Bracknell Forest Council: Business Survey 2021

Report: December 2021

Bracknell
Forest
Council

Research
Evaluation
Community Engagement
Strategy Development

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Bracknell Forest Council: Business Survey 2021

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1. Bracknell Forest Council commissioned a survey of businesses to gain an understanding of the impacts of changing economic conditions, Covid-19 and the EU exit transition on businesses in Bracknell Forest, as well as to capture the views of local businesses about skills, infrastructure and the green agenda. The research will be used to inform pandemic recovery plans and inform local economic strategies that support local business and economic growth.

2. 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).

Approach to the research

3. A total of 504 interviews were carried out via CATI (computer assisted telephone interviewing) between the middle of October and the end of November 2021. The survey was timed to follow the end of the UK furlough support programme, to capture views of businesses post such support as they look forward to a period of recovery. The surveys were conducted prior to the emergence of the Omicron variant of the virus, which led to increased social distancing measures being put in place and some impact on consumer confidence.

4. A bespoke, local questionnaire was developed and tested with local businesses. Some of the questions repeated those asked in previous business surveys conducted in 2020 and 2014/15 to allow for comparability.

5. The research was designed to ensure a representative split of the approximate 4,750 businesses registered in Bracknell Forest by size and sector and a good geographical mix across Bracknell Forest. The comments shown in bold are those of Public Perspectives and intended to briefly summarise the findings of each section.

Key findings and conclusions

The pandemic

6. A third of businesses (35%) said their business turnover was substantially lower than normal as a result of the Covid-19 crisis and a fifth (22%) said it was slightly lower than normal.

7. Businesses with 0-4 staff were more likely to say that their turnover was substantially lower than normal – 38% said this, compared with 25% of businesses with 5-9 staff and 28% of businesses with 10+ staff.

8. Business confidence for the coming year is more positive than negative, with 51% expecting to see an improvement in their performance.

9. Half of Bracknell Forest businesses interviewed were able to mention at least one positive impact of Covid-19 on their business -12% mentioned new ways of working and 10%

mentioned more remote or flexible working hours. However, the majority of businesses mentioned at least one negative impact of Covid-19 on their business. A decrease in financial returns was the top issue; 22% mentioned loss of income or reduced turnover and 20% mentioned less profitability.

10. Around half of businesses (52%) have changed the way their business works over the longer term as a result of Covid-19. The most common action was social distancing measures (10%). 7% mentioned increased digital delivery of services or products and the same proportion introduced new services or products. The remainder changed the way they deliver their services/products, introduced efficiencies, cost reductions and remote/flexible working, or invested in marketing and entering new markets.

11. Some 44% of businesses said the pandemic impacted on the wellbeing of staff. A quarter of businesses (23%) said that their staff had suffered from increased stress levels as a result of Covid-19, and 13% said it had decreased mental health and wellbeing.

12. Three-fifths of businesses (60%) mentioned at least one means of support that could help their business and the local economy to recover from the impact of Covid-19. One-in-six businesses (17%) said that access to finance such as grants, affordable finance and loans would help them to recover from the impact of Covid-19, and 12% asked for specific business support to recover from the pandemic. In 'other' comments, approximately 15% of businesses stated that they wanted to avoid future lockdowns and restrictions and to essentially 'learn to live with Covid'.

13. **These results highlight the notable and on-going impact of the pandemic, albeit one tempered with a degree of optimism for the future, at the time of the survey at least. However, the results also suggest there is some demand for pro-active local business support to assist with recovery and mitigate the on-going impact of the pandemic, potentially targeted at key sectors and businesses.**

Brexit

14. Half of businesses in Bracknell Forest (51%) said leaving the EU had had no notable impact on their business. Among those who said it had had an impact, businesses in Bracknell Forest were more likely to be negative than positive, with eight times as many saying the UK's departure had a negative impact (41%) than a positive one (5%).

15. Problems importing from the EU was the most common negative impact for businesses in the EU exit, with 22% saying this was a key issue for them. Supply chain problems were an issue for 13% and the increased cost of business for 10%.

16. **The proportion that said Brexit has had an impact on their business is higher in 2021 than the proportion of businesses that expected there to be a negative impact in the 2020 business survey. This suggests that the reality of the impact has been greater than first thought, and is perhaps overshadowed by the pandemic. This highlights the continued need to support businesses to adapt to the post-EU reality.**

Recruitment, skills and retention

17. Around two-fifths of businesses (37%) have had at least one vacancy in the 12 months preceding the survey, with larger businesses were more likely to have had vacancies.

18. Approaching three-fifths (59%) of businesses that had vacancies reported that they had found at least one of these vacancies hard to fill, which is an increase on 2020 results.

19.   The main reason for difficulties finding recruits with the right skills was a low number of applicants with the required skills (40%). This was followed by a low number of applicants with the required attitude (24%). Both the pandemic and Brexit are also cited as issues by businesses.

20.   74% of businesses in Bracknell Forest did not feel that there are any gaps in their skills base, a lower position than 2020 i.e. more businesses in 2021 believe there are skills gaps in their existing workforce than in 2020.

21.   Almost half of businesses mentioned that they found it easy to retain staff in Bracknell Forest, similar to 2020 results. Just 4% said it is difficult to retain staff, with the remainder either not employing staff (35%) or not finding retention easy or difficult (15%).

22.   **The increased recruitment difficulties are in line with the national challenges reported in the media and are a combination of underlying and on-going skills issues, exacerbated by the pandemic and Brexit. Recruitment and skills tend to be major constraints on growth and are likely to represent key areas to support local businesses as they recover from the pandemic.**

Infrastructure

23.   Almost three-fifths of businesses (56%) said that they expect their operations to stay the same over the next 3 years, whereas a third of businesses (35%) expected an increase, broadly similar to 2020.

24.   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 24% of businesses. Around one in six businesses mentioned the availability of car parking (16%).

25.   16% and 12% of businesses mentioned improving the local road network and traffic alleviation and reducing business rates respectively, as actions that the council and its partners should do to help grow the economy in Bracknell Forest. Reducing business rates was the most frequently mentioned action in the 2020 Business Infrastructure Survey, when 20% had mentioned it, followed closely by improving the local road network and traffic alleviation, which was mentioned by 19%.

26.   **Transport access and travel movement, and reducing business rates remain the main aspects to focus on, according to businesses, to help improve the local area as a business destination and promote business growth.**

Broadband

27.   Most businesses were not aware of Superfast Berkshire, as was the case in 2020.

28.   Above two fifths of businesses have access to superfast broadband and a similar proportion do not have access.

29.   73% of businesses said superfast broadband is "important". This proportion was 79% in 2020.

30.   The majority of businesses (58%) felt their internet connection was adequate. This is similar to the 59% seen in 2020. 26% said it was excellent, with overall 84% stating that their internet connection is at least adequate.

31.   87% of businesses were not aware of the grants to install superfast broadband. 7% were aware of them in their area and 3% were aware of them, but not that they may be eligible for the grants in their area.

32. 77% of businesses were not aware of the Building Digital UK Gigabit project and 19% were aware of it.

33. 67% of businesses said that having Gigabit capable broadband is important to their business. 16% said it was not important.

34. 76% of businesses said that they were not aware of Smart Cities.

35. 81% of businesses said that they had not changed their broadband to support the way they do business due to Covid-19.

36. 28% of businesses said that their staff had sufficient broadband to enable effective home/remote working and 60% of businesses said that this was not applicable to them as they do not do home or remote working.

37. **These results highlight the continued scope to increase awareness about the opportunities to invest in broadband, with demand and appetite for improvement tending to outstrip awareness of the opportunities available.**

Business support bodies

38. 16% of businesses were aware of the Thames Valley Berkshire LEP. In 2020, a quarter of businesses said they were aware.

39. 22% of businesses were aware of the Thames Valley Berkshire Growth Hub. This proportion was 14% in the 2020 Business Infrastructure Survey.

40. 11% of businesses were aware of the Bracknell Business Improvement District.

41. **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.**

Green agenda

42. Whilst 51% of businesses have the intention of being more environmentally friendly, just 12% have a specific target or aim to achieve net-zero and just 5% have set a deadline to this commitment.

43. The most common actions being taken by businesses were measuring their carbon footprint (14%) and sourcing sustainable materials (13%). Supporting staff to work at home or remotely and reviewing energy efficiency in the buildings were also commonly mentioned.

44. The key barrier to doing more to reduce businesses' carbon footprint is a lack of knowledge, closely followed by lack of availability of suitable alternatives, and lack of finance or grants.

45. **Arguably, the sentiment amongst consumers for sustainability is only matched by half of businesses locally. This suggests there is notable scope to increase awareness amongst businesses of their role to promote the green agenda, and support them to develop more sustainable business practices.**

The importance of segmenting and targeting

46. **The survey results highlight consistent differences based on size of business (and also business sector). This demonstrates the importance of segmenting businesses and developing appropriate strategies and support packages based on those segments.**

Bracknell Forest Council: Business Survey 2021

Main Report

Section 1: Introduction

Introduction, background and aims of the research

1.1. Bracknell Forest Council commissioned a survey of businesses to gain an understanding of the impacts of changing economic conditions, Covid-19 and the EU exit transition on businesses in Bracknell Forest, as well as to capture the views of local businesses about skills, infrastructure and the green agenda. The research will be used to inform pandemic recovery plans and inform local economic strategies that support local business and economic growth.

1.2. 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).

1.3. Specific issues covered by the survey are:

- The Covid-19 pandemic
- Brexit
- Skills including vacancies, hard-to-fill vacancies, skills gaps and retention
- Infrastructure including physical infrastructure, broadband and business support provision
- Employee wellbeing
- The green agenda and commitment to net-zero

Approach to the research

1.4. A total of 504 interviews were carried out via CATI (computer assisted telephone interviewing) between the middle of October and the end of November 2021. The survey was timed to follow the end of the UK furlough support programme, to capture views of businesses post such support as they look forward to a period of recovery. This was prior to the emergence of the Omicron variant of the virus, which led to increased social distancing measures being put in place and some impact on consumer confidence.

1.5. Interviews took an average of 20-25 minutes to complete and were conducted with business decision makers.

1.6. Surveys were completed at the local 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.

1.7. A bespoke, local questionnaire was developed and tested with local businesses. Some of

the questions repeated those asked in previous business surveys conducted in 2020 and 2014/15 to allow for comparability.

1.8. Quota sampling was used to ensure a representative split of the approximate 4,750 registered 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. Quotas or number of interviews were set in proportion to the latest local area business population statistics, sourced from the Office of National Statistics[1]. 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.

1.9. This report presents current results and compares them, where data is available, against the results for 2020, as well as by other variables such as business size.

1.10. With 504 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 +/-4.2% at a 95% confidence level (and a minimum sample error of +/-2.5%, depending on the result)[2]. This means that there is 95% confidence that the "real" result for any given question would be within 4.2 percentage points of that stated within the survey findings. For example, if the survey result was '50%', the real result would be between 45.8% and 54.2%, 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 2020 survey and the current one (differences of approximately 7 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.

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[1] Inter-departmental Business Register (IDBR) 2020. 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 available 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.

[2] 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: The Covid-19 Pandemic

Key Findings:

- A third of businesses (35%) said their business turnover was substantially lower than normal as a result of the Covid-19 crisis and a fifth (22%) said it was slightly lower than normal.

- Businesses with 0-4 staff were more likely to say that their turnover was substantially lower than normal – 38% said this, compared with 25% of businesses with 5-9 staff and 28% of businesses with 10+ staff.

- Business confidence for the coming year is more positive than negative, with 51% expecting to see an improvement in their performance.

- Half of Bracknell Forest businesses were able to mention at least one positive impact of Covid-19 on their business. 12% mentioned new ways of working and 10% mentioned more remote or flexible working hours. However, the majority of businesses mentioned at least one negative impact of Covid-19 on their business. A decrease in financial returns was the top issue; 22% mentioned loss of income or reduced turnover and 20% mentioned less profitability.

- The Job Retention Scheme (15%) and Small Business Grant Funding (12%) were the most commonly accessed Government business support schemes.

- Around half of businesses (52%) have changed the way their business works over the longer term as a result of Covid-19. The most common action was social distancing measures (10%). 7% mentioned increased digital delivery of services or products and the same proportion introduced new services or products.

- Three-fifths of businesses (60%) mentioned at least one means of support that could help their business and the local economy to recover from the impact of Covid-19. One-in-six businesses (17%) said that access to finance such as grants, affordable finance and loans would help them to recover from the impact of Covid-19.

Introduction

2.1. This section presents findings about businesses' perceptions of Covid-19, its impact and related business support.

Covid-19 impact on businesses' turnover

2.2. A third of businesses (35%) said their business turnover was substantially lower than normal as a result of the Covid-19 crisis and a fifth (22%) said it was slightly lower than normal.

2.3. In 2020, half of businesses (52%) said their business turnover was substantially lower than normal as a result of the Covid-19 crisis and a fifth (20%) said it was slightly lower than normal.

2.4. 19% of businesses said Covid-19 had no effect on turnover. In 2020, this figure was 14%.

2.5. Businesses with 0-4 staff were more likely to say that their turnover was substantially lower than normal – 38% said this, compared with 25% of businesses with 5-9 staff and 29% of businesses with 10+ staff.

