is consistent with qualitative responses later in the survey as many respondents said that impact depended on individual business practices and/or could be highly influenced by government initiatives or regulations.

"To clarify form the last question - not all companies have a negative impact but some do. It completely depends on the ethics of the company e.g., from whether you use single use plastics to how you interact with marine animals and the environment. Issues include Lack of regulation and lack of enforcement… lack of whale watching licensing or regulation etc".

"Greed would need to be eliminated!"

It is not possible to compare perceived impact between the sectors represented in this survey. Respondents often chose the same or similar impact option across all possible environment options.

Of the options given for environmental impacts from business, the most 'positive' responses were 'marine biological resource availability' (n=7), 'mineral and aggregate availability' (n=7) and 'terrestrial biological resource availability' (n=8). Environmental impacts with the most 'negative' responses were 'environmental disturbance' (n=9) and 'greenhouse gas emissions' (n=9).

Although 11 respondents included an additional 'other' in their response, only one respondent provided qualitative information about business sector impacts on the environment:

"As a whole the Tourism sport fishing sector has a very minor problem impact. Move to low emission diesel engines if it was enforced amongst everyone. Ban Longliner ships in TCI waters and offshore if possible. Lots of boats obviously are all emitting CO2. Encourage investment in Sailing industry instead (low emissions), tourism is huge (See BVI, Bahamas etc)".

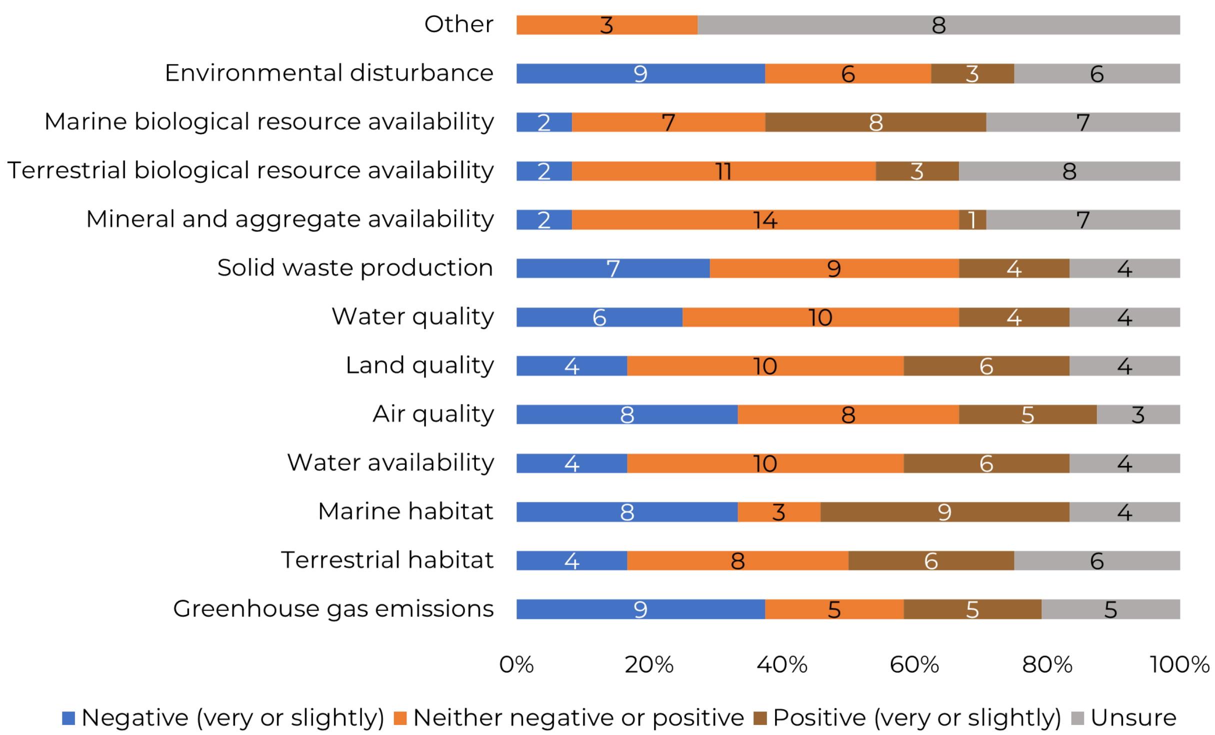

Figure 13. Business sector impacts on the environment as indicated by survey responses (n=24)

3.3.3 Private sector support of investment in the natural environment

This subsection is split into what actions business sectors can take to support the natural environment and what skills development/training is needed to support the natural environment.

