

Bracknell Forest Council: Business Infrastructure Survey 2020

Report: April 2020



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Bracknell Forest Council: Business Infrastructure Survey 2020

Executive Summary

Introduction and background

1. Bracknell Forest Council commissioned a survey of businesses about local infrastructure. The research has been conducted by independent research organisation Public Perspectives, who specialises in conducting research on behalf of the public and charitable sectors. This research has been carried out with the support of the Bracknell Forest Economic and Skills Development Partnership (ESDP) and follows on from a similar survey conducted in 2014/15.
2. The purpose of the survey was to understand the views of local businesses about infrastructure in the area to inform local economic strategies and activity, and support local business and economic growth.
3. The survey was undertaken as the challenges placed on businesses around the Coronavirus and the associated social distancing measures began to emerge. On a practical level, this did make the research challenging to conduct, given that businesses were changing their way of working and prioritising mitigating against the impact of the virus on their business. However, the researchers do not believe that the situation affected the quality or nature of the responses in any notable way provided by businesses that participated in the research, because the vast majority of interviews were conducted prior to the Covid-19 lockdown and before the impact of such measures on the economy became apparent.

Approach to the research

4. A total of 356 interviews (a similar amount to that conducted in 2014/15) were carried out via CATI (computer assisted telephone interviewing) between the middle of February and the end of March 2020. Interviews took an average of 20-25 minutes to complete and were conducted with business decision makers.
5. The questionnaire was based on that used in the 2014/15 survey, with some amendments to reflect updated priorities and changes in the area.
6. The research was designed to ensure a representative split of the approximate 4,665 businesses in Bracknell Forest by size and sector and a good geographical mix across Bracknell Forest, including businesses within and outside the Bracknell Business Improvement District (BID).

Key findings and conclusions

Business context

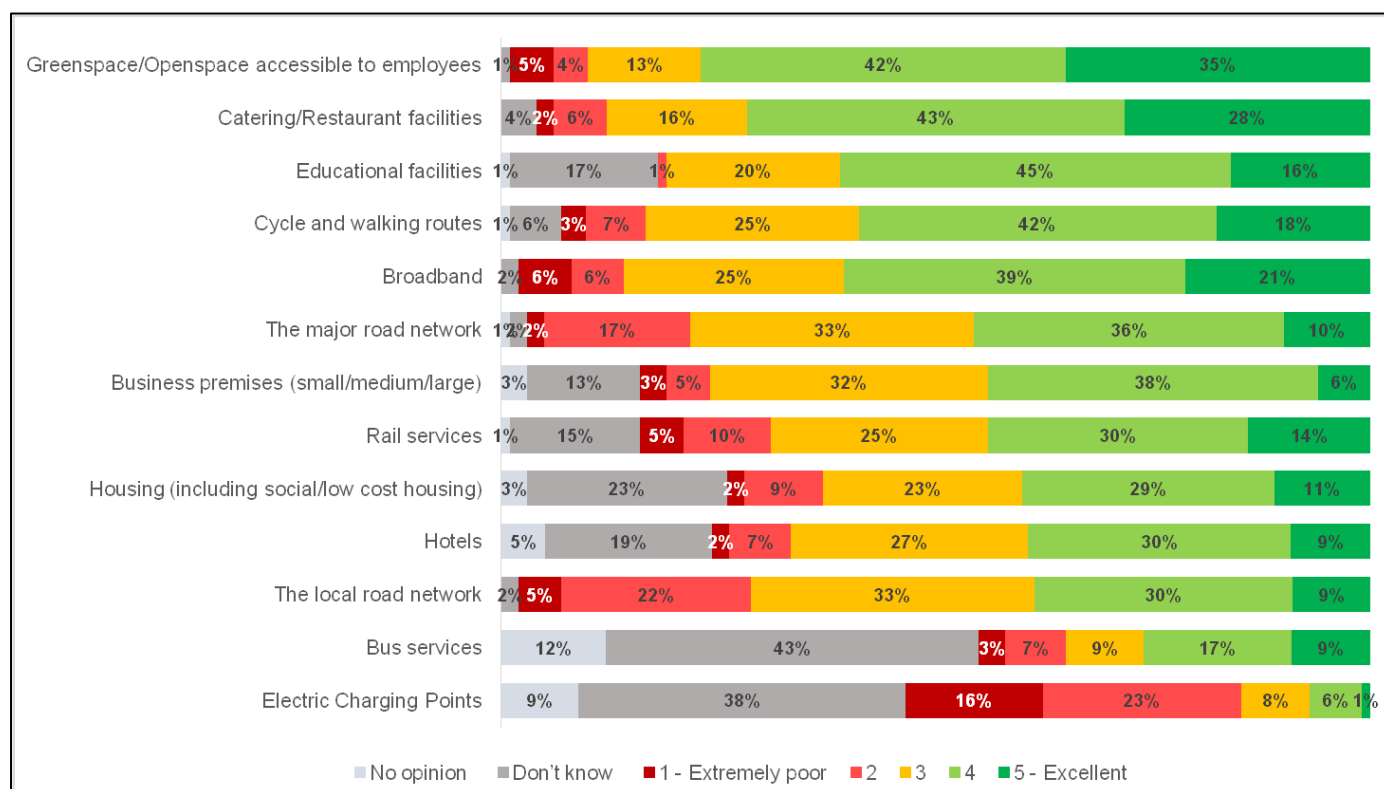
7. The majority of businesses (76%) classify themselves as a local company.
8. The most common reason for being located in Bracknell Forest was that the owner lives locally (cited by 69% of businesses), as was also the case in 2015.
9. Overall, 87% of businesses in Bracknell Forest expect business operations to either stay the same (47%) or increase (40%) over the next 3 years, similar to 2015. Only 6% of businesses expect operations to decline.
10. **The expected growth highlights the continued demand and expectations around high quality local infrastructure to support the business growth aspirations of local businesses, while attracting new businesses and inward investment into the area.¹**

Local Infrastructure

11. Businesses generally rated local infrastructure positively - three quarters of businesses gave positive ratings to greenspace/openspace being accessible to employees. Catering and restaurant facilities, educational facilities, cycle and walking routes, and broadband were also positively rated, with an increase in the proportion giving a positive rating for cycle and walking routes compared to 2015.
12. The most common aspect of local infrastructure in Bracknell Forest to be improved to make it a better place to do business was the local road network, access to motorways, and traffic alleviation, mentioned by 39% of businesses. Local rail links including to London were only considered by businesses in the Bracknell Business Improvement District, where 13% mentioned it as the most important aspect in need of improvement, compared to none of those not in the BID.
13. A fifth of businesses mentioned reduced business rates (notably up from 2015), improving the local road network and traffic alleviation as actions that the council and its partners should do to help grow the economy in Bracknell Forest. Completion of the regeneration of the town centre as a means to grow the local economy was down to 3% in 2020 from 22% in 2015, reflecting the progress made over the past 5 years.
14. **The positive perceptions of the local infrastructure bode well for meeting the growth aspirations of local businesses, although continued investment in the local road network, public transport, access to motorways, and traffic alleviation, plus rail links into London for businesses in the BID and support around business rates can help make the area a better place to do business and grow the local economy.**

¹ Highlighted sentences represent Public Perspectives' interpretation and summary of the research findings and the views expressed are not necessarily shared by Bracknell Forest Council.

Ratings of aspects of the local infrastructure



Number of respondents: 354. Question asked: How would you rate the following in Bracknell Forest?

Transport

15. Two thirds of businesses (64%) considered access to the M3 and M4 motorways to be important, slightly lower than 2015 (74%).
16. The majority of businesses (76%) reported that congestion had a “negative” impact on their business. This is in line with the picture seen in 2015 (71%).
17. 51% of businesses were able to name at least one barrier preventing their employees from using other forms of transport to get to work apart from a car.
18. Businesses were mostly not aware of the Council’s website information about sustainable travel choices (86% were not aware of this information). This is slightly higher than the 78% who were not aware in 2015.
19. 53% of businesses had working from home policies and 50% had flexi time/gliding work pattern policies, where employees can start or end their workday flexibly to avoid rush hour. Such policies were more common amongst larger businesses, especially those with 50+ staff.
20. Overall, around two thirds of businesses (62%) believed the local transport system in Bracknell Forest is about the same as other places in Berkshire. A tenth (10%) believed it was better and a similar proportion (9%) believed it to be worse. This is somewhat different than the picture seen in 2015, when a lower proportion (45%) believed the transport system is about the same as other places in Berkshire and a higher proportion (31%) was not able to decide.
21. **The transport and road network, although a priority area for continued investment and improvement, is broadly meeting the needs of local businesses compared to neighbouring areas. However, there is scope to work alongside businesses to promote sustainable travel opportunities, policies and behaviour.**

Parking

22. Nearly two thirds of businesses said their allocated parking met their business needs.
23. The majority of businesses (83%) agreed there is sufficient parking available in the town centre, whereas 45% agreed there is sufficient parking for businesses, 36% of businesses agreed there is sufficient parking available for residents and 22% agreed there is sufficient parking at the station.
24. **The challenge is ensuring sufficient parking to meet business need and growth, while balancing the priority to promote sustainable travel for employees and customers.**

Airports

25. Two-in-ten businesses (20%) take flights from Gatwick and 28% take flights from Heathrow, down from 29% and 38% respectively in 2015.
26. Over two-fifths (43%) of businesses who ever used Gatwick think having a fast and reliable public transport service to the airport is not important, and 50% of businesses who ever used Heathrow think having a fast and reliable public transport service to the airport is not important.
27. A car/van that is left at or near the airport is the most commonly used method to travel to Gatwick and Heathrow airports, as was also the case in 2015.
28. A quarter of businesses (26%) were able to mention at least one reason why Gatwick and Heathrow are important to business other than employees taking flights, with the most common reason bringing overseas customers to the organisation, mentioned by 15% of businesses (6% in 2015).
29. **Access to airports remains an important positive attribute of Bracknell Forest for local businesses, although perhaps not as much a priority compared to improving access to major roads and improving local roads and local transport, while there is scope to promote sustainable travel options to the airports.**

Broadband

30. Only a fifth (21%) of businesses were aware of Superfast Berkshire, as was the case in 2015.
31. Two fifths of businesses have access to superfast broadband and an equal proportion do not have access.
32. 79% of businesses said superfast broadband is “important”, in line with the 77% seen in 2015.
33. The majority of businesses (59%) felt their internet connection was adequate and 30% said it was excellent, with overall 89% stating that their internet is connection is at least adequate. This is broadly similar to 2015.
34. 69% of businesses do not see the benefit of having a wi-fi enabled internet access in Bracknell town centre, this is a higher figure than in 2015 (58%).
35. **There remains scope to increase awareness of Superfast Berkshire broadband, as well as continuing to implement it to help meet the growth needs of local businesses.**

Premises

36. Two fifths of businesses leased their business premises, 28% owned their premises (a decrease compared to 50% ownership in 2015) and over 20% of businesses cited 'other' responses including working from home (which has increased since 2015).
37. Around a quarter of businesses who leased their premises said they would be able to leave their leased premises within the next 12 months, should they wish to. 19% said they were more than 3 years away, lower than the 32% that were more than 3 years away in 2015.
38. 65% of businesses who leased their premises said they intend to renew the lease on their existing premises. This is the same proportion in 2015.
39. In short, only about 2-3% of all businesses (whether own or lease) suggest they may look to move outside of Bracknell Forest within the next 3 years.
40. 91% of businesses said their current business premises meet the needs of their organisation. This is comparable to the 93% seen in 2015.
41. **This highlights that in broad terms business premises are meeting the current needs and growth aspirations of local businesses. However, continuing to provide choice, variety, quality and flexible business premises will be essential to support businesses on their growth journey, while attracting new businesses to the area.**

Housing

42. Half of businesses positively rated the impact on their business of the availability of housing generally and just 8% rated it negatively, similar to 2015.
43. The 2020 survey results are similar to the ratings given to the impact of housing options in 2015, except the proportion of positive ratings for the impact of the availability of larger, executive style homes has decreased from 41% in 2015 to 25% in 2020.
44. Just 5% of businesses believed the availability of housing in the area had a negative impact on their ability to recruit staff. This is comparable to the 7% in 2015. While 15% said housing had a positive impact on recruitment (17% in 2015).
45. Above half of businesses (56%) believed that the housing options available in Bracknell Forest are about the same as other parts of Berkshire. This is comparable to 52% in 2015. 18% of businesses said the housing options are better in Bracknell Forest (19% in 2015) and just 2% said they are worse (6% in 2015).
46. **Housing represents a positive attribute for local businesses, both to attract and retain staff and increase the customer base. However, as with premises, there will continue to need to be choice, variety and quality of housing to attract and retain appropriately skilled staff to support the growth of local businesses and continue to increase the customer base.**

Thames Valley Berkshire Local Enterprise Partnership

47. A quarter of businesses were aware of the Thames Valley Berkshire LEP, similar to 2015.
48. Around two-thirds of businesses aware of the Thames Valley Berkshire LEP were able to mention at least one way in which it is trying to promote growth in the region. Providing support to businesses and improving infrastructure were the most common ways. This is comparable to 2015 figures.

49. 14% of businesses were aware of the Thames Valley Berkshire Growth Hub. Around half of businesses who were aware of the Thames Valley Berkshire Growth Hub had used the Hub's services and all of these were very satisfied with it.
50. **There remains scope to increase awareness of the LEP and the Growth Hub to help maximise the benefit of these services to local businesses, and support business growth.**

Corporate Social Responsibility (CSR)

51. Two thirds of businesses took part in at least one CSR activity (compared to 60% in 2015), with larger businesses more likely to engage in such activity.
52. Half of businesses would like to do more CSR activities, with businesses already conducting CSR activity more keen than those that do not.
53. 27% of businesses have a CSR Strategy, compared to 10% in 2015. This increases to 38% of those businesses that currently undertake CSR activity. Larger businesses are more likely to have a CSR Strategy.
54. **There is interest and demand amongst local businesses around CSR. There is scope to promote the benefits of CSR and support local businesses to develop CSR strategies and undertake CSR activities, especially businesses that currently do not do any CSR activity.**

Brexit

55. 14% of businesses were expecting to see a positive impact to the UK leaving the EU, whereas 23% expected the impact to be negative. The most common response, given by 38%, was to expect no notable impact. Larger businesses with 50 or more staff were more likely to expect a negative impact than smaller businesses.
56. The top concerns for businesses about leaving the EU were problems exporting to the EU and importing from the EU, mentioned by 9% and 8% respectively, with loss of business (7%), labour availability (7%) and increased cost of business (6%) also cited.
57. **Supporting businesses to prepare for Brexit and addressing local economic challenges around Brexit remains an important issue to help maximise the benefits and mitigate against any negative outcomes arising from leaving the EU.**

Bracknell Business Improvement District (BID)

58. The following represent the most notable differences between perceptions of businesses inside or outside the BID:
 - BID businesses are less likely to be a local company (71%) than non-BID businesses (84%) and more likely to be a national or international company (28%) than non-BID businesses (16%).
 - Businesses in the BID were more positive about business operations in the next 3 years at the time of the survey, with 45% expecting an increase in operations (and just 3% expecting a decrease), compared to 29% of those not in the BID expecting an increase (and 12% expecting a decrease).
 - Businesses in the BID were more likely to rate bus services, the local road network, catering/restaurant facilities, cycling/walking routes and business premises as "good" compared to non-BID businesses.

- Local rail links were only considered by businesses in the Bracknell Business Improvement District (BID) to need improvement, where 13% mentioned it as an important aspect for improvement, compared to none of those not in the BID.
- The local road network (35% of BID businesses and 47% of non-BID businesses) and availability of car parking (7% of BID businesses and 19% of non-BID businesses) were less likely to be considered as in need of improvement by BID businesses compared to non-BID businesses.
- Businesses in the BID were more likely to say that they had benefited from improvements to Warfield Link Road (14% of BID businesses compared with 2% of non-BID businesses), Martins Heron roundabout (34% of BID businesses compared with 21% of non-BID businesses) and road improvements in the town centre (38% of BID businesses compared with 20% of non-BID businesses).
- BID businesses are more likely to state that allocated parking meets their business needs (66%) compared with non-BID businesses (54%). Similarly, BID businesses are more likely to agree that there is sufficient parking available for businesses (50% of BID businesses agree compared with 36% of non-BID businesses) and in the town centre (88% of BID businesses agree compared with 72% of non-BID businesses).
- BID businesses are more likely than non-BID businesses to have facilities and policies to promote sustainable travel for their employees, such as shower facilities / changing rooms for employees cycling to work (27% of BID businesses compared with 15% of non-BID businesses), flexi time / gliding work patterns (57% of BID businesses compared with 36% of non-BID businesses), working from home (60% of BID businesses compared with 38% of non-BID businesses) and hot desking (21% of BID businesses compared with 10% of non-BID businesses).
- BID businesses are more likely to state that having a fast and reliable public transport service to Heathrow is important (35% of BID businesses compared to no non-BID businesses), whereas non-BID businesses were more likely to state the importance of such a service to Gatwick (13% of BID businesses compared with 26% of non-BID businesses).
- Businesses in the BID (24% aware) are slightly more aware than other businesses of Superfast Berkshire (14% of non-BID businesses aware).
- Businesses in the BID are slightly more supportive of the introduction of wi-fi enabled internet access in Bracknell town centre (32% said it would be beneficial) than other businesses (22% of non-BID businesses said it would be beneficial).
- Businesses in the BID area (23%) are less likely to own their premises than businesses outside the area (41%).
- Businesses in the BID area are slightly more positive about housing, with 21% stating that housing options in Bracknell Forest are better than other places in Berkshire compared to 12% of businesses outside the BID area.
- Businesses in the BID area were more negative about leaving the EU (31% said leaving the EU would have a negative impact on their business) than other businesses (7% negative impact) and more likely to have concerns about the UK leaving the EU and having an impact on their business (53% of BID businesses had a concern, compared with 20% of non-BID businesses).

The importance of segmenting and targeting

59. The survey results highlight consistent differences based on size of business, target growth sector and whether the business is in the Bracknell Business Improvement District area or not. This demonstrates the importance of segmenting businesses and developing appropriate strategies and support packages based on those segments.

Bracknell Forest Council: Business Infrastructure Survey 2020

Main Report

Section 1: Introduction

Introduction, background and aims of the research

- 1.1. Bracknell Forest Council commissioned a survey of businesses about local infrastructure. The research has been conducted by independent research organisation Public Perspectives, who specialises in conducting research on behalf of the public and charitable sectors. This research has been carried out with the support of the Bracknell Forest Economic and Skills Development Partnership (ESDP) and follows on from a similar survey conducted in 2014/15.
- 1.2. The purpose of the survey was to understand the views of local businesses about infrastructure in the area to inform local economic strategies and activity, and support local business and economic growth. Specific issues covered by the survey are:
 - Transport
 - Parking
 - Premises
 - Broadband
 - Airports
 - Housing
 - Thames Valley Berkshire LEP
 - Corporate Social Responsibility
 - Brexit
- 1.3. The survey was undertaken as the challenges placed on businesses around the Coronavirus and the associated social distancing measures began to emerge. On a practical level, this did make the research challenging to conduct, given that businesses were changing their way of working and prioritising mitigating against the impact of the virus on their business. However, the researchers do not believe that the situation affected the quality or nature of the responses in any notable way provided by businesses that participated in the research, because the vast majority of interviews were conducted prior to the Covid-19 lockdown and before the impact of such measures on the economy became apparent.

Approach to the research

- 1.4. A total of 356 interviews (a similar amount to that conducted in 2014/15) were carried out via CATI (computer assisted telephone interviewing) between the middle of February and the end of March 2020. Interviews took an average of 20-25 minutes to complete and were conducted with business decision makers.
- 1.5. Surveys were completed at the establishment/unit level - every site of a business was sampled separately and had a chance of being included, and responses given related to the situation at that site only (e.g. a local retail outlet of a national chain would be surveyed about their local situation, and not expected to provide responses relating to the business at a national or wider level). This ensured the information collected reflects the local picture.
- 1.6. The questionnaire was based on that used in the 2014/15 survey, with some amendments to reflect updated priorities and changes in the area.
- 1.7. Quota sampling was used to ensure a representative split of the approximate 4,665 businesses in Bracknell Forest by size and sector (sector is based on UK Standard Industrial Classification of Economic Activities (SIC) 2007) and a good geographical mix across Bracknell Forest, including businesses within and outside the Bracknell Business Improvement District (BID). Quotas or number of interviews were set in proportion to the latest local area business population statistics, sourced from the Office of National Statistics². In practice the number of interviews with businesses with 20+ staff was doubled allowing for more reliable analysis of larger businesses (because otherwise the sample size for these businesses would have been small and therefore less reliable). This increase in numbers was taken from the 0-4 number of employees group. The results were then re-weighted at the analysis stage to bring them back into proportion and ensure the final data was fully representative of the business population and ensure there is not a bias in the results. The total number of interviews achieved, and the corresponding proportion once weighted to the population, are shown in Figure 1.1.

² Inter-departmental Business Register (IDBR) 2019.

Figure 1.1: Business profile by size and sector with number of interviews achieved

Quota	Number of interviews achieved (weighted)	
	N	% of total
Business size		
0-4 staff (includes 10% self-employed that do not have staff)	286	81
5-9 staff	28	8
10-19 staff	18	5
20-49 staff	9	2
50+ staff	15	4
Business sector		
Accommodation and food service activities	11	3
Business administration and support services	39	11
Agriculture, forestry and fishing	4	1
Arts, entertainment and recreation	11	3
Construction	53	15
Education	7	2
Financial and insurance activities	7	2
Health	11	3
Information and communication	60	17
Production	14	4
Other activities	11	3
Professional, scientific and technical activities	74	21
Property	7	2
Transportation and storage	11	3
Wholesale and retail	35	10

Note: Business contact details were purchased and sampled from Experian data (which is made up from business administrative data such as VAT, PAYE or Companies House registered businesses and other public and credit-based data about businesses). A proportion of the 4,665 businesses were selected at random to ensure a good geographical mix across the area and that all businesses had an equal chance to participate, with quotas set to ensure a representative mix of business size and sector.

- 1.8. As Figure 1.1 shows, the business population in the area is heavily weighted towards small and micro establishments with 96% of businesses having fewer than 50 staff and 81% fewer than 5. Professional, scientific and technical activities is the dominant sector in terms of the number of establishments in the area, with Information/Communication and Construction also common.

A note on this report

- 1.9. This report presents current results and compares them, where data is available, against the results for 2014/15. The analysis also aims to identify important findings, where sample size allows, by business size, sector (including the local target sectors of IT and Digital, Life Sciences, and Retail)³ and by businesses in the Bracknell Business Improvement District).
- 1.10. With 356 respondents, the survey provides for statistically reliable data. At this number of respondents, the sample error or accuracy of the survey results is no more than +/-5% at a 95% confidence level (and a minimum sample error of +/-3%, depending on the result)⁴. This means that there is 95% confidence that the “real” result for any given question would be within 5 percentage points of that stated within the survey findings. For example, if the survey result was ‘50%’, the real result would be between 45% and 55%, if a census or all businesses in the area were interviewed. This provides for robust data when analysed at a headline level. It also allows for indicative analysis when different questions are cross-referenced against each other, such as by business size or business sector – as the sample gets broken down, it becomes less reliable because the sample size is smaller. It also allows for comparison over time between the 2014/15 survey and the current one (differences of 7-8 percentage points or more are likely to be statistically significant over time).
- 1.11. The report only comments on differences where they are statistically significant and/or where they show a consistent pattern or tell an important story.

³ These target sectors combine relevant businesses operating across different SIC sectors, where they fit within the broad definition of such a business. In total in the survey sample there were 63 IT/Digital businesses (combining relevant businesses from the Information and Communication sector and Professional, Scientific and Technical sectors), 37 Retail businesses (mainly drawn from the Wholesale and Retail sector and combining other relevant retail businesses from across other sectors) and 28 Life Science businesses (mainly drawn from the Professional, Scientific and Technical sectors).

⁴ Sampling error exists because even when surveying as robustly as has been the case with this survey, only a proportion of the business population has been interviewed. Sampling error, therefore, is the measure of accuracy between the survey results and those that would have been obtained if all businesses in the area had been surveyed, i.e. a census conducted.

Section 2: Operating in Bracknell Forest

Key Findings:

- The majority of businesses (76%) classify themselves as a local company.
- The most common reason for being located in Bracknell Forest was that the owner lives locally, as was also the case in 2015.
- Overall, 87% of businesses in Bracknell Forest expected business operations to either stay the same or increase over the next 3 years, similar to 2015.

Introduction

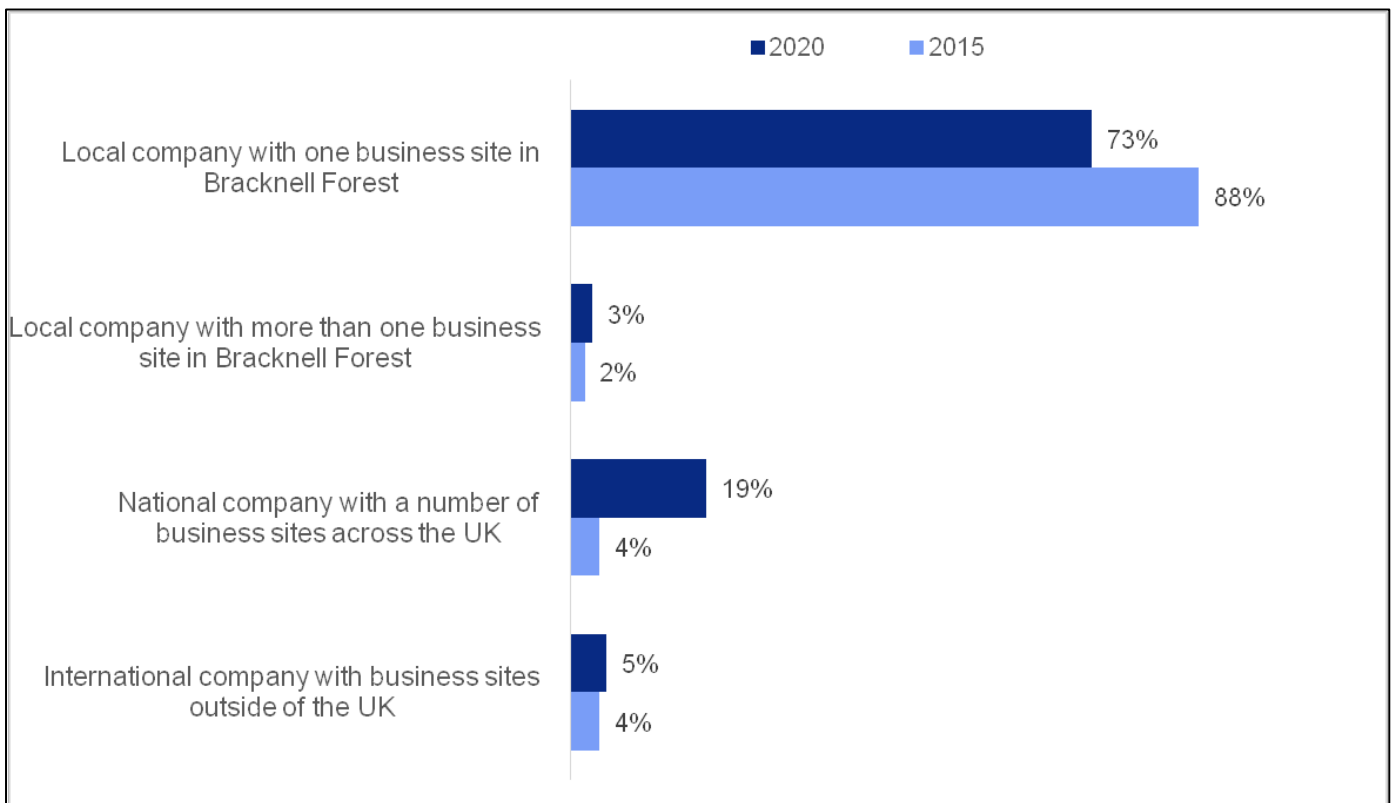
2.1. This section presents findings about businesses operating in Bracknell Forest, by way of context.

Type of business

- 2.2. The majority of businesses (76%) classify themselves as a local company, with most indicating they have one business site in Bracknell Forest. This is different to the 90% seen in 2015. The change in the proportion of businesses that classify themselves as a local company, reflects that more national businesses operate in the area (this has increased to 19% in 2020, compared with 4% in 2015).
- 2.3. BID businesses are less likely to be a local company (71%) than non-BID businesses (84%) and more likely to be a national or international company (28%) than non-BID businesses (16%).
- 2.4. IT and digital businesses were more likely than Life Sciences and Retail businesses to be local companies in Bracknell Forest. Almost all businesses in IT and digital are local companies, compared to 70% and 75% of Life Sciences and Retail businesses, respectively.⁵

⁵ Please note that relatively small sample sizes for these target sectors (63 IT/Digital businesses, 37 Retail businesses and 28 Life Science businesses) means that comparison should be treated indicatively and differences between the sectors treated with caution.

Figure 2.1: Description of company operating in Bracknell Forest



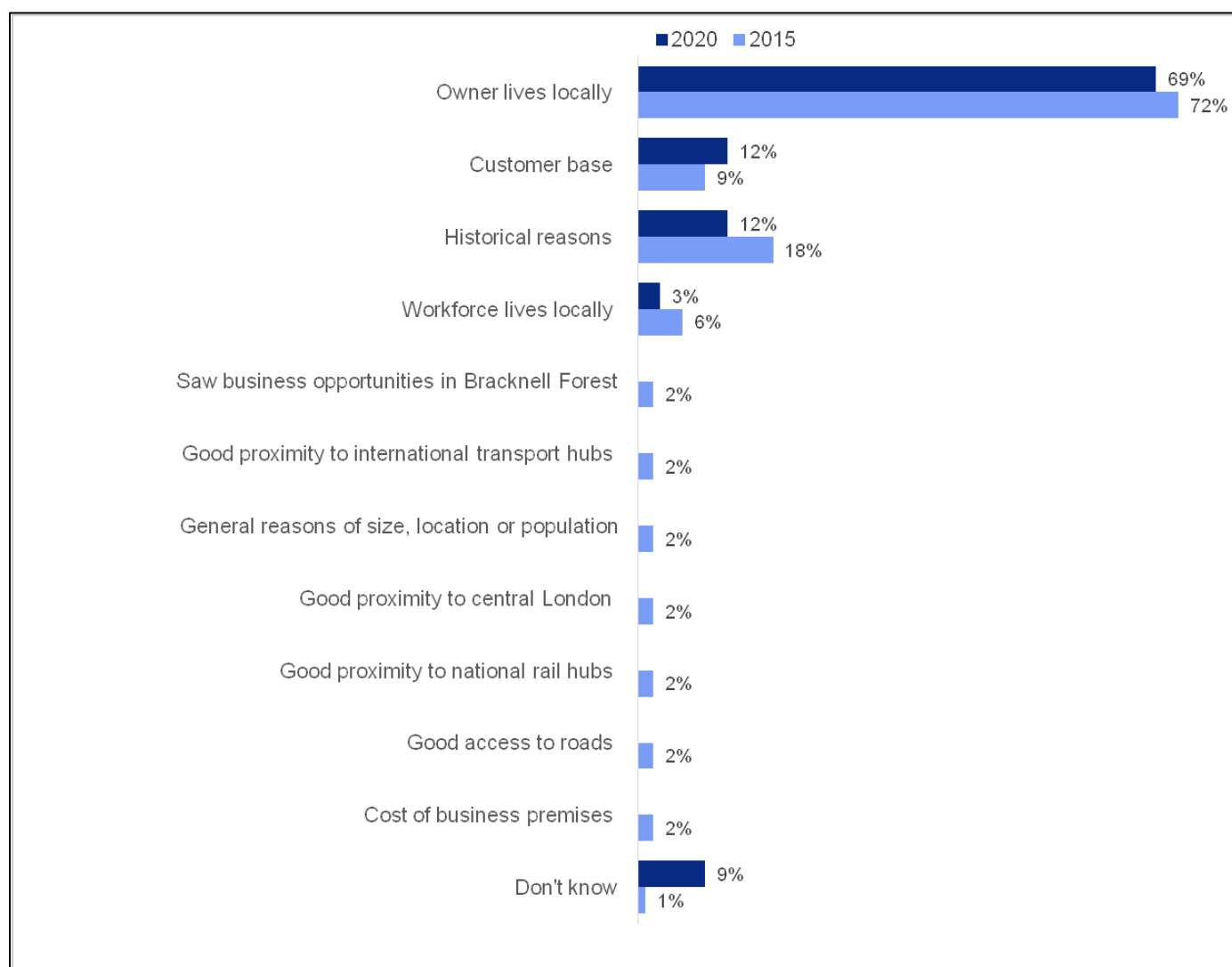
Number of respondents: 2020 - 354, 2015 - 350.