**Figure 2.1: Impact of Covid-19 on businesses' turnover**
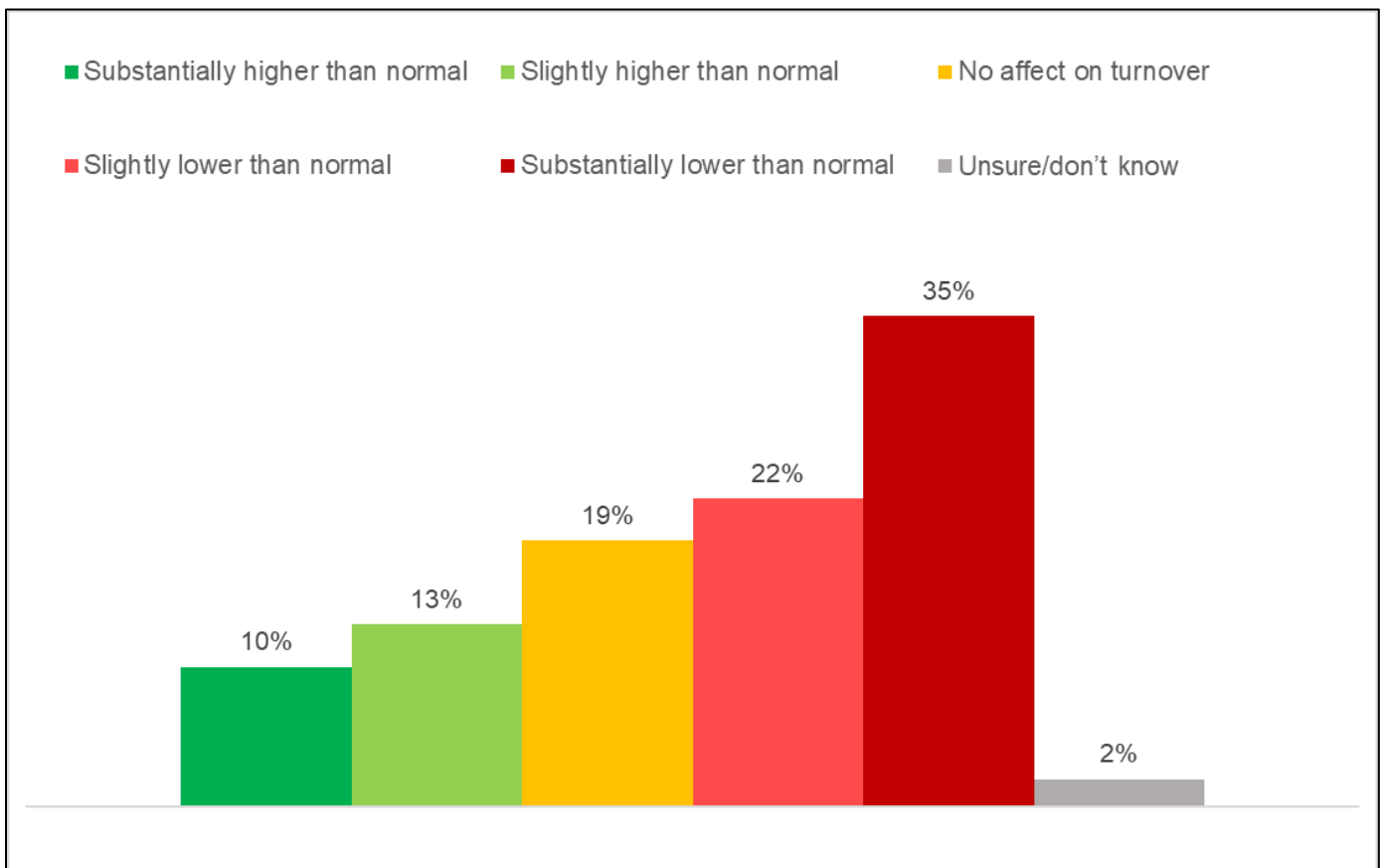
Number of respondents: 503.

Question asked: What has been the impact of Covid-19 on your businesses' turnover?

Home Working

2.6.   One change businesses have had to deal with in the period since March 2020 is home and remote working. Businesses were asked whether, in the next 6 months they expected the proportion of the workforce working from home to have increased, decreased or remained the same compared to pre-pandemic levels.

2.7.   The majority (90%) said they expected levels of home working to be the same as they were pre-pandemic in the next 6 months, suggesting a view at the time of the survey that matters were returning to some sort of normal (this was before the emergence of the Omicron variant and associated new requirements to work from home). 5% expected home working to decrease and 4% expected it to increase. Businesses with 10 or more staff were less likely to say that they expected levels of working from home to be the same as they were pre-pandemic in the next 6 months, with 78% saying so (and 16% saying they felt it would decrease compared to pre-pandemic levels)[3], compared with 93% of businesses with 0-4 staff and 90% of businesses with 5-9 staff.

Figure 2.2: Whether Bracknell Forest businesses expect the proportion of the workforce working from home to decrease, stay the same or increase
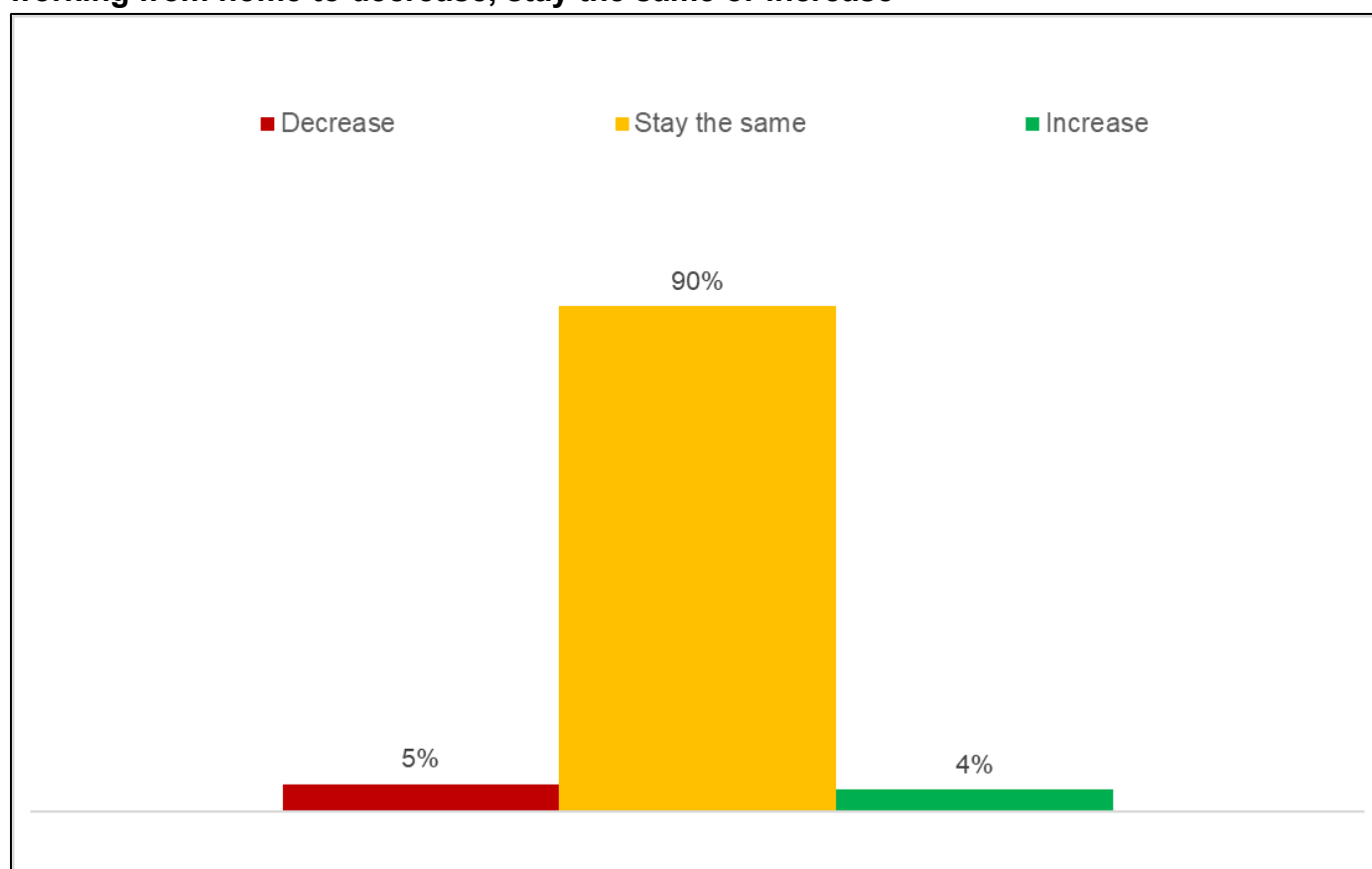
Number of respondents: 458. Excludes 'don't know'/no response.
Question asked: Compared to pre-pandemic levels, do you expect the proportion of your workforce working from home to decrease, stay the same or increase in the next 6 months?

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[3] This response raises the question as to whether respondents properly understood the question as it is not expected that homeworking levels would decrease compared to pre-pandemic levels. Perhaps they felt the question referred to current homeworking levels. The other explanation is that there will be a decrease in homeworking in the near future as it is well documented that some businesses are reluctant to support home working for a variety of reasons, including concerns around productivity, performance and relationships.

Business performance in next 12 months

2.8. Bracknell Forest businesses were more likely to expect performance over the next 12 months to improve (51%) rather than deteriorate (6%), while two-fifths (42%) expected performance to remain stable.

2.9. Larger businesses were more likely to expect performance over the next 12 months to improve (63% of businesses with 10 or more staff said it would improve, compared with 49% of other businesses).

**Figure 2.3: Expected business performance over next 12 months**
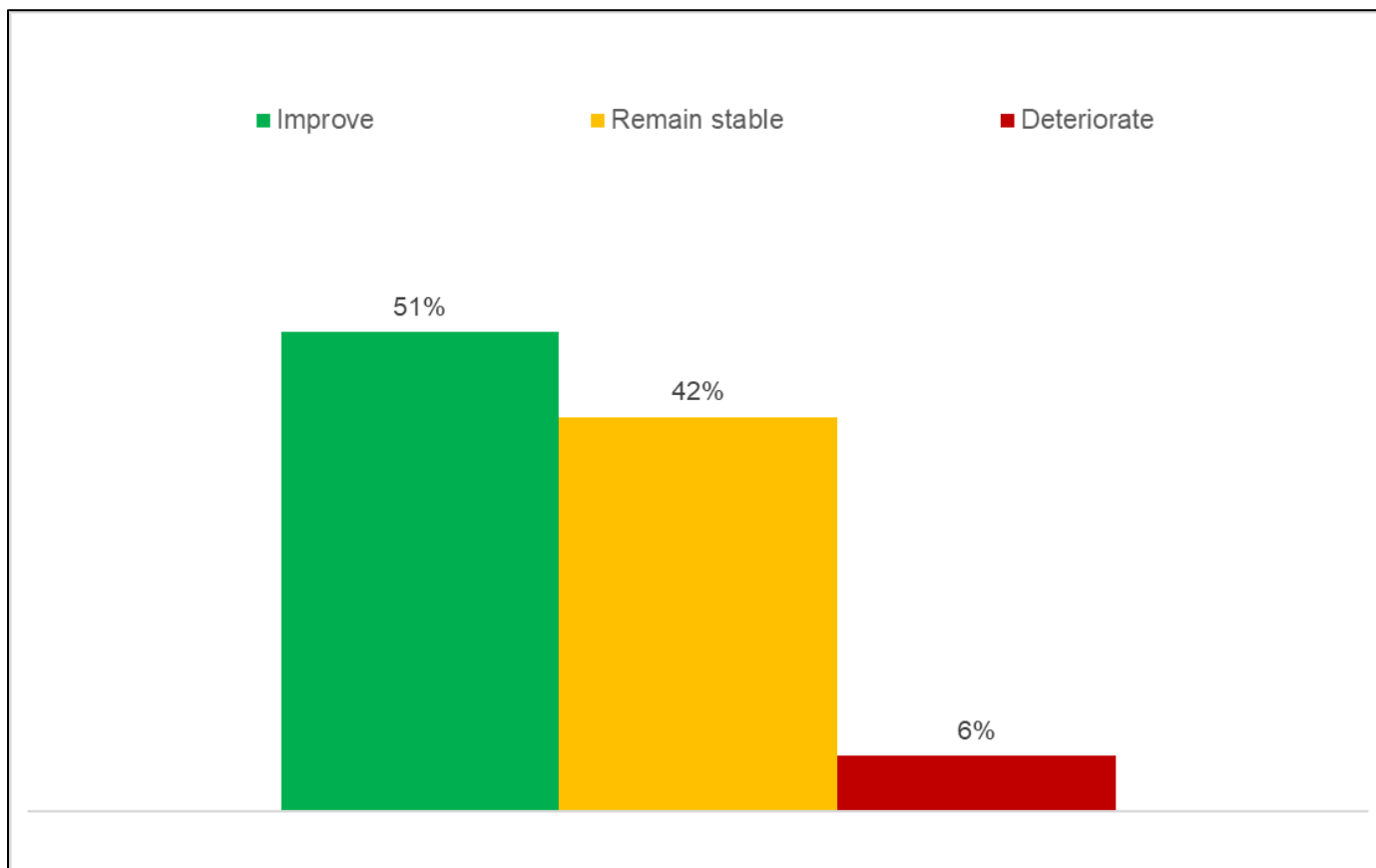
Number of respondents: 501.

Question asked: Over the next 12 months do you expect your business performance to generally improve, remain stable, or deteriorate?

Positive impacts of Covid-19

2.10. Half of Bracknell Forest businesses were able to mention at least one positive impact of Covid-19 on their business. 12% mentioned new ways of working and 10% mentioned more remote or flexible working hours.

2.11. Increased turnover was mentioned by 9% and an increased customer base and increased productivity were mentioned by 8% each. 7% of businesses mentioned increased profitability.

2.12. Nearly half of businesses (47%) said there were not any positive impacts.

2.13. Businesses with 0 employees (self-employed) and businesses with 5-9 staff were more likely to say that Covid-19 had had no positive impacts on their business, with 62% and 61% of businesses with 0 employees and businesses with 5-9 employees saying so respectively, compared with 45% of businesses with 1-4 staff and 36% of businesses with 10 or more staff.