Business sector support

Respondents were asked how their business sector or the private sector in general can support investment in, or maintenance and improvement of the natural environment in the Turks and Caicos Islands. Suggestions for private sector action included educating customers on environmentally friendly practices while on island, ceasing dumping, and participating in public sector programmes for cleanup, research, and conservation activities.

> *"The private water sports sector already contributes to and supports the improvement of the natural environment through associations that help monitor usage of resources and promote good practices; through educating visitors about the importance of the marine environment (by helping them enjoy it responsibly) and by helping fund and promote funding for mooring balls to help protect the reefs."*

> *"-providing access for research and conservation by volunteering services of boats to scientists and conservationists to observe, etc- educate guests and crew about the natural environment, eco-tourism etc so they in turn are more aware of their impact and become more responsible in their actions while in the TCI - contributing to clean ups and other positive efforts on island - offering mentorships, contributing in educational efforts with youth on island".*

Most responses did not include what their sector or the private sector generally could do. Rather, respondents provided ideas for how negative impacts on the environment could be reduced through some form of government or community action. Frequency of ideas for both private and/or public sector action to support investment in the natural environment are included in Table 3.

Table 3. Respondent ideas to reduce negative impacts to the environment (n=30)

Idea (frequency)	**Quote examples**
Regulation/penalties/enforcement (e.g., enacting levies, enforcement of waste disposal) (8)	"4/ force more resorts to set up waste collection bins & recyclable collections at resorts and public beach access locations." "[...] the government needs to impose fines for littering". "Paying mandatory taxes".
Education (of locals (incl youth) and tourists) (7)	"More education in the schools regarding those subjects." "Yes, giving back and helping educate others about the world and what's going on in it". "A park warden or educated tour guide [at Salt Cay] will ensure tourist receive information and education about the protection of the animals living in this sanctuary."

Idea (frequency)	Quote examples
Government using taxes and fees for clean-up and infrastructure (excluding waste) (6)	“Right now grants, private sector and tourists provide the bulk of the funding for the dive and snorkel moorings. It would be nice to see the govt take some of the 12% and allocate it towards a conservation fund to support moorings etc. it could also be an added ‘marketing tool’ for the tourism product; that the Govt takes conservation seriously.” “Have a public campaign against littering to make it not cool to litter. Impose penalties for littering. I see people throw things out of their car windows. Tourists comment on the garbage and the island is supposed to be 'beautiful by nature."
Investment in waste infrastructure) (4)	“Need professionally operated wastewater treatment facilities in the more densely developed areas of the islands. Need proper planning and development to manage storm water run-off to avoid erosion and/or flooding. Need to avoid unnecessary clearance of virgin land. Need proper facilities for disposing of toxic waste, especially used lubricating oils and batteries.”
More public/private projects to support/restore the environment (e.g., cleaning) (3)	My clients are sometimes interested in 'give back' elements, if there was a clear, well organized project to protect the environment then I could definitely garner support from them- either monetary or with volunteers.
Incentives for business to take more environmentally friendly actions (e.g., duty exemptions) (2)	“1/ offer marine business’s incentive to participate (e.g., free lunch, media attention, free advertising, customs duty exemption, free fuel) in cleanup days of outer island beaches. 2/ duty exemption/customs exemption on importation of more environmentally friendly products (soap, detergent, engines, sailboats/yachts.”