Question asked: How would you describe your company from the following list?

Reasons for being located in Bracknell Forest

- 2.5. The most common reason for being located in Bracknell Forest, mentioned by more than two thirds, was that the owner lives locally (69%). This reflects the fact that around three-quarters of businesses operate solely in Bracknell Forest. Around one-in-ten businesses (12%) mentioned their customer base and a similar proportion cited historical reasons. This is in line with the figures seen in 2015, when 72% mentioned that the owner lived locally, 9% and 18% cited customer base and historical reasons, respectively.
- 2.6. Customer base was more likely to be considered by businesses in the Bracknell Business Improvement District (BID), with 15% mentioning it as a reason for being located in Bracknell Forest, compared to 5% of those not in the BID. It was also a more significant reason for businesses in Life Sciences and Retail sectors, mentioned by 21% and 14%, respectively, compared to only 1% of businesses in the IT and Digital sector.

Figure 2.2: Main reasons for being located in Bracknell Forest



Number of respondents: 2020 - 354, 2015 - 350.

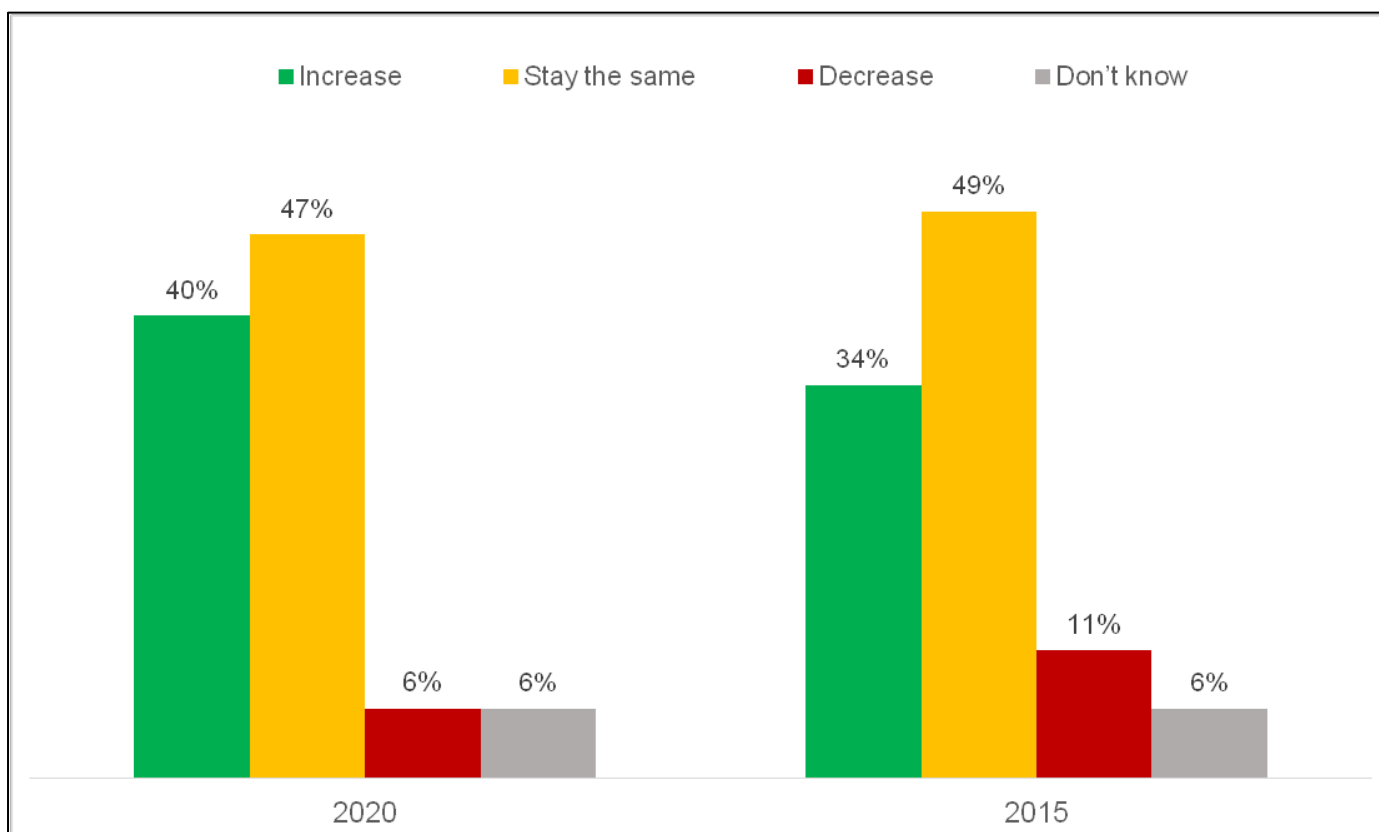
Question asked: What are the main reasons for your organisation being located in Bracknell Forest?

Note: Respondents could select more than one answer.

Likely change in operations in Bracknell Forest in next 3 years

- 2.7. Businesses in Bracknell Forest mostly expected business operations to stay the same (47%) or increase (40%).
- 2.8. This is comparable to the figures seen in 2015, when 49% of businesses expected operations to stay the same and 34% expected an increase.
- 2.9. Larger businesses were more likely to expect stable operations. 64% of businesses with 5 or more staff expected operations to stay the same, compared to 43% of businesses with less than 5 staff. Smaller businesses were more likely to expect operations to increase, with 42% of businesses with less than 5 staff stating this, compared with 29% of larger businesses.
- 2.10. Businesses in the BID were more positive about business operations, with 45% expecting an increase in operations (and just 3% expecting a decrease), compared to 29% of those not in the BID (and 12% expecting a decrease).
- 2.11. Businesses in the IT and Digital and Retail sectors were more likely to expect stable operations - 64% of IT and Digital businesses and 71% of Retail businesses expected operations to stay the same, compared to 38% of businesses in the Life Sciences sector. Also 35% of IT/Digital businesses expected operations to increase (none said it would decrease), 23% in Retail said operations would increase (6% said it would decrease) and 31% of Life Science businesses said operations would increase (4% said it would decrease and 28% did not know).

Figure 2.3: Likely change in operations in Bracknell Forest in next 3 years



Number of respondents: 2020 - 354, 2015 - 350.

Question asked: Over the next 3 years, is your organisation likely to increase or decrease the size and scale of operations in Bracknell Forest or are they likely to stay the same?

- 2.12. Businesses that expected an increase in operations were asked in what ways. Most businesses referred to staff numbers, more customers and increasing size.
- 2.13. Businesses that expected a decrease in operations were asked in what ways. The few businesses that said business operations would decrease mainly mentioned retirement, coronavirus, and less output or demand for their business.

Section 3: Local Infrastructure

Key Findings:

- Three quarters of businesses gave positive ratings to greenspace/openspace being accessible to employees.
- Catering and restaurant facilities, educational facilities, cycle and walking routes, and broadband were also positively rated, with an increase in the proportion giving a positive rating for cycle and walking routes compared to 2015.
- The most common aspect of local infrastructure in Bracknell Forest to be improved to make it a better place to do business was the local road network, access to motorways, and traffic alleviation, mentioned by 39% of businesses. Local rail links including to London were only considered by businesses in the Bracknell Business Improvement District, where 13% mentioned it as the most important aspect, compared to none of those not in the BID.
- A fifth of businesses mentioned reduced business rates (notably up from 2015), improving the local road network and traffic alleviation as actions that the council and its partners should do to help grow the economy in Bracknell Forest.
- Completion of the regeneration of the town centre to help grow the local economy was down to 3% in 2020 from 22% in 2015, reflecting the progress made over the past 5 years.

Introduction

- 3.1. Infrastructure is important to businesses in terms of staff and customer access/travel, and the movement of goods and products both in and out of the company. This section looks at businesses' perceptions of the local infrastructure.

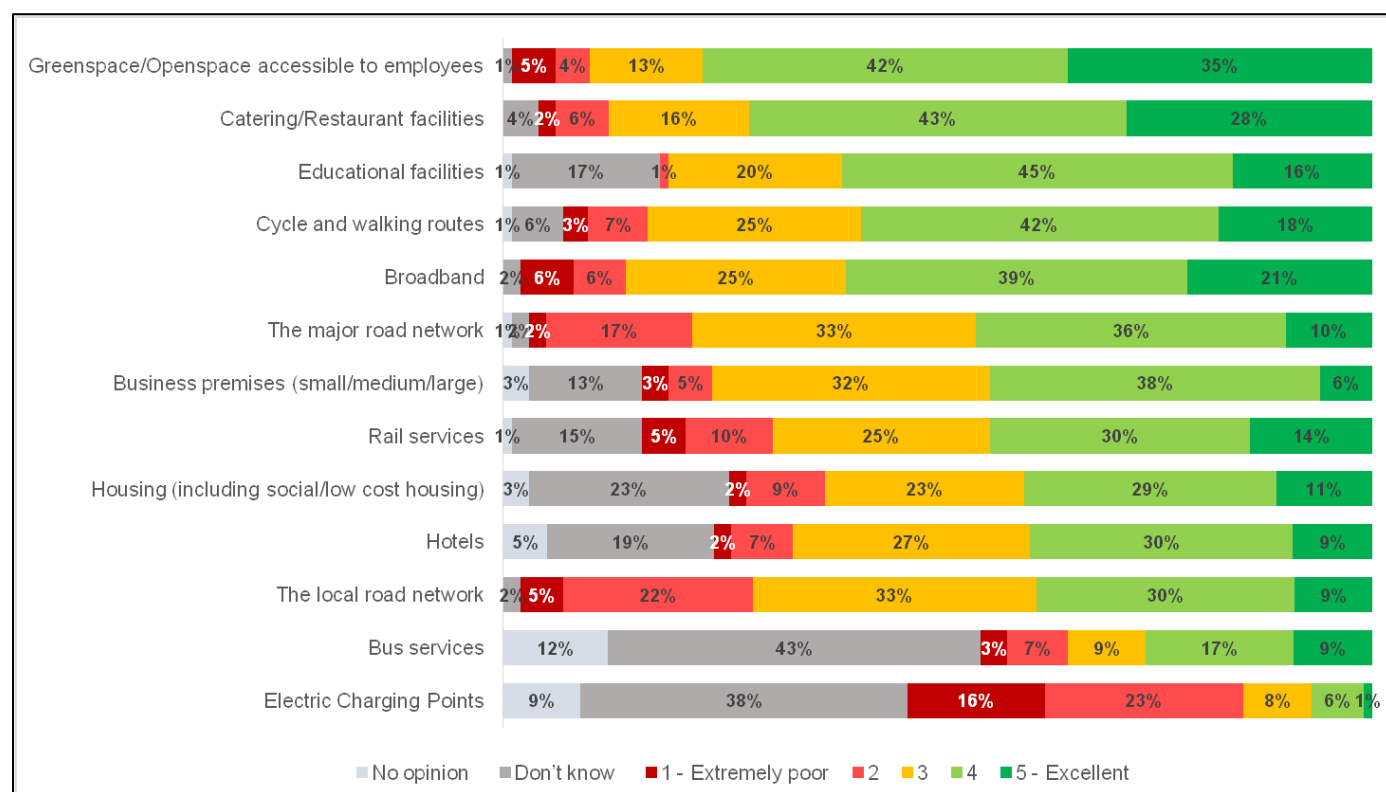
Ratings of the local infrastructure

- 3.2. Throughout this section, a rating of 4 or 5 out of 5 is described as rating the aspect as "good", and a rating of 1 or 2 out of 5 is described as rating it "poor". A rating of 3 represents a neutral or 'neither good nor poor' response.
- 3.3. Businesses gave predominantly positive ratings to greenspace/openspace being accessible to employees, with around eight-in-ten businesses rating it "good" (77%).
- 3.4. Businesses were also positive about the catering and restaurant facilities (71% "good"). Businesses in the BID were more likely to rate catering/restaurant facilities as good – 76% rated it as good, compared to 62% of non-BID businesses.
- 3.5. Businesses were also generally positive about the educational facilities, cycle and walking routes and the broadband, with around six-in-ten businesses in each case rating it "good" (61%, 60% and 60% respectively). Businesses in the BID were more likely to rate cycling/walking routes as good – 67% rated it as good, compared to 46% of non-BID businesses.
- 3.6. Views on the major road network tended to also be positive on balance; 46% felt it was "good", although around a fifth (19%) rated it as "poor". Businesses in the IT and Digital sector were more likely to rate the major road network as "good". 70% rated it as "good", compared to 45% and 41% of businesses in Life Sciences and Retail sectors respectively.
- 3.7. Views on business premises, rail services, housing and hotels were also generally positive

on balance; around four-in-ten businesses in each case felt it was “good” (44%, 44%, 40% and 39% respectively). Businesses in the BID were more likely to business premises as good – 52% rated it as good, compared to 29% of non-BID businesses.

- 3.8. Ratings of the local road network were mixed; 39% felt the local road network was “good” but 27% felt this was “poor”. Larger businesses were less likely to rate the local road network as “good”. 20% of businesses with 10 or more staff rated it as “good”, compared to 41% of businesses with less than 5 staff. Businesses in the BID were also more likely to rate the local road network as good – 46% rated it as good, compared to 21% of non-BID businesses.
- 3.9. Ratings of bus services were also mixed. Just over a quarter (26%) felt the bus services in their location were “good”, but a tenth (10%) felt they were “poor”. Above half (55%) were not able to provide a rating for bus services. Businesses in the BID were more likely to rate bus services as “good” - 31% rated them as “good”, compared to 15% of those not in the BID (this response could have been influenced by the availability of company shuttle buses to specific businesses).
- 3.10. Businesses were less likely to provide a positive rating for electric charging points; 7% felt electric charging points were “good”, while 39% felt these were “poor”. Around half (47%) were not able to provide a rating for electric charging points.

Figure 3.1: Ratings of aspects of the local infrastructure

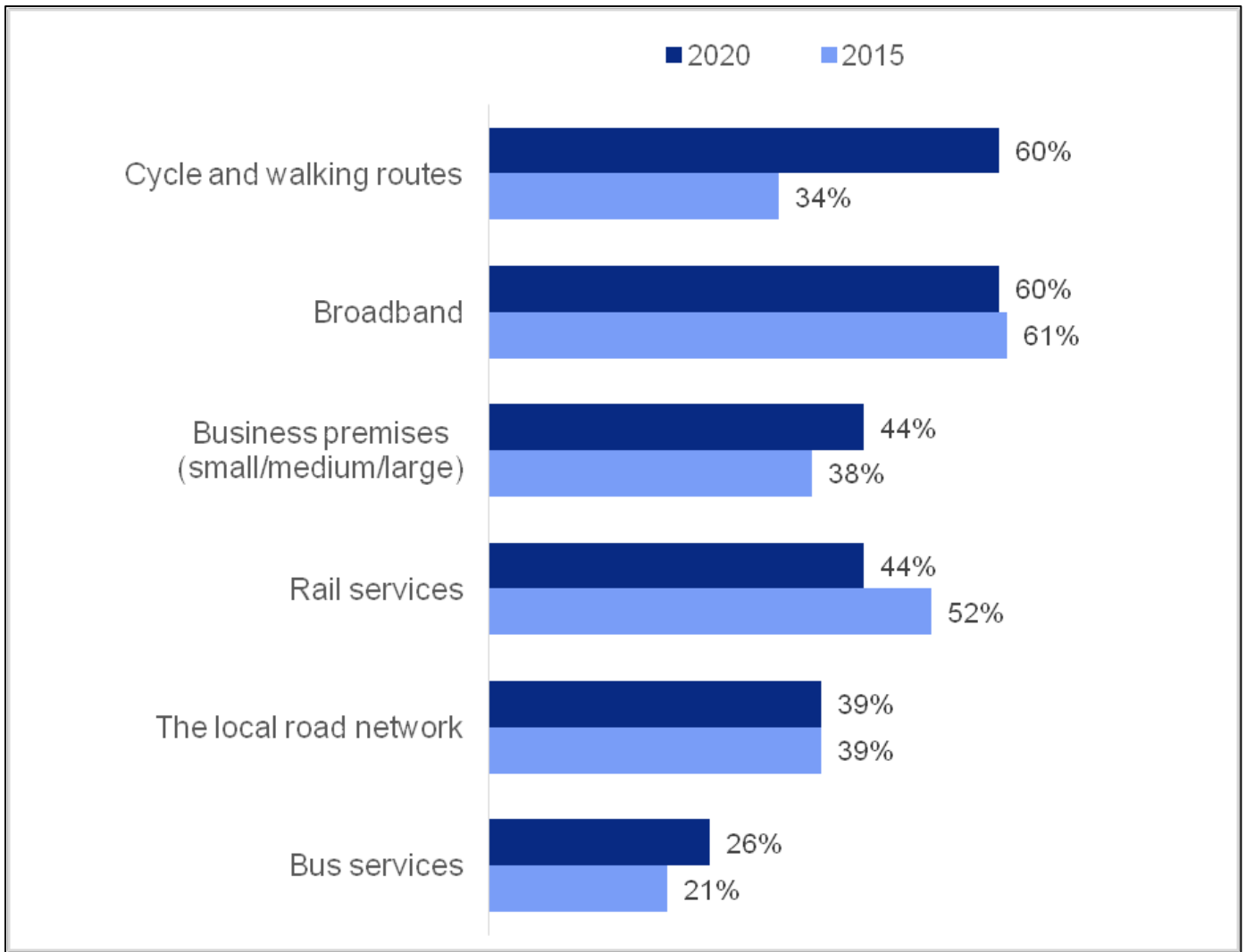


Number of respondents: 354.

Question asked: How would you rate the following in Bracknell Forest?

- 3.11. The 2020 survey results remain in line with the ratings given to infrastructure in 2015, although the proportion of positive ratings for cycle and walking routes has increased notably (26 percentage points) and that of positive ratings for rail has decreased slightly (by 8 percentage points) (see Figure 3.2).

Figure 3.2: Proportion of businesses giving a rating of 4 or 5 out of 5 for aspects of the local infrastructure: time series



Number of respondents: 2020 354, 2015 350.

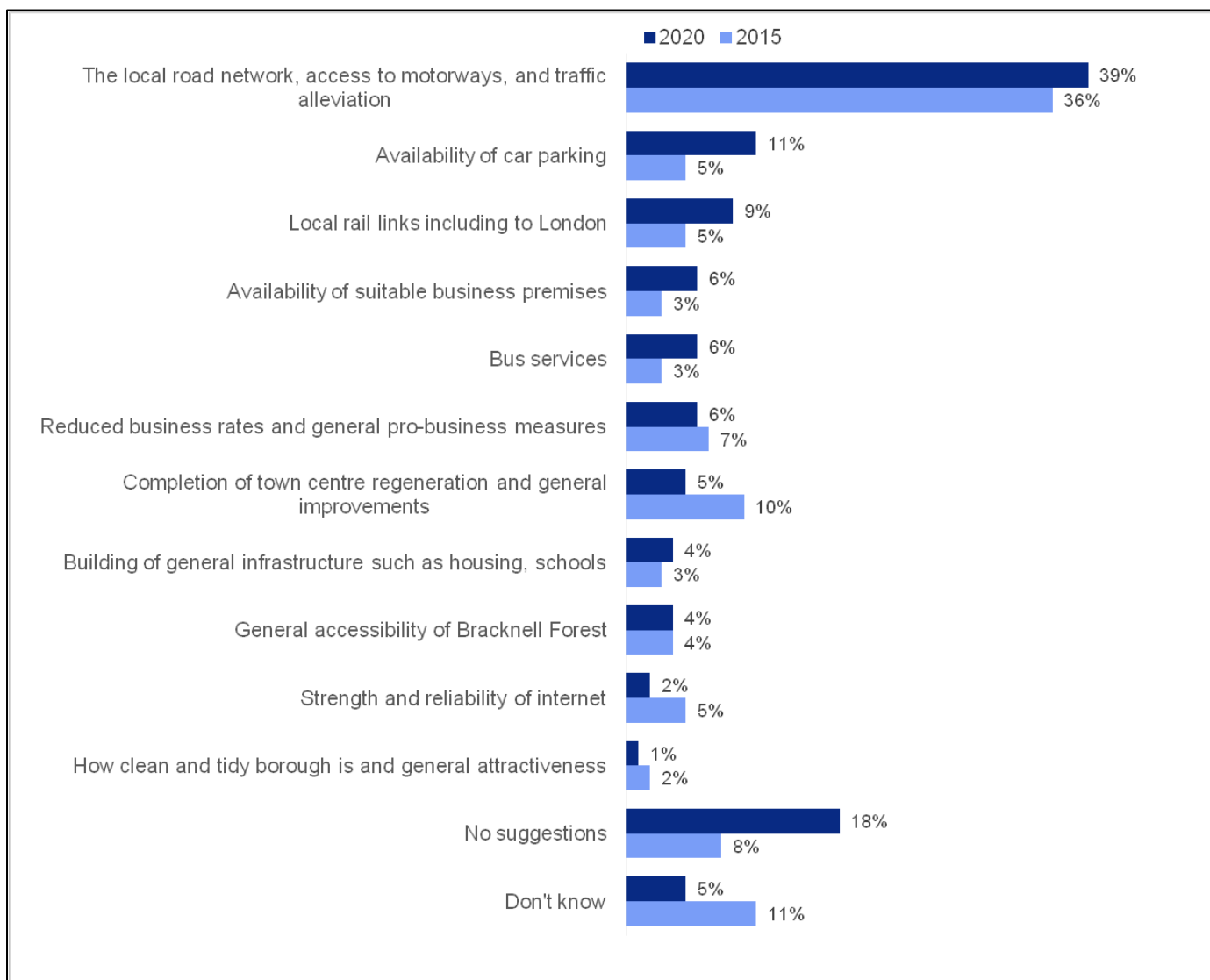
Question asked: How would you rate the following in Bracknell Forest?

No comparative data available for “Greenspace/Openspace accessible to employees”, “Catering/Restaurant facilities”, “Educational facilities”, “The major road network”, “Housing”, “Hotels” or “Electric charging points”.

Most important aspect of local infrastructure in Bracknell Forest to improve

- 3.12. The most common aspect, mentioned by around two-fifths, was the local road network, access to motorways, and traffic alleviation (39%). This reflects the relatively low ratings given to “the local road network” above. Around one in ten mentioned the availability of car parking and local rail links (11% and 9% respectively). This is comparable to the figures seen in 2015, when 36% mentioned the local road network, access to motorways, and traffic alleviation, with an increase on the 5% who cited availability of car parking and the 5% who mentioned local rail links.
- 3.13. Local rail links were only considered by businesses in the Bracknell Business Improvement District (BID), where 13% mentioned it as the most important aspect, compared to none of those not in the BID.
- 3.14. The local road network (35% of BID businesses and 47% of non-BID businesses) and availability of car parking (7% of BID businesses and 19% of non-BID businesses) were less likely to be considered as in need of improvement by BID businesses compared to non-BID businesses.
- 3.15. Availability of suitable business premises was more likely to be mentioned by businesses in the Life Sciences sector (which may reflect their specialist nature and that they tended to be larger businesses), mentioned by 29%, compared to 5% of businesses in the IT and Digital sector and a similar proportion of businesses in the Retail sector.

Figure 3.3: Most important aspect to improve



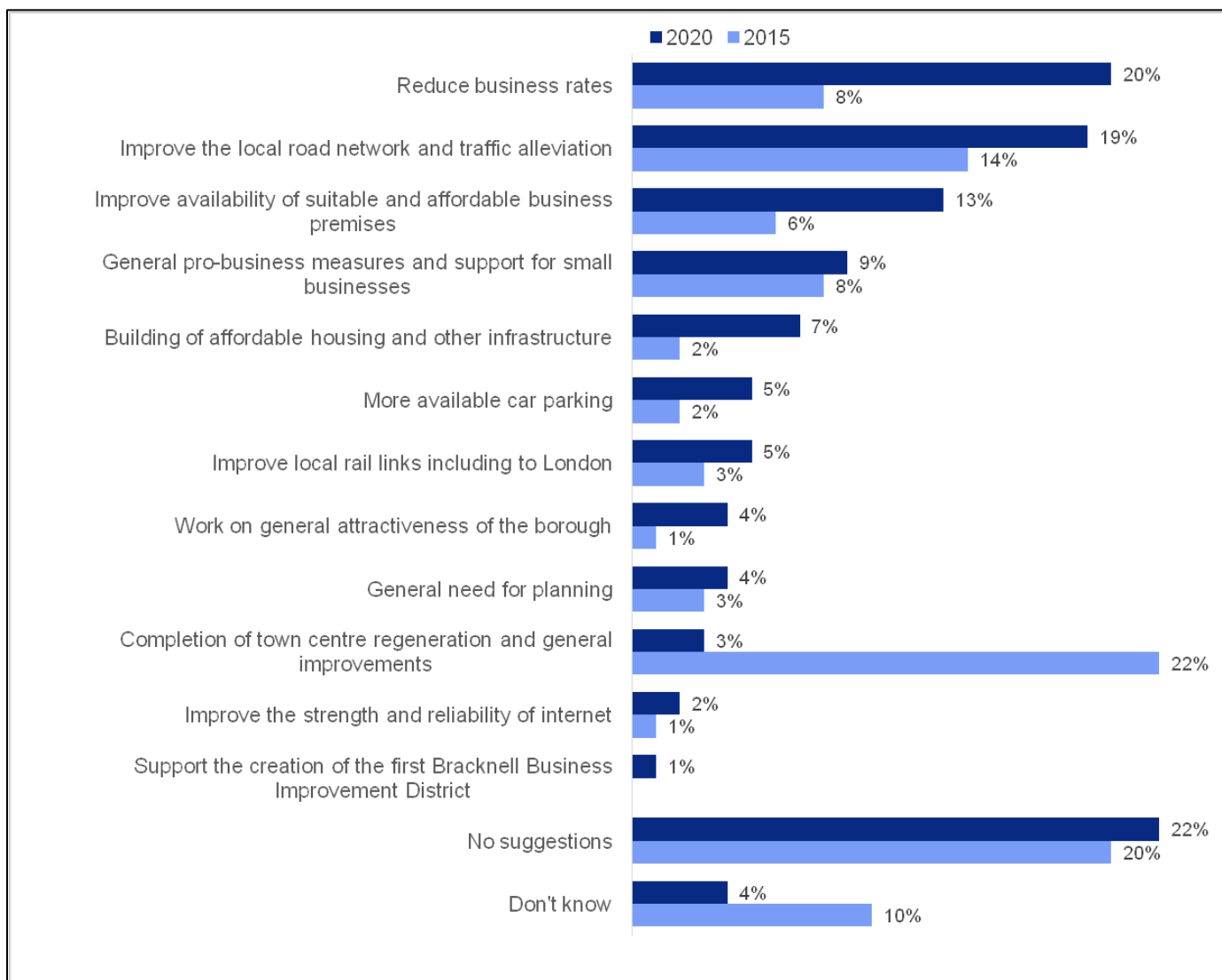
Number of respondents: 2020 - 354, 2015 - 350. Question asked: What do you consider is the most important aspect of the local infrastructure in Bracknell Forest that should be improved to make it a better place to do business? Note: Respondents could select more than one answer.

Infrastructure actions to grow the Bracknell Forest economy

- 3.16. Reduced business rates and improving the local road network and traffic alleviation were the most frequently mentioned actions (20% and 19% respectively). Reduced business rates was significantly higher than in 2015 when 8% had mentioned it.
- 3.17. Improving availability of suitable and affordable premises was mentioned by 13% of businesses (up from 6% in 2015). Similar to the above finding highlighting the importance of the availability of suitable business premises to businesses in the Life Sciences sector, businesses in this sector were also particularly likely to mention improving availability of suitable and affordable premises here; 56% of them had done so compared to just 16% and 5% of those in the IT and Digital and Retail sectors respectively.
- 3.18. A tenth (9%) mentioned general pro-business measures and support for small businesses, in line with the 8% seen in 2015.
- 3.19. A similar proportion mentioned building of affordable housing and other infrastructure (7%), up from 2% in 2015.

3.20. Completion of the regeneration of the town centre was down to 3% in 2020 from 22% in 2015, reflecting the progress made over the past 5 years.

Figure 3.4: Actions Council and partners could take to grow the Bracknell Forest economy over time



Number of respondents: 2020 - 346, 2015 - 350.

Thinking specifically about infrastructure (things like roads and transport, premises and buildings and the availability of broadband and housing and the local environment), is there anything that the council and its partners could do to help grow the economy in Bracknell Forest and attract more business to the borough?

Note: Respondents could select more than one answer.

3.21. Other suggestions to grow the economy included more advertising of the benefits of Bracknell Forest as an area to do business.

Section 4: Transport

Key Findings:

- Two thirds of businesses (64%) considered access to the M3 and M4 motorways to be important, slightly lower than 2015 (74%).
- The majority of businesses (76%) reported that congestion had a “negative” impact on their business. This is in line with the picture seen in 2015 (71%).
- Coral Reef Roundabout improvements benefited more businesses, compared to other improvements; 47% benefited from reduced and more reliable travel times. However, 40% said they did not benefit from improvements made to the roundabout.
- 51% of businesses were able to name at least one barrier preventing their employees from using other forms of transport to get to work apart from a car.
- Businesses were mostly not aware of the Council’s website information about sustainable travel choices. 86% were not aware of this information. This is higher than the 78% who were not aware in 2015.
- 53% of businesses had working from home policies and 50% had flexi time/gliding work pattern policies, where employees can start or end their workday flexibly to avoid rush hour. Such policies were more common amongst larger businesses, especially those with 50+ staff.
- Overall, around two thirds of businesses (62%) believed the local transport system in Bracknell Forest is about the same as other places in Berkshire. A tenth (10%) believed it was better and a similar proportion (9%) believed it to be worse. This is somewhat different than the picture seen in 2015, when a lower proportion (45%) believed the transport system is about the same as other places in Berkshire and a higher proportion (31%) was not able to decide.