Figure 2.4: Positive impacts of Covid-19 on business
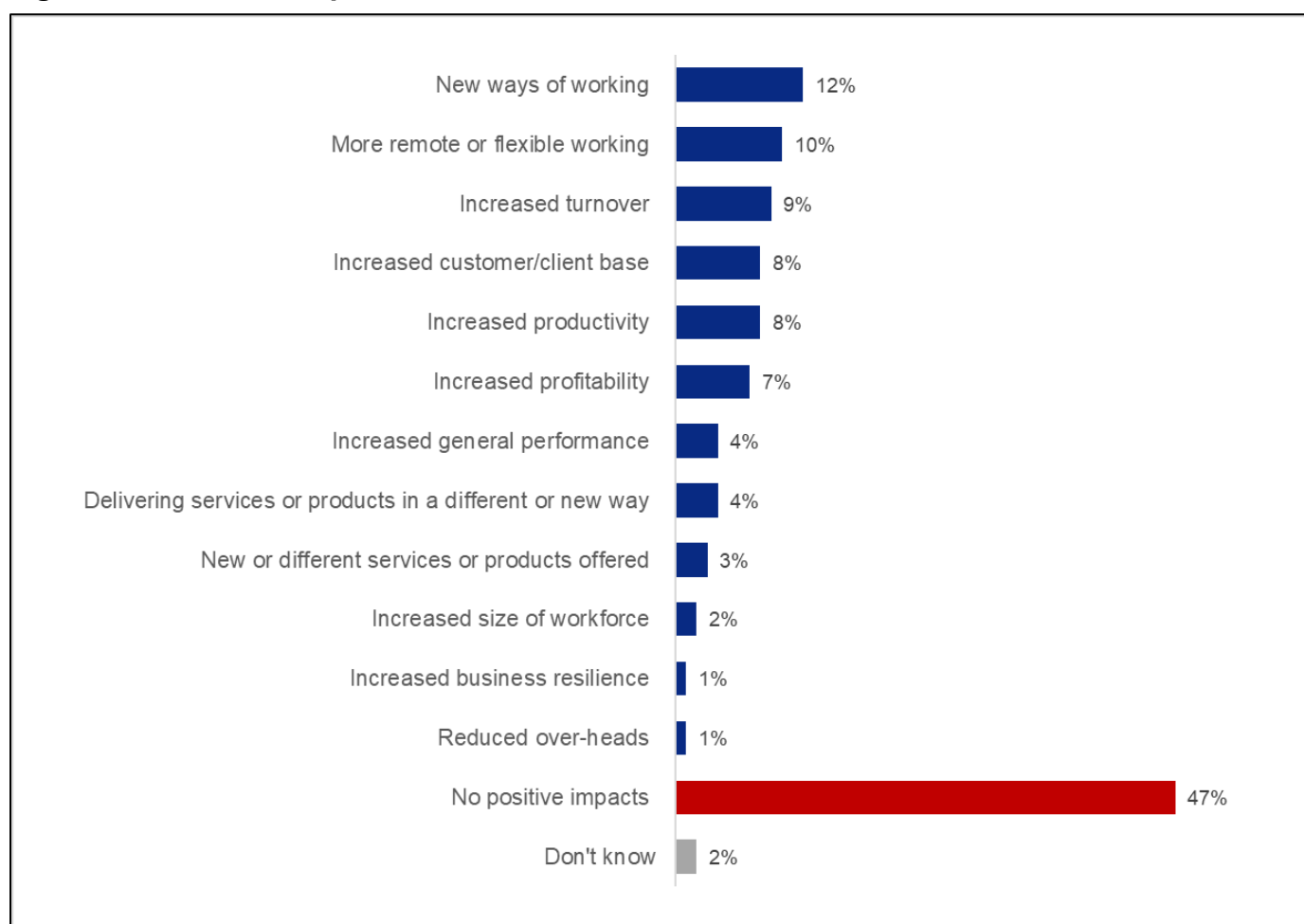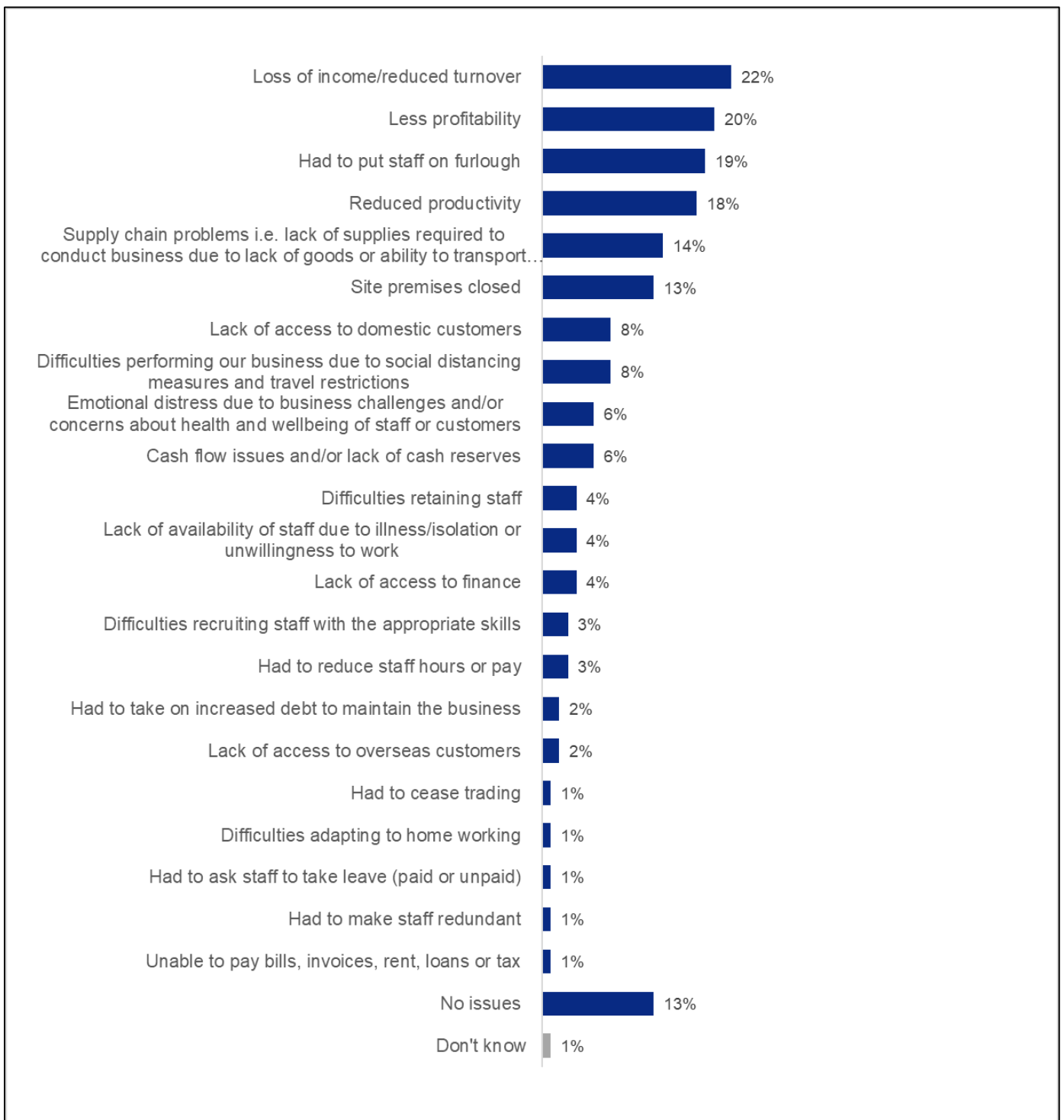

Number of respondents: 495.

Question asked: What, if any, have been positive impacts of Covid-19 on your business?

Note: Respondents could select more than one answer.

Negative impacts of Covid-19

2.14. The majority of Bracknell Forest businesses mentioned at least one negative impact of Covid-19 on their business. A decrease in financial returns was the top issue; 22% mentioned loss of income or reduced turnover and 20% mentioned less profitability.

2.15. Putting staff on furlough was mentioned by 19%, reduced productivity was mentioned by 18% and supply chain problems were mentioned by 14%. 13% of businesses mentioned closing site premises.

2.16. Lack of access to domestic customers and difficulties performing business due to social distancing and travel restrictions were mentioned by 8% each.

2.17. Larger businesses were more likely to mention furloughing staff as a result of Covid-19, with 27% and 34% of businesses with 5-9 employees and businesses with 10 or more employees mentioning this respectively, compared with 17% of businesses with 1-4 staff.

2.18. Larger businesses were also more likely to mention closed site premises, with 21% and 22% of businesses with 5-9 employees and businesses with 10 or more employees mentioning this respectively, compared with 13% of businesses with 0 staff (self-employed) and 9% of businesses with 1-4 staff.

2.19. Just 13% of businesses mentioned that there had been 'no issues' caused by the pandemic.

Figure 2.5: Negative impacts of Covid-19 on business

Impact	Percentage
Loss of income/reduced turnover	22%
Less profitability	20%
Had to put staff on furlough	19%
Reduced productivity	18%
Supply chain problems i.e. lack of supplies required to conduct business due to lack of goods or ability to transport…	14%
Site premises closed	13%
Lack of access to domestic customers	8%
Difficulties performing our business due to social distancing measures and travel restrictions	8%
Emotional distress due to business challenges and/or concerns about health and wellbeing of staff or customers	6%
Cash flow issues and/or lack of cash reserves	6%
Difficulties retaining staff	4%
Lack of availability of staff due to illness/isolation or unwillingness to work	4%
Lack of access to finance	4%
Difficulties recruiting staff with the appropriate skills	3%
Had to reduce staff hours or pay	3%
Had to take on increased debt to maintain the business	2%
Lack of access to overseas customers	2%
Had to cease trading	1%
Difficulties adapting to home working	1%
Had to ask staff to take leave (paid or unpaid)	1%
Had to make staff redundant	1%
Unable to pay bills, invoices, rent, loans or tax	1%
No issues	13%
Don't know	1%

Number of respondents: 480.

Question asked: What, if any, have been negative impacts of Covid-19 on your business?

Note: Respondents could select more than one answer.

Access to Government's business support schemes

2.20. Half of businesses (52%) did not access and are not planning to access any of the Government's business support schemes.

2.21. One-in-seven businesses (15%) accessed or are planning to access the Job Retention Scheme (21% amongst businesses with 5 or more staff)[4] and one-in-eight businesses (12%) accessed or are planning to access Small Business Grant Funding. These were also the top mentioned business support schemes in the 2020 Business Skills Survey.

2.22. 9% and 6% accessed or are planning to access the Coronavirus Bounce Back Loan and Self-employment Income Support Scheme, respectively.

2.23. 5% of businesses mentioned a business rates holiday.

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[4] These figures are perhaps lower than may have been expected, with some 45% of businesses saying they accessed the job retention scheme in a survey in 2020 at the height of the pandemic and in the midst of the furlough scheme. This current survey was conducted once the furlough scheme was ended, and perhaps some businesses misinterpreted the question as referring to recently accessing the scheme or some may not have been aware of their business previously accessing the scheme several months previously.

Figure 2.6: Access to Government's business support
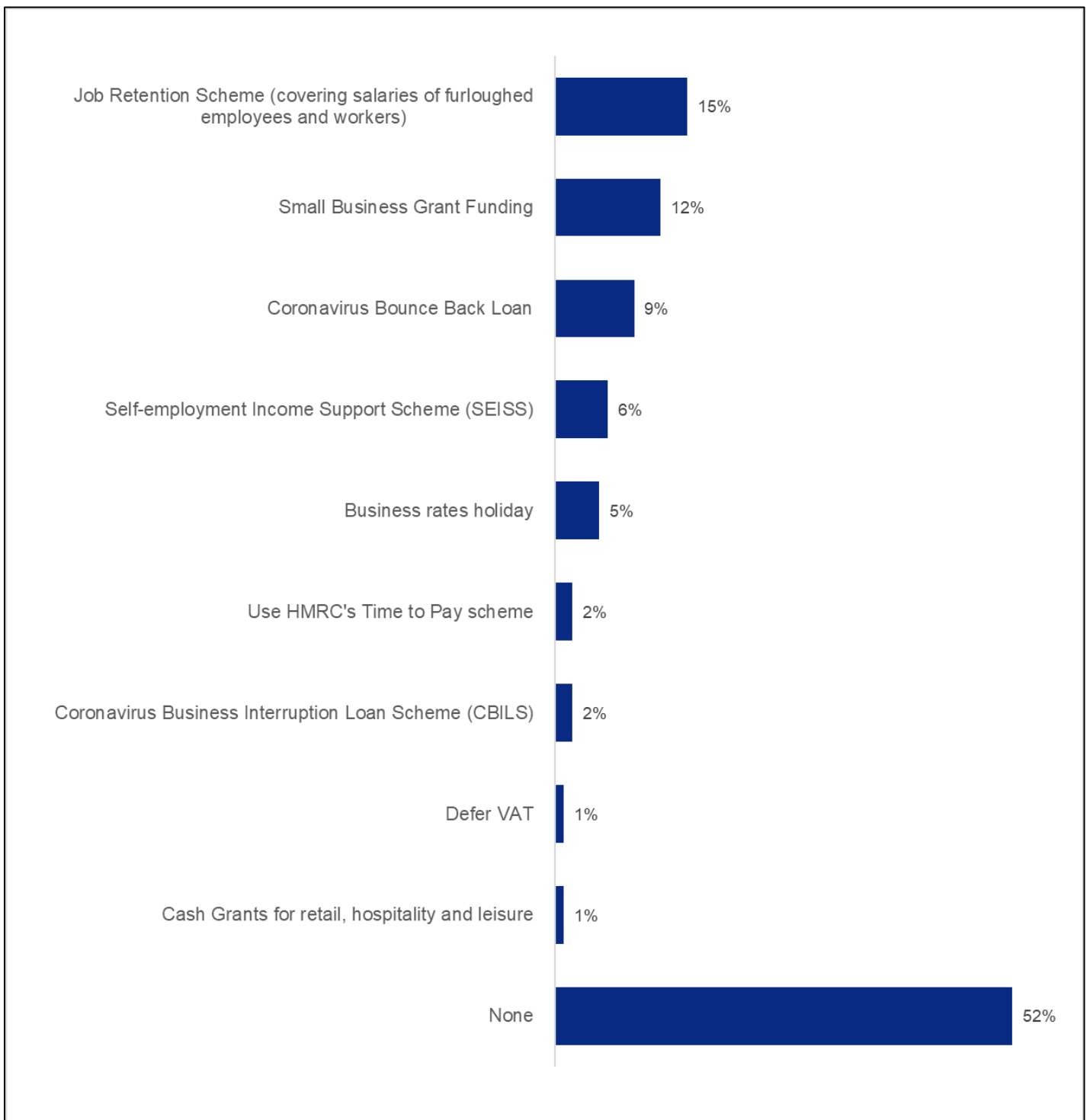
Number of respondents: 484.

Question asked: Have you accessed (or are you planning to access) any of the Government's business support schemes?

Note: Respondents could select more than one answer.

Difficulties in accessing Government's business support schemes

2.24. Three-quarters of all businesses (73%) said they did not experience difficulties when trying to access any of the Government's business support schemes (this question was asked to all businesses regardless of whether they accessed support or not).

2.25. One-in-seven businesses (15%) had experienced difficulties when trying to access the Government's business support (this figure increased to 20% when analysed by those businesses that accessed support).

2.26. Those that experienced problems cited confusion about what types of support were available to them, not being eligible for support they felt they should be able to access, and/or difficulties getting through to the council or other organisations to ask questions/receive advice.