Skills development/ training

Respondents were asked what kind of skill development and training opportunities would be useful to enable the private sector to better support investment in, or maintenance and improvement of the natural environment in TCI.

Respondents did not limit their responses just to what skills are needed in the private sector. Their answers often included what public sector actions were needed to improve negative environmental impact.

The majority of responses included education as the key skill development/training needed (n=16). 'Education' includes improvements to available technical training programmes and requirements for technical training to operate boats, tours, and other roles that directly interact with the environment.

Table 4 outlines the skills development/training needed to improve the natural environment as reported by respondents.

Table 4. Skills development/training needed to improve the natural environment as indicated by respondents (n=23)

Skills training needed (frequency)	**Quote examples**
Education (16)	"-education education education - opportunities for staff and companies to take part in educational programs to raise awareness and take part in government sponsored/supported programs, [...]". "Outreach through workshops on natural environment, newsletters etc. DECR is already doing some of this! Perhaps establishment of a 'stewardship certification' - if person/tour company attends 'x' number of courses offered (i.e., courses on cultural history as it relates to marine environment, natural history of the islands, current threats to environment etc.) they can earn that rating. " "Make environment training essential to operate in fields dealing with environment "

Skills training needed (frequency)	**Quote examples**
Better public private relationships, especially with non-locals (2)	"-there is a clear disconnect between the private sector and the government. the government does its best to alienate any private sector company that is not exclusively local, regardless of financial commitment and life commitment to this island... meetings are held in the sector that I'm in that only include locals although most of the companies are owned and supported by expats. From my perspective the government is not concerned with the environment at all, the officials drive vehicles that are the worst possible for the environment and operate with a mindset of "us against them" instead of seeking ways to harmonize everyone who chooses to live and support the TCI. There needs to be a major change in the attitude and acceptance of everyone who lives here, works here and strives to positively impact the island. Many become disillusioned after trying to do so much for the island only to be dismissed as not a local by the government and media. There is so much we can do as a community if we are ever actually encouraged and supported to looking beyond where we were born vs where we now call home.".
Eliminate greed (1)	"Greed would need to be eliminated!"
Increase funds to DECR (1)	"More funds to DECR".
Regular inspection (1)	"Would love on regular basis of reef inspection to inform management. Non control of fishing size. Education of what it does to then ecology if overfishing. Turtles are hunted for food. No understanding of how it impacts the environment."
Healthcare (1)	"Healthcare infectious disease".
More enforcement of regulations (1)	"Safety and environmental consciousness need to increase and be enforced".

4. Discussion

This section discusses the results of the Business Attitudes survey. It considers (4.1) sampling and representativeness of the respondents, (4.2) the impact of COVID-19 on TCI business, (4.3) business perceptions around impact and dependency on natural capital, and proposed solutions to promote improvements in the condition of natural capital, and (4.4) further areas for exploration.

4.1. Sampling

Only 24 responses were received. A number of issues are likely to contribute to this, but the main reason is likely the online delivery method. Reasons why this was unsuccessful are not clear, but may be due to a lack of awareness, access, time or interest, incentives to partake in the survey, and/or its complexity.

As was evidenced by the NCIP interviews (Finance Earth and eftec, 2024b), on-the-ground data collectors or interviews are more successful. Such a strategy is, of course, much more expensive. An alternative approach would be to target key business sector representatives (e.g., TCI Hotels and Tourism Committee; InvestTCI) to facilitate delivery and promotion of the survey. However, this approach only had a limited impact in the NCIP interviews.

4.2. Impact of COVID-19 on businesses in TCI

Most respondents cited the cessation of their business activities and the associated income loss as the main short-term impacts to their businesses from COVID-19. Only one respondent cited any positive outcomes in the short-term. In comparison, respondents selected a wider range of types of impacts in the long-term, and in aggregate suggested greater variation in fortunes across businesses in the long-term. This is evidenced by respondents selecting income as the most common long-term effect for both negative impact (reduced) and positive impact (increased).