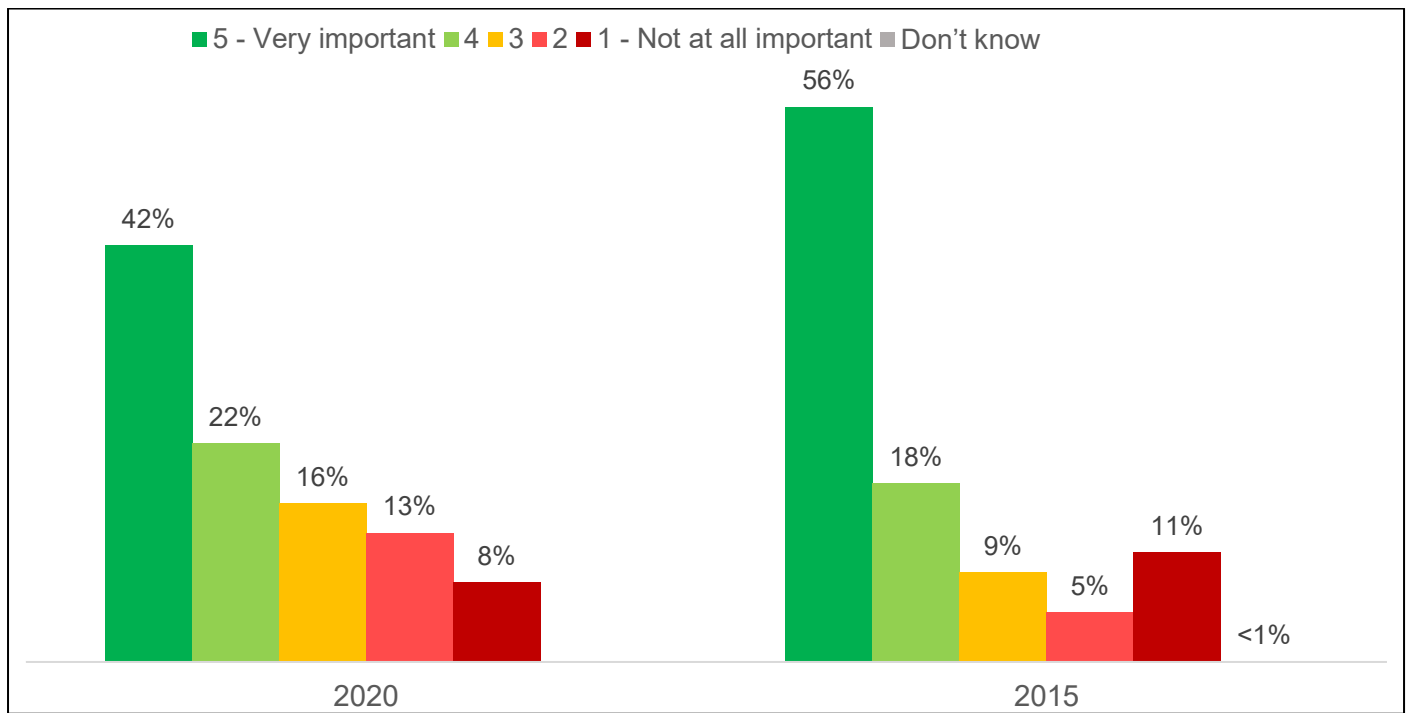
Introduction

- 4.1. This section explores businesses’ perceptions of the local transport infrastructure specifically and in more detail, including sustainable transport.

Importance of having good access to the M3 and M4 motorways

- 4.2. Around six-in-ten businesses (64%) considered access to these motorways to be important, giving a score of 4 or 5 out of 5. This is slightly lower than the 74% seen in 2015.
- 4.3. Businesses in the IT and Digital sector were more likely to find access important. 78% of them considered it important, compared to 56% and 50% of businesses in the Life Sciences and Retail sectors respectively.

Figure 4.1: Importance of having good access to the M3 and M4 motorways



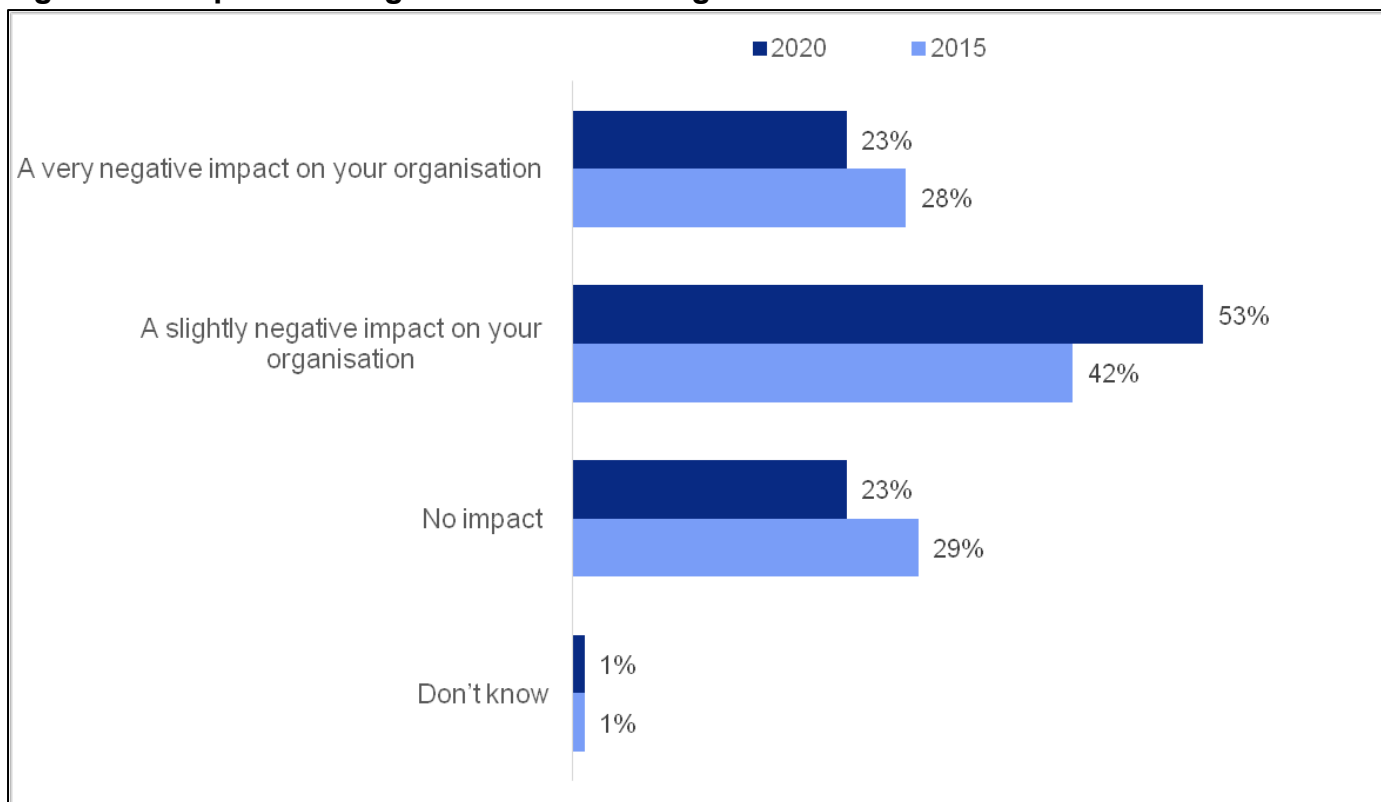
Number of respondents: 2020 - 354, 2015 - 350.

Question asked: How important is having good access to the M3 and M4 motorways to your organisation in Bracknell Forest?

Impact of congestion

4.4. The majority of businesses (76%) reported that congestion had a “negative” impact on their business. This is in line with the picture seen in 2015. Figure 4.2 shows the time series analysis.

Figure 4.2: Impact of congestion in the borough on the business



Number of respondents: 2020 - 353, 2015 - 350.

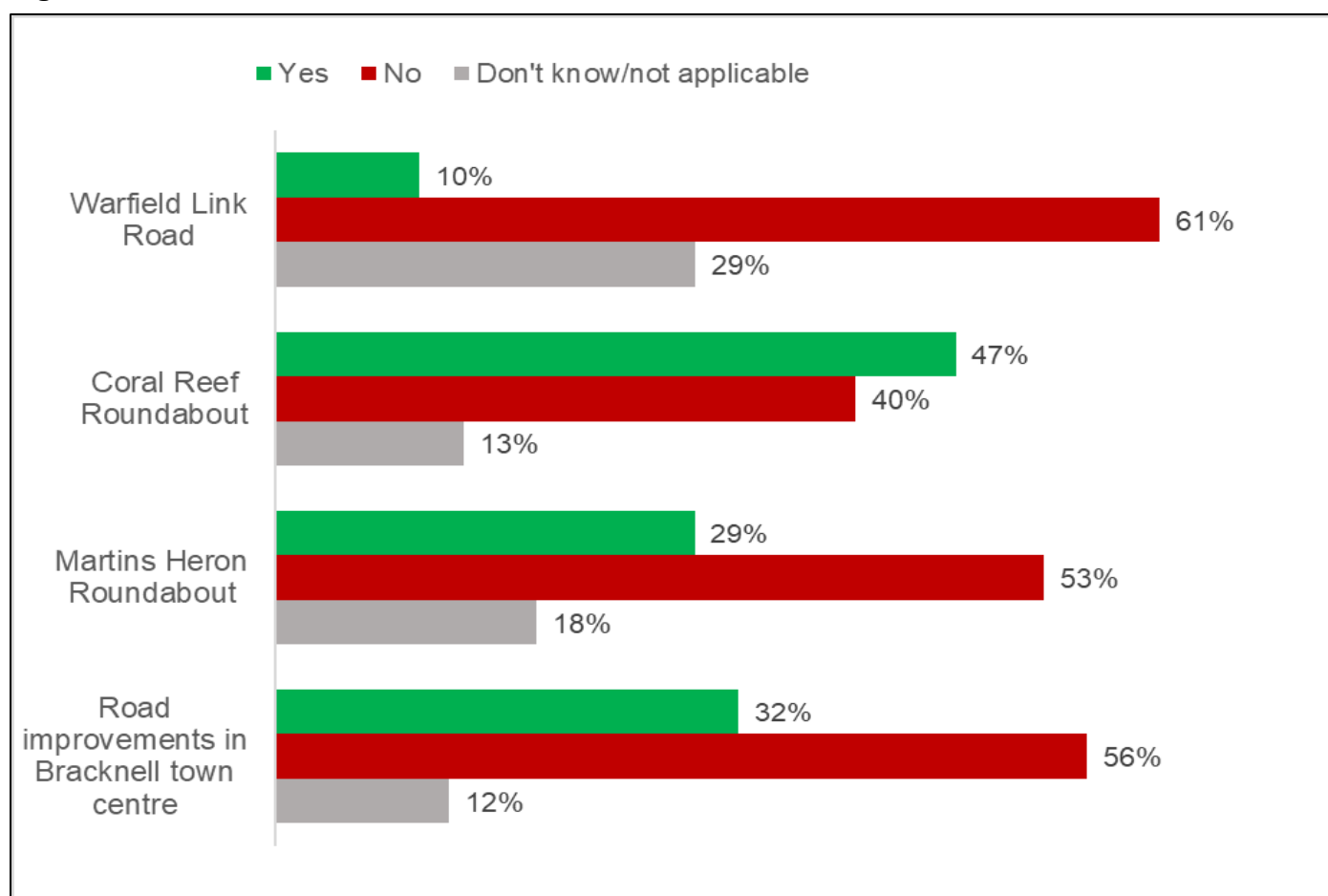
Question asked: Would you say that the level of congestion on the roads in the borough has...

4.5. Businesses that were negatively impacted by congestion were asked how congestion impacted their organisation. Most businesses mentioned making people/customers late, increasing journey times and having to plan (e.g. start earlier) to avoid congestion.

Benefit as a result of road improvements over the last two years

- 4.6. Businesses were more likely to benefit from Coral Reef Roundabout improvements as compared to other improvements; nearly half (47%) benefited from reduced and more reliable travel times. However, 40% said they did not benefit from improvements made to the roundabout.
- 4.7. Businesses in the BID were more likely to say that they had benefited from improvements to Warfield Link Road (14% BID businesses compared with 2% of non-BID businesses), Martins Heron roundabout (34% BID businesses compared with 21% non-BID businesses) and road improvements in the town centre (38% BID businesses compared with 20% of non-BID businesses).

Figure 4.3: Benefit from reduced and more reliable travel times

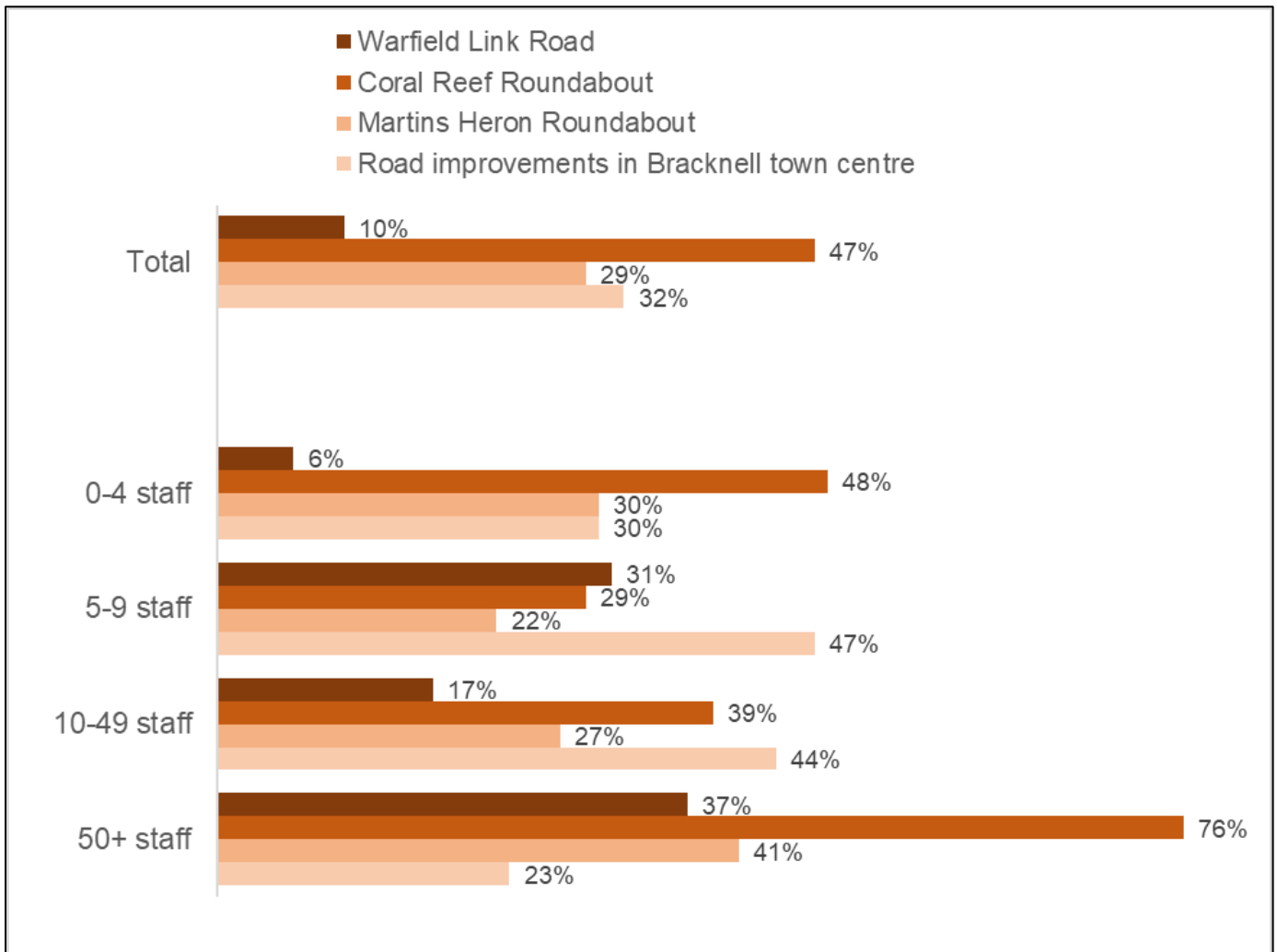


Number of respondents: 354.

Question asked: Has your businesses benefited from reduced and more reliable travel times as a result of improvements over the last two years to the following?

4.8. There were differences by size of business, however this should be treated with caution due to low sample sizes by business size. Those with 50 or more staff have benefited the most from Coral Reef Roundabout improvements, with 76% mentioning they had benefited from such improvements. Businesses with 0-4 staff have also benefited from the Coral Reef Roundabout improvements, with around half of such businesses mentioning they had benefited from the improvements. Only 6% of those businesses however had benefited from the Warfield Link Road improvements.

Figure 4.4: Proportion of businesses benefited from reduced and more reliable travel times by business size



Number of respondents: Total 354, 0-4 staff 287, 5-9 staff 28, 10-49 staff 25, 50+ staff 14.

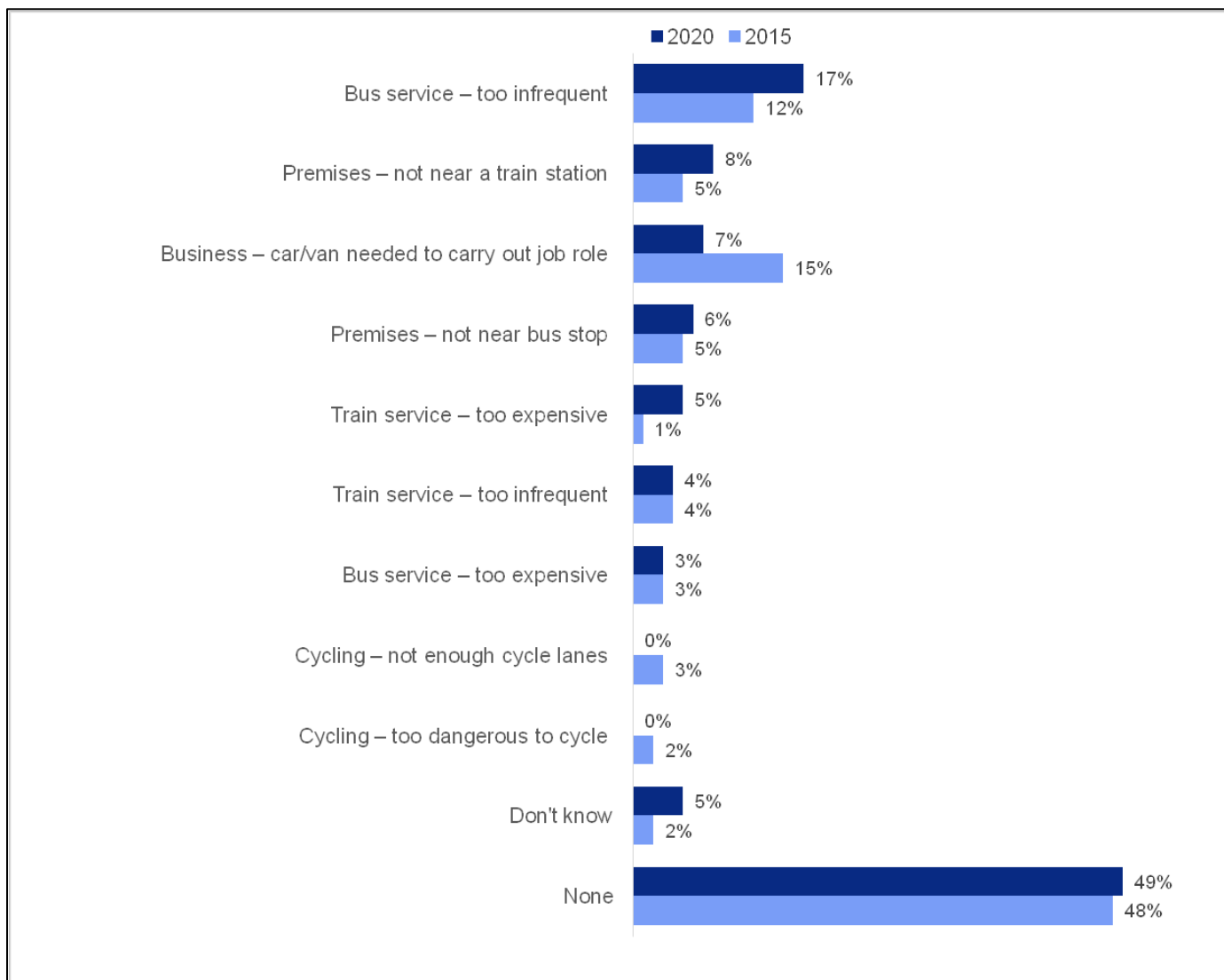
Question asked: Has your businesses benefited from reduced and more reliable travel times as a result of improvements over the last two years to the following?

Sustainable transport

Barriers to using other forms of transport apart from car

- 4.9. Around half (51%) of businesses were able to name at least one barrier preventing their employees from using other forms of transport to get to work apart from a car.
- 4.10. The most commonly reported barrier was infrequent bus service, mentioned by 17% of all businesses. This barrier was mentioned by a comparable 12% of businesses in 2015.
- 4.11. Premises not near a train station was the second common barrier (8%), followed by a car/van needed to carry out job role (7%). This latter barrier was the top barrier in 2015, mentioned by 15% of businesses at the time.

Figure 4.5: Barriers to employees using other forms of transport apart from car



Number of respondents: 2020 - 354, 2015 - 350.

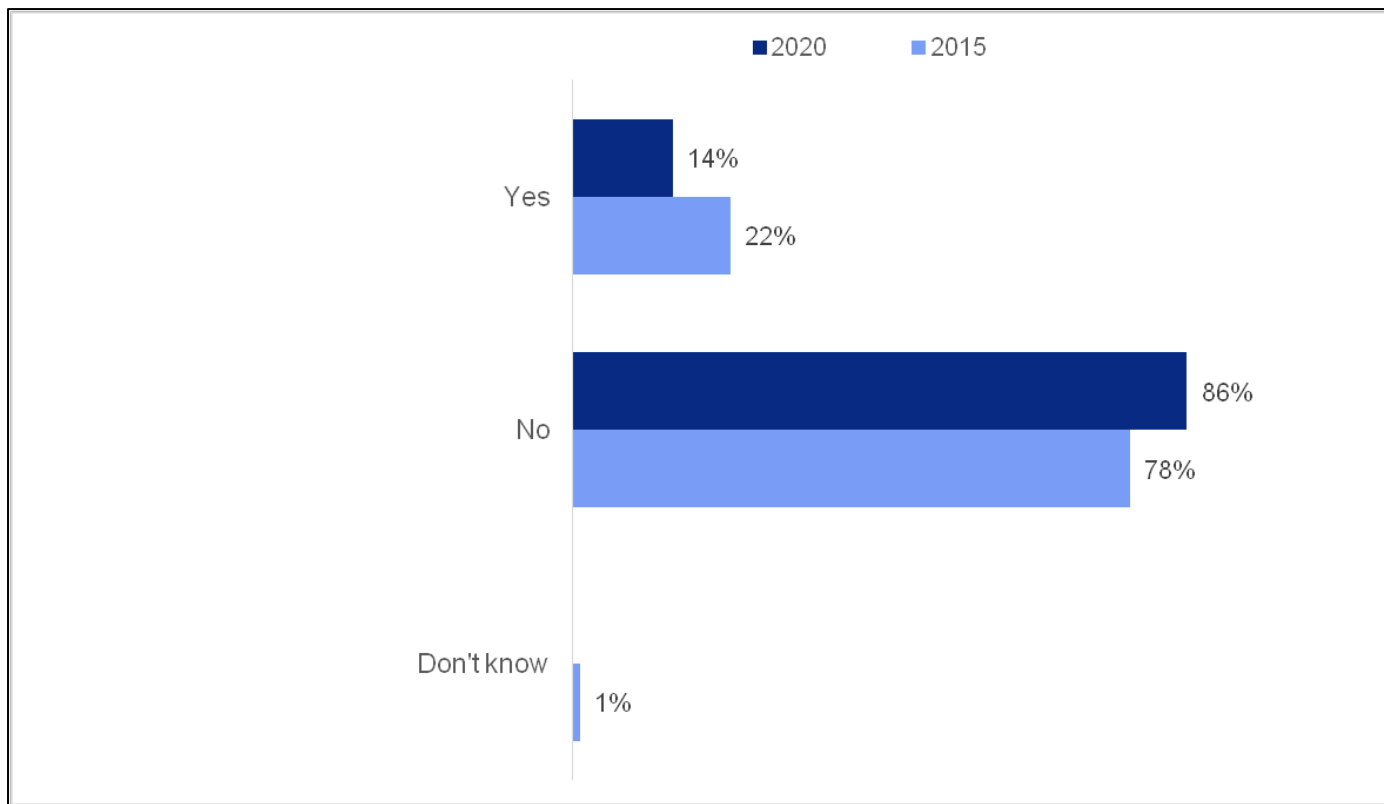
Question asked: Is there anything that you feel prevents your employees from using other forms of transport to get to work apart from a car?

Note: Respondents could select more than one answer.

Awareness of Council's website information about sustainable travel

4.12. Businesses were more likely not to be aware of the Council's website information about sustainable travel choices. Around nine-in-ten businesses (86%) were not aware of this information. This is an increase on the 78% who were not aware in 2015.

Figure 4.6: Awareness of information on the website about sustainable travel choices



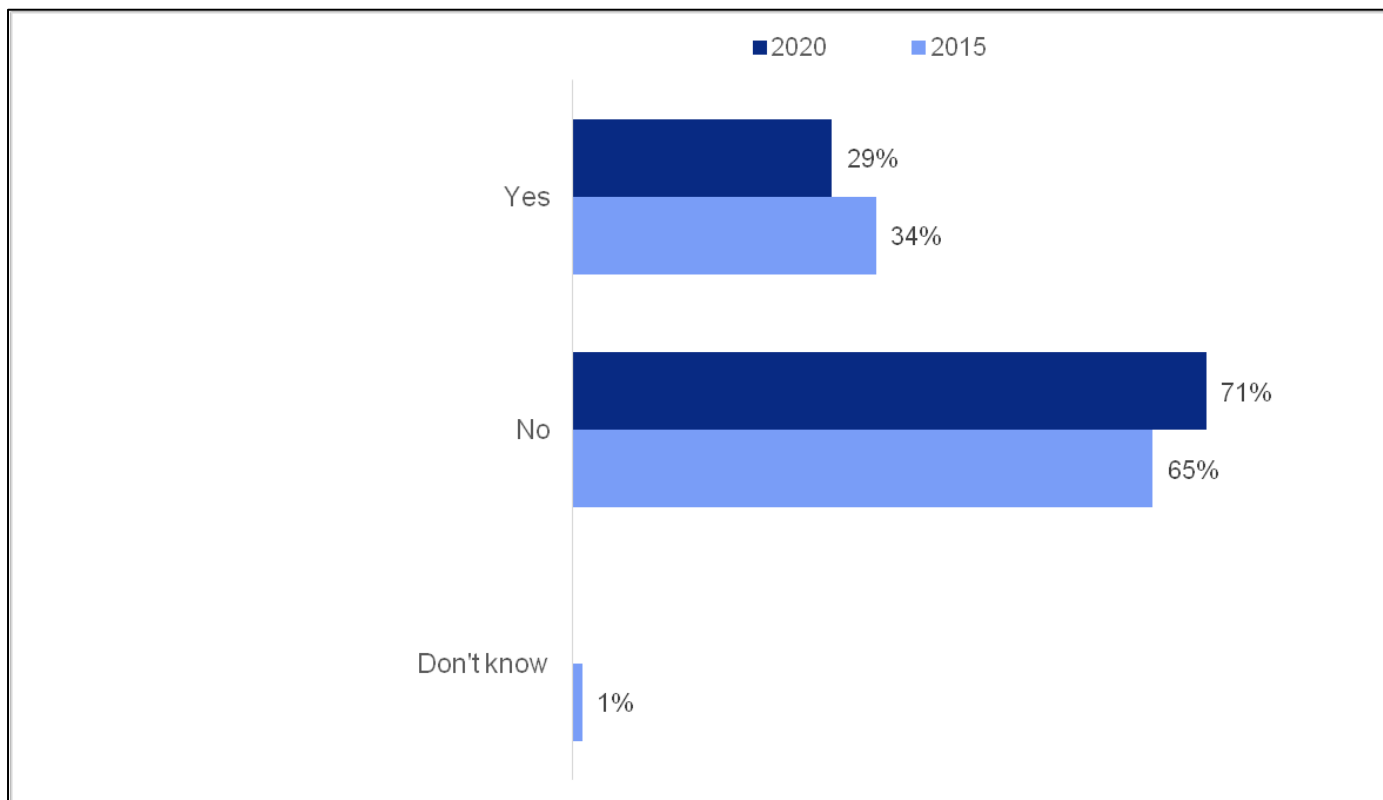
Number of respondents: 2020 - 354, 2015 - 350.

Question asked: There is information on the Council's website to help businesses and residents plan and consider sustainable travel choices. It includes information on workplace travel plans to reduce car use and information on car sharing and public transport? Were you aware that this information exists?

Accessing Council's website information about sustainable travel

- 4.13. The majority of businesses aware of the information on the Council's website did not access such information. Only 29% of those businesses accessed this information. This is in line with the 34% who accessed it in 2015.
- 4.14. This equates to about 4% or under 1 in 20 businesses that have accessed sustainable travel information.

Figure 4.7: Whether accessed information on the website about sustainable travel choices



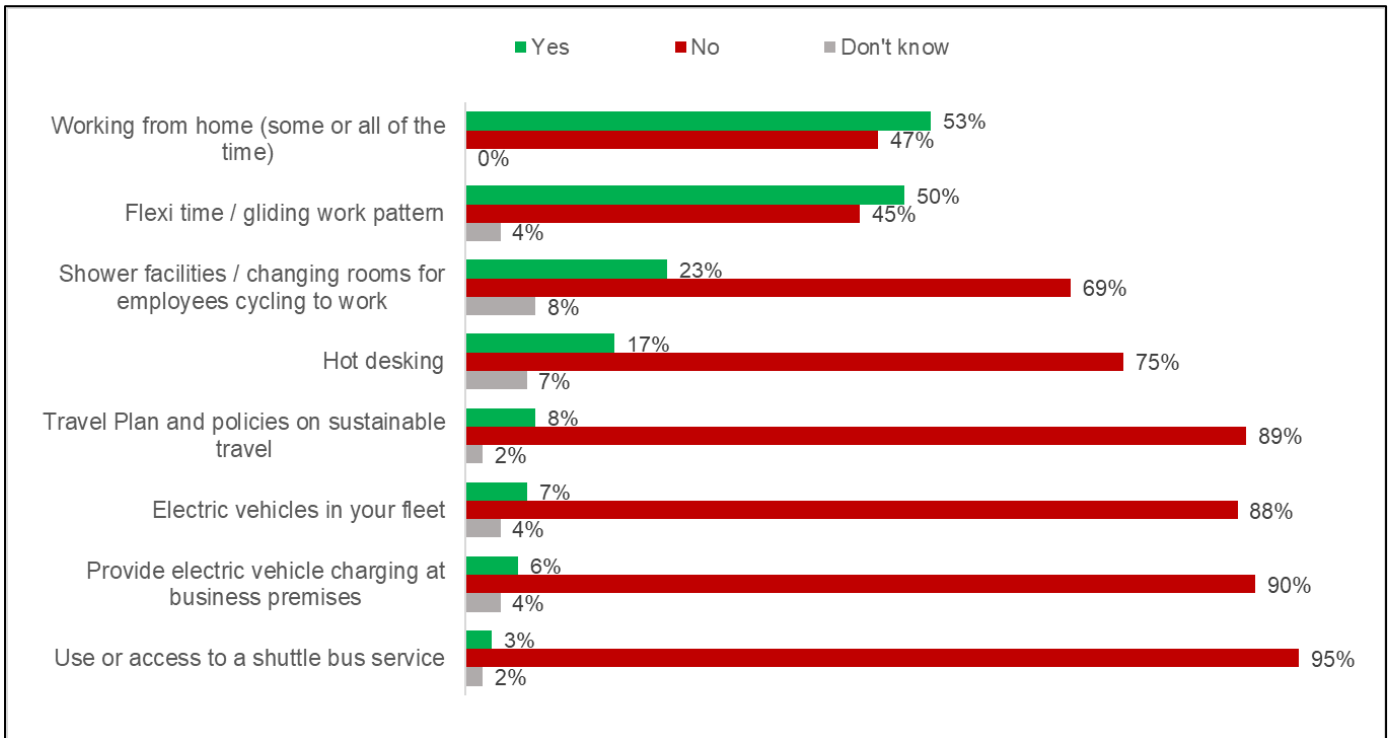
Number of respondents: 2020 49, 2015 92 (only asked to businesses aware of the information).