Figure 2.7: Whether businesses experienced difficulties when trying to access the Government's business support
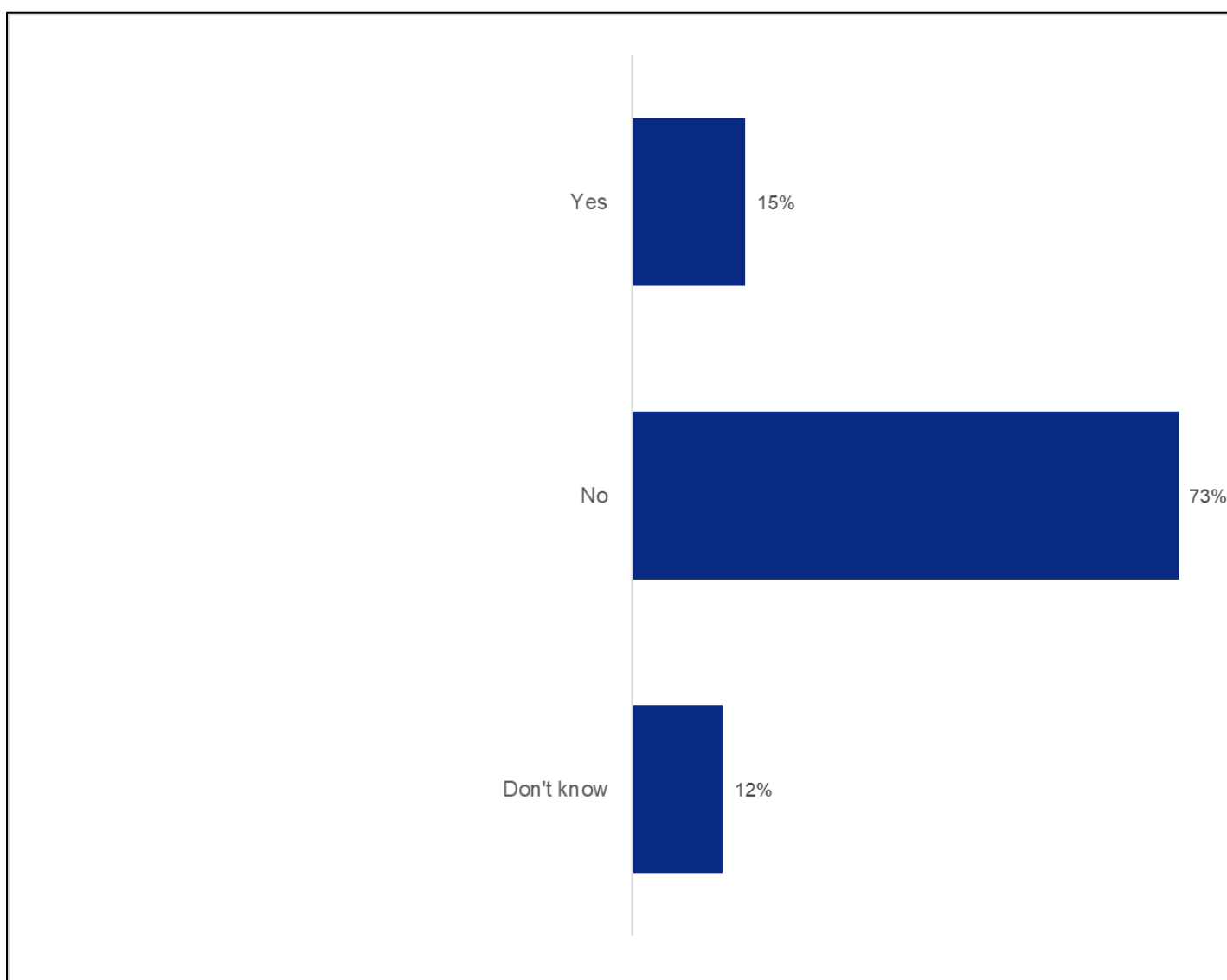
Number of respondents: 376 (several businesses did not reply to this question because they had not accessed support).

Question asked: Have you experienced any difficulties when trying to access any of the above?

Changing the way the business works as a result of Covid-19

2.27. Around half of businesses (52%) have changed the way their business works over the longer term as a result of Covid-19. A tenth of businesses (10%) said they had introduced social distancing measures.

2.28. 7% mentioned increased digital delivery of services or products and the same proportion introduced new services or products.

2.29. Bracknell Forest businesses were asked in the 2020 Business Skills Survey how they were planning to change the way the business works over the longer term as a result of Covid-19. Back then, different ways of working and more remote working were the top mentioned.

Figure 2.8: Changing the way the business works as a result of Covid-19
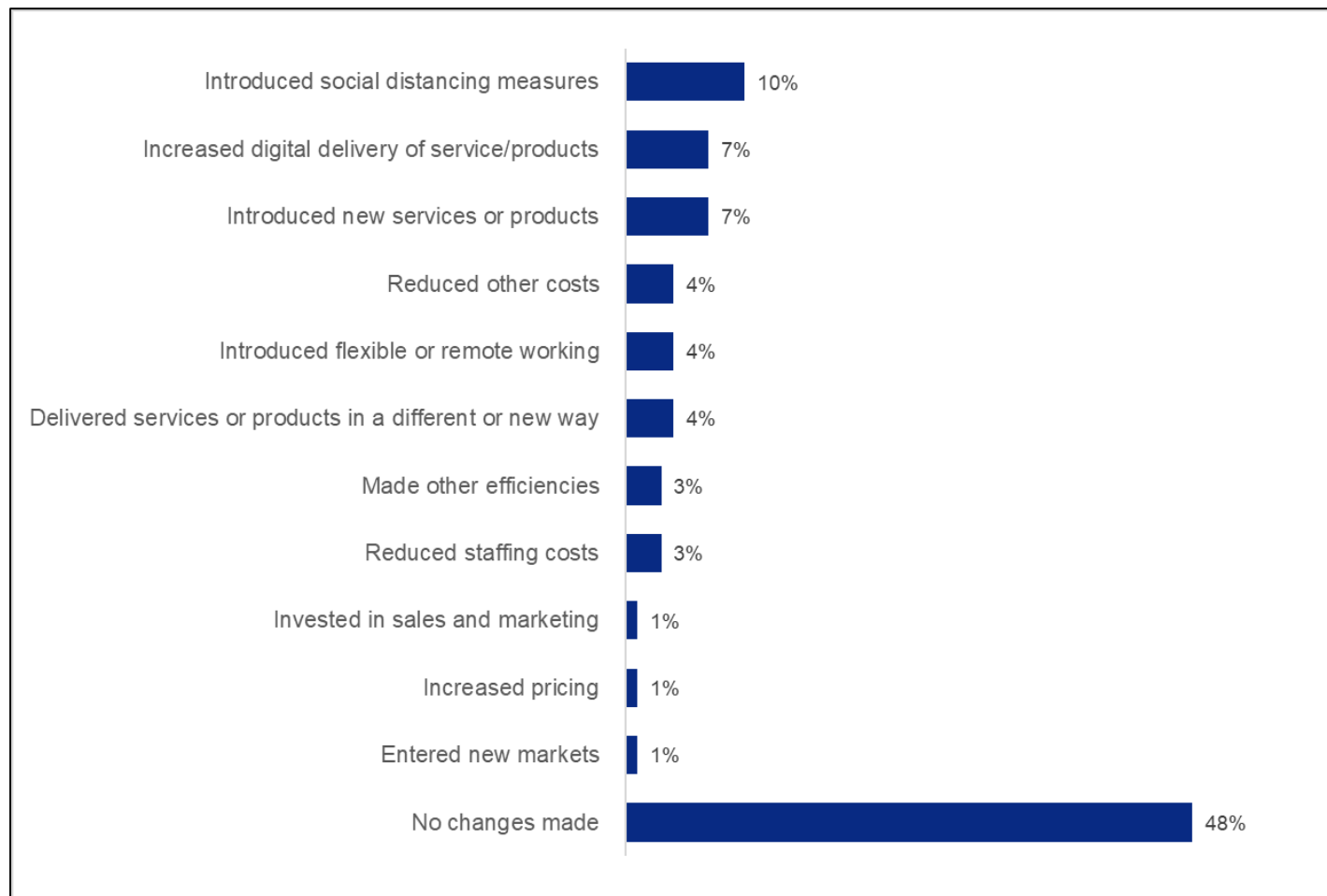
Number of respondents: 480.

Question asked: How have you changed, if at all, the way your business works over the longer term as a result of Covid-19? Note: Respondents could select more than one answer.

Employment and workplace measures

2.30.   Eight-in-ten businesses (79%) had taken at least one employment or workplace measure to help keep their business, staff and customers safe. Almost two-thirds of businesses (64%) said they had taken hygiene measures.

2.31.   48% mentioned social distancing and 29% mentioned personal protective equipment.

2.32.   Larger businesses were more likely to have taken hygiene measures, with 85% of businesses with 5-9 employees and 88% of businesses with 10 or more employees mentioning hygiene measures, compared with 37% of businesses with 0 employees (self-employed) and 60% of businesses with 1-4 staff.

Figure 2.9: Employment and workplace measures taken to help keep the business, staff and customers safe
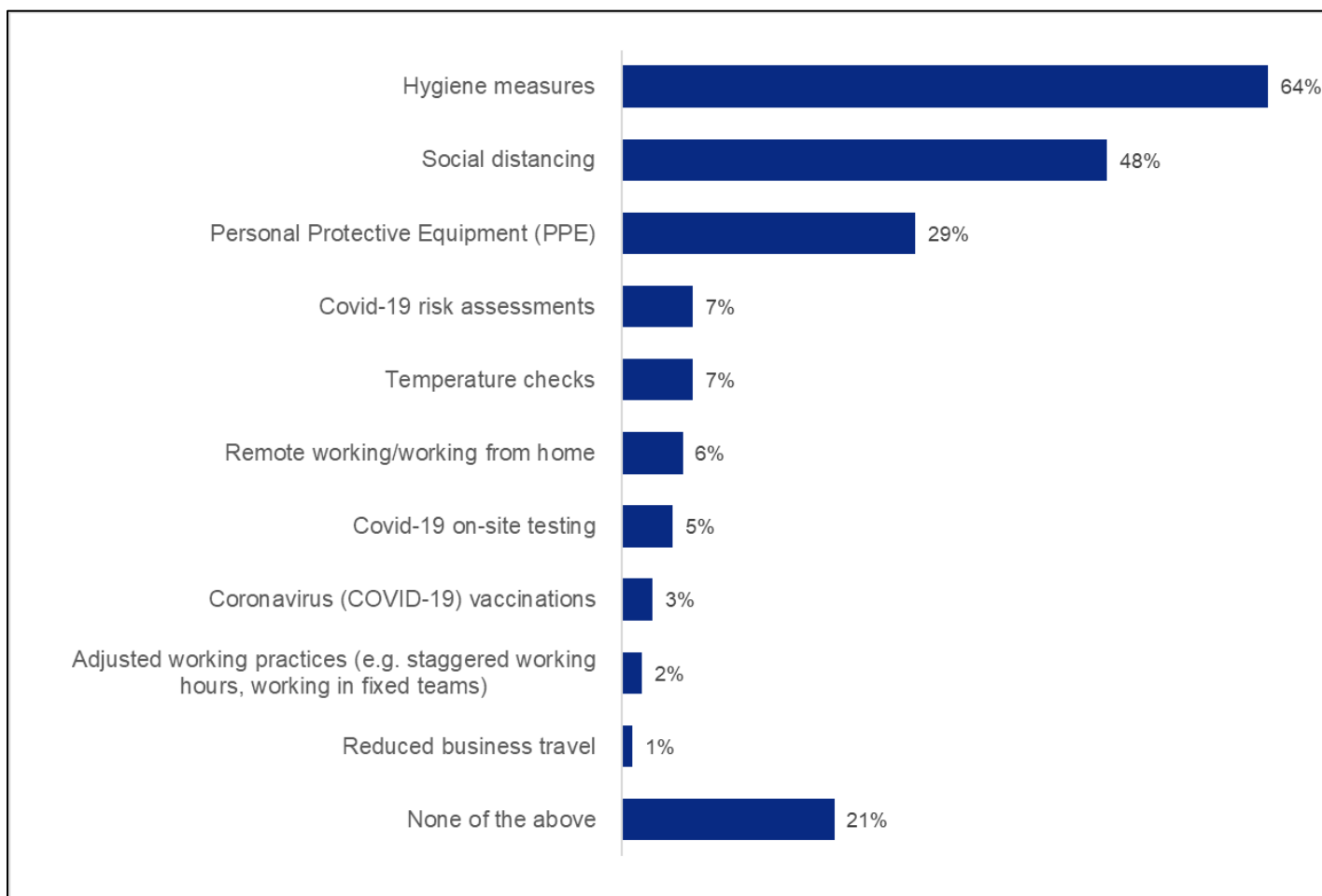
Number of respondents: 499.

Question asked: What employment and workplace measures have you taken, if any, to help keep your business, staff and customers safe? Note: Respondents could select more than one answer.

Helping businesses and the local economy to recover

2.33. Three-fifths of businesses (60%) mentioned at least one means of support that could help their business and the local economy to recover from the impact of Covid-19. One-in-six businesses (17%) said that access to finance such as grants, affordable finance and loans would help them to recover from the impact of Covid-19.

2.34. 12% mentioned access to business information, support or advice and 7% mentioned investment to improve the local infrastructure and area.

2.35. 6% mentioned support to reduce costs such as debt relief, loan, mortgage, rent or rate holidays or subsidies, or deferral of tax payments.

2.36. About a third of businesses provided a range of 'other' comments. These included about 15% of businesses stating that they wanted to avoid future lockdowns and restrictions and to essentially 'learn to live with Covid'. About 10% of businesses said they would like to see a package of business support from the council focussed around marketing and business growth support, especially for small and start-up businesses. A similar proportion of businesses mentioned they would like to a see a 'shop local' campaign introduced to help local businesses. About 5% of businesses said there needed to be specific and targeted support for the hospitality sector.

Figure 2.10: Helping businesses and the local economy to recover from the impact of Covid-19

Access to finance (such as grants, affordable finance and loans) — 17%

Business information, support or advice (such as advice about business recovery, resilience or growth) — 12%

Investment to improve the local infrastructure and area to encourage business and economic growth (such as improved travel, broadband, high streets, public spaces, premises, reduced crime and asb) — 7%

Support to reduce costs (such as debt relief, loan, mortgage, rent or rate holidays or subsidies, deferral of tax payments) — 6%

Access to employment and skills support (including training and development programmes for staff, good employer practice guidance, support to employers to recruit skilled staff or local staff, access to apprenticeship programmes) — 4%

Access to Government support programmes (such as job retention, statutory sick pay schemes) — 2%

No changes or help required — 29%

Don't know — 11%

Number of respondents: 493.

Question asked: What, if anything, would help your business and the local economy to recover from the impact of Covid-19? Note: Respondents could select more than one answer.

Section 3: Brexit

Key Findings:

- Half of businesses in Bracknell Forest (51%) said leaving the EU had had no notable impact on their business. Among those who said it had had an impact, businesses in Bracknell Forest were more likely to say it was negative rather than positive, with eight times as many saying the UK's departure had had a negative impact (41%) than a positive one (5%).

- Problems importing from the EU was the most common negative impact for businesses in the EU exit, with 22% saying this was a key issue for them. Supply chain problems were an issue for 13% and the increased cost of business for 10%.

Introduction

3.1.   The UK formally left the European Union on 31st January 2020 and the transition period following this came to an end on the 31st December of that year.

3.2.   In this context, this section explores businesses' perceptions and concerns about the UK leaving the European Union.