Written responses outlined that differences in COVID-19 regulations across business activities are a possible explanation for this. For example, the fisheries sector experienced total closure in the short-term whereas the real estate / development sector did not close. The increase in tourist numbers post-COVID-19, in comparison with pre-COVID 19, was also cited as a reason for positive long-term business impacts. This influx directly impacted businesses in the tourism sector; with other sectors indicating positive spillover effects on their businesses. However, it was also cited as impacting the condition of the natural environment in TCI. These findings highlight the indirect pressures created on nature by the COVID-19 pandemic and support the need to develop business and community resilience to adapt to similar events that may occur in the future.

It is unclear whether the size of businesses (using annual earnings as a proxy) explains any positive or negative long-term trends. This is, in part, because most respondents chose 'prefer not to say' rather than report their business earnings. Additionally, it is difficult to distinguish impacts within certain business sectors i.e., distribution of impacts in the tourism sector. However, respondents reported some inter-island differences as post-COVID-19 recovery growth was not consistent across the islands for the tourism and fisheries sectors. This reflects the different nature and reliance of these businesses on the smaller islands (e.g., Middle Caicos, South Caicos and Grand Turk), in comparison with high volume tourism in Providenciales. Respondents from across all sectors indicated that recovery was initially slow and there were significant labour shortages, but the recovery time could vary within sector depending on access to supplies.

4.3. Business perceptions of the environment and actions to maintain it

Many respondents describe that their businesses have dependencies on *both* the terrestrial and the marine environments, even if they are predominantly marine or terrestrial-based businesses. There appears to be an understanding of the linkages between terrestrial and marine habitats, in particular how human pressures upstream/on-land (e.g., water, air or noise pollution) have negative impacts on the marine environment and business activities. This suggests that willingness to engage, or support, environmental management projects may not be limited to the habitat type or ecosystem within which the business predominantly operates.

In comparison, respondents appeared able, or willing, to describe their business' activities' dependencies upon the natural environment better than their impacts. There are numerous reasons this may be the case. For example, impacts arising directly from specific activities may be difficult to identify for business operators (i.e., not visually obvious for those without training or education in marine or terrestrial ecology), or manifest slowly over time such that the change is difficult to perceive. Equally, attribution of impacts to local human activity, in comparison with climate change or natural processes, is not straightforward in real-time. Finally, if a given business or sector is broadly operating within the existing laws and regulations, and undertaking specific best-practice activities, there may be a perspective that, as a result, their activities are not impacting the environment. Understanding these reasons is important for incentivising, regulating or financing environmental improvements. High understanding of natural capital dependencies is positive since it demonstrates higher motivation for action (whilst managing complacency and equity of actions across resource user groups and society). However, lower recognition of natural capital impacts may limit investment or resource allocation towards environmental protection if there is a perception that there is no problem to resolve and (in the absence of incentives and/or regulation) there is limited responsibility to take action.

Consistent with the JNCC socio-economic survey, both education and enforcement of existing regulations and legislation were often suggested as a key supporting management action to instigate environmental management. These are also important aspects for natural capital investment since community and business buy-in, as well as regular and consistent public monitoring and enforcement, are needed to deliver and evidence successful natural capital projects. Whilst education was cited most regularly, further research is likely required to understand the relative importance of other economic issues such as a lack of financing (e.g., prohibitively high costs) or the structure of economic incentives (e.g., more beneficial to undertake illegal or unsustainable practices given the perception of low enforcement rates or risk of detection) and how important these are for local businesses in comparison with education.

Finally, environmental management actions are likely to be mutually reinforcing, for example education and outreach initiatives would hope to promote greater up-take or investment in clean-up and sustainability initiatives.

4.4. Next steps

This survey aimed to understand the views and perspectives of businesses on the environmental impact of COVID-19. The survey also provided a platform for people to share their experience and ideas for sustainable recovery from the COVID-19 pandemic. These results should be interpreted alongside the results of the socio-economic survey to give a holistic picture regarding how communities and businesses view a sustainable post-COVID-19 future on TCI.