Question asked: Has your business ever accessed this information?

Business sustainable travel policies

- 4.15. Around half of businesses (53%) have working from home policies, be it some or all of the time. A similar proportion (50%) has flexi time/gliding work pattern policies, where employees can start or end their workday flexibly to avoid rush hour. The other policies, including shower facilities (23%) and hot desking (17%) have low take up.
- 4.16. BID businesses are more likely than non-BID businesses to have Shower facilities / changing rooms for employees cycling to work (27% BID businesses compared with 15% of non-BID businesses), Flexi time / gliding work patterns (57% BIF businesses compared with 36% of non-BID businesses), working from home (60% BID businesses compared with 38% non-BID businesses) and hot desking (21% BID businesses compared with 10% non-BID businesses).

Figure 4.8: Whether business has sustainable travel policies



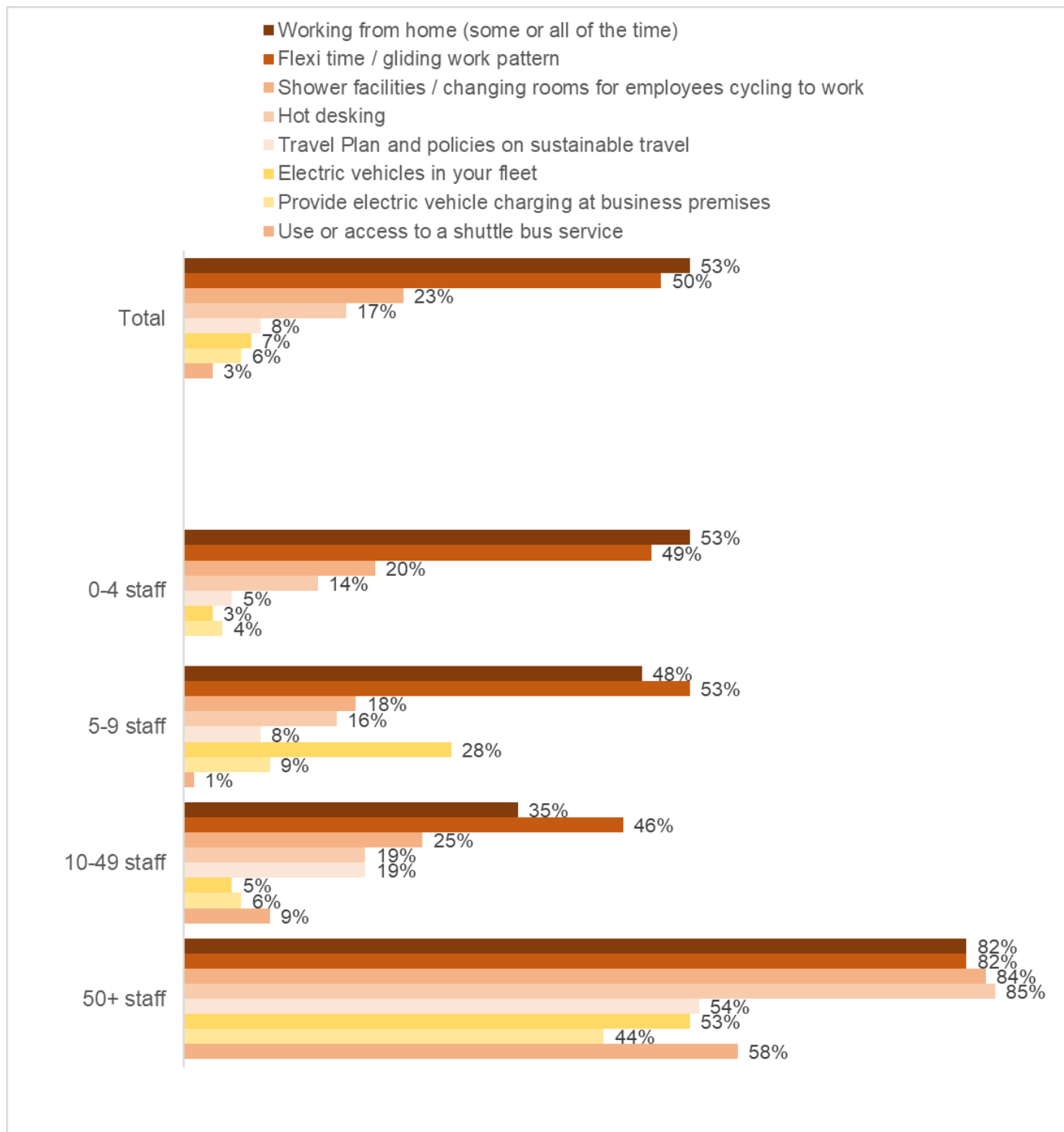
Number of respondents: 354.

Question asked: Does your business have or do any of the following?

Note: Respondents could select more than one answer.

4.17. There were differences by size of business, however this should be treated with caution due to low sample sizes by business size. Businesses with 50 or more staff were generally more engaged with sustainable travel policies. 85% mentioned they had hot desking (compared to just 17% of all businesses), 84% had shower facilities/changing rooms for employees cycling to work (compared to just 23% of all businesses), 82% had flexi time / gliding work pattern (compared to just 23% of all businesses), 82% had flexi time / gliding work pattern (compared to 50% of all businesses) and the same proportion had working from home policies (compared to 53% of all businesses).

Figure 4.9: Whether business has sustainable travel policies by business size



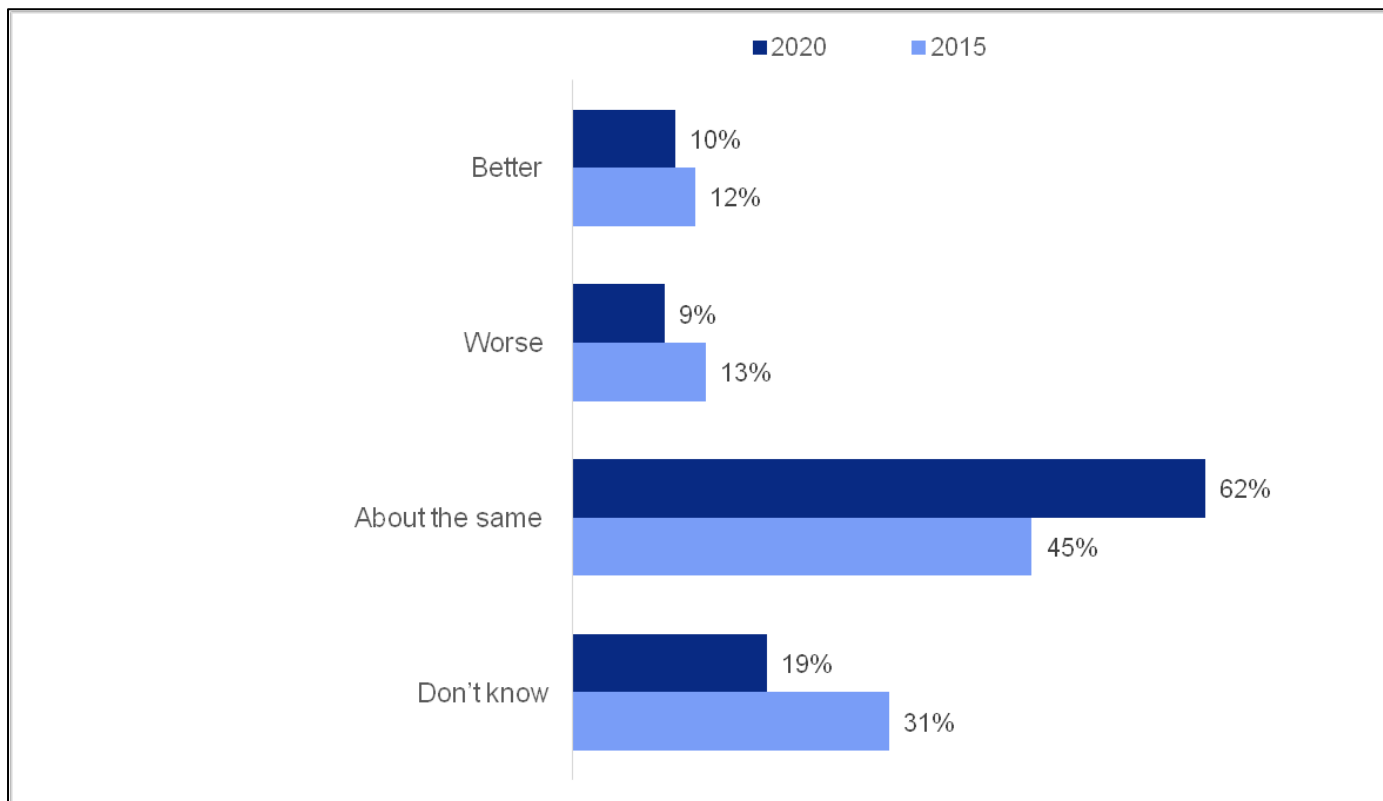
Number of respondents: Total 354, 0-4 staff 287, 5-9 staff 28, 10-49 staff 25, 50+ staff 14.

Question asked: Does your business have or do any of the following?

Overall transport

4.18. Overall, around two thirds of businesses (62%) believed the local transport system in Bracknell Forest is about the same as other places in Berkshire. A tenth (10%) believed it was better and a similar proportion (9%) believed it to be worse. This is somewhat different than the picture seen in 2015, when a lower proportion (45%) believed the transport system is about the same as other places in Berkshire and a higher proportion (31%) was not able to decide.

Figure 4.10: Evaluation of transport system compared to other places in Berkshire



Number of respondents: 2020 354, 2015 350.

Question asked: Generally speaking, do you think that the local transport system in Bracknell Forest is better or worse than other places in Berkshire or is it about the same?

Section 5: Car Parking

Key Findings:

- Nearly two thirds of businesses said their allocated parking met their business needs.
- The majority of businesses (83%) agreed there is sufficient parking available in the town centre, whereas 45% agreed there is sufficient parking for businesses, 36% of businesses agreed there is sufficient parking available for residents and 22% agreed there is sufficient parking at the station.
- A quarter of all businesses (23%) thought Residential Estates have the biggest problems with car parking.

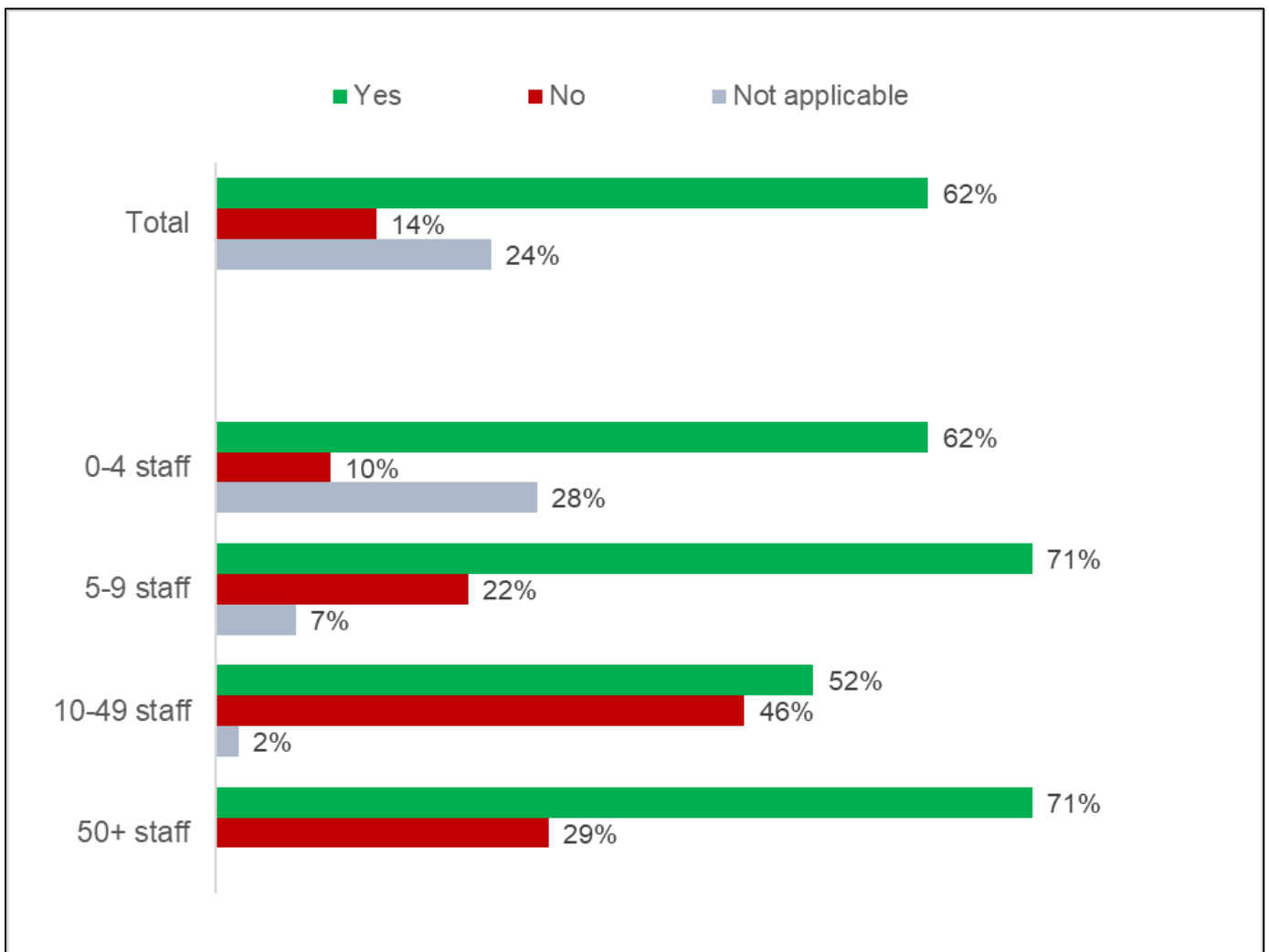
Introduction

5.1. This section explores businesses' perceptions of car parking availability and satisfaction.

Whether parking meets business needs

- 5.2. Around six-in-ten businesses (62%) said their allocated parking met their business needs.
- 5.3. Businesses with 10-49 staff were the least satisfied - 52% of them thought parking met their needs, compared to 62% of all businesses. 28% of businesses with 0-4 staff said this was not applicable to them.
- 5.4. BID businesses are more likely to state that allocated parking meets their business needs (66%) compared with non-BID businesses (54%).

Figure 5.1: Whether allocated parking meets business needs



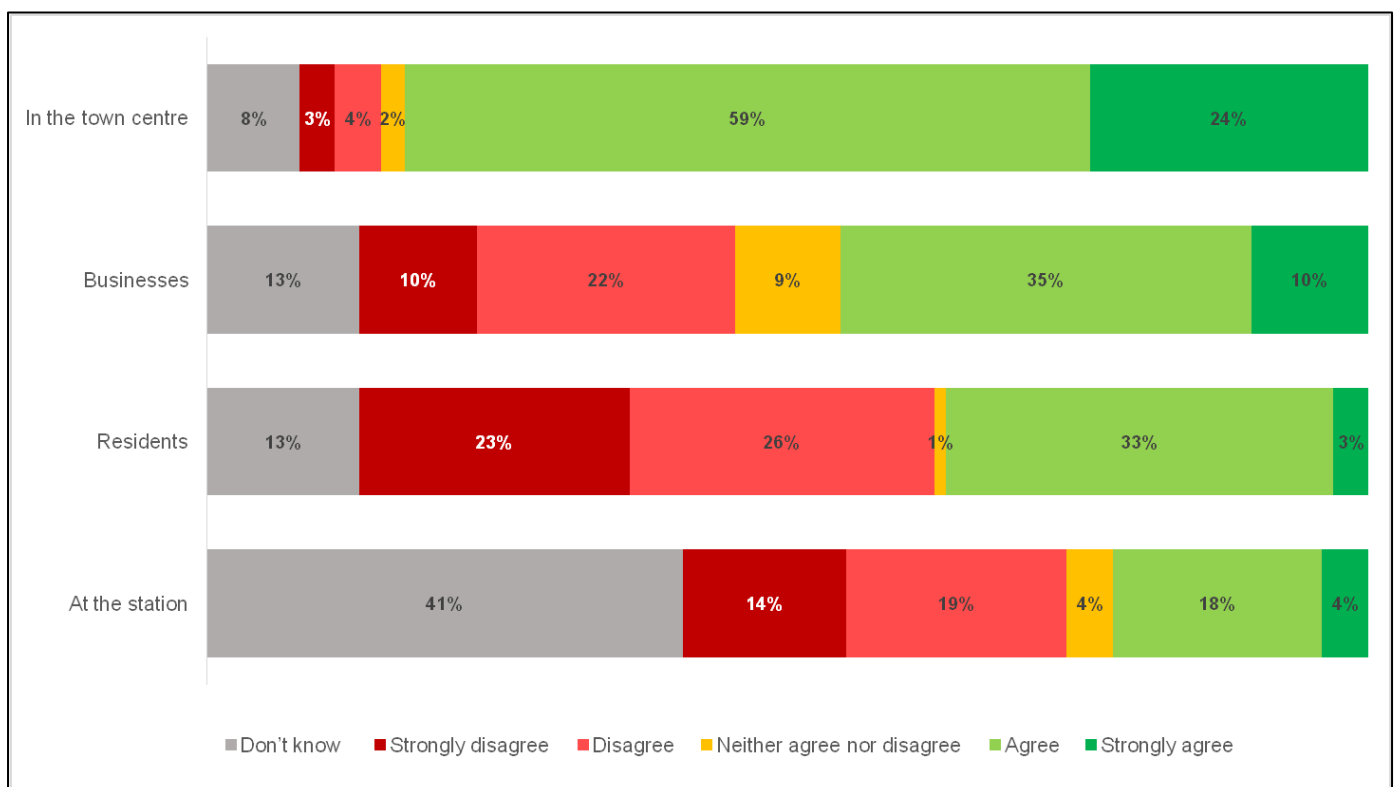
Number of respondents: Total 354, 0-4 staff 287, 5-9 staff 28, 10-49 staff 24, 50+ staff 14.

Question asked: Does you allocated parking meet your business needs?

Whether sufficient parking is available in Bracknell Forest

- 5.5. Businesses were asked whether there is sufficient parking available in Bracknell Forest for businesses, residents, in the town centre and at the station.
- 5.6. Around eight-in-ten businesses (83%) agreed there is sufficient parking available in the town centre (7% disagreed).
- 5.7. 45% agreed there is sufficient parking for businesses and 32% disagreed.
- 5.8. Businesses tended to disagree there is sufficient parking available for residents - 36% of businesses agreed there is sufficient parking available for residents, while 49% disagreed.
- 5.9. 22% agreed there is sufficient parking at the station and 33% disagreed, while 41% did not know.
- 5.10. BID businesses are more likely to agree that there is sufficient parking available for businesses (50% BID businesses agree compared with 36% of non-BID businesses) and in the town centre (88% BID businesses agree compared with 72% of non-BID businesses).
- 5.11. In 2015, the survey simply asked 'Generally, do you think that there is sufficient car parking available in the borough?', with 64% stating 'Yes' and 31% stating 'No' (5% did not know).

Figure 5.2: Whether there is sufficient parking available in Bracknell Forest



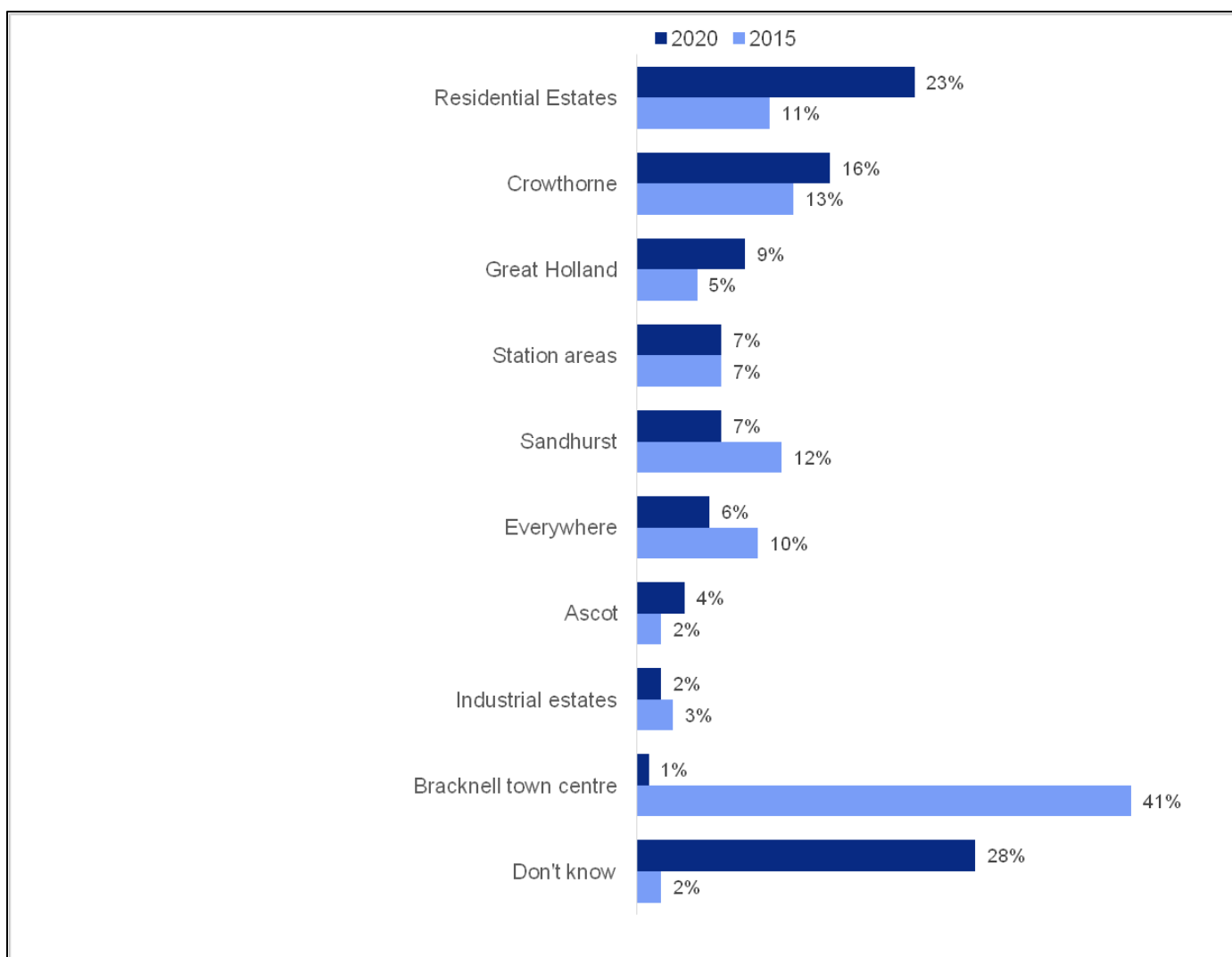
Number of respondents: 354.

Question asked: Do you agree or disagree that there is sufficient parking available in Bracknell Forest for/at the following?

Areas with biggest car parking problems

- 5.12. Around a quarter of all businesses (23%) thought Residential Estates have the biggest problems with car parking. 16% of businesses thought Crowthorne has the biggest problems with car parking, relatively similar to 2015.
- 5.13. In most cases, the size of the problem in different areas was similar in 2020 compared to 2015. However, in 2015, Bracknell town centre had the biggest problems with car parking (41% of businesses did not think there was sufficient parking), but this issue is less important in 2020, perhaps a sign of the positive changes and regeneration of the town centre. It appears that many of those that thought the town centre was a problem in 2015 selected 'don't know' as a response in 2020, which has increased to 28% from 2% in 2015. This perhaps reflects that these 28% of businesses do not consider there to be a problem with parking.

Figure 5.3: Areas with biggest car parking problems



Number of respondents: 2020 - 340, 2015 - 118. Question asked: Which areas of the borough do you think have the biggest problems with car parking? Note: In the 2015 survey, the question was asked only to those who didn't think there is sufficient car parking, meaning figures are not directly comparable and are presented to give an indicative comparison. Respondents could select more than one answer.

- 5.14. Businesses were asked what their organisation does to provide car parking for employees. Most that responded to this question mentioned designated or private car parks.

Section 6: Airports

Key Findings:

- Two-in-ten businesses (20%) take flights from Gatwick and 28% take flights from Heathrow, down from 29% and 38% respectively in 2015.
- Over two-fifths (43%) of businesses who ever used Gatwick think having a fast and reliable public transport service to the airport is not important, and 50% of businesses who ever used Heathrow think having a fast and reliable public transport service to the airport is not important.
- A car/van that is left at or near the airport is the most commonly used method to travel to Gatwick and Heathrow airports, as was also the case in 2015.
- A quarter of businesses (26%) were able to mention at least one reason why Gatwick and Heathrow are important to their business other than employees taking flights, with the most common reason bringing overseas customers to the organisation, mentioned by 15% of businesses (6% in 2015).

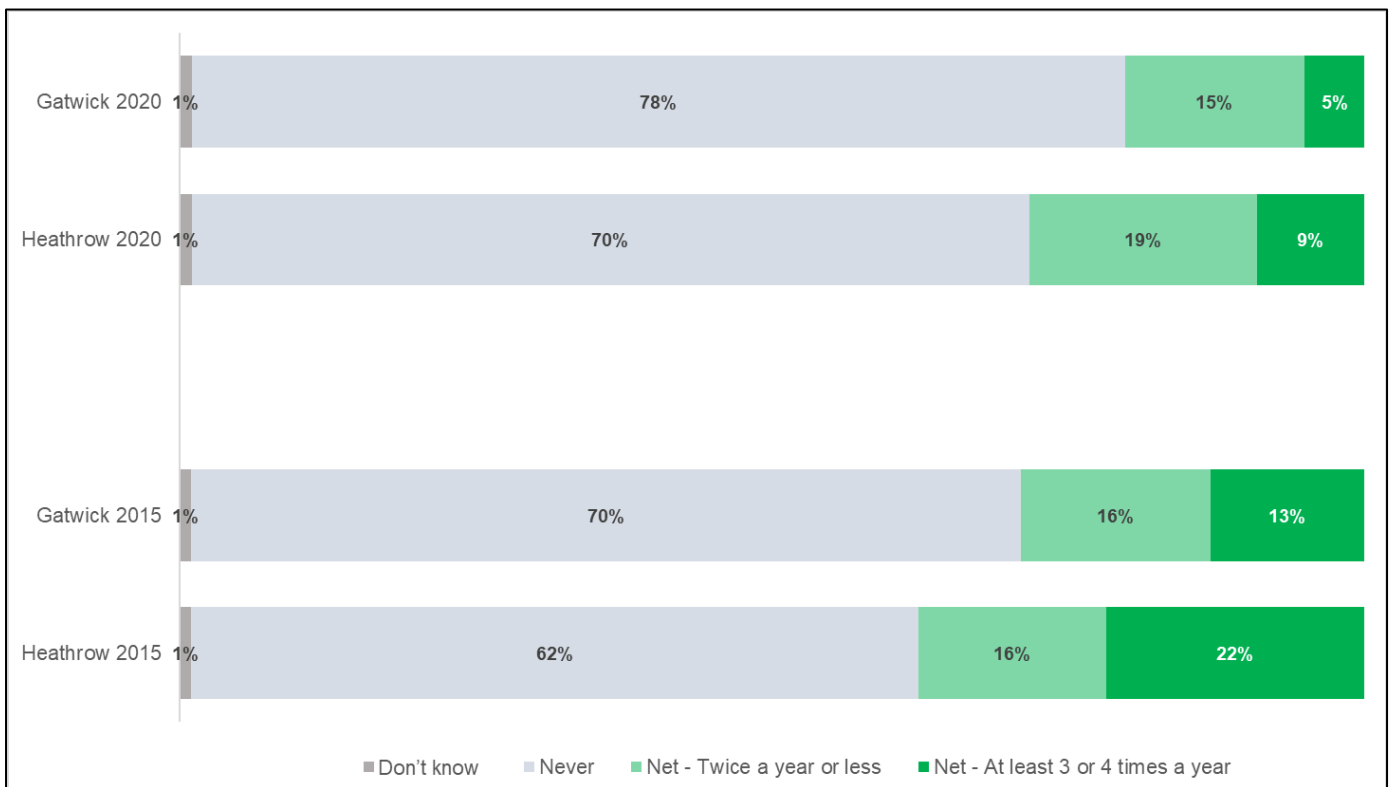
Introduction

6.1. This section explores businesses' usage of, and access to, airports.

Frequency of employees taking flights

- 6.2. Two-in-ten businesses (20%) take flights from Gatwick and 28% take flights from Heathrow, down from 29% and 38% respectively in 2015 (these are relatively small, albeit statistically significant differences, which may reflect the increasing restrictions on flying that were in place during late February 2020 onwards due to Coronavirus).
- 6.3. 1% of businesses said they use Gatwick once a month or more and 5% said they use Heathrow once a month or more, while a further 12% said they use Gatwick once a year or more and 14% said they use Heathrow once a year or more.
- 6.4. Larger businesses are more likely to use the airports with 43% of businesses with 10 or more staff using Gatwick and 66% using Heathrow, compared with 19% and 27% of businesses with less than 10 employees.

Figure 6.1: Frequency of employees taking flights



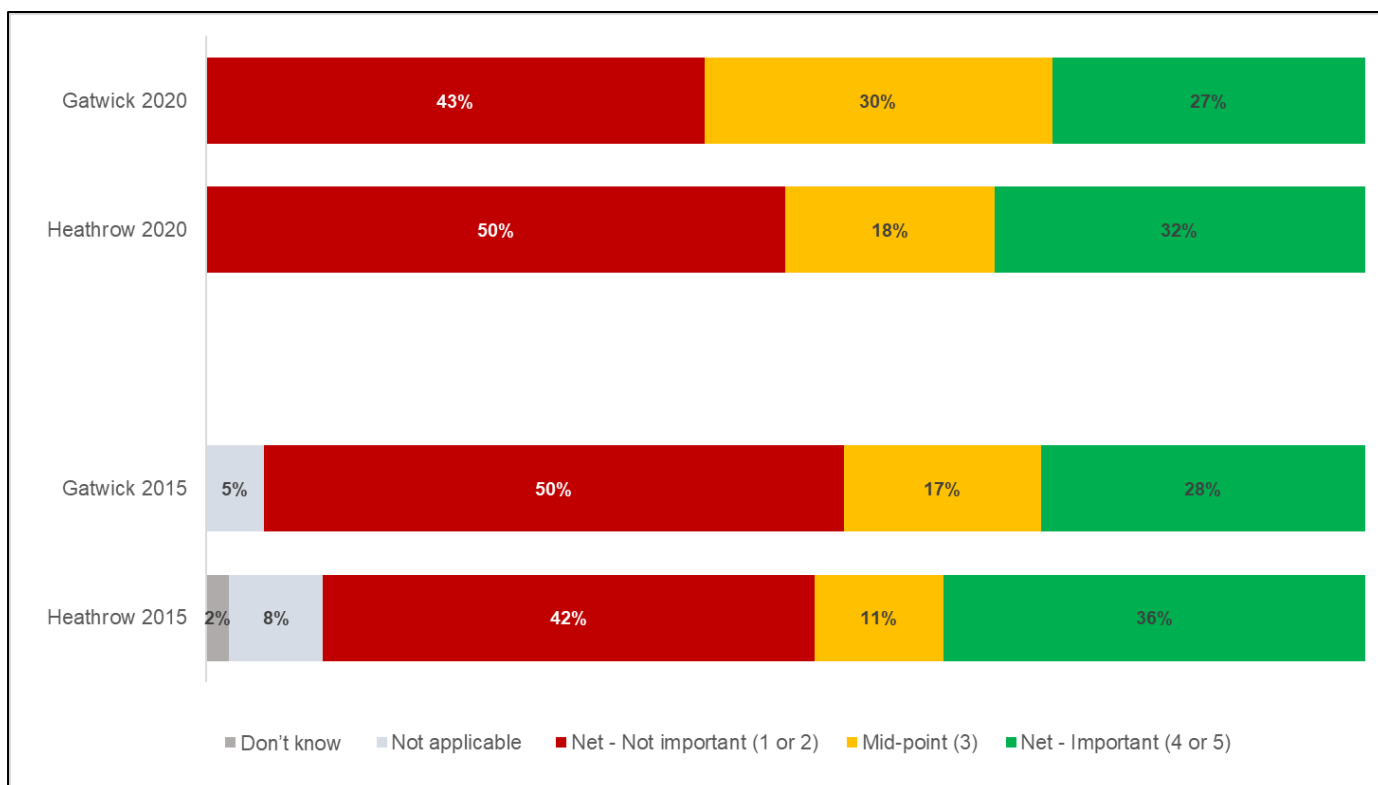
Number of respondents: 2020 - 354, 2015 - 350.