Leaving the European Union

3.3.   Half of businesses in Bracknell Forest (51%) said leaving the EU had had no notable impact on their business. Among those who said it had had an impact, businesses in Bracknell Forest were more likely to be negative than positive, with eight times as many saying the UK's departure had had a negative impact (41%) than a positive one (5%).

3.4.   The direction of the impact was more skewed towards negative than had been anticipated by businesses beforehand. In the 2020 Business Infrastructure Survey, 23% had anticipated a negative impact.

3.5.   The small number of businesses that said leaving the EU is positive mentioned this is because it has reduced red tape and provides more opportunities for UK suppliers to support UK based businesses.

Figure 3.1: Impact of the UK's exit from the European Union
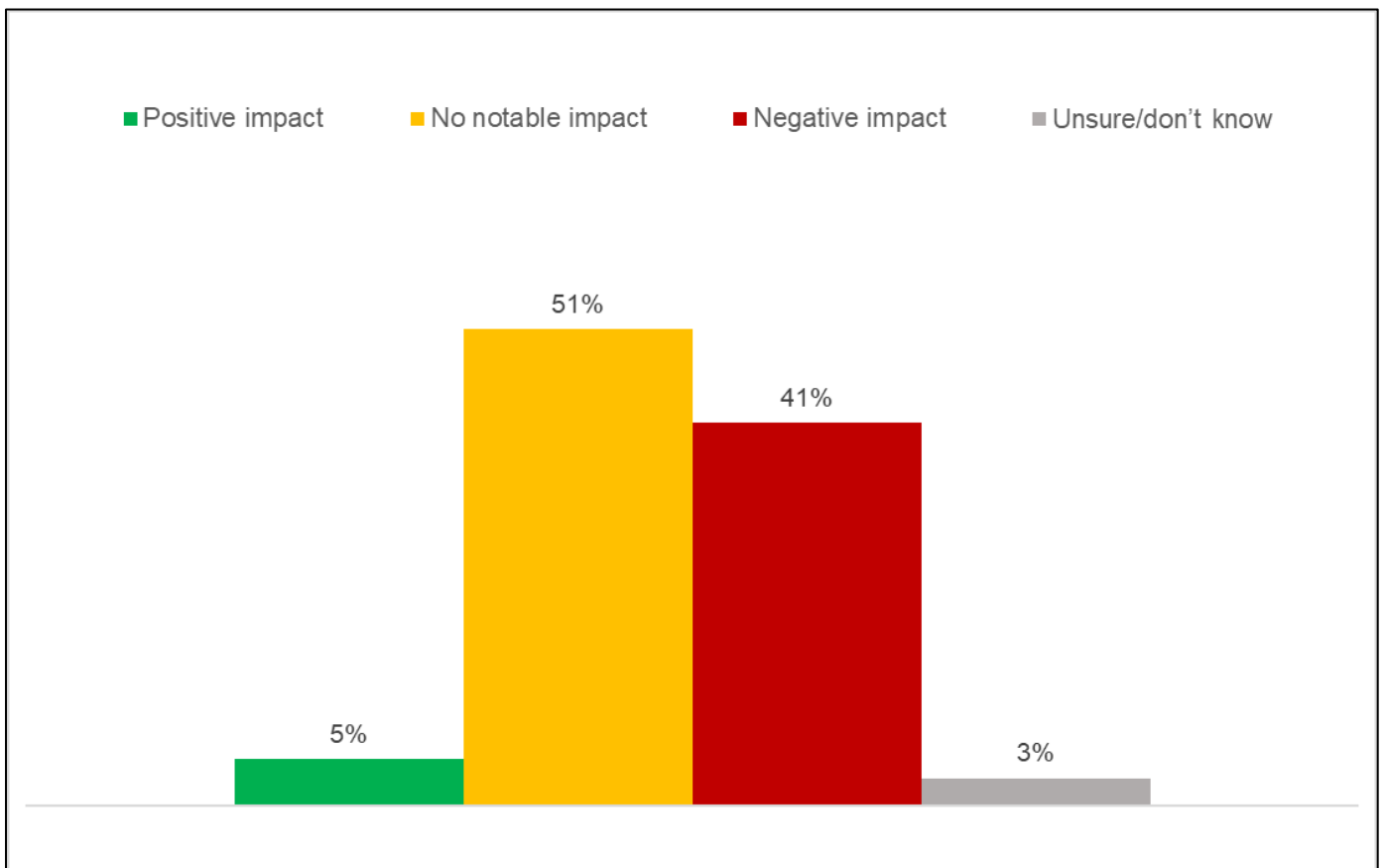
Number of respondents: 501.

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

3.6.   Problems importing from the EU was the most common negative impact for businesses, with 22% saying this was a key issue for them. Supply chain problems were an issue for 13% and the increased cost of business for 10%.

3.7.   The financial impact was mentioned by 9% and labour availability by 7%.

3.8.   In the 2020 Business Infrastructure Survey, 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.

3.9.   Almost half of businesses (46%) did not mention any negative impacts of leaving the EU on their business.

3.10.   Businesses with 10 or more staff are more likely to mention labour availability as a negative impact of the UK leaving the EU (28% of businesses with 10 or more staff mentioned this, compared with 3% and 2% of businesses with 0-4 staff and 5-9 staff, respectively).

Figure 3.2: Negative impacts of leaving the EU
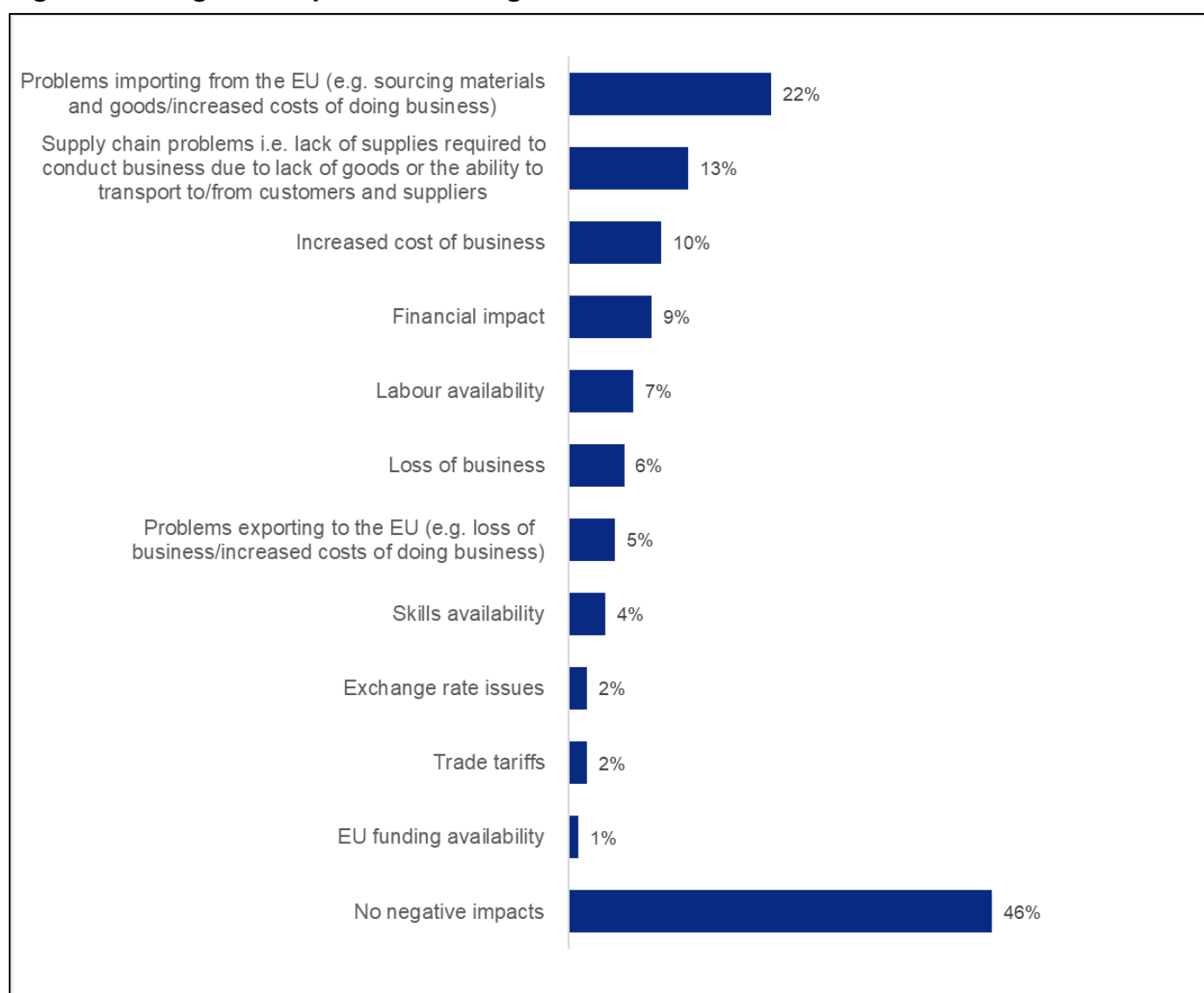
Number of respondents: 494.

Question asked: What have been the main negative impacts, if any, you have seen on your business of the UK leaving the EU? Note: Respondents could select more than one answer.

Section 4: Recruitment, Skills and Retention

Key Findings:

- Around two-fifths of businesses (37%) have had at least one vacancy in the 12 months preceding the survey.

- Larger businesses were more likely to have had vacancies.

- Approaching three-fifths (59%) of businesses that had vacancies reported that they had found at least one of these vacancies hard to fill.

- Just under two-fifths of businesses in Bracknell Forest indicated they had never recruited staff and one-eighth said that it was easy to recruit staff with the right skills.

- The main reason for difficulties finding recruits with the right skills was a low number of applicants with the required skills (40%). This was followed by a low number of applicants with the required attitude (24%). In the 2020 Business Skills Survey, the main reason for difficulties finding skills amongst new recruits was also a low number of applicants with the required skills (24%). This was followed by a shortage in people interested in doing the type of job (13%).

- 74% of businesses in Bracknell Forest did not feel that there are any gaps in their skills base, a lower position than 2020.

- Almost half of businesses mentioned that they found it easy to retain staff in Bracknell Forest and above a third mentioned they do not have any staff. In 2020, half (51%) of businesses mentioned it was easy for them to retain staff and above a third of businesses said they do not have any staff to retain.

Introduction

4.1.   This section presents businesses' experiences of issues surrounding their people, in terms of recruitment, skills shortages in the labour market and skills gaps in the existing workforce, plus retention issues.

Vacancies

4.2. Around two-fifths of businesses (37%) reported having had at least one vacancy in the 12 months preceding the survey. This is comparable to the proportion of businesses (31%) who reported having had at least one vacancy in the 2020 Business Skills Survey.

4.3. Larger businesses were more likely to have had vacancies; 92% of the businesses with 10+ staff have had a vacancy in the past 12 months, compared to just 26% of those with 1-4 staff.

Figure 4.1: Businesses with vacancies in Bracknell Forest
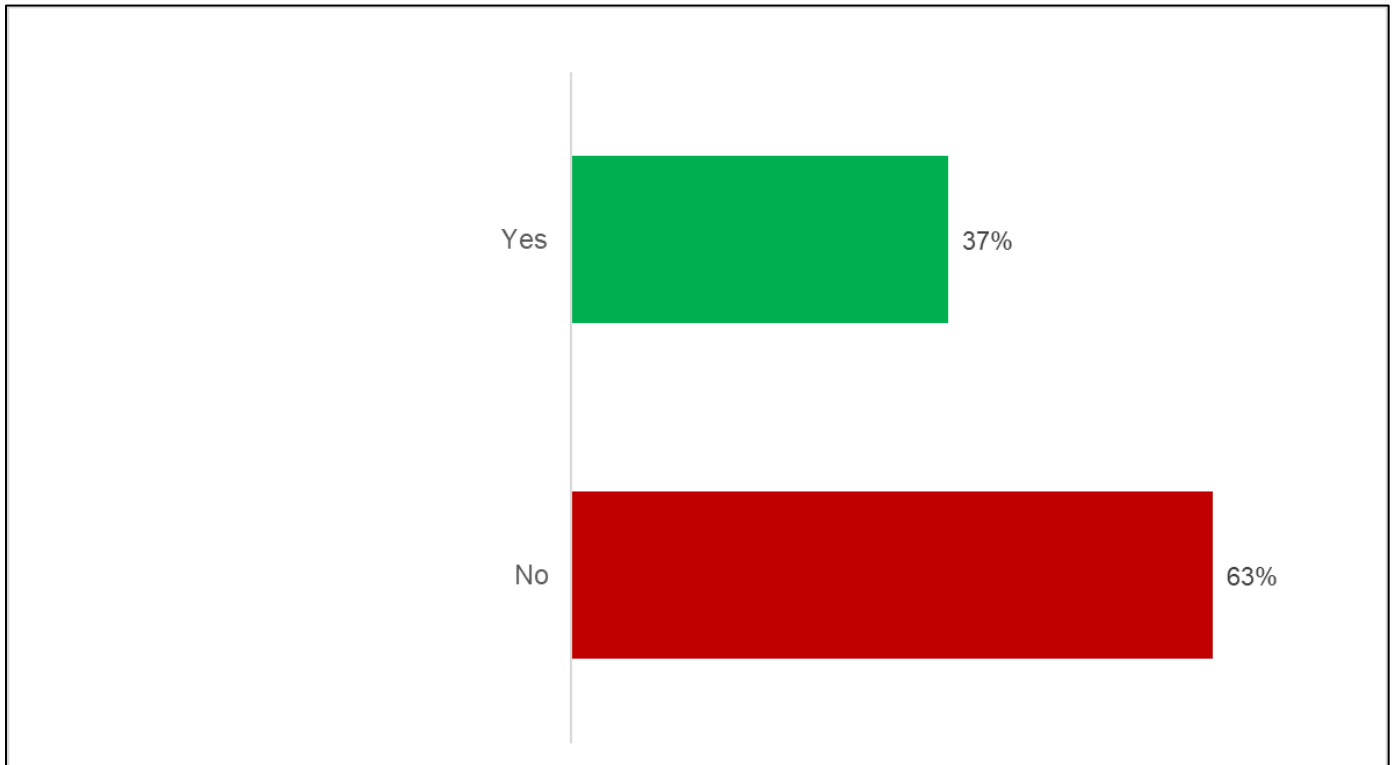
Number of respondents: 498.

Question asked: Have you had any vacancies in the last 12 months?

Recruitment difficulties

4.4.   Approaching three-fifths (59%) of businesses that had vacancies reported that they had found at least one of these vacancies hard to fill, equating to 22% of all businesses. This is higher than the proportion seen in the 2020 Business Skills Survey when 48% of businesses that had vacancies reported that they had found at least one of these vacancies hard to fill, equating to 15% of all businesses.