The next step is for these findings to inform the development of a Turks and Caicos Natural Capital Investment Plan (Finance Earth and eftec, 2024a), principally through informing the interview and engagement stage of the programme. These will probe further into business views on their impacts on nature, reasons for this, and perspectives around barriers and challenges to investing in, or managing, natural capital. Table 5 outlines how this survey, as well as the socio-economic survey, were used to develop the NCIP.

Table 5: How insights from the SE and BA surveys have been used to inform the NCIP

Information collected in the SE and BA survey	Importance for natural capital investment	Use in NCIP
The positive and negative dependencies and impacts of key business sectors on the environment in TCI	To build resilience of the TCI economy and support the development of low-impact business sectors with high natural capital consequences in the face of economic and physical risks	Further probing of perceptions of responsibility and priorities for reducing the business' impact on nature. Attempts to elicit willingness to fund, invest or manage natural capital projects.
Skills and development opportunities for supporting a sustainable recovery	To address prime areas for future economic growth and social development centered on natural capital	Further probing of barriers and challenges to undertaking or supporting natural capital projects, including skills and opportunities on-island.
Barriers to engagement in sustainable development opportunities	To identify gaps in public participation and awareness and introduce projects/ initiatives which may facilitate investment in natural capital	

References

Finance Earth and eftec. 2024. Development of a Natural Capital Investment Plan for the Turks and Caicos Islands: Technical Report. Resilient Community Recovery from Covid-19 in the Turks and Caicos Islands Project Report. JNCC, Peterborough.

Finance Earth and eftec, 2024b. Business and Community Perspectives on Natural Capital Management in the Turks and Caicos Islands. Resilient Community Recovery from Covid-19 in the Turks and Caicos Islands Project Report. JNCC, Peterborough.

Robinson, J. and Irving, E. 2023. Socio-Economic and Environmental Impacts of Covid-19 in the Turks and Caicos Islands: Technical Report. Resilient Community Recovery from Covid-19 in the Turks and Caicos Islands Project Report. JNCC, Peterborough.

Appendix 1

BA Questionnaire script

TCI Business Attitudes Survey - English

Information sheet for participants (*to be read and optionally provided to participant*)

This survey is designed to understand how the Covid-19 pandemic has affected businesses in the Turks and Caicos Islands and to identify opportunities for environmentally sustainable economic growth. The results will inform a Turks and Caicos Natural Capital Investment Plan and training activities to support sustainable livelihoods and a resilient economy. Activities will be coordinated via a new Community Hub.

<u>Please only complete this survey if you represent a business in the Turks and Caicos Islands (owner, employee etc.) and you are 18 years of age or over</u>. Providing your name/business name is optional - please see our privacy notice online at the web address below (or request a copy) for further information on how we will use your data.
Completing this survey should take approximately 10 minutes. We are very grateful for your time in helping unlock potential in the Turks and Caicos Islands.

The project is funded by the European Commission Resilience, Sustainable Energy and Marine Biodiversity Programme (ReSEMBiD) COVID-19 Resilience Response Facility. The project is led by the Joint Nature Conservation Committee (JNCC) and managed in partnership with the Department of Environment and Coastal Resources (DECR), the Turks and Caicos Islands National Trust, Invest Turks and Caicos and the Turks and Caicos Fishing Cooperative. You can find out more about the project online at: **https://jncc.gov.uk/our-work/tci-resilient-recovery-from-covid-19/**

If you have any questions about this survey, or would like to be involved / sign up for updates, please email us on TCIcommunity@jncc.gov.uk

Date:	Surveyor name:
Survey number: BA	

☐ **I am 18 years of age or older and I consent to taking part in this survey ***

PART 1. IMPACTS OF COVID-19 ON BUSINESS

1. How was <u>your</u> business affected by the Covid-19 pandemic in the <u>short term</u> (1 March to 22 July 2020, during initial lockdown and closure of ports/businesses/schools)? ***(tick all that apply)* ***