Question asked: How frequently would you say that your company's employees at this site take a flight from the following airports for a business reason?

Importance of public transport services to Gatwick and Heathrow

- 6.5. Over two-fifths (43%) of businesses who ever used Gatwick think having a fast and reliable public transport service to the airport is not important, and 50% of businesses who ever used Heathrow think having a fast and reliable public transport service to the airport is not important.
- 6.6. BID businesses are more likely to state that having a fast and reliable public transport service to Heathrow is important (35% of BID businesses compared to no non-BID businesses), whereas non-BID businesses were more likely to state the importance of such a service to Gatwick (13% of BID businesses compared with 26% of non-BID businesses).
- 6.7. The proportion of businesses, that use the airports, believing a fast and reliable public transport service to them is important is fairly consistent between 2015 and 2020.

Figure 6.2: Importance of having a fast and reliable public transport service to Gatwick and Heathrow



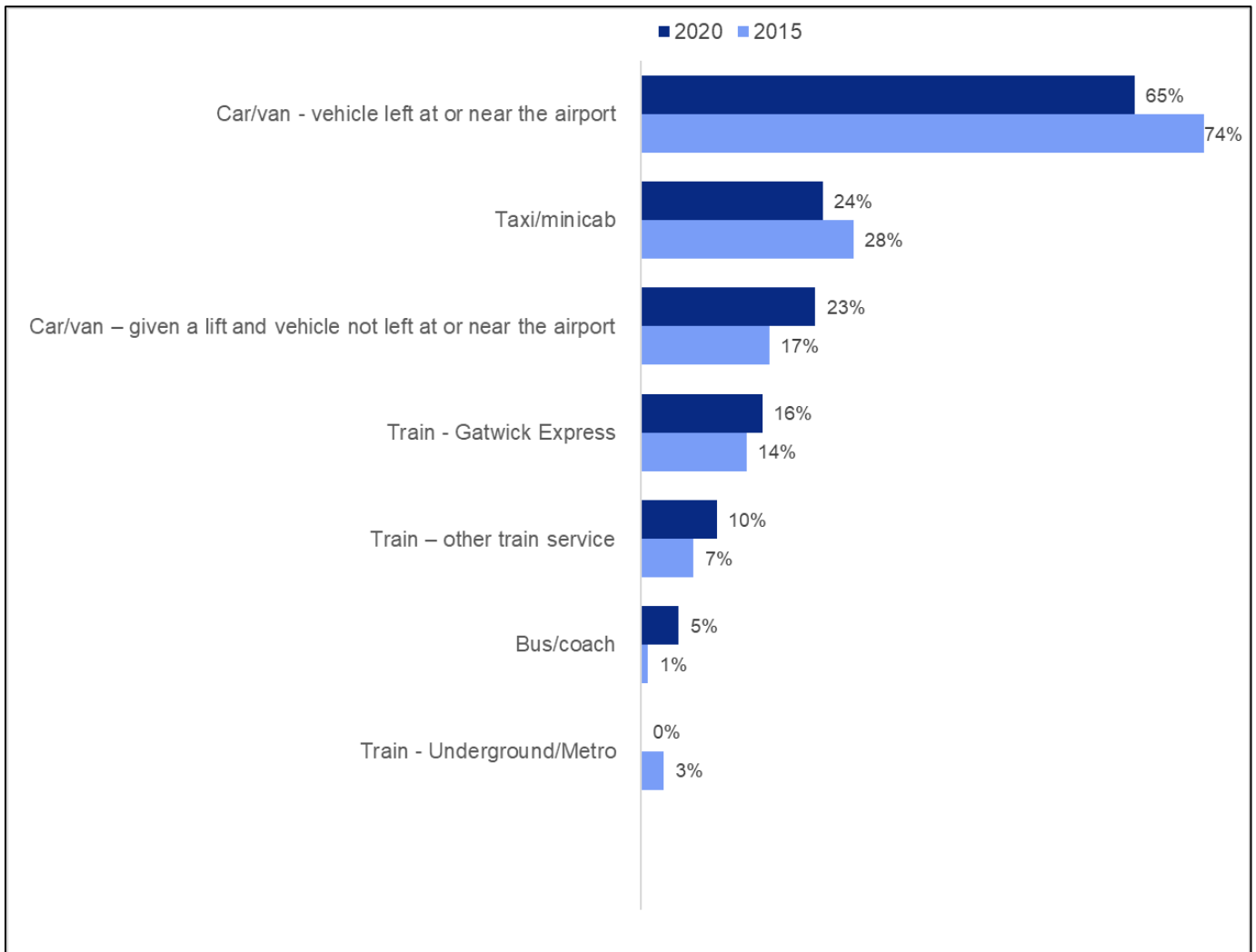
Number of respondents: 2020 Gatwick 73 Heathrow 102, 2015 Gatwick 99 Heathrow 124. Only asked to businesses that use the airports.

Question asked: How important are the following to your organisation in Bracknell Forest?

Methods of transport used to travel to Gatwick and Heathrow

- 6.8. Almost two-thirds of businesses (65%) who ever used the airport normally use a car/van that is left at or near the airport to travel to Gatwick, slightly lower than the 74% who had done so in 2015.
- 6.9. 24% use a taxi/minicab and 23% get a lift in a car or a van that is not left at or near the airport, broadly similar to results in 2015.
- 6.10. There has not been a notable increase either in absolute terms or over time in the use of public transport to access the airport, although the trend seems to be moving in a positive direction.

Figure 6.3: Methods of transport used to travel to Gatwick



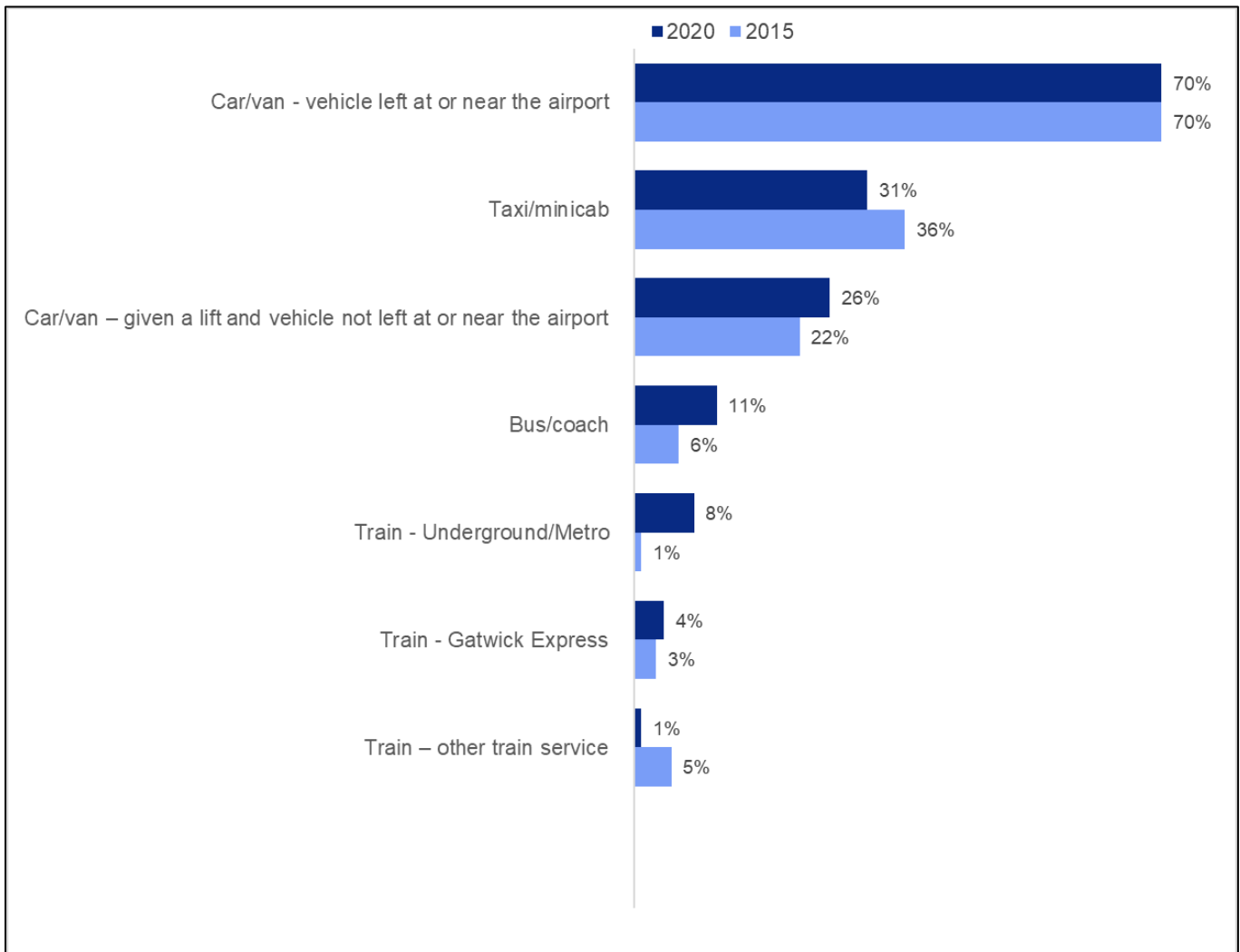
Number of respondents: 2020 - 74, 2015 - 99. Only asked to businesses that use Gatwick airport.

Question asked: What methods of transport do your employees normally use to travel to the following airports?

Note: Respondents could select more than one answer.

- 6.11. 70% of businesses who ever used the airport normally use a car/van that is left at or near the airport to travel to Heathrow, same proportion as seen in 2015.
- 6.12. 31% use a taxi/minicab and 26% get a lift in a car or a van that is not left at or near the airport, similar to 2015.
- 6.13. There is a slight increase in the proportion using public transport to get to the airport – a total of 24% of businesses that use Heathrow travel by bus or train in 2020 compared with 15% in 2015.

Figure 6.4: Methods of transport used to travel to Heathrow



Number of respondents: 2020 - 102, 2015 - 124. Only asked to businesses that use Heathrow airport.

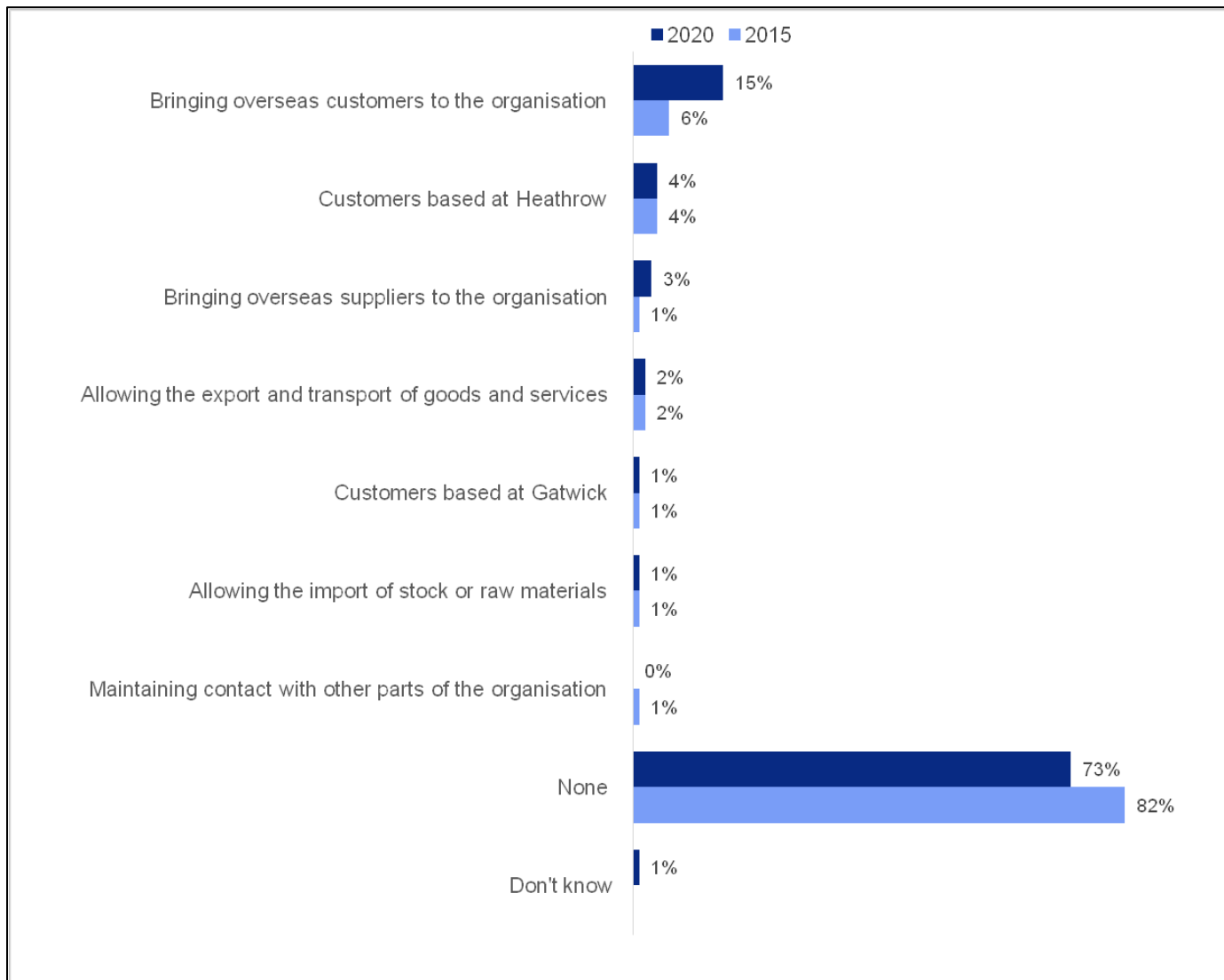
Question asked: What methods of transport do your employees normally use to travel to the following airports?

Note: Respondents could select more than one answer.

Other reasons why Gatwick and Heathrow are important to business

- 6.14. A quarter of businesses (26%) were able to mention at least one reason why Gatwick and Heathrow are important to business other than employees taking flights. This is higher than the 17% of businesses seen in 2015, reflecting an increased importance of these two airports.
- 6.15. The most common reason was bringing overseas customers to the organisation, mentioned by 15% of businesses (6% in 2015).

Figure 6.5: Other reasons why Gatwick and Heathrow are important to business



Number of respondents: 2020 - 354, 2015 - 350.

Question asked: Apart from employees taking flights, are there any other reasons why Gatwick and Heathrow are important to your business?

Note: Respondents could select more than one answer.

Section 7: Broadband

Key Findings:

- Most businesses were not aware of Superfast Berkshire, as was the case in 2015.
- Two fifths of businesses have access to superfast broadband and an equal proportion do not have access.
- 79% of businesses said superfast broadband is “important”, in line with the 77% seen in 2015.
- The majority of businesses (59%) felt their internet connection was adequate and 30% said it was excellent, with overall 89% stating that their internet is connection is at least adequate. This is broadly similar to 2015.
- 69% of businesses do not see the benefit of having a wi-fi enabled internet access in Bracknell town centre, this is a higher figure than in 2015 (58%).

Introduction

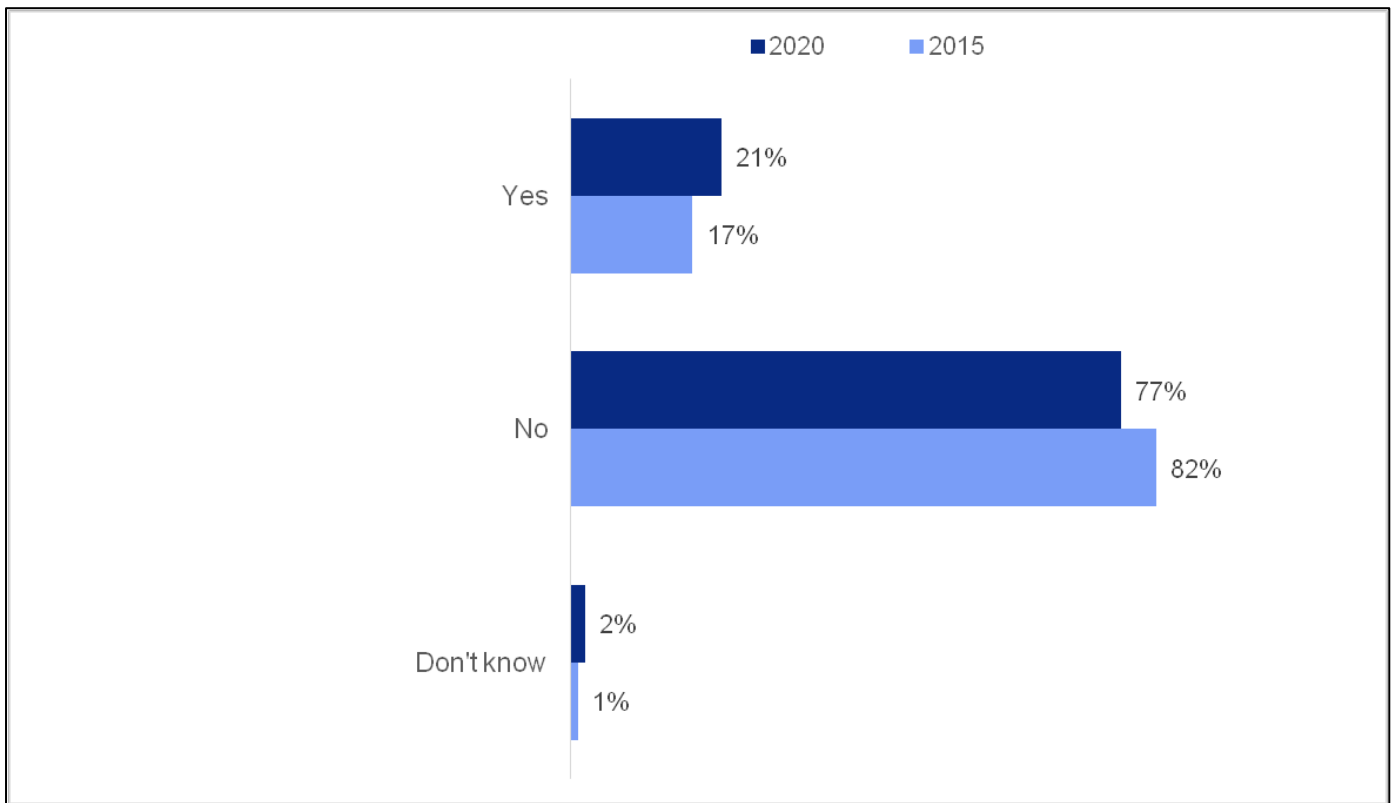
7.1. This section covers businesses’ usage and perceptions of broadband.

Awareness of Superfast Berkshire

- 7.2. The majority of businesses were not aware of Superfast Berkshire.⁶ Two-in-ten businesses (21%) are aware of it, comparable to the 17% who were aware in 2015.
- 7.3. Businesses in the BID (24% aware) are slightly more aware than other businesses (14%).
- 7.4. Life Science businesses (60%) are more aware than I.T/Digital (27%) and Retail businesses (6%).

⁶ The Superfast Berkshire programme started in 2011, as part of the Government's subsidised national programme, to improve broadband coverage in areas deemed not commercially viable by the private sector. The programme is backed by all six Berkshire unitary councils and the Thames Valley Berkshire Local Enterprise Partnership.

Figure 7.1: Awareness of Superfast Berkshire

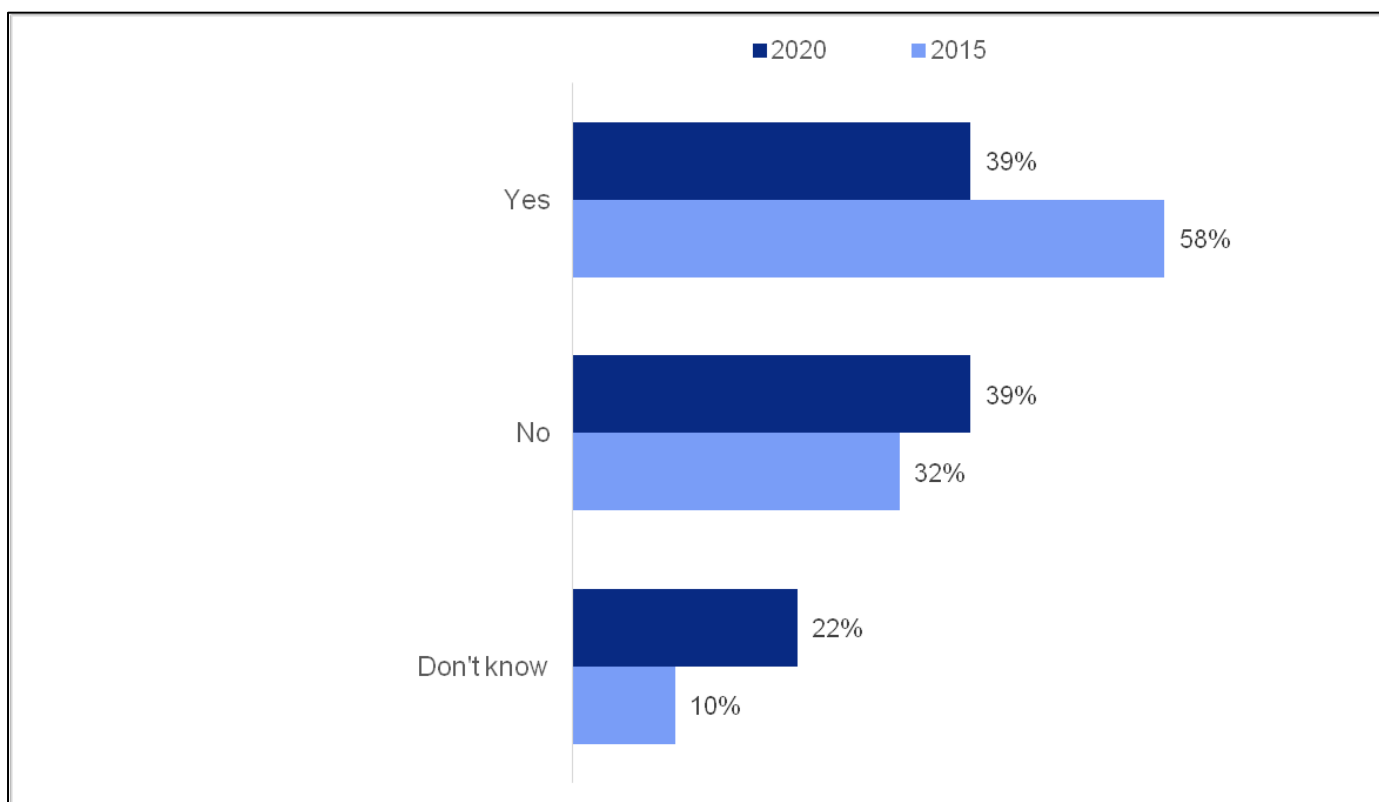


Number of respondents: 2020 - 354, 2015 - 350. Question asked: Bracknell Forest Council is involved with a programme to improve broadband throughout Berkshire called Superfast Berkshire, which aims to ensure that 96% of Bracknell Forest have access to superfast broadband. Where you aware of this?

Access to superfast broadband

- 7.5. Two fifths of businesses have access to superfast broadband and an equal proportion do not have access. There is lower access compared to the 58% who had access in 2015 (although once 'don't know' responses are removed the differences are less).⁷
- 7.6. Businesses that are aware of Superfast Berkshire were more likely to say they have access to superfast broadband (46% said they had access) compared with businesses that were not aware (35% had access). This highlights the importance of increasing awareness of Superfast Berkshire.
- 7.7. Larger businesses are more likely to have access to superfast broadband – 34% of businesses with under 5 employees have access, compared with 52% with 5 to 9 employees, 62% with 10 to 49 employees and 74% with 50 or more employees that have access.
- 7.8. Life Science businesses (that tend to be larger) are more likely to have access (60%), compared with I.T/Digital businesses (48%) and Retail businesses (13%).

Figure 7.2: Access to superfast broadband



Number of respondents: 2020 - 350, 2015 - 350.

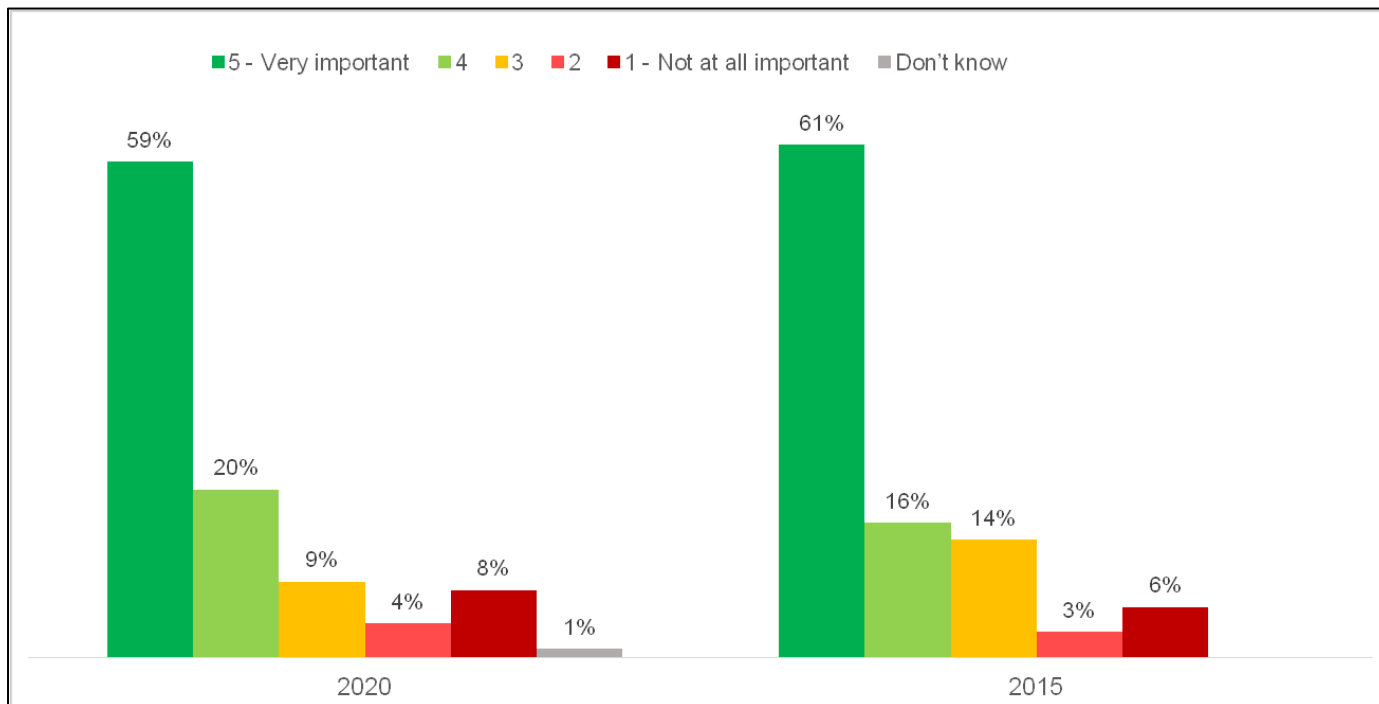
Question asked: Does your business currently have access to superfast broadband?

⁷ The differences in results may also reflect changes in perceptions and expectations. For example, in 2015 'superfast' broadband may have been associated with standard broadband, while in 2020 there is probably greater awareness that standard broadband is slower than the higher levels of speed and bandwidth associated with superfast broadband.

Importance of superfast broadband to business in Bracknell Forest

- 7.9. Eight-in-ten businesses (79%) said superfast broadband is “important”. This is in line with the 77% seen in 2015.
- 7.10. Businesses with under 5 employees were less likely to say it is important (75% said it is important), compared with 94% of larger businesses.
- 7.11. I.T/Digital businesses (100%) and Life Science businesses (90%) said superfast broadband is important, compared with 52% of Retail businesses.

Figure 7.3: Importance of superfast broadband to business in Bracknell Forest



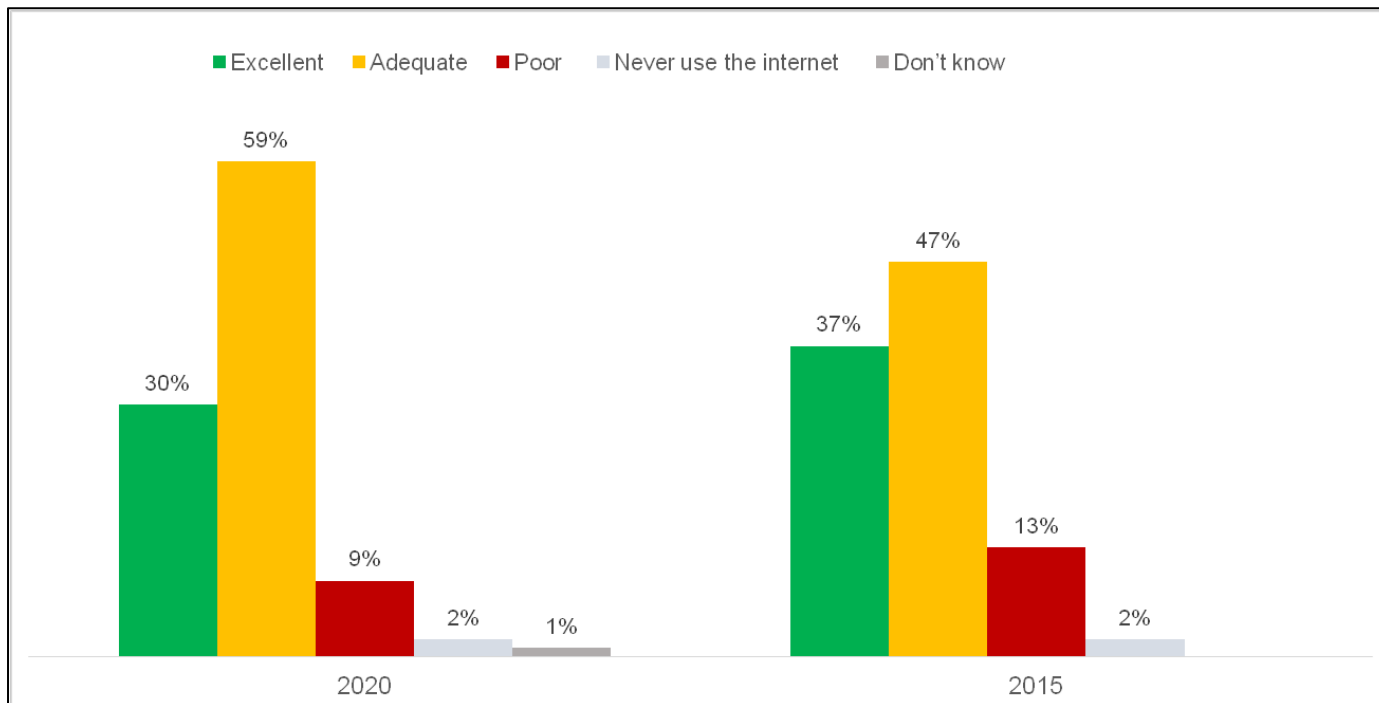
Number of respondents: 2020 - 354, 2015 - 350.