Figure 4.2: Businesses with hard-to-fill vacancies in Bracknell Forest
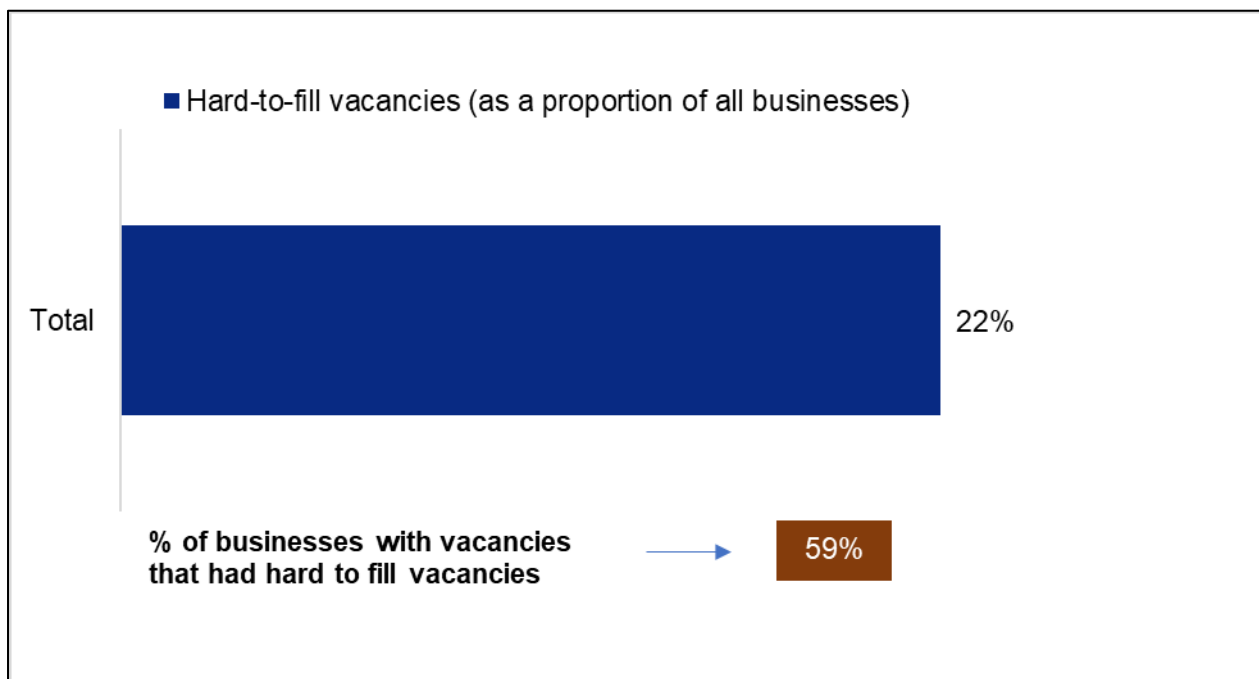
Number of respondents: 498.

Question asked: Have you had any vacancies in the last 12 months that you have found hard to fill?

Ease of recruitment in Bracknell Forest

4.5.   Just under two-fifths of businesses in Bracknell Forest indicated they had never recruited staff (38%). Only one-eighth (12%) said that it was easy to recruit staff with the right skills.

4.6.   This is a less positive picture than that seen in the 2020 Business Skills Survey when one fifth (20%) said that it was easy to recruit staff with the right skills.

Figure 4.3: Ease of recruiting employees with right skills in Bracknell Forest
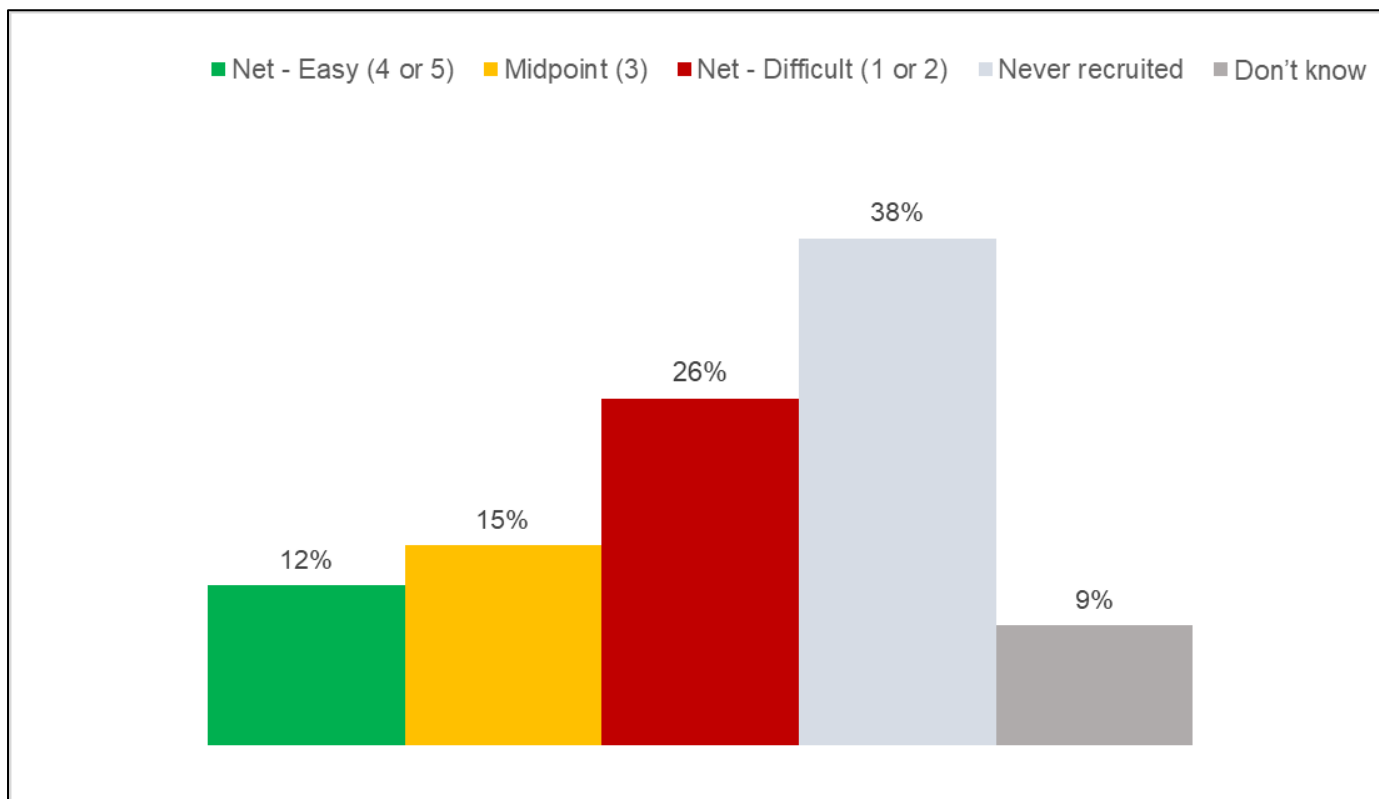
Number of respondents: 497.

Question asked: Thinking about recruiting staff in Bracknell Forest, how easy or difficult would you say it is to recruit employees with the right skills, giving your answer on a 5 point scale, where 5 is very easy and 1 if very difficult?

Reasons for difficulties in finding skill amongst new recruits

4.7.   The main reason for difficulties finding recruits with the right skills was a low number of applicants with the required skills (40%). This was followed by a low number of applicants with the required attitude (24%).

4.8.   In the 2020 Business Skills Survey, the main reason for difficulties finding skills amongst new recruits was also a low number of applicants with the required skills (24%). This was followed by a shortage in people interested in doing the type of job (13%).

4.9.   11% of businesses cited Brexit and 9% the pandemic as reasons for recruitment difficulties.

4.10.   Businesses with 10 or more staff were more likely to mention a low number of applicants with the required skills. 57% of businesses with 10 or more staff mentioned this, compared to 34% of businesses with 0-4 staff and 33% of businesses with 5-9 staff.

Figure 4.4: Reasons for difficulties in finding skill amongst new recruits
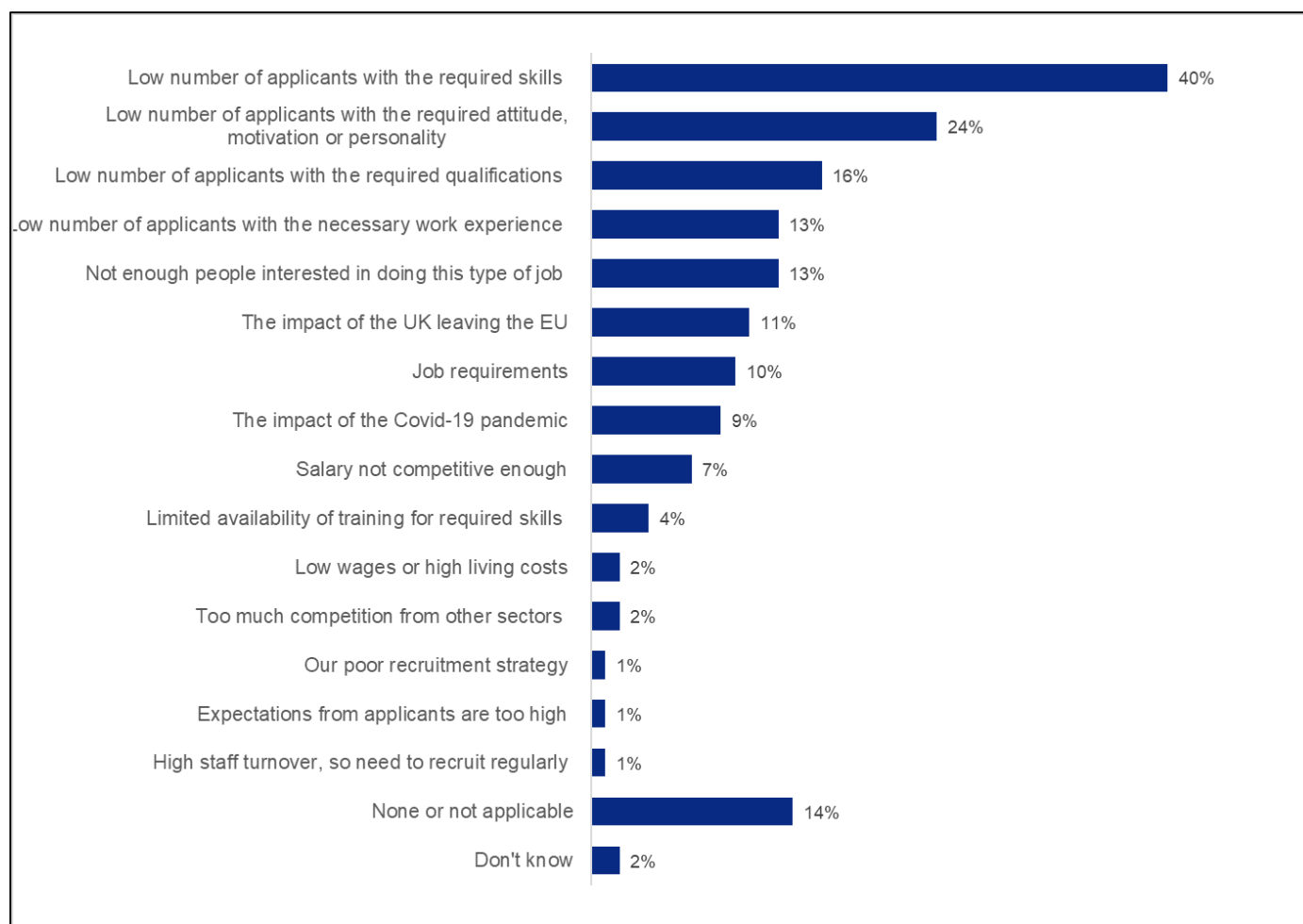
Number of respondents: 263 (only asked to businesses that have recruited staff).

Question asked: Why would you say that your organisation is experiencing, or has experienced, difficulties finding recruits with the right skills?

Skills gaps amongst all businesses

4.11. Three-quarters of businesses in Bracknell Forest did not feel that there are gaps in their skills base (74%).

4.12. This is lower than the figure seen in the 2020 Business Skills Survey, when 85% of businesses mentioned there were no gaps in their skills base.

**Figure 4.5: Proportion of businesses with skills gaps in Bracknell Forest**
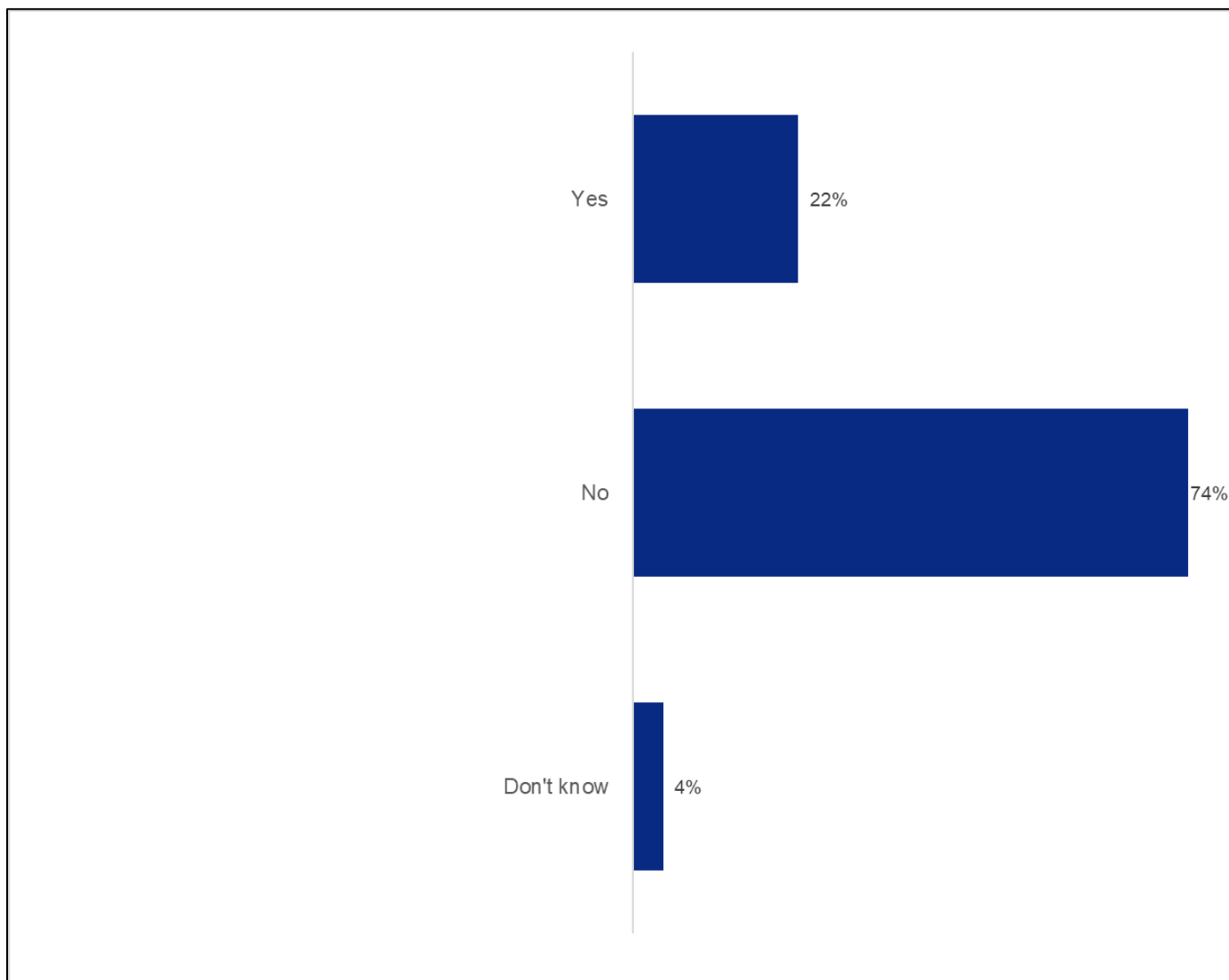
Number of respondents: 337. Excludes 'not applicable – do not have any staff' responses for comparability with previous data.