- ☐ No impact
- ☐ Total closure
- ☐ Unable to trade
- ☐ Reduced trading
- ☐ Reduced income / cash flow / revenue
- ☐ Domestic supply chain problems
- ☐ Overseas supply chain problems
- ☐ Reduced access to domestic customers
- ☐ Reduced access to overseas customers
- ☐ Reduced availability of local staff
- ☐ Reduced availability of overseas staff
- ☐ Increased trading
- ☐ Increased income / cash flow / revenue
- ☐ Increased access to domestic customers
- ☐ Increased access to overseas customers
- ☐ Increased availability of local staff
- ☐ Increased availability of overseas staff
- ☐ Other (please specify):

2. Please provide further details on the way in which <u>your</u> business was affected in the <u>short term</u> (i.e. March to 22 July 2020, during initial lockdown and closure of ports/businesses/schools) following the start of the Covid-19 pandemic. *

3. In what ways has <u>your</u> business been affected by the covid-19 pandemic in the <u>long term</u> (i.e. from when airports, seaports, beaches, schools, restaurants and business were re-opened on 22 July 2020 until present)?
***(tick all that apply) ***

- ☐ No impact
- ☐ Total closure
- ☐ Unable to trade
- ☐ Reduced trading
- ☐ Reduced income / cash flow / revenue
- ☐ Domestic supply chain problems
- ☐ Overseas supply chain problems
- ☐ Reduced access to domestic customers
- ☐ Reduced access to overseas customers
- ☐ Reduced availability of local staff
- ☐ Reduced availability of overseas staff
- ☐ Increased trading
- ☐ Increased income / cash flow / revenue
- ☐ Increased access to domestic customers
- ☐ Increased access to overseas customers
- ☐ Increased availability of local staff
- ☐ Increased availability of overseas staff
- ☐ Other (please specify):

4. Please provide further information regarding the long-term effects the Covid-19 pandemic has had on your business (i.e. from when airports, seaports, beaches, schools, restaurants and business were re-opened on 22 July 2020 until present). *

5. What do you think were the most significant long-term effects of the Covid-19 pandemic on the private sector in general? *

PART 2. NATURAL ENVIRONMENT

6. How dependent is your business on each of the following aspects of the natural environment in Turks and Caicos? *

	Not at all dependent	Somewhat dependent (e.g. a view of mangroves from a café)	Highly dependent (e.g. bird watching tours)	Essential (e.g. fishing)	Unsure
Marine – coral reefs	☐	☐	☐	☐	☐
Marine – seagrass	☐	☐	☐	☐	☐
Marine – offshore pelagic zones (open sea)	☐	☐	☐	☐	☐
Wetlands and salt ponds	☐	☐	☐	☐	☐
Mangroves	☐	☐	☐	☐	☐
Beaches and sand dunes	☐	☐	☐	☐	☐
Pine yards and other forest	☐	☐	☐	☐	☐
Other (please specify below)	☐	☐	☐	☐	☐

If "Other" please specify: *

7. Are there other aspects of the natural environment that are important to the operation of your business? *

8. How dependent is your business on each of the following "provisioning" services provided by the natural environment in Turks and Caicos Islands? *

	Not at all dependent	Somewhat dependent	Highly dependent	Essential	Unsure
Food - terrestrial sources	☐	☐	☐	☐	☐
Food - seafood	☐	☐	☐	☐	☐
Wood and timber products	☐	☐	☐	☐	☐
Fresh water reserves (e.g. natural aquifers)	☐	☐	☐	☐	☐
Natural fibres	☐	☐	☐	☐	☐
Biomass fuels	☐	☐	☐	☐	☐
Freshwater (e.g. rainfall or freshwater bodies)	☐	☐	☐	☐	☐
Genetic resources (e.g. microorganisms, plant varieties, animal breeds, genetic sequences)	☐	☐	☐	☐	☐
Biochemicals or other natural pharmaceuticals	☐	☐	☐	☐	☐
Energy production	☐	☐	☐	☐	☐
Other (please specify below)	☐	☐	☐	☐	☐