Question asked: How important is having superfast broadband to your business in Bracknell Forest?

Rating of internet connection

7.12. The majority of businesses (59%) felt their internet connection was adequate and 30% said it was excellent, with overall 89% stating that their internet is connection is at least adequate. This is broadly similar to 2015, where 84% of businesses said their internet connection was at least adequate.

Figure 7.4: Rating of business's internet connection



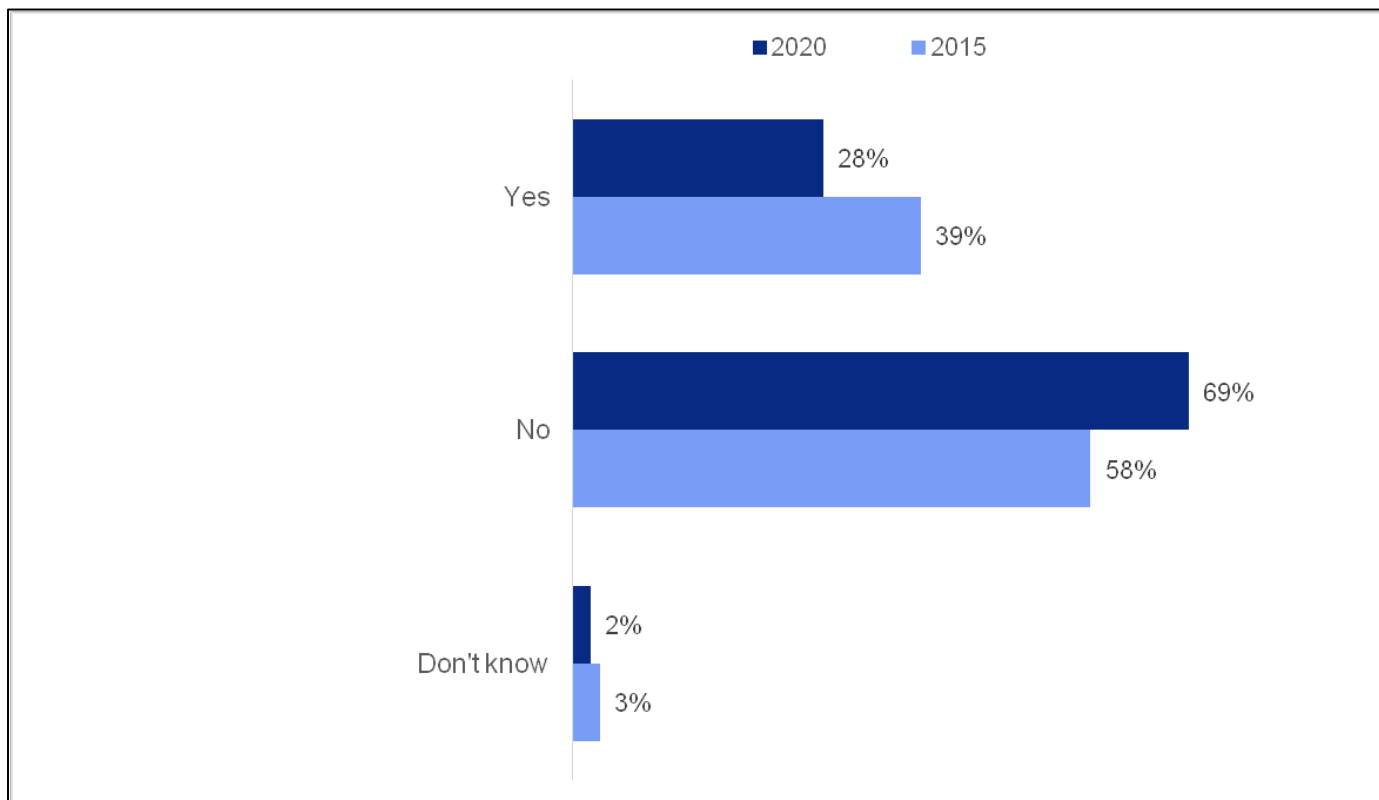
Number of respondents: 2020 - 354, 2015 - 350.

Question asked: How would you rate your business's current internet connection?

Wi-fi enabled access to internet in town centre

- 7.13. The majority of businesses (69%) do not see the benefit of having a wi-fi enabled internet access in Bracknell town centre. This is a higher figure than in 2015 (58%), perhaps reflecting improvements in broadband access for businesses and residents and mobile data access for visitors to the town centre.
- 7.14. Businesses in the BID are slightly more supportive (32% said it would be beneficial) than other businesses (22% said it would be beneficial).

Figure 7.5: Whether wi-fi enabled access to internet in town centre would be beneficial



Number of respondents: 2020 - 354, 2015 - 350.

Question asked: Do you think that having wi-fi enabled access to the internet in Bracknell town centre would be beneficial to your business?

- 7.15. Businesses that thought having wi-fi enabled access to the internet in Bracknell town centre would be beneficial were asked in what ways. Most responses mentioned making things easier and more accessible to customers.

Section 8: Premises

Key Findings:

- Two fifths of businesses leased their business premises, 28% owned their premises (a decrease compared to 50% ownership in 2015) and over 20% of businesses cited 'other' responses including working from home.
- Around a quarter of businesses who leased their premises said they would be able to leave their leased premises within the next 12 months, should they wish to. 19% said they were more than 3 years away, lower than the 32% that were more than 3 years away in 2015.
- 65% of businesses who leased their premises said they intend to renew the lease on their existing premises. This is the same proportion in 2015.
- In short, only about 2-3% of all businesses (whether own or lease) suggest they may look to move outside of Bracknell Forest within the next 3 years.
- 91% of businesses said their current business premises meet the needs of their organisation. This is comparable to the 93% seen in 2015.

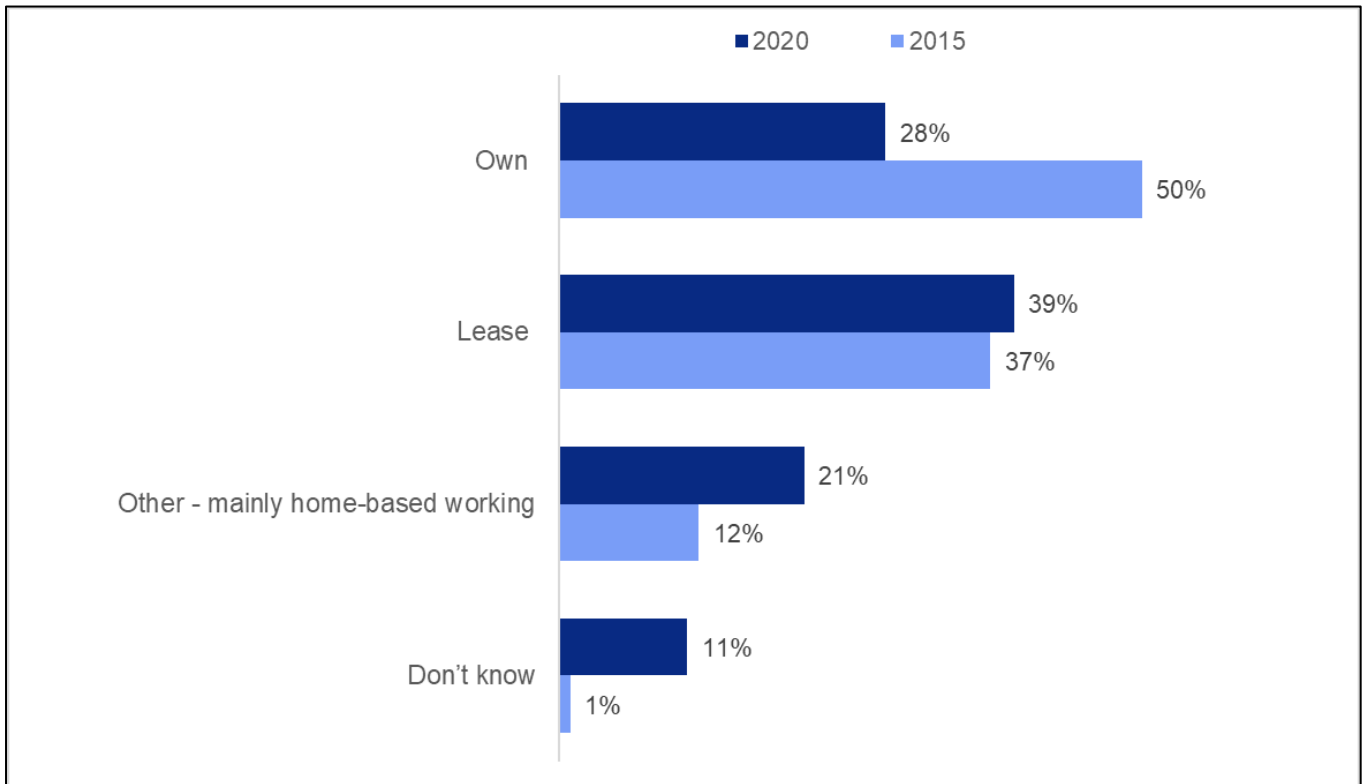
Introduction

8.1. This section explores businesses' attitudes towards premises in Bracknell Forest.

Whether own or lease business premises

- 8.2. Two fifths of businesses leased their business premises (39%) and 28% owned their premises. This latter figure is lower than in 2015 when 50% of businesses mentioned they owned their premises.
- 8.3. In 2020, more businesses provided 'other' reasons (21% in 2020 compared with 12% in 2015), which mainly were business working from home.
- 8.4. Businesses in the BID area (23%) are less likely to own their premises than businesses outside the area (41%).

Figure 8.1: Whether own or lease business premises



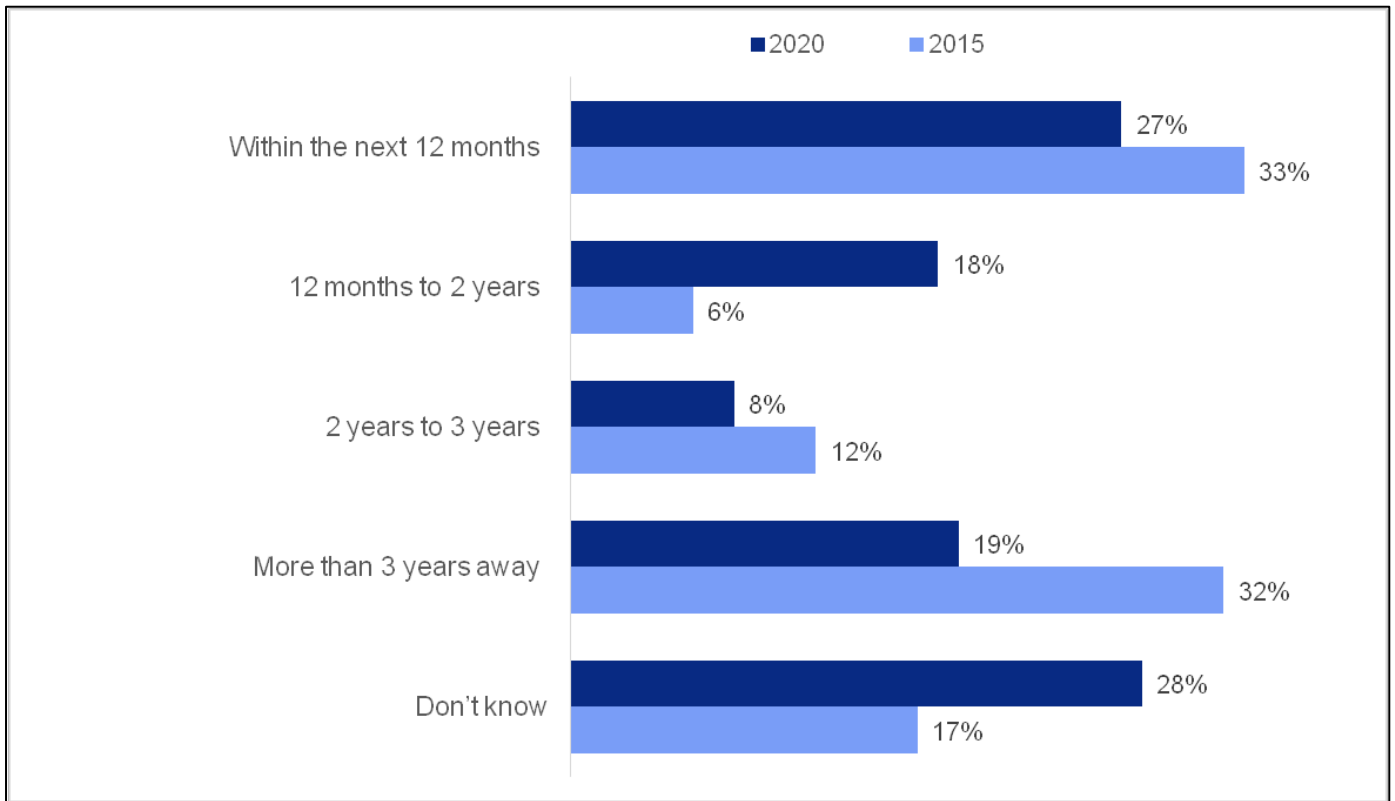
Number of respondents: 2020 - 344, 2015 - 350.

Question asked: Do you know if your company owns or leases your business premises at this site?

When lease on business premises expires or there is a break clause

8.5. Around a quarter of businesses (27%) who leased their premises said they would be able to leave their leased premises within the next 12 months, should they wish to. 19% said they were more than 3 years away, lower than the 32% that were more than 3 years away in 2015, which perhaps reflects an increase in use of shorter term serviced office accommodation leased facilities.

Figure 8.2: When lease on business premises expires or there is a break clause



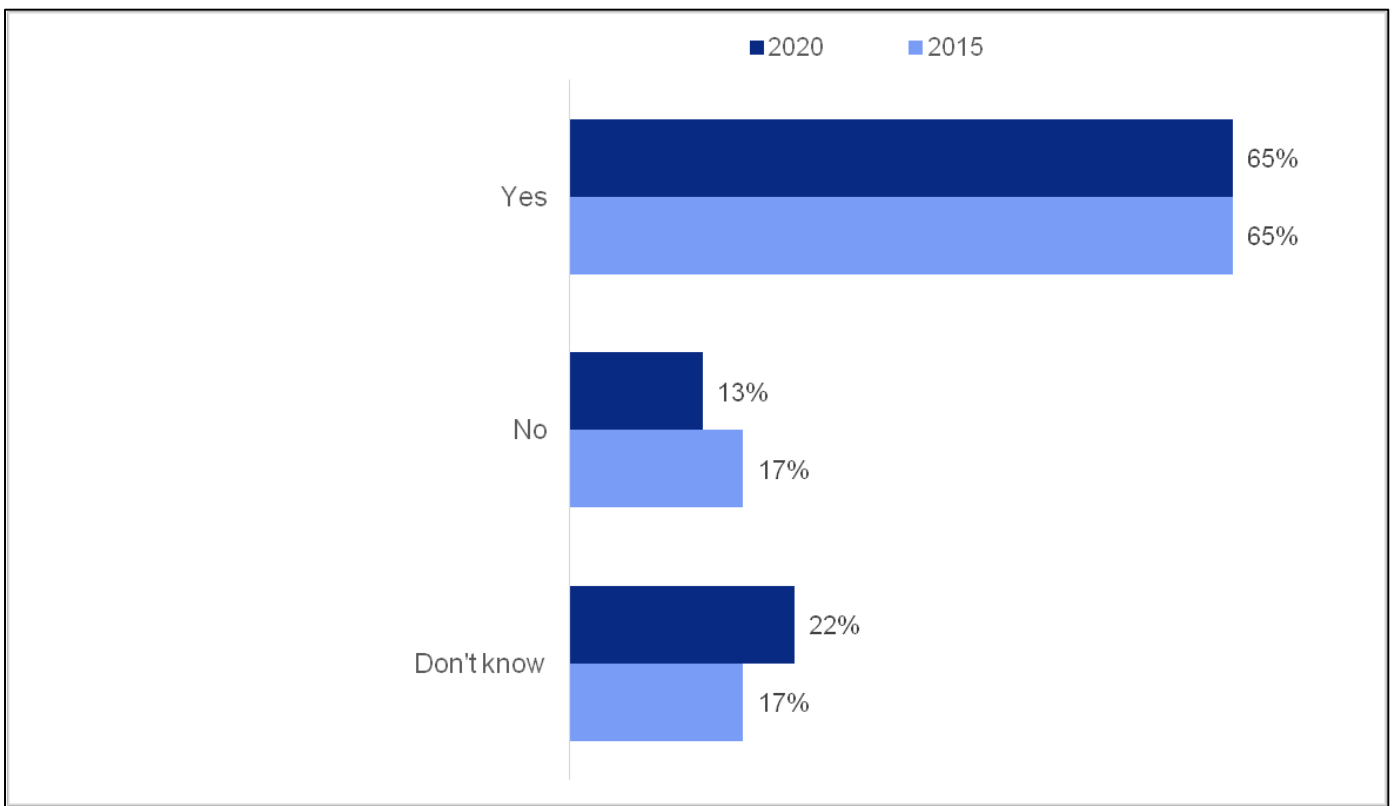
Number of respondents: 2020 - 137, 2015 - 174. Only asked to businesses that lease.

Question asked: Do you know when does your lease expire or when is the break clause?

Renewing lease on existing business premises

- 8.6. Around two thirds of businesses (65%) who leased their premises said they intend to renew the lease on their existing premises. This is the same proportion seen in 2015.
- 8.7. Of the small number of businesses (41) in the sample that said they were not likely to renew their lease, over two-thirds said they intended to find new premises in Bracknell Forest. These businesses, in equal numbers, cited they would seek larger premises, smaller premises, better transport and road links, more parking and better quality premises. Similarly, in equal numbers, businesses that may seek alternative premises in the future said they were seeking established premises, new premises or purpose built premises or had no preference.
- 8.8. In short, only about 2-3% of all businesses (whether own or lease) suggest they may look to move outside of Bracknell Forest in the next 3 years.

Figure 8.3: Likelihood of renewing lease on existing business premises



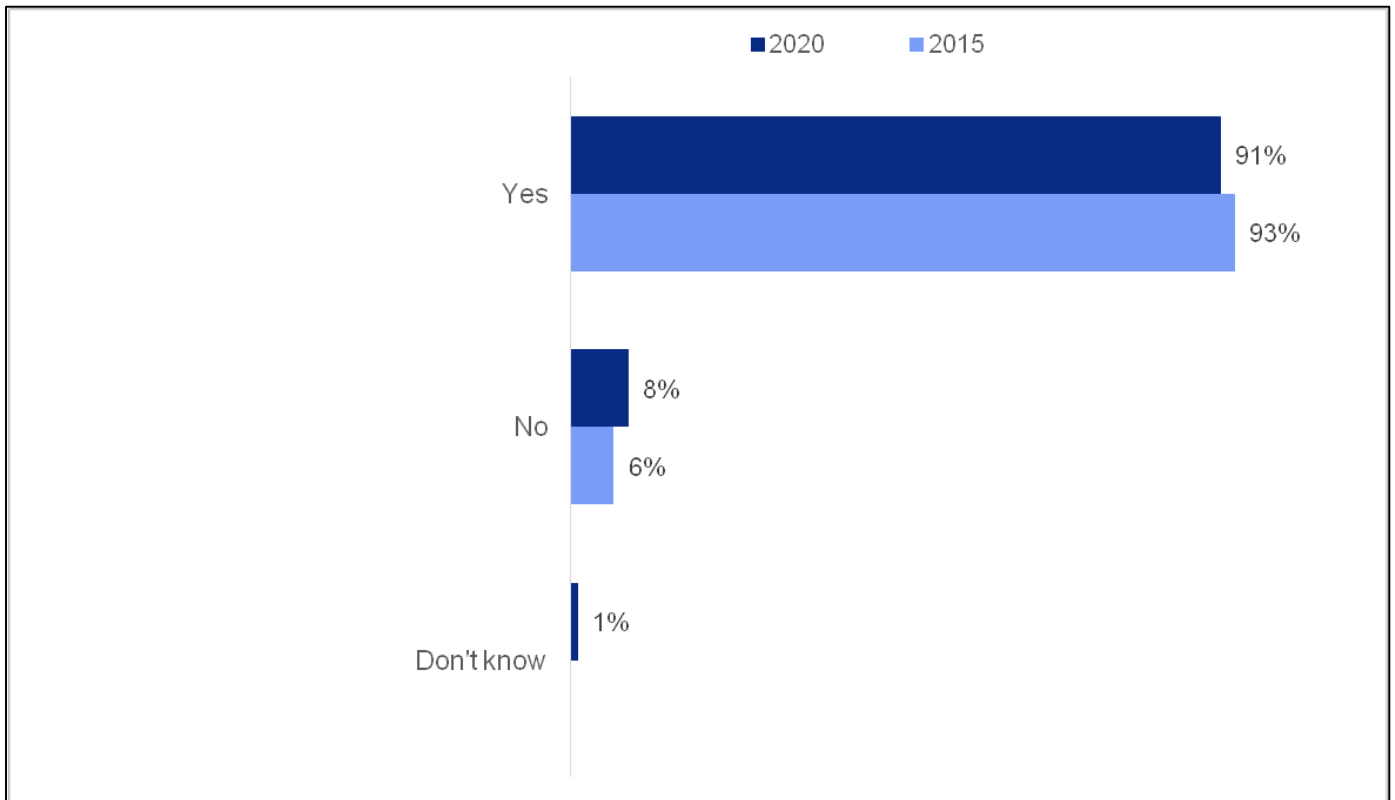
Number of respondents: 2020 - 118, 2015 - 172. Only asked to businesses that lease.

Question asked: Do you know if you will be looking to renew or continue the lease on your existing premises?

Whether current business premises meet the needs of the organisation

- 8.9. Nine-in-ten businesses (91%) said their current business premises meet the needs of their organisation. This is comparable to the 93% in 2015.
- 8.10. There are not any notable differences by business size, sector or location.
- 8.11. The small proportion of businesses that said their premises did not meet their needs mainly said that their current space is too small.

Figure 8.4: Whether current business premises meet the needs of the organisation



Number of respondents: 2020 - 354, 2015 - 350.

Question asked: Do your current business premises meet the needs of your organisation?

Section 9: Housing

Key Findings:

- Half of businesses positively rated the impact on their business of the availability of housing generally and just 8% rated it negatively, similar to 2015.
- The 2020 survey results are similar to the ratings given to the impact of housing options in 2015, except the proportion of positive ratings for the impact of the availability of larger, executive style homes has decreased from 41% in 2015 to 25% in 2020.
- Just 5% of businesses believed the availability of housing in the area had a negative impact on their ability to recruit staff. This is comparable to the 7% in 2015. While 15% said housing had a positive impact on recruitment (17% in 2015).
- Above half of businesses (56%) believed that the housing options available in Bracknell Forest are about the same as other parts of Berkshire. This is comparable to 52% in 2015. 18% of businesses said the housing options are better in Bracknell Forest (19% in 2015) and just 2% said they are worse (6% in 2015).

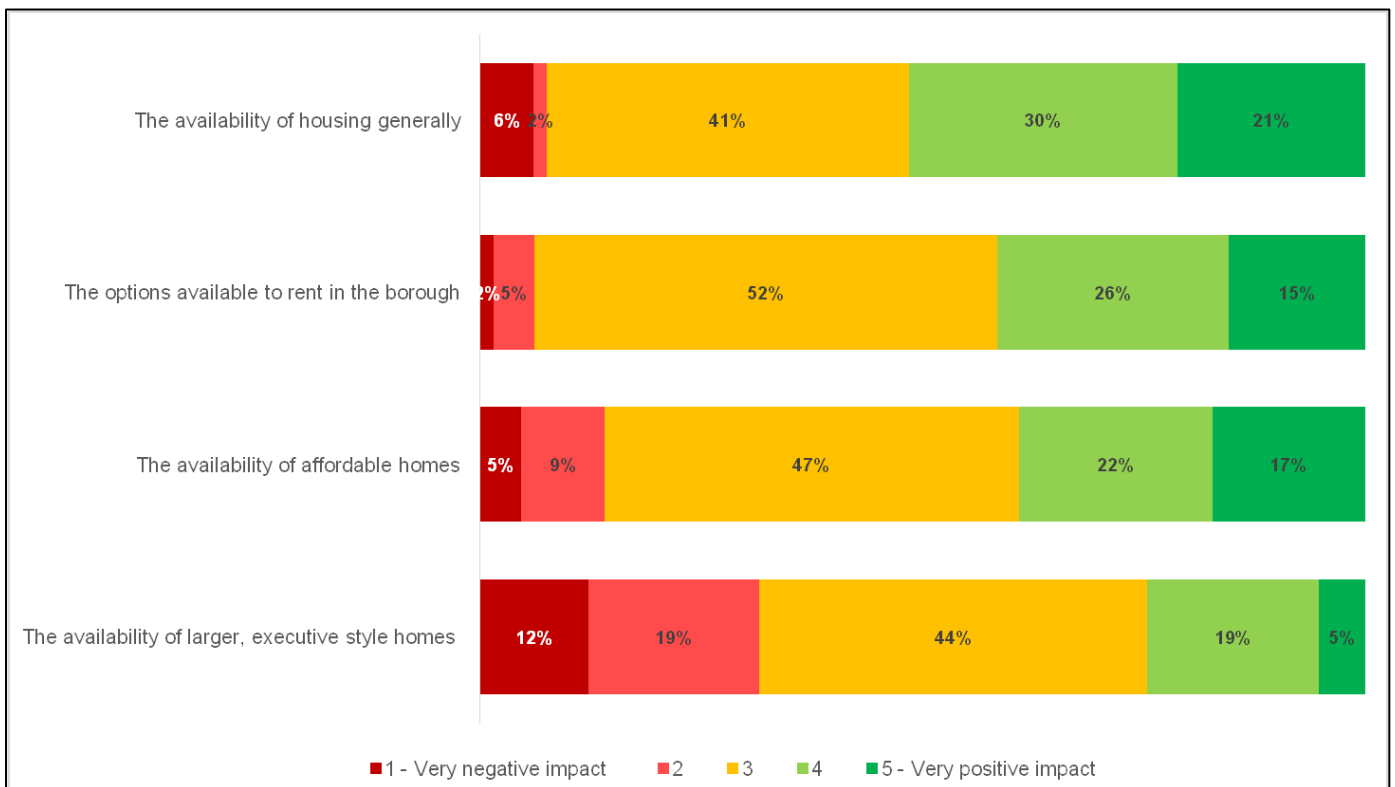
Introduction

- 9.1. This section explores businesses' views on the availability and impact of housing in Bracknell Forest.

Impact of specific housing options on business in Bracknell Forest

- 9.2. Throughout this section, a rating of 4 or 5 out of 5 is described as rating the impact as "positive", and a rating of 1 or 2 out of 5 is described as rating it "negative". A rating of '3' represents a neutral response i.e. the impact was neither positive nor negative.
- 9.3. Half of businesses positively rated the impact of availability of housing generally (51%).
- 9.4. Businesses were also more likely to be positive than negative about the impact of the options available to rent in the borough (41% "positive") and the availability of affordable homes (39% "positive").
- 9.5. About a third of businesses (31%) were negative about the impact of the availability of larger, executive style homes, whereas 24% were positive.

Figure 9.1: Impact of specific housing options on businesses in Bracknell Forest

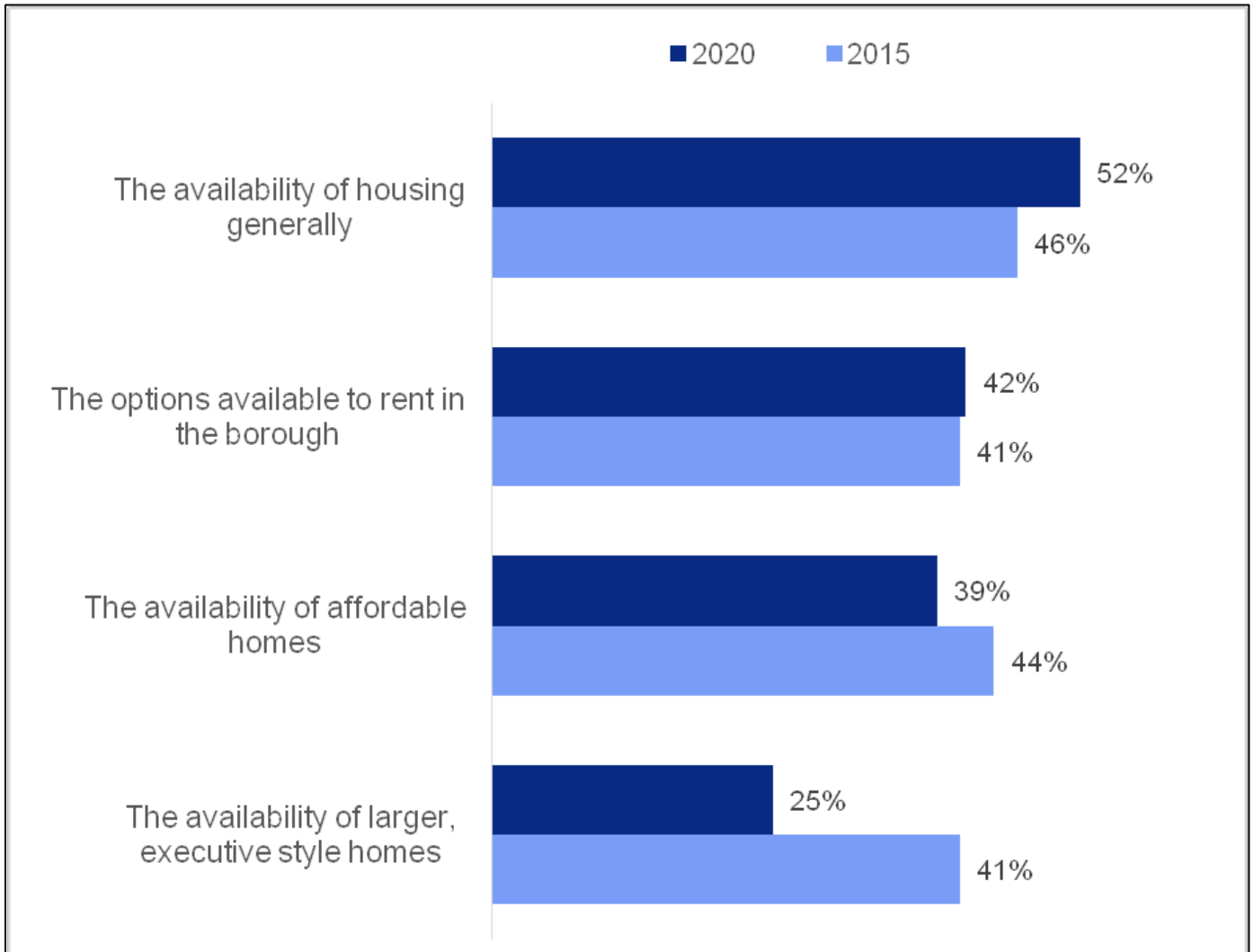


Number of respondents: 354. Excludes 'don't know' and 'not applicable' responses.

Question asked: How much of an impact do the following have on your organisation in Bracknell Forest, in relation to your employees and more generally?

9.6. The 2020 survey results are similar to the ratings given to the impact of housing options in 2015, except the proportion of positive ratings for the impact of the availability of larger, executive style homes has decreased from 41% in 2015 to 25% in 2020.