Question asked: Thinking about your current workforce in Bracknell Forest do you feel that there are gaps in the skills base of your current staff?

4.13. One-in-six businesses with gaps in their skills base mentioned a low number of applicants with the required skills (17%). This was followed by a lack of time to be able to upskill staff (12%).

4.14. In the 2020 Business Skills Survey, limited availability of training was the most commonly mentioned reason for experiencing skills gaps (18%). This was followed by a lack of time to be able to upskill staff and a low number of applicants with the required skills (14% each).

Figure 4.6: Reasons for experiencing skills gaps in current workforce
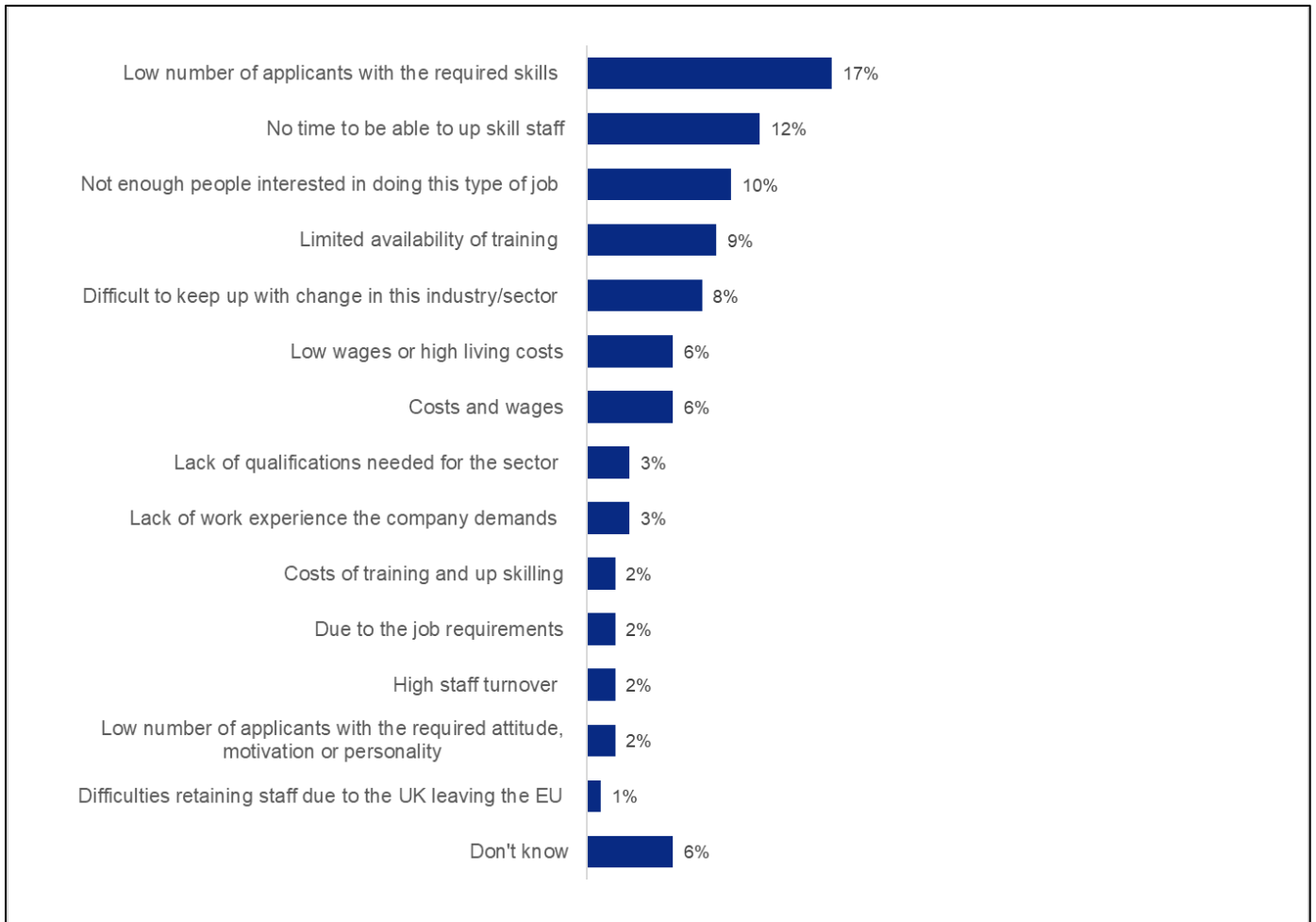
Number of respondents: 73 (only asked to businesses that have skills gaps).

Question asked: In general, why would you say you are experiencing skills gaps amongst your current workforce?

Note: Respondents could select more than one answer.

Ability to retain staff in Bracknell Forest

4.15. Almost half (46%) of businesses mentioned that they found it easy to retain staff in Bracknell Forest. Above a third (35%) of businesses mentioned they do not have any staff to retain. Just 4% said it is difficult to retain staff.

4.16. This is similar to the figures seen in the 2020 Business Skills Survey, when half (51%) of businesses mentioned that they found it easy to retain staff in Bracknell Forest and above a third (37%) of businesses mentioned they do not have any staff to retain.

Figure 4.7: Ability to retain staff in Bracknell Forest
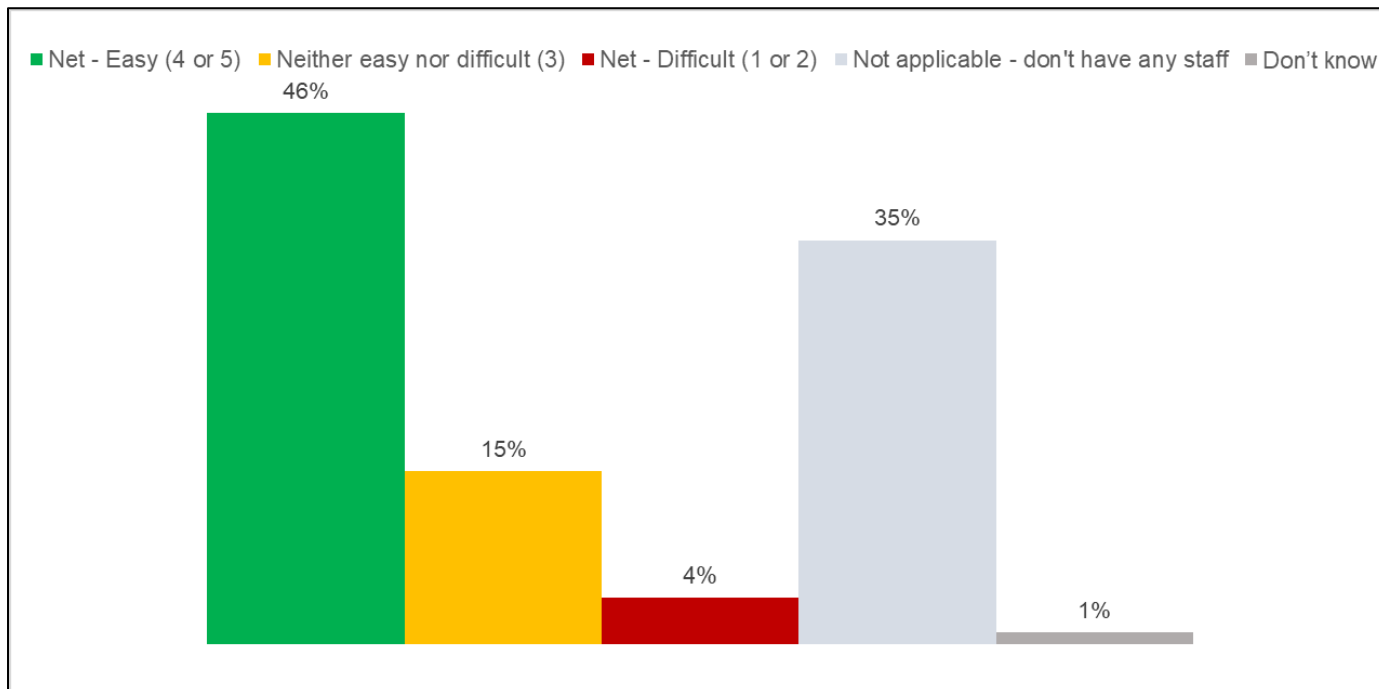
Number of respondents: 502.

Question asked: How would you rate your ability to retain staff in Bracknell Forest, where 5 means it is very easy and 1 means it is very difficult?

Section 5: Training and Development

Key Findings:

- A third of businesses (34%) said their workforce would not benefit from skills training, in addition to three-in-ten businesses (30%) who said that this is not applicable to them as they do not recruit staff.

- Half of businesses (52%) said they do not offer any of the listed types of training and development. Apprenticeships were the most commonly offered type of training, mentioned by a quarter (23%) of businesses.

- Businesses with 10 or more staff were more likely to offer training, just 27% of businesses with 10 or more staff mentioned that they do not offer any of the listed types of training and development, compared to 68% of businesses with 0 staff (self-employed), 56% of businesses with 1-4 staff and 54% of businesses with 5-9 staff.

Introduction

5.1. This section presents businesses' training and development usage and offer.

Benefit of training

5.2.   A third of businesses (34%) said their workforce would not benefit from skills training. Additionally, three-in-ten businesses (30%) said this is not applicable to them as they do not recruit staff.

**Figure 5.1: Proportion of businesses benefiting from skills training**
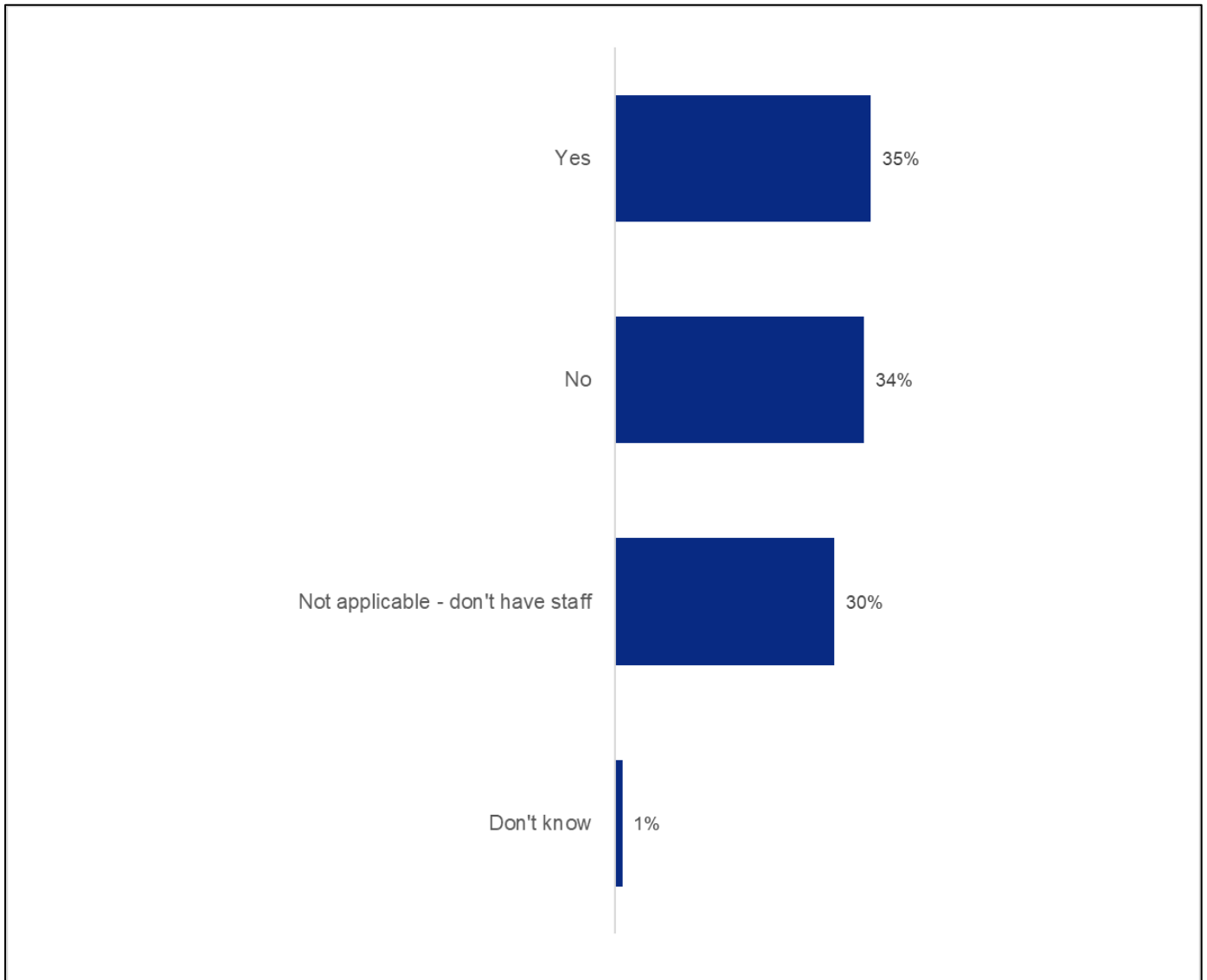
Number of respondents: 502.

Question asked: Generally, would your workforce in Bracknell Forest benefit from training to improve their skills?

Training and development offered

5.3.   Half of businesses (52%) said they do not offer any of the listed types of training and development. Apprenticeships were the most commonly offered type of training, mentioned by a quarter (23%) of businesses. 18% provided unpaid, or expenses only, work experience or work placements/trials.