If "Other" please specify: *

9. How dependent is your business on each of the following "regulating" services provided by the natural environment in Turks and Caicos Islands? *

	Not at all dependent	Somewhat dependent	Highly dependent	Essential	Unsure
Air quality	☐	☐	☐	☐	☐
Climate regulation (local)	☐	☐	☐	☐	☐
Carbon sequestration (capture and storage of carbon dioxide from the earth's atmosphere)	☐	☐	☐	☐	☐

Erosion protection and control (e.g. reduced soil loss and sand loss from beaches)	☐	☐	☐	☐	☐
Natural hazard protection and mitigation (e.g. protection against storm surge and flooding)	☐	☐	☐	☐	☐
Soil productivity	☐	☐	☐	☐	☐
Water purification	☐	☐	☐	☐	☐
Waste product treatment	☐	☐	☐	☐	☐
Disease control	☐	☐	☐	☐	☐
Pest or other biological control	☐	☐	☐	☐	☐
Pollination	☐	☐	☐	☐	☐
Other (please specify below)	☐	☐	☐	☐	☐

If "Other" please specify: *

10. How dependent is your business on each of the following "cultural" services provided by the natural environment in Turks and Caicos Islands? *

	Not at all dependent	Somewhat dependent	Highly dependent	Essential	Unsure
Recreation	☐	☐	☐	☐	☐
Ecotourism	☐	☐	☐	☐	☐
Wellbeing	☐	☐	☐	☐	☐
Spiritual use	☐	☐	☐	☐	☐
Cultural heritage	☐	☐	☐	☐	☐
Aesthetic values (beauty/appreciation of natural environment)	☐	☐	☐	☐	☐
Scientific research	☐	☐	☐	☐	☐
Other (please specify below)	☐	☐	☐	☐	☐

If "Other" please specify:*

11. What kind of impacts do you think <u>your business sector</u> as a whole has across Turks and Caicos on the following areas?

(from "Very negative" (e.g. contributes to greenhouse gas emissions) to "Very positive" (e.g. mitigates greenhouse gas emissions)) *

	Very negative	Slightly negative	Neither negative nor positive	Slightly positive	Very positive	Unsure
Greenhouse gas emissions	☐	☐	☐	☐	☐	☐
Terrestrial habitat	☐	☐	☐	☐	☐	☐
Marine habitat	☐	☐	☐	☐	☐	☐
Water availability	☐	☐	☐	☐	☐	☐
Air quality	☐	☐	☐	☐	☐	☐
Land quality	☐	☐	☐	☐	☐	☐
Water quality	☐	☐	☐	☐	☐	☐
Solid waste production	☐	☐	☐	☐	☐	☐
Mineral and aggregate availability	☐	☐	☐	☐	☐	☐
Terrestrial biological resource availability	☐	☐	☐	☐	☐	☐
Marine biological resource availability	☐	☐	☐	☐	☐	☐
Environmental disturbance e.g. noise	☐	☐	☐	☐	☐	☐
Other (please specify below)	☐	☐	☐	☐	☐	☐

If "Other" please specify: *

12. **Do you have ideas or preferences regarding how <u>your business sector or the private sector in general</u> can support investment in, or maintenance and improvement of the natural environment in the Turks and Caicos Islands? ***

13. **What kind of skill development and training opportunities would be useful to enable the <u>private sector</u> to better support investment in, or maintenance and improvement of the natural environment in the Turks and Caicos Islands? ***

PART 3. BUSINESS PROFILE

14. What sector does your business operate in? *

- ☐ Agriculture; plantations; other rural sectors
- ☐ Basic metal production
- ☐ Biomedical sciences
- ☐ Chemical industries
- ☐ Commerce
- ☐ Construction
- ☐ Childcare (paid childcare, excluding own caring responsibilities)
- ☐ Education
- ☐ Environmental consultancy
- ☐ Financial services; professional services
- ☐ Fisheries
- ☐ Food; drink; tobacco
- ☐ Fuel filling station and fuel resale
- ☐ General labourer
- ☐ Health services
- ☐ Hotels; tourism; catering
- ☐ Landlord
- ☐ Legal services
- ☐ Mining (sand extraction; other mining)
- ☐ Mechanical and electrical engineering
- ☐ Media; culture; graphical
- ☐ Oil and gas production; oil refining
- ☐ Pensioner
- ☐ Postal and telecommunications services
- ☐ Public service
- ☐ Real estate, land requisitions
- ☐ Retail
- ☐ Shipping; ports; inland waterways; maritime activities