Figure 9.2: Impact of specific housing options on business in Bracknell Forest over time



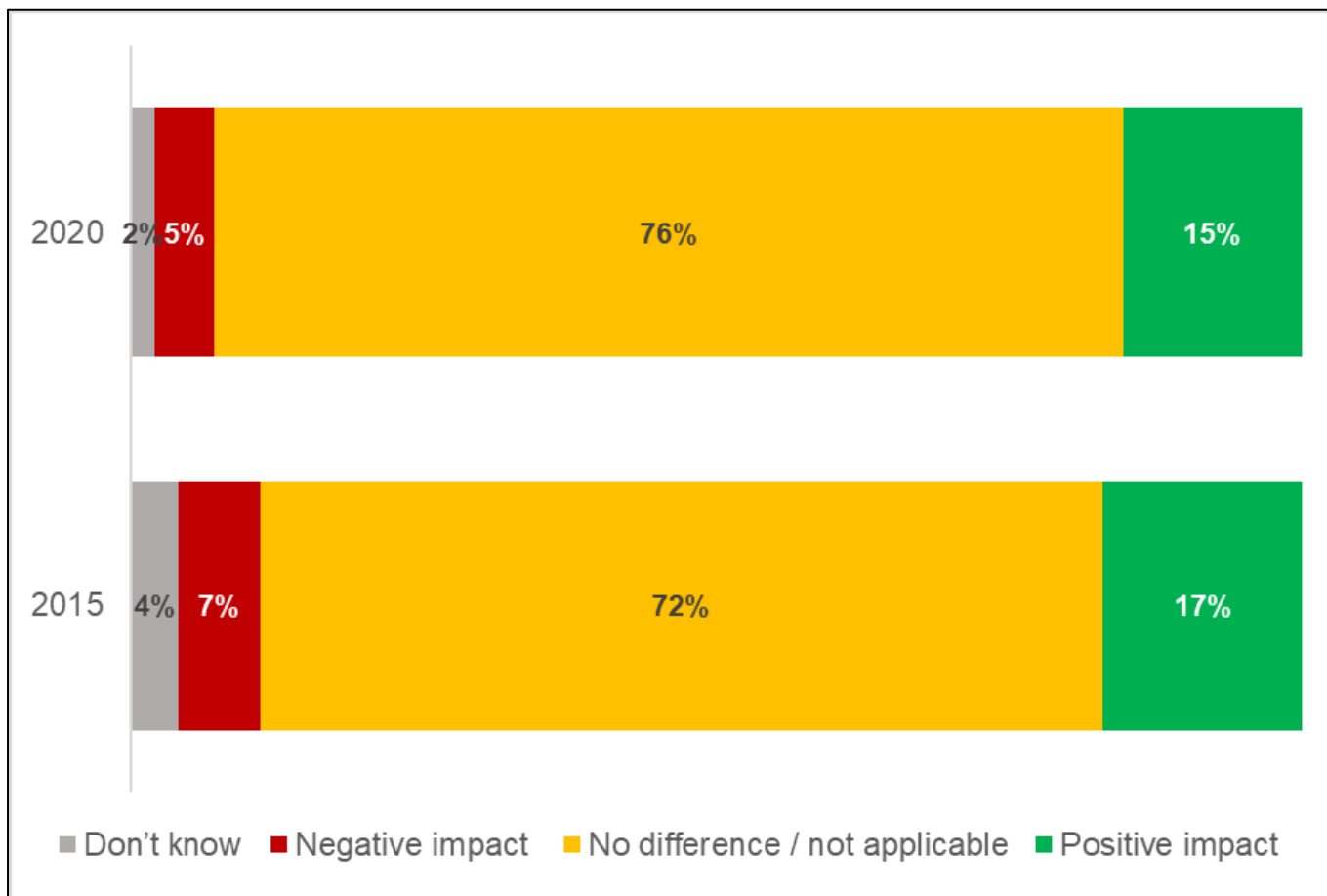
Number of respondents: 2020 354, 2015 350.

Question asked: How much of an impact do the following have on your organisation in Bracknell Forest, in relation to your employees and more generally?

Impact of the availability of housing on ability to recruit staff

9.7. Just 5% of businesses believed the availability of housing in the area had a negative impact on their ability to recruit staff. This is comparable to the 7% in 2015. While 15% said housing had a positive impact on recruitment (17% in 2015).

Figure 9.3: Impact of the availability of housing on ability to recruit staff



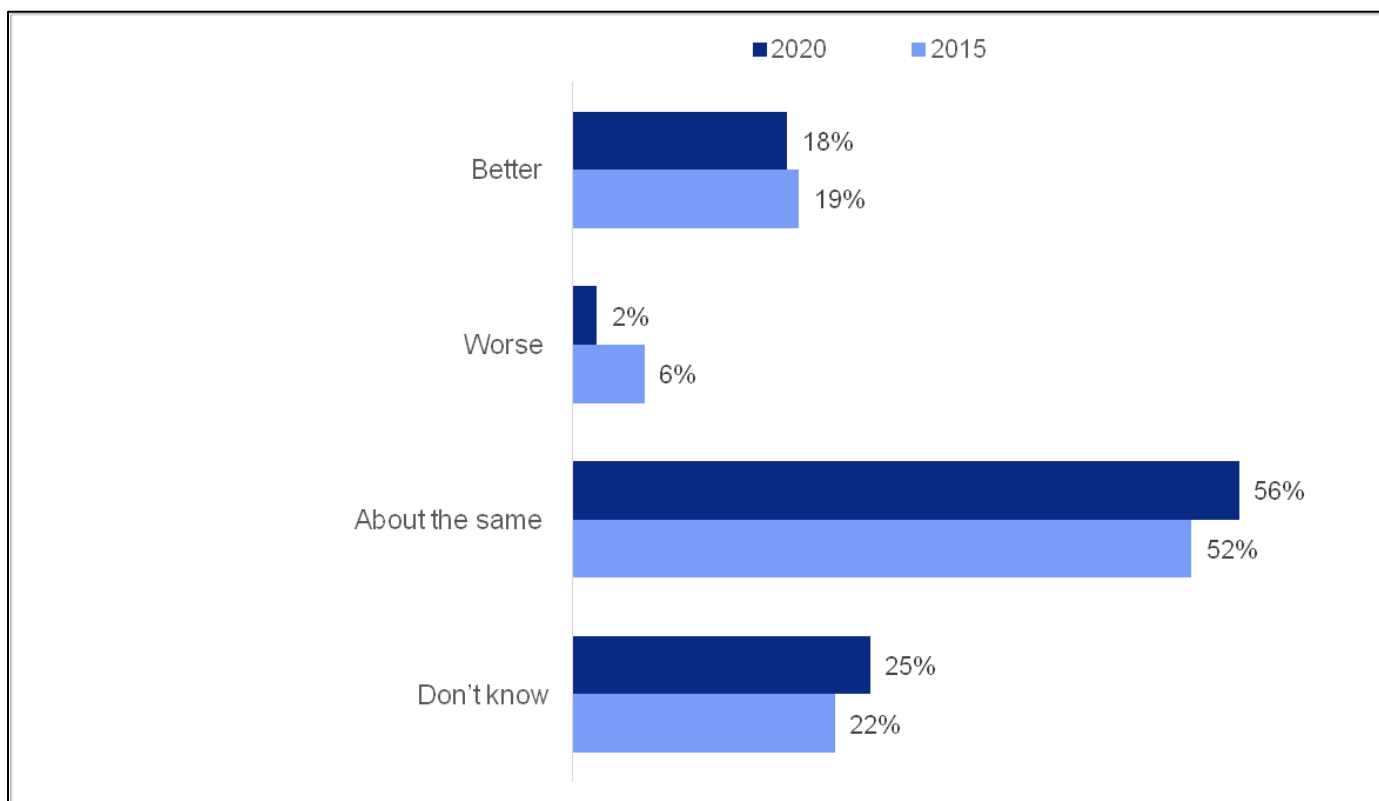
Number of respondents: 2020 - 354, 2015 - 350.

Question asked: Do you think the availability of housing generally in Bracknell Forest has a positive impact or a negative impact on your ability to recruit staff for your business or does it make no difference?

Evaluation of housing options compared to other places in Berkshire

- 9.8. Above half of businesses (56%) believed that the housing options available in Bracknell Forest are about the same as other parts of Berkshire. This is comparable to 52% in 2015.
- 9.9. 18% of businesses said the housing options are better in Bracknell Forest (19% in 2015) and just 2% said they are worse (6% in 2015).
- 9.10. Businesses in the BID area are slightly more positive, with 21% stating that housing options in Bracknell Forest are better than other places in Berkshire compared to 12% of businesses outside the BID area.

Figure 9.4: Evaluation of housing options compared to other places in Berkshire



Number of respondents: 2020 - 354, 2015 - 350.

Question asked: Generally speaking, do you think that the housing options available in Bracknell Forest are better or worse than other places in Berkshire or are they about the same?

Section 10: Thames Valley Berkshire LEP

Key Findings:

- A quarter of businesses were aware of the Thames Valley Berkshire LEP, similar to 2015.
- Around two-thirds of businesses aware of the Thames Valley Berkshire LEP were able to mention at least one way in which it is trying to promote growth in the region. Providing support to businesses and improving infrastructure were the most common ways. This is comparable to 2015 figures.
- 14% of businesses were aware of the Thames Valley Berkshire Growth Hub.
- Around half of businesses who were aware of the Thames Valley Berkshire Growth Hub had used the Hub's services and all of these were very satisfied with it.

Introduction

10.1. This section covers businesses' awareness of the Thames Valley Berkshire Local Enterprise Partnership (TVB LEP) and how they felt it could promote economic growth.

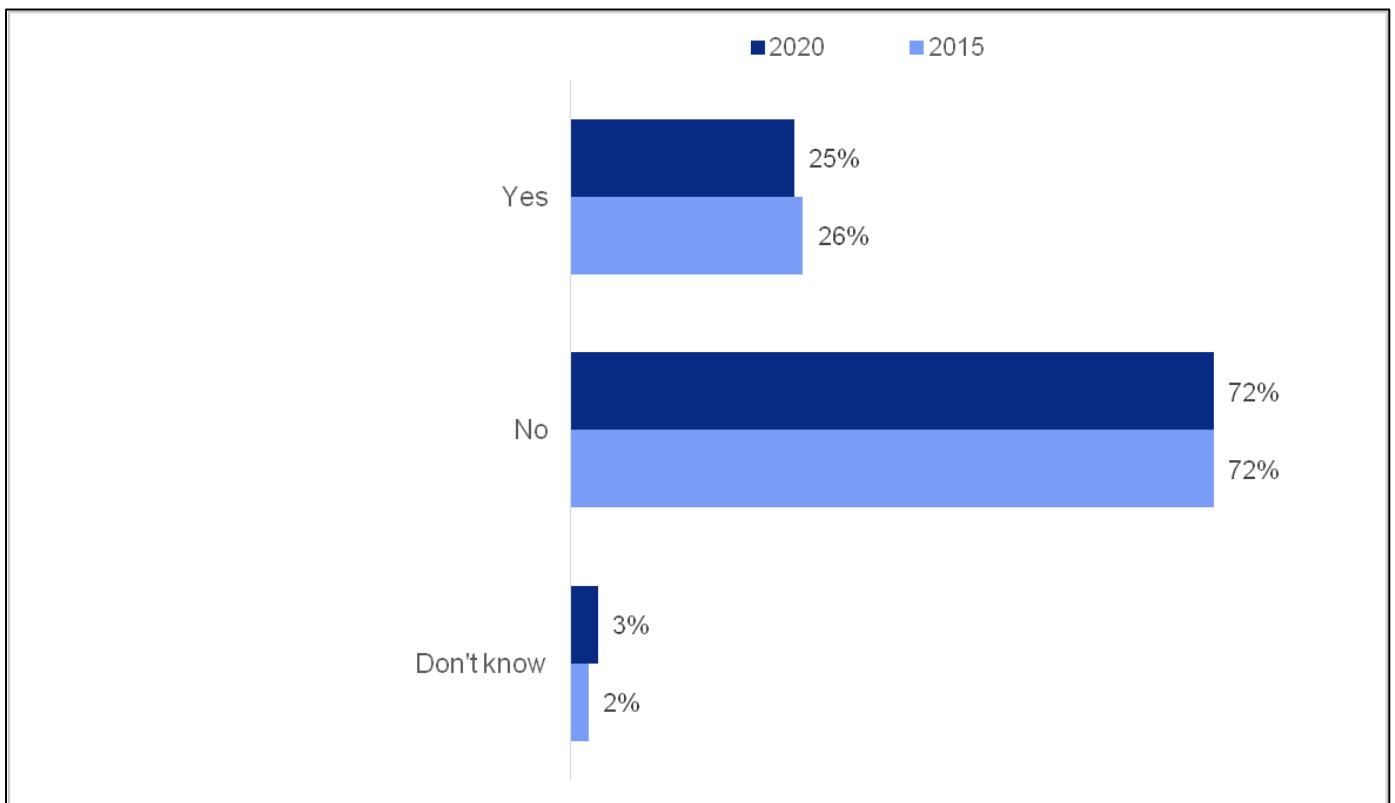
Awareness of the Thames Valley Berkshire LEP

10.2. A quarter of businesses were aware of the LEP, whereas 72% were not aware. This is in line with the figures in 2015.

10.3. Business with 5 to 49 staff were less aware (11% aware), compared with 26% of businesses with under 5 staff and 71% of businesses with 50 or more staff.

10.4. Life Science businesses were more aware (60% aware), than I.T/Digital businesses (27%) and Retail businesses (18%).

Figure 10.1: Awareness of the Thames Valley Berkshire LEP



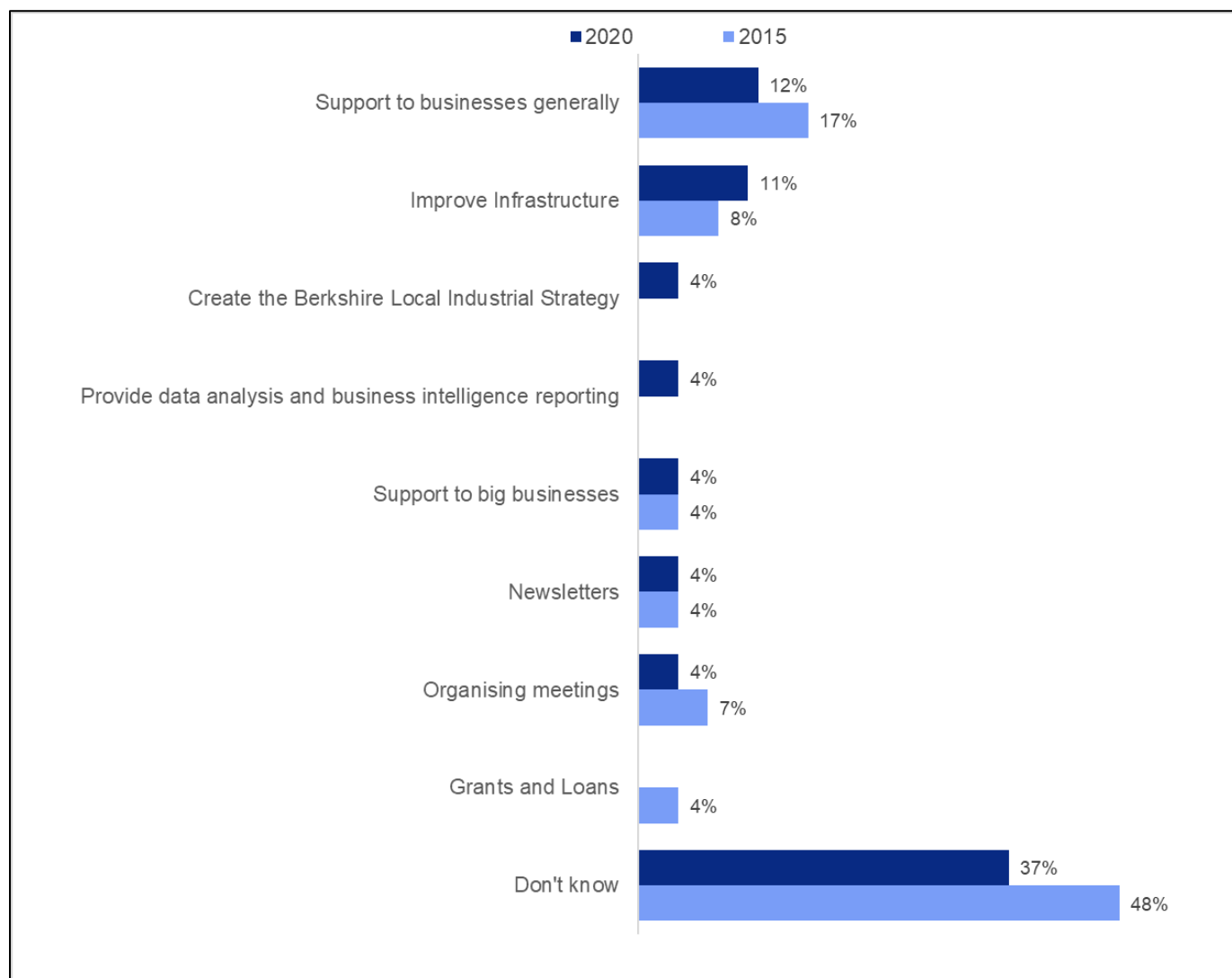
Number of respondents: 2020 - 354, 2015 - 350.

Question asked: The Thames Valley Berkshire Local Enterprise Partnership, also known as the TVB LEP, brings together business, local authorities, education and the community sector to drive the local economy. Have you heard of the LEP?

Ways Thames Valley Berkshire LEP is trying to promote growth

- 10.5. Around two-thirds of businesses aware of the LEP were able to mention at least one way in which it is trying to promote growth in the region. Providing support to businesses and improving infrastructure were the most common ways, each mentioned by around a tenth of businesses (12% and 11% respectively). This is comparable to 2015 figures.
- 10.6. In addition, a small number of businesses provided ‘other’ comments, stating that the LEP could help with networking, investing in the growth hub, supporting the BID, promoting Bracknell Forest as an area to do business/inward investment and supporting apprenticeships.
- 10.7. The high proportion of ‘don’t know’ responses, reflects the lack of awareness and knowledge about the LEP.

Figure 10.2: Ways Thames Valley Berkshire LEP is trying to promote growth



Number of respondents: 2020 90, 2015 84. Only asked to businesses aware of the LEP.

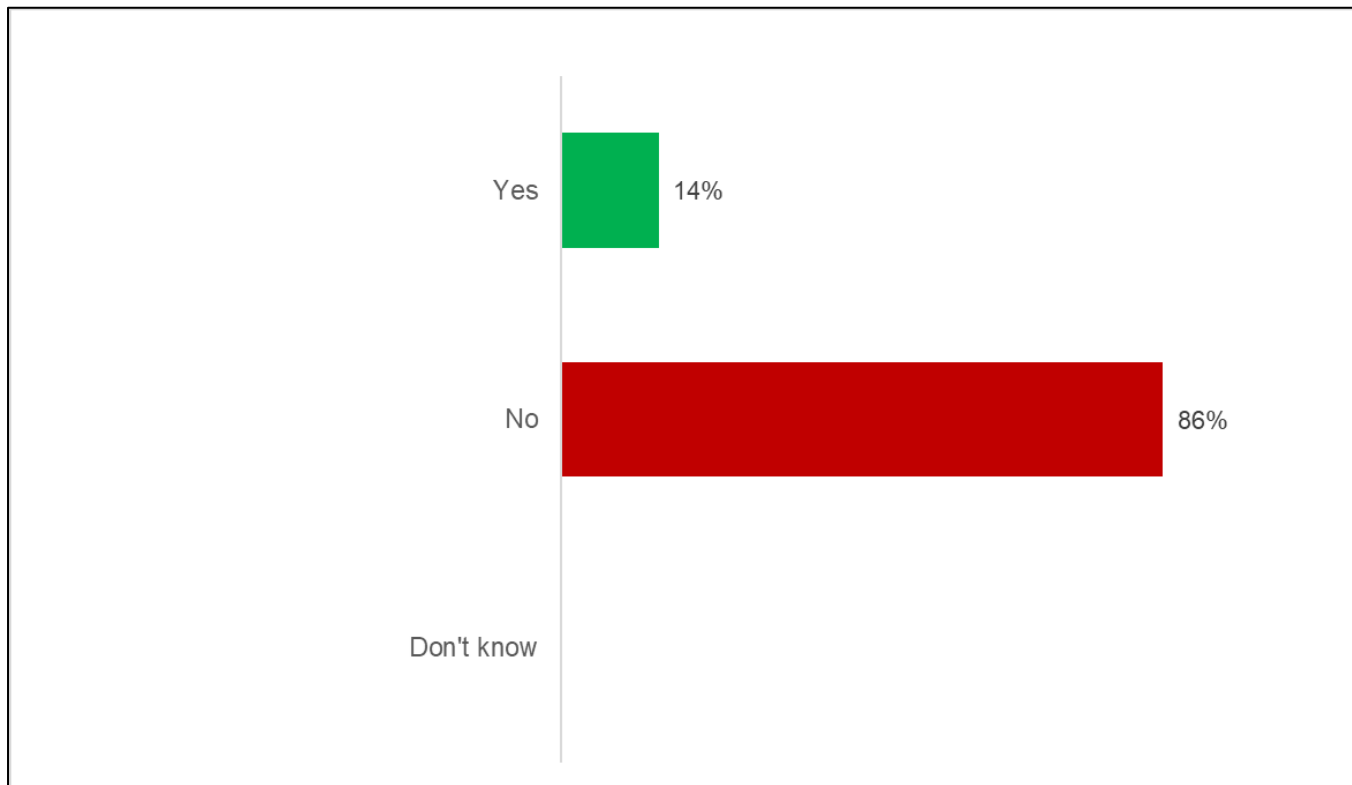
Question asked: In what specific ways do you think the LEP is trying to promote economic growth in the region?

Awareness of Thames Valley Berkshire Growth Hub

10.8. Overall, 14% of businesses were aware of the Thames Valley Berkshire Growth Hub.

10.9. There are no statistically significant differences in awareness between businesses by size, target sector or whether the business is in the BID or not.

Figure 10.3: Awareness of Thames Valley Berkshire LEP Growth Hub



Number of respondents: 354.

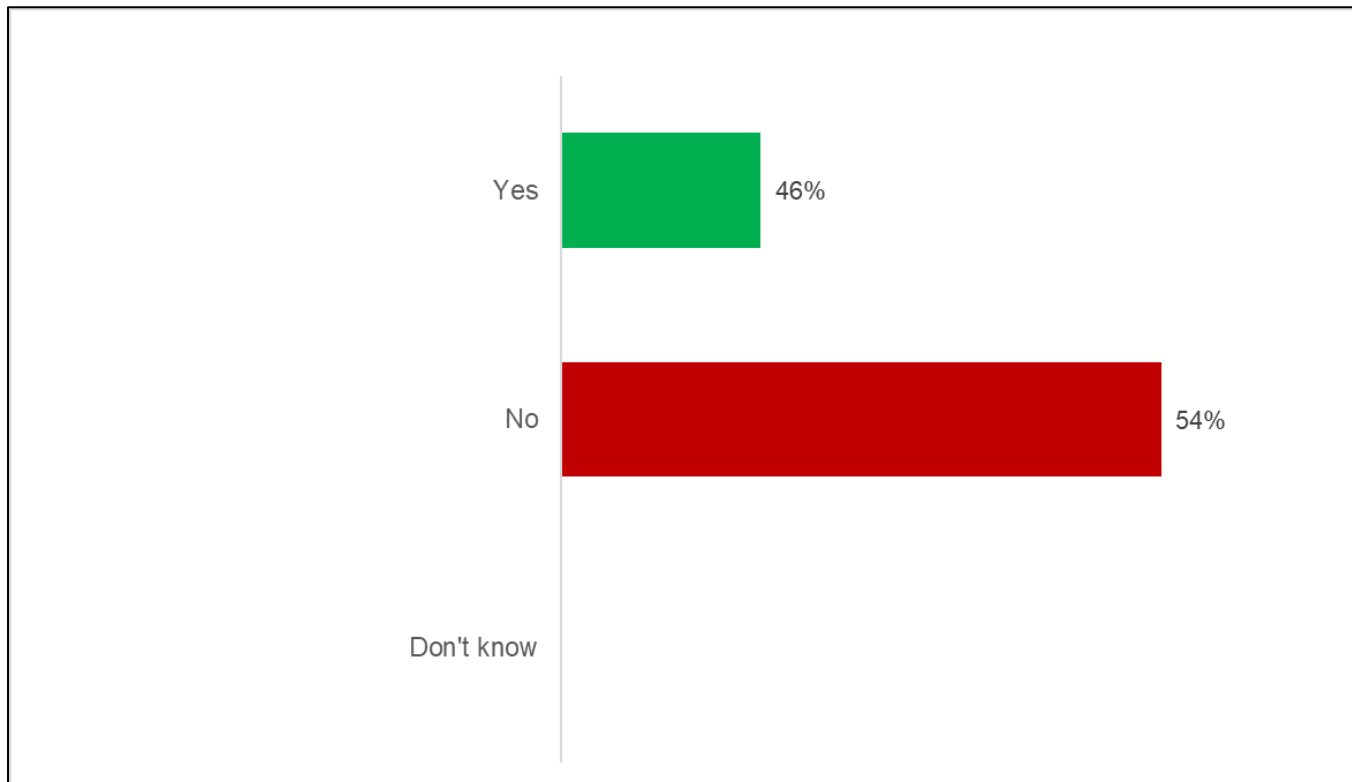
Question asked: Have you heard of the Thames Valley Berkshire Growth Hub and their services provided to SME's and star-ups?

Use of the Thames Valley Berkshire LEP Growth Hub

10.10. Around half of businesses (46%) who were aware of the Thames Valley Berkshire Growth Hub had used the Hub's services.

10.11. All of the businesses (22 or 6% of our sample) that had used the Hub were very satisfied with it.

Figure 10.4: Using Thames Valley Berkshire LEP Growth Hub



Number of respondents: 48. Only asked to businesses aware of the Hub.

Question asked: Has your business used the services?

Section 11: Corporate Social Responsibility

Key Findings:

- Two thirds of businesses took part in at least one CSR activity, with larger businesses more likely to engage in such activity.
- Half of businesses would like to do more CSR activities, with businesses already conducting CSR activity more keen than those that do not.
- 27% of businesses have a CSR Strategy. This increases to 38% of those businesses that currently undertake CSR activity. Larger businesses are more likely to have a CSR Strategy.

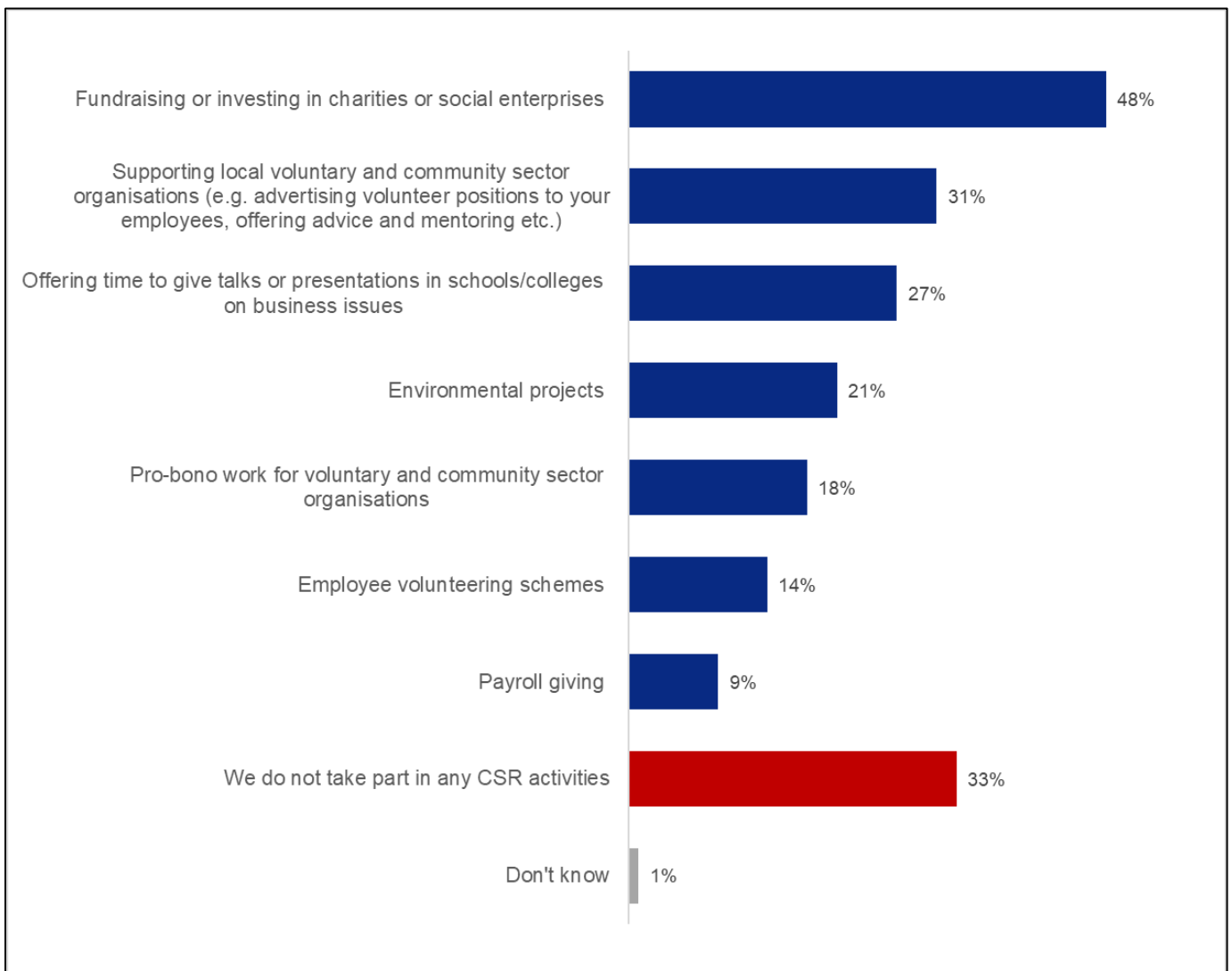
Introduction

11.1. This section explores the levels of participation of businesses with Corporate Social Responsibility (CSR).

Participation in Corporate Social Responsibility activities

- 11.2. Two thirds of businesses took part in at least one CSR activity (compared to 60% in 2015).
- 11.3. This includes 48% of businesses that had undertaken fundraising or invested in charities or social enterprises (45% in 2015), 31% that had supported local voluntary or community organisations (18% in 2015), 27% have given time to schools/colleges (15% in 2015) and 21% have supported environmental projects (5% in 2015).
- 11.4. Larger businesses are more likely to engage in CSR activity. For example, 62% of businesses with under 5 staff participate, compared with 81% of businesses with 5-9 staff and 96% of businesses with 10 or more employees.
- 11.5. Life Science businesses (93% engage in CSR activity) are more likely to conduct CSR activity, compared to I.T/Digital businesses (72%) and Retail businesses (63%).