5.4.   While these were the two top types of training offered by businesses in the 2020 Business Skills Survey, unpaid, or expenses only, work experience or work placements/trials was the most commonly offered type of training, mentioned by a third (34%) of businesses in 2020 and 18% provided apprenticeships in the 2020 survey.

5.5.   Businesses with 10 or more staff were more likely to offer training, just 27% of businesses with 10 or more staff mentioned that they do not offer any of the listed types of training and development, compared to 56% of businesses with 1-4 staff and 54% of businesses with 5-9 staff.

Figure 5.2: Training and development offered by businesses
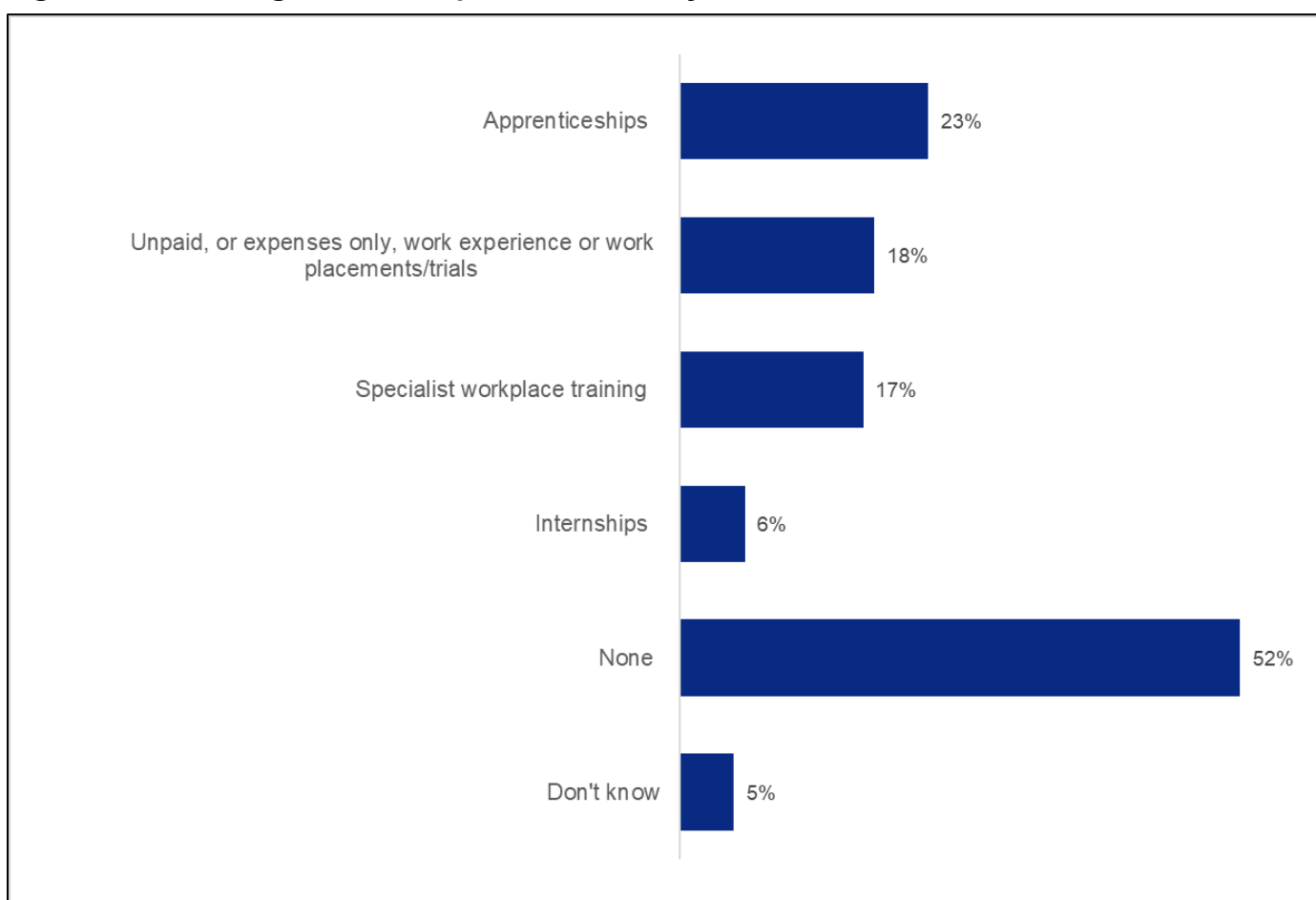
Number of respondents: 483.

Question asked: Which of the following does your organisation offer? Note: Respondents could select more than one answer.

Section 6: Wellbeing

Key Findings:

- A third of businesses (33%) offered flexible working and around one-in-six businesses (17%) offered home working, both schemes were on top of the list of schemes in the 2020 Business Skills Survey as well.

- Half of businesses (50%) said they measure or monitor staff wellbeing levels, for example through employee surveys or appraisals.

- Above a quarter of businesses (27%) said that Covid-19 had no impact on staff wellbeing. In addition, 29% said that this is not applicable to them. However, some 44% of businesses said the pandemic did impact on staff wellbeing. A quarter of businesses (23%) said that their staff had suffered from increased stress levels as a result of Covid-19, and 13% said it had decreased mental health and wellbeing.

Introduction

6.1.   This section details responses to questions about any well-being schemes that businesses offer their employees and the Covid-19 impact on staff wellbeing.

Health and well-being schemes

6.2. A third of businesses (33%) offered flexible working and around one-in-six businesses (17%) offered home working. These schemes were also the top schemes in the 2020 Business Skills Survey, however at higher proportions of 52% offering flexible working and 33% offering home working.[5]

6.3. Larger businesses were more likely to offer flexible working. For example, 67% of businesses with 10 or more staff, 49% of businesses with 5-9 staff and 24% of those with fewer than 5 staff offered flexible working.

Figure 6.1: Health and well-being schemes offered to employees
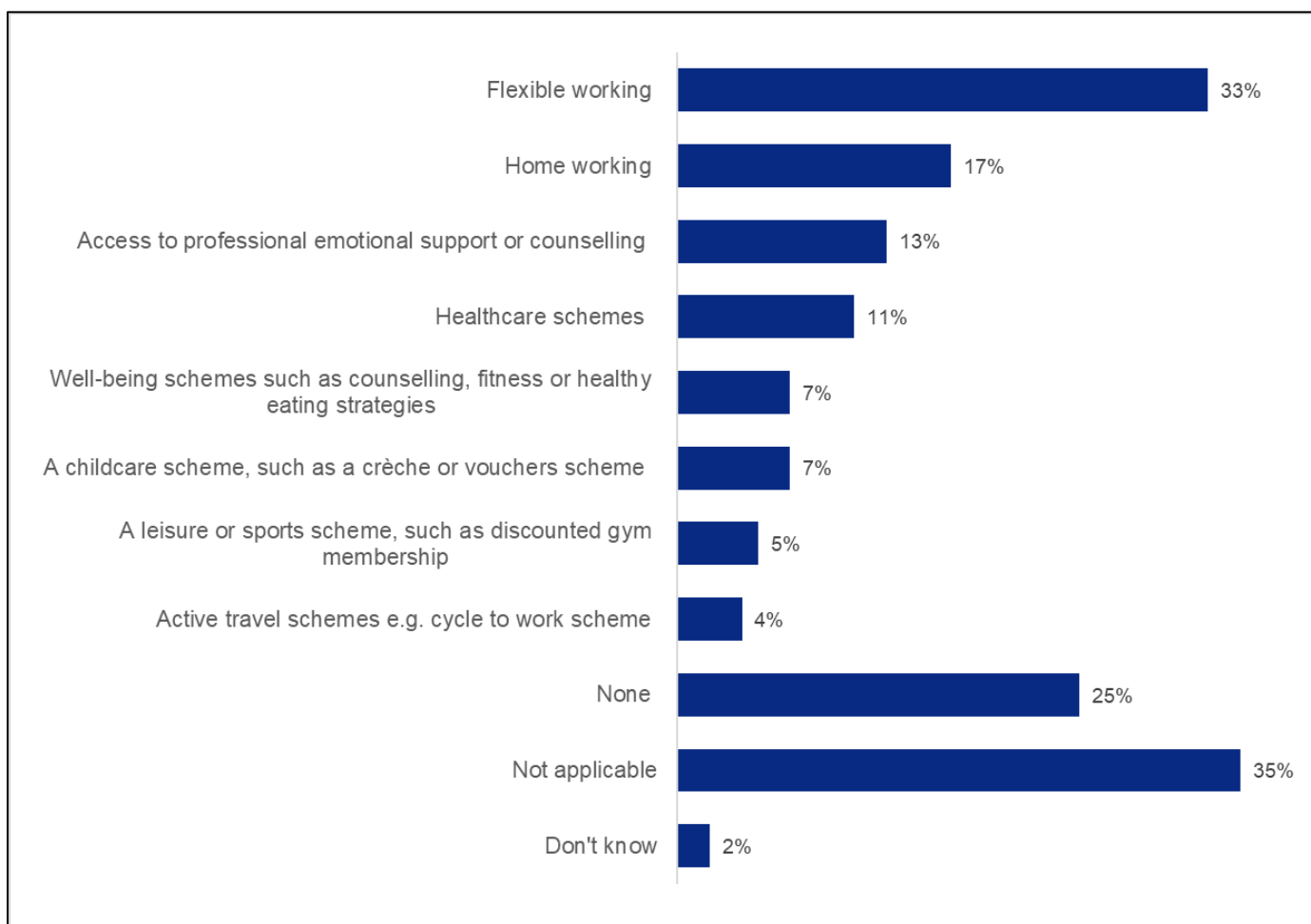
Number of respondents: 503.

Question asked: Which of the following does your organisation offer to employees? Note: Respondents could select more than one answer.

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[5] The figures may be inflated because the question was asked during the height of the Covid-19 pandemic and lockdown, when flexible and home working were prevalent.

Measuring staff wellbeing levels

6.4.   Half of businesses (50%) said they measure or monitor staff wellbeing levels, for example through employee surveys or appraisals.

6.5.   Businesses with 5 or more staff were more likely to measure or monitor staff wellbeing levels, 78% of businesses with 5-9 staff and 82% of businesses with 10 or more staff mentioned that they measure or monitor staff wellbeing levels, compared to 44% of businesses with 1-4 staff.

Figure 6.2: Measuring or monitoring staff wellbeing levels
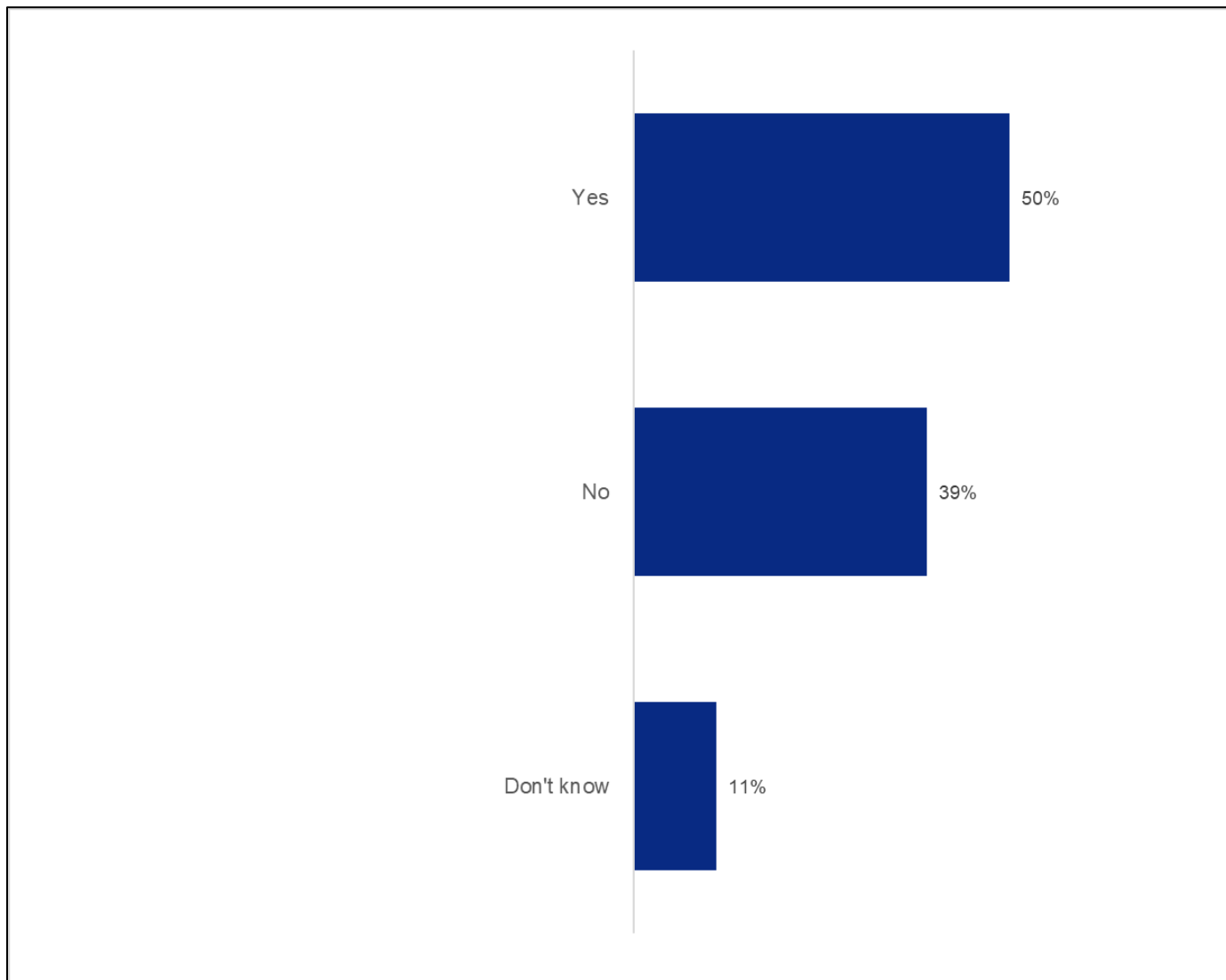
Number of respondents: 459.

Question asked: Do you measure or monitor staff wellbeing levels (e.g. through employee surveys or appraisals)?

Impact of Covid-19 on staff wellbeing

6.6.   Above a quarter of businesses (27%) said that Covid-19 had no impact on staff wellbeing. In addition, 29% said that this is not applicable to them.

6.7.   However, some 44% of businesses said the pandemic did impact on staff wellbeing. A quarter of businesses (23%) said that their staff had suffered from increased stress levels as a result of Covid-19, and 13% said it had decreased mental health and wellbeing.

Figure 6.3: How Covid-19 has impacted staff wellbeing