- ☐ Textiles; clothing; leather; footwear
- ☐ Transport equipment manufacturing
- ☐ Utilities (water; electricity)
- ☐ Utilities (gas, fuel)
- ☐ Utilities (Renewables)
- ☐ Other (please specify below)

If "Other" please specify: *

15. Which of the following best describes <u>your</u> role in the business? *

- ☐ Owner, CEO
- ☐ Senior grade professionals, administrators, and officials; managers in large industrial establishments; large proprietors
- ☐ Other professionals, administrators and officials; higher grade technicians; managers in small industrial establishments; supervisors of non-manual employees
- ☐ Routine non-manual employees, higher grade (administration and commerce)
- ☐ Routine non-manual employees, lower grade (sales and services)
- ☐ Small proprietors, artisans and so on, with employees
- ☐ Small proprietors, artisans and so on, without employees
- ☐ Farmers and small holders; other self- employed workers in primary production
- ☐ Lower grade technicians; supervisors of manual workers
- ☐ Skilled manual workers
- ☐ Semi-skilled and unskilled manual workers (not in agriculture etc.)
- ☐ Agricultural workers and other workers in primary production
- ☐ Other or not sure (please describe below)

If "Other or not sure" please describe:

16. Is <u>your business HQ</u> located in the Turks and Caicos Islands? *

- ☐ Yes
- ☐ No

17. Where does your business operate?
***(tick all that apply)* ***

- ☐ Providenciales
- ☐ North Caicos
- ☐ Middle Caicos
- ☐ South Caicos
- ☐ Grand Turk
- ☐ Salt Cay
- ☐ Other (please specify):

18. How long has your business been trading? *

- ☐ Less than 1 year
- ☐ 1-2 years
- ☐ 3-5 years
- ☐ 6-10 years
- ☐ 11-20 years
- ☐ Over 20 years
- ☐ Unsure

19. How long has your business been operating in Turks and Caicos? *

- ☐ Less than 1 year
- ☐ 1-2 years
- ☐ 3-5 years
- ☐ 6-10 years
- ☐ 11-20 years
- ☐ Over 20 years
- ☐ Unsure

20. How many employees does your business have currently? *

- ☐ 1 - 10
- ☐ 11 - 25
- ☐ 26 - 100

- [ ] 101 - 250
- [ ] 251 - 500
- [ ] 501 - 1000
- [ ] Over 1000
- [ ] Unsure

21. What is your approximate annual company turnover (USD)? *

- [ ] Under $10,000
- [ ] $10,000 - $50,000
- [ ] $50,001 - $100,000
- [ ] $100,001 - $500,000
- [ ] $500,001 - $1,000,000
- [ ] $1,000,001 - $2,000,000
- [ ] $2,000,001 - $5,000,000
- [ ] Over $5,000,000
- [ ] Prefer not to say
- [ ] Unsure

22. Do you have any additional comments you would like to add on the topics covered in this questionnaire?

23. We are keen to involve both society and the private sector in this project, for example through the Community Hub and the Natural Capital Investment Plan. In particular, businesses may help ensure skill development opportunities delivered through the Community Hub are aligned to business needs.

Would you be interested in talking to us further about the topics covered in this survey? *

- ☐ Yes
- ☐ No

24. What is the name of your business? ***(Optional)***

If you would be happy for us to follow up with you directly, please could you leave your name and email address in the box below, or alternatively, email TCIcommunity@jncc.gov.uk and leave your contact details. ***(Optional)***

Thank you for taking the time to complete this survey!

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