Figure 11.1: Participation in Corporate Social Responsibility activities



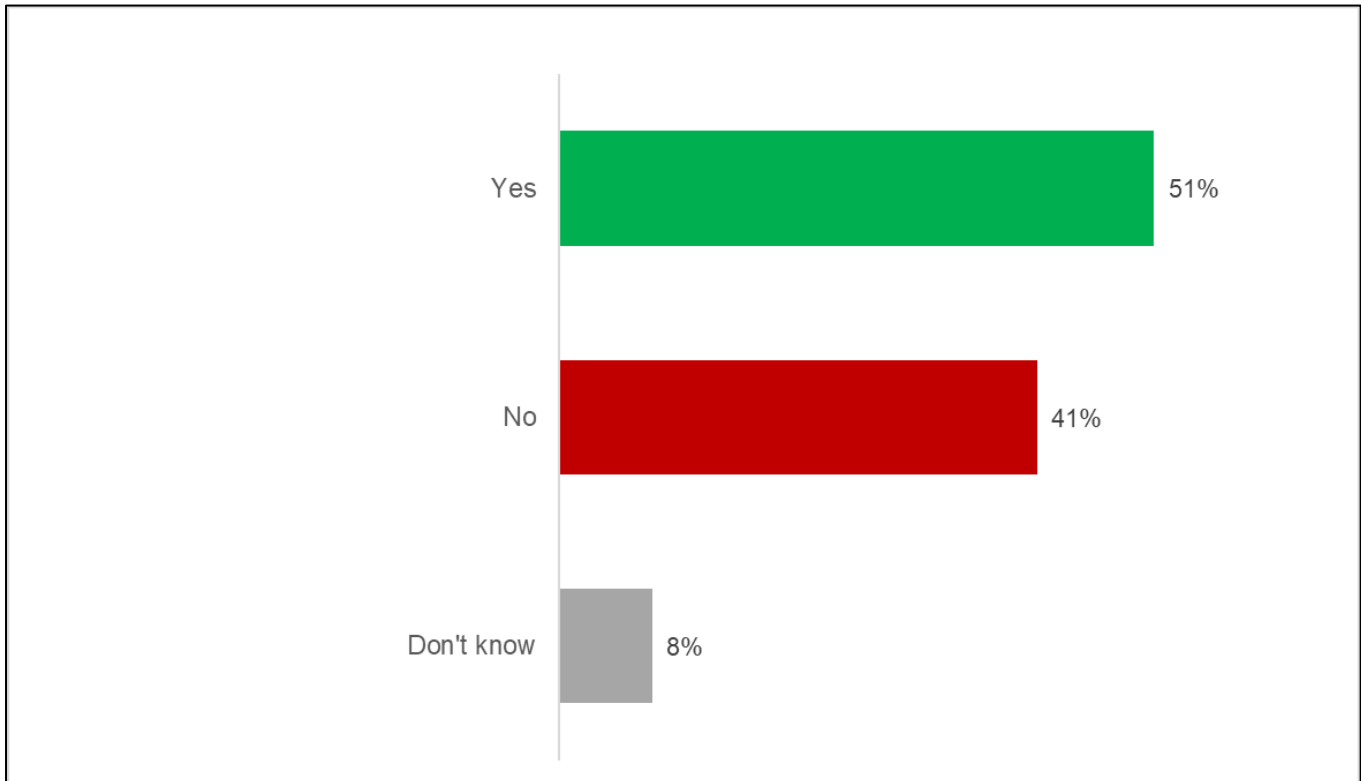
Number of respondents: 354.

Question asked: Does your organisation undertake any of the following Corporate Social Responsibility activities?

Whether would like to participate more in CSR activities

- 11.6. Overall, half of businesses would like to do more CSR activities. This compares to about a third of businesses (32%) in 2015 (the question was asked, and the results presented, slightly differently and is therefore not directly comparable).
- 11.7. 31% of businesses that do not currently undertake CSR activity would like to do more, compared to 60% of those businesses that already engage in CSR. A similar pattern was found in 2015.

Figure 11.2: Whether would like to participate more in CSR activities



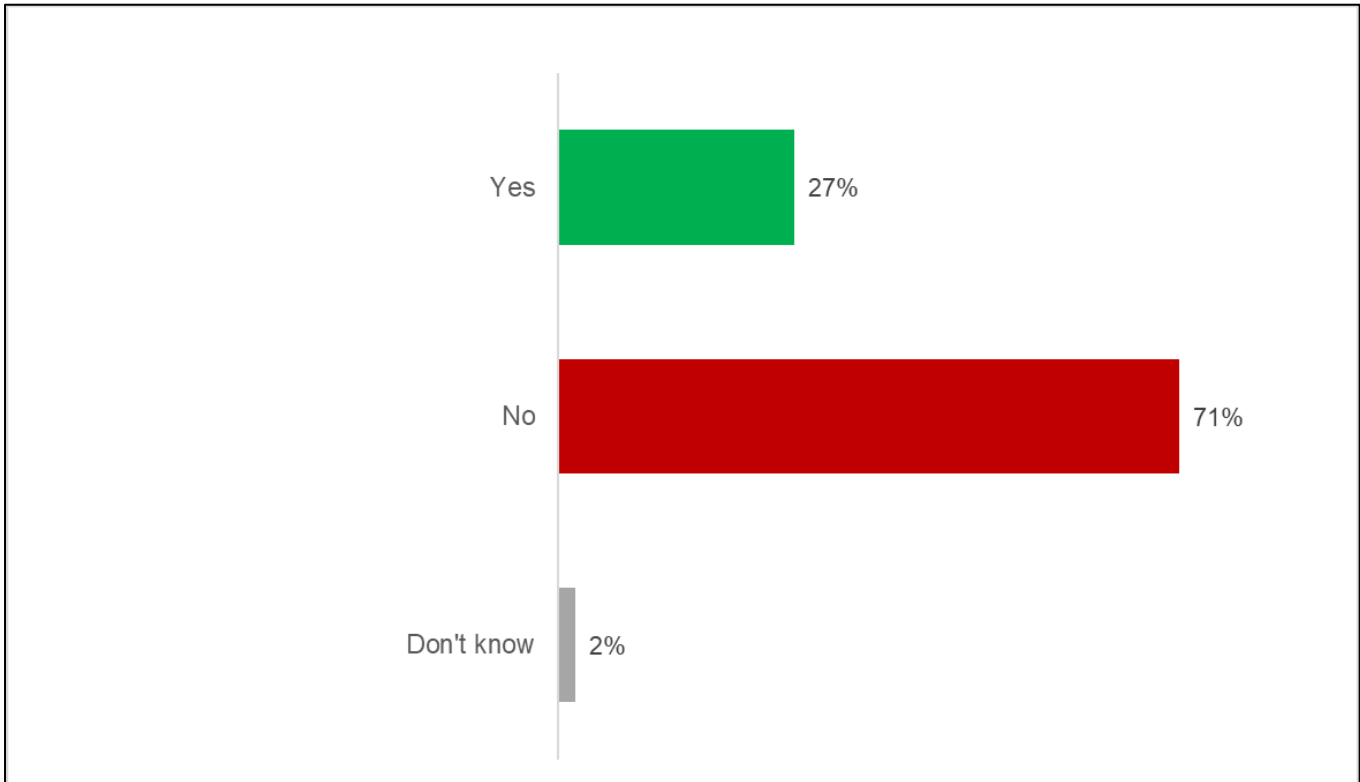
Number of respondents: 354.

Question asked: Would you like to do more of these types of activities as a business?

CSR Strategy

- 11.8. 27% of businesses have a CSR Strategy (compared to 10% in 2015). This increases to 38% of those businesses that currently undertake CSR activity.
- 11.9. Larger businesses are more likely to have a CSR Strategy. For example, 23% of businesses with under 5 staff have a strategy compared with 66% of businesses with 50 or more staff.
- 11.10. I.T/Digital businesses (38% have a strategy) are more likely to have a strategy than Life Science businesses (23%) and Retail businesses (13%).

Figure 11.3: Whether business has a CSR strategy



Number of respondents: 354.

Question asked: Does your organisation have a Corporate Social Responsibility strategy?

- 11.11. Businesses with a strategy were asked what help they would like to deliver their strategy and businesses that do not have a CSR strategy were asked what, if any, support or information they would like to help them develop a CSR strategy. Most businesses mentioned they did not need support, whereas some businesses referred to information on local possibilities/opportunities to engage in CSR, including being matched or introduced to local charities and community organisations. Some businesses that do not have a strategy said they would welcome some technical/consultancy support to develop a strategy or at least a template CSR strategy to adapt to their business.

Section 12: Brexit

Key Findings:

- 14% of businesses were expecting to see a positive impact to the UK leaving the EU, whereas 23% expected the impact to be negative. The most common response, given by 38%, was to expect no notable impact. Larger businesses with 50 or more staff were more likely to expect a negative impact than smaller ones.
- The top concerns for businesses about leaving the EU were problems exporting to the EU and importing from the EU, mentioned by 9% and 8% respectively, with loss of business (7%), labour availability (7%) and increased cost of business (6%) also cited.

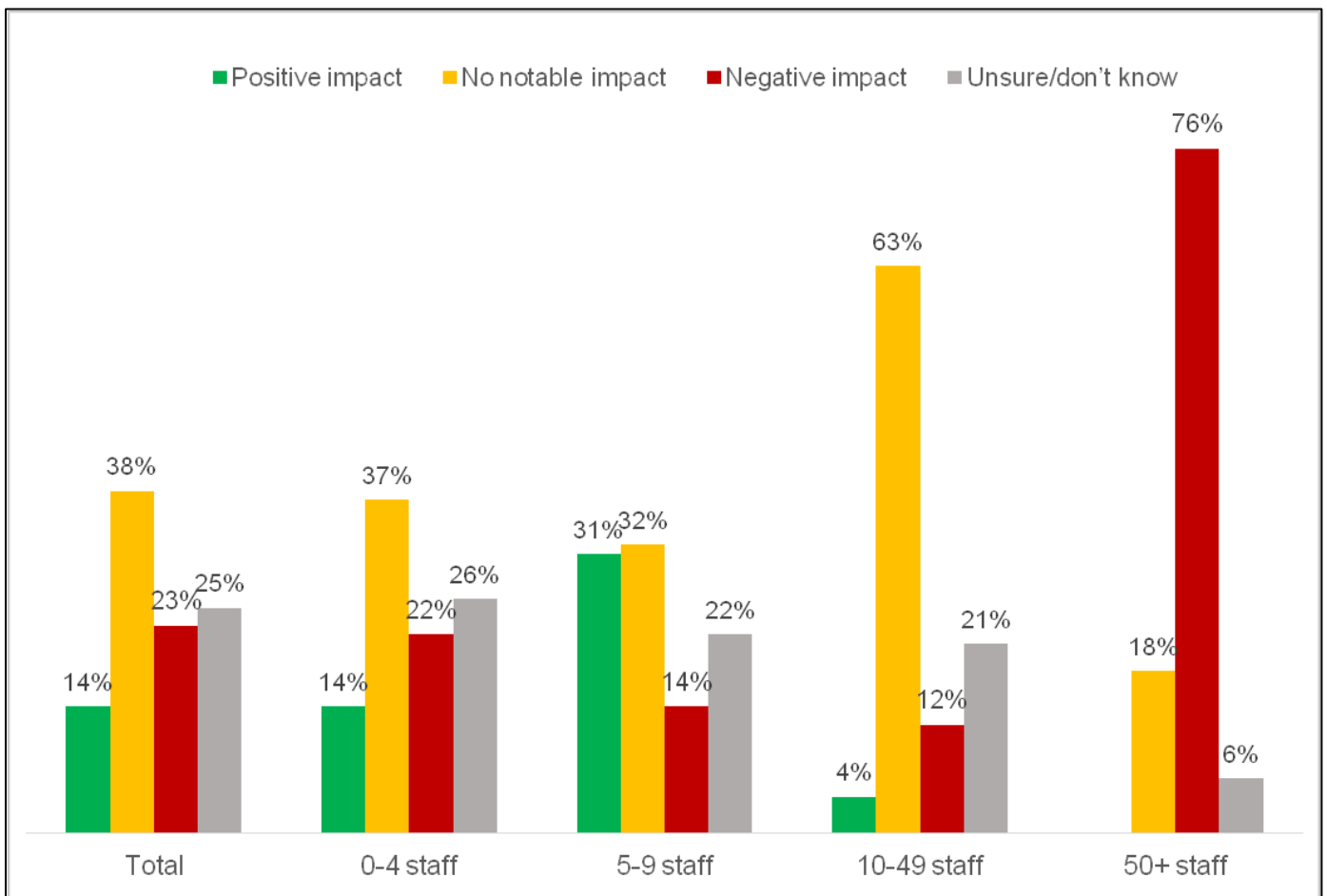
Introduction

12.1. This section explores businesses' perceptions and concerns about the UK leaving the European Union.

Leaving the European Union

- 12.2. Amid the Brexit uncertainty, businesses were less likely to be positive about the impact that the UK leaving the EU will have on their business. 14% were expecting to see a positive impact, whereas 23% expected the impact to be negative. The most common response, given by 38%, was to expect no notable impact. These results are similar to other business surveys conducted in other parts of the UK by Public Perspectives.
- 12.3. Larger businesses with 50 or more staff were more likely to expect a negative impact than smaller ones (see graph below).
- 12.4. Businesses in the BID area were more negative about leaving the EU (31% said leaving the EU would have a negative impact on their business) than other businesses (7% negative impact).
- 12.5. Life Science businesses (42% negative impact of leaving) tend to be more negative than I.T/Digital businesses (28% negative) and Retail businesses (12% negative).

Figure 12.1: Expected impact of the UK's exit from the European Union by business size

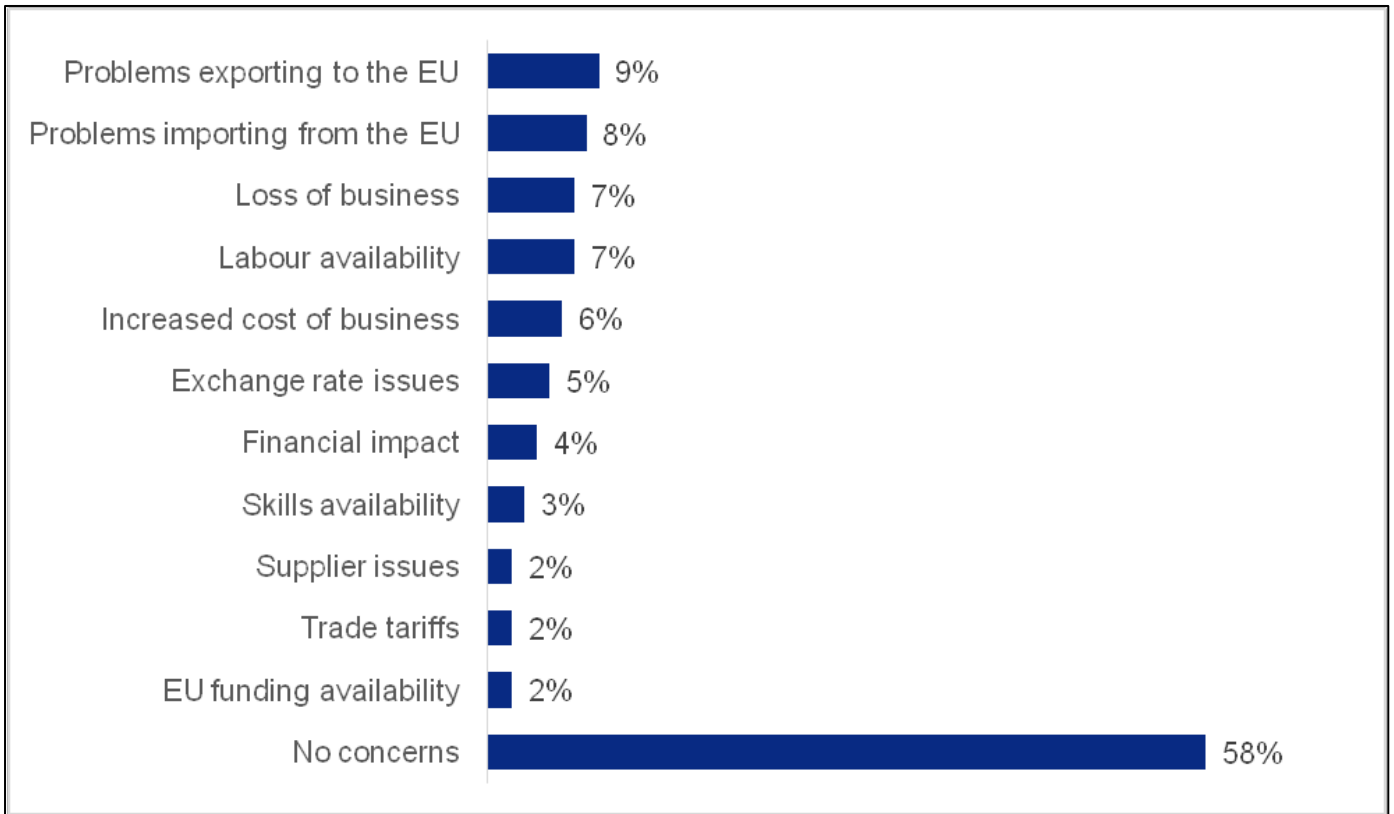


Number of respondents: Total 351, 0-4 staff 284, 5-9 staff 28, 10-49 staff 24, 50+ staff 14.

Question asked: Overall, what do you think will be the impact on your business, if any, of leaving the European Union?

- 12.6. The top concerns for businesses about leaving the EU were problems exporting to the EU and importing from the EU, mentioned by 9% and 8% respectively, with loss of business (7%), labour availability (7%) and increased cost of business (6%) also cited.
- 12.7. Over half of businesses (58%) did not mention any concerns about the impact of leaving the EU on their business.
- 12.8. BID businesses are more likely to have concerns about the UK leaving the EU and having an impact on their business (53% of BID businesses had a concern, compared with 20% of non-BID businesses).

Figure 12.2: Concerns for businesses about leaving the EU



Number of respondents: 349.

Question asked: What are your main concerns, if any, about the UK leaving the EU and its impact on your business?

Appendix: Questionnaire

Bracknell Forest Business Survey 2020 (Infrastructure)

Good morning/afternoon, my name is

I'm calling from Public Perspectives, a business research company, on behalf of **Bracknell Forest Council**.

We have been asked to conduct a telephone survey with businesses based in Bracknell Forest about local infrastructure.

The Council is keen to understand the views of local businesses regarding infrastructure such as roads and transport, premises and buildings and the availability of broadband and housing.

We would be very grateful if you could spend approximately 15 minutes of your time answering some questions as part of the survey.

Your participation in the survey will help the Council inform the development of the new economic strategy for the borough.

As an independent organisation we can guarantee that all responses are treated in the strictest confidence and anonymously, this means that we will not report your name or organisation's name alongside your responses.

Note to interviewer: If the respondent wants to check this is a legitimate interview, you can refer them to: <https://www.bracknell-forest.gov.uk/business-information/bracknell-forest-business/get-involved>

Note to interviewer: Check that the person being interviewed has the knowledge to speak about the business.

Section 1: Business information

Q1. How many people are employed by your organisation in Bracknell Forest? Select one answer only.

- 0 (self-employed - interviewer, please check they are self-employed and not an employed director, if the latter than code into the next box)
- 1 to 4 (including employed directors)
- 5 to 9
- 10 to 19
- 20 to 49
- 50 to 99
- 100 to 249
- 250 to 499
- 500+

Section 2: Operating in Bracknell Forest

Q2. How would you describe your company from the following list? Read out and select one answer only.

- Local company with one business site in Bracknell Forest
- Local company with more than one business site in Bracknell Forest
- National company with a number of business sites across the UK
- International company with business sites outside of the UK
- Other – please state
- Don't know

If 'other', please state:

Q3. What are the main reasons for your organisation being located in Bracknell Forest? Ask unprompted and select all relevant answers.

- Historical reasons
- Owner lives locally
- Workforce lives locally
- Access to skilled labour
- Cost of business premises
- Quality of business premises
- Good public transport
- Good access to roads
- Good proximity to national rail hubs
- Good proximity to international transport hubs
- Quality of the physical environment
- Good amenities for workers
- Customer base
- Supplier base
- Similar businesses nearby
- Reputation of Bracknell Forest as a place to do business
- Low crime and anti-social behaviour
- Good proximity to cultural and visitor attractions
- Good proximity to universities or research institutions
- Good proximity to professional services (lawyers, accountants, etc)
- Good proximity to the financial district
- Good proximity to central London
- Other (please record)
- Don't know

If other, please specify:

Q8. What do you consider is the most important aspect of the local infrastructure in Bracknell Forest that should be improved to make it a better place to do business? Ask unprompted and select all relevant answers.

- The local road network, access to motorways, and traffic alleviation
- Completion of town centre regeneration and general improvements
- Reduced business rates and general pro-business measures
- Strength and reliability of internet
- Availability of car parking
- Local rail links including to London
- General accessibility of Bracknell Forest
- Bus services
- Availability of suitable business premises
- Building of general infrastructure such as housing, schools
- How clean and tidy borough is and general attractiveness
- No suggestions
- Other
- Don't know

If other, please specify:

Q9. Thinking specifically about infrastructure (things like roads and transport, premises and buildings and the availability of broadband and housing and the local environment), is there anything that the council and its partners could do to help grow the economy in Bracknell Forest and attract more business to the borough? Ask unprompted and select all relevant answers.

- Completion of town centre regeneration and general improvements
- Improve the local road network and traffic alleviation
- General pro-business measures and support for small businesses
- Reduce business rates
- Improve availability of suitable and affordable business premises
- General need for planning
- Improve local rail links including to London
- More available car parking
- Building of affordable housing and other infrastructure
- Work on general attractiveness of the borough
- General need for investment
- Improve the strength and reliability of internet
- Support the creation of the first Bracknell Business Improvement District
- No suggestions
- Other
- Don't know

If other, please specify:

Section 4: Transport

Q10. How important is having good access to the M3 and M4 motorways to your organisation in Bracknell Forest? Please give your answer on a 5 point scale, where 1 means not at all important and 5 means very important. Select one answer only.

- 1 – Not at all important
- 2
- 3
- 4
- 5 - Very important
- Don't know

Q11. Would you say that the level of congestion on the roads in the borough has.... Read out and select one answer only.

- A very negative impact on your organisation
- A slightly negative impact on your organisation
- No impact
- Don't know

Q12. If 'very of slightly negative' in previous question: How does congestion impact your organisation?

Q13. Ask all: Has your businesses benefited from reduced and more reliable travel times as a result of improvements over the last two years to the following? Read out each category and select one answer for each:

	Yes	No	Don't know/not applicable
Warfield Link Road	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Coral Reef Roundabout	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Martins Heron Roundabout	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Road improvements in Bracknell town centre	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Section 5: Car parking

Q14. **Ask all:** Does you allocated parking meet you business needs? Select one answer only.

- Yes
- No
- Don't know
- Not applicable

Q15. **Ask all:** Do you agree or disagree that there is sufficient parking available in Bracknell Forest for/at the following? Read out each category and select one answer for each.

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't know
Businesses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Residents	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
In the town centre	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
At the station	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q16. Which areas of the borough do you think have the biggest problems with car parking? Ask unprompted and select all relevant answers.

- Ascot
- Bracknell town centre
- Crowthorne
- Great Holland
- Sandhurst
- Industrial estates
- Residential Estates
- Station areas
- Everywhere
- Other
- Don't know

If other, please specify:

Q17. What, if anything, does your organisation do to help provide car parking for your employees?

Section 6: Sustainable transport

Q18. **Is there anything that you feel prevents your employees from using other forms of transport to get to work apart from a car?** Ask unprompted and select all relevant answers.

- Business – car/van needed to carry out job role
- Premises – not near bus stop
- Premises – not near a train station
- Premises – too difficult to access on foot
- Premises – too difficult to access by bike
- Bus service – too infrequent
- Bus service – too expensive
- Train service – too infrequent
- Train service – too expensive
- Cycling – too dangerous to cycle
- Cycling – not enough cycle lanes
- Cycling – not enough cycle storage in local area
- Cycling – not enough cycle storage at business premises
- Other (Write in)
- None
- Don't know

If other, please specify:

Q19. **There is information on the Council's website to help businesses and residents plan and consider sustainable travel choices. It includes information on workplace travel plans to reduce car use and information on car sharing and public transport? Were you aware that this information exists?** Select one answer only.

- Yes
- No
- Don't know

Q20. **If said 'Yes' to previous question: Has your business ever accessed this information?** Please select one answer only.

- Yes
- No
- Don't know

Q24. Ask if ever use the airport: What methods of transport do your employees normally use to travel to the following airports? Ask unprompted and select all relevant answers for each airport.

	Car/van - given a lift and Car/van vehicle - vehicle not left left at or at or near the near the airport airport	Motorcy cle/ scooter	Taxi/ minicab	Bus/ coach	Train - Gatwick Express	Train - Undergr ound/ Metro	Train - other train service	Walk	Cycle	Other (write in)	Don't know
Gatwick	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Heathrow	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q25. Ask all: Apart from employees taking flights, are there any other reasons why Gatwick and Heathrow are important to your business? Ask unprompted and select all relevant answers.

- Bringing overseas customers to the organisation
- Bringing overseas suppliers to the organisation
- Allowing the export and transport of goods and services
- Allowing the import of stock or raw materials
- Maintaining contact with other parts of the organisation
- Customers based at Gatwick
- Customers based at Heathrow
- Other (write in)
- None
- Don't know

If other, please specify:

Transport overall

Q26. Generally speaking, do you think that the local transport system in Bracknell Forest is better or worse than other places in Berkshire or is it about the same? Select one answer only.

- Better
- Worse
- About the same
- Don't know

Section 8: Broadband

- Q27.** Bracknell Forest Council is involved with a programme to improve broadband throughout Berkshire called Superfast Berkshire, which aims to ensure that 96% of Bracknell Forest have access to superfast broadband. Where you aware of this? Select one answer only.
- Yes
- No
- Don't know
- Q28.** Does your business currently have access to superfast broadband? Select one answer only.
- Yes
- No
- Don't know
- Q29.** How important is having superfast broadband to your business in Bracknell Forest? Read out and select one answer only.
- 1 – Not at all important
- 2
- 3
- 4
- 5 - Very important
- Don't know
- Q30.** How would you rate your business's current internet connection? Would you say it's.... Read out and select one answer only.
- Excellent
- Adequate
- Poor
- Never use the internet
- Don't know
- Q31.** Do you think that having wi-fi enabled access to the internet in Bracknell town centre would be beneficial to your business?
- Yes
- No
- Don't know
- Q32.** If 'Yes' to the previous question: In what ways would it benefit your business?

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Section 9: Business Premises

Q33. Do you know if your company owns or leases your business premises at this site? Select one answer only.

- Own
- Lease
- Other (Write in)
- Don't know

If other, please specify:

Q34. If 'lease': Do you know when does your lease expire or when is the break clause? Select one answer only.

- Within the next 12 months
- 12 months to 2 years
- 2 years to 3 years
- More than 3 years away
- Don't know

Q35. If 'lease': Do you know if you will be looking to renew or continue the lease on your existing premises? Select one answer only.

- Yes
- No
- Don't know

Q36. Ask if not looking to renew lease i.e. 'No' to Q35, or if own premises: Do you know if you are likely to be looking for alternative business premises in Bracknell Forest when your current lease expires or in the next 3 years? Select one answer only.

- Yes
- No
- Don't know

Q37. If 'Yes' to Q36: What in particular will you be looking for from new business premises? Select all relevant answers.

- Larger premises
- Smaller premises
- Better transport links
- Better road access
- Better rail access
- Better access to public transport
- More parking
- Better quality premises
- Other (Write in)
- Don't know

If other, please specify:

Q38. If 'No' to Q36 and therefore looking to relocate outside of Bracknell Forest, why?

Q39. Ask if looking for premises: Are you likely to look for established premises or something brand new or purpose built? Select all relevant answers.

- Established premises
- New premises
- Purpose built premises
- Other (Write in)
- No preference
- Don't know

If other, please specify:

Q40. Ask all: Do your current business premises meet the needs of your organisation? Select one answer only.

- Yes
- No
- Don't know

Q41. If 'No': Why is that?

Section 10: Housing

Q42. **Ask all:** How much of an impact do the following have on your organisation in Bracknell Forest, in relation to your employees and more generally? Please tell me on a 5 point scale, where 5 means it has a very positive impact and 1 means it has a very negative impact. Read out for each type and select one answer only.

	1 – Very negative impact	2	3	4	5 – Very positive impact	Not applicable	Don't know
The availability of affordable homes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The availability of larger, executive style homes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The options available to rent in the borough	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The availability of housing generally	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q43. Do you think the availability of housing generally in Bracknell Forest has a positive impact or a negative impact on your ability to recruit staff for your business or does it make no difference? Select one answer only.

- Positive impact
- Negative impact
- No difference
- Don't know
- Not applicable

Q44. Generally speaking, do you think that the housing options available in Bracknell Forest are better or worse than other places in Berkshire or are they about the same? Select one answer only.

- Better
- Worse
- About the same
- Don't know

Section 11: Thames Valley Berkshire LEP

Q45. The Thames Valley Berkshire Local Enterprise Partnership, also known as the TVB LEP, brings together business, local authorities, education and the community sector to drive the local economy. Have you heard of the LEP? Select one answer only.

- Yes
- No
- Don't know

Q46. **If aware:** In what specific ways do you think the LEP is trying to promote economic growth in the region? Ask unprompted and select all relevant answers.

- Support to businesses generally
- Improve Infrastructure
- Organising meetings
- Newsletters
- Grants and Loans
- Support to big businesses
- Provide data analysis and business intelligence reporting
- Provide strategic direction for economic development in Berkshire
- Create the Berkshire Local Industrial Strategy
- Other
- Don't know

If other, please specify:

Q47. **Ask all:** Have you heard of the Thames Valley Berkshire Growth Hub and their services provided to SME's and star-ups? Select one answer only.

- Yes
- No
- Don't know

Q48. **If aware of the Growth Hub:** Has your business used the services? Select one answer only.

- Yes
- No
- Don't know

Q49. **If used the Growth Hub:** How satisfied were you with the support provided? Select one answer only.

- Very satisfied
- Fairly satisfied
- Neither satisfied nor dissatisfied
- Fairly dissatisfied
- Very dissatisfied
- Don't know

Section 12: CSR

Q50. Ask all: Does your organisation undertake any of the following Corporate Social Responsibility activities? Read out and select all relevant answers.

- Supporting local voluntary and community sector organisations (e.g. advertising volunteer positions to your employees, offering advice and mentoring etc.)
- Pro-bono work for voluntary and community sector organisations
- Offering time to give talks or presentations in schools/colleges on business issues
- Fundraising or investing in charities or social enterprises
- Environmental projects
- Employee volunteering schemes
- Payroll giving
- Others (Write in)
- We do not take part in any CSR activities
- Don't know

If other, please specify:

Q51. Would you like to do more of these types of activities as a business? Select one answer only.

- Yes
- No
- Don't know

Q52. Does your organisation have a Corporate Social Responsibility strategy? Select one answer only.

- Yes
- No
- Don't know

Q53.a If 'Yes' to Q52 and have a CSR Strategy: What, if any, support or information would you like to help you deliver your Corporate Social Responsibility strategy?

Q53.b If 'No' to Q52 and do not have a CSR Strategy: What, if any, support or information would you like to help you develop a Corporate Social Responsibility strategy?

Section 13: Brexit

Q54. Overall, what do you think will be the impact on your business, if any, of leaving the European Union? Select one answer only.

- Positive impact
- Negative impact
- No notable impact
- Unsure/don't know

Q55. What are your main concerns, if any, about the UK leaving the EU and its impact on your business? Ask unprompted and select all relevant answers.

- Labour availability
- Skills availability
- EU funding availability
- Problems importing from the EU (e.g. sourcing materials and goods/increased costs of doing business)
- Problems exporting to the EU (e.g. loss of business/increased costs of doing business)
- Trade tariffs
- Loss of business
- Increased cost of business
- Financial impact
- Exchange rate issues
- Supplier issues
- Cost of Brexit planning
- No concerns
- Other

If other, please specify:

Q56. Would you be interested in being contacted by the Council to receive any business support, information or advice?

- Yes
- No
- Don't know

Q57. **If yes**, please provide your contact details (please note: these details will only be used to contact you about business support, they will not be used for any other purpose and not linked to your responses).

Name:

Business:

E-mail:

Phone:

That is the end of the questionnaire. Thank you for all your help. The findings of the survey will be published on council's website later in the year.

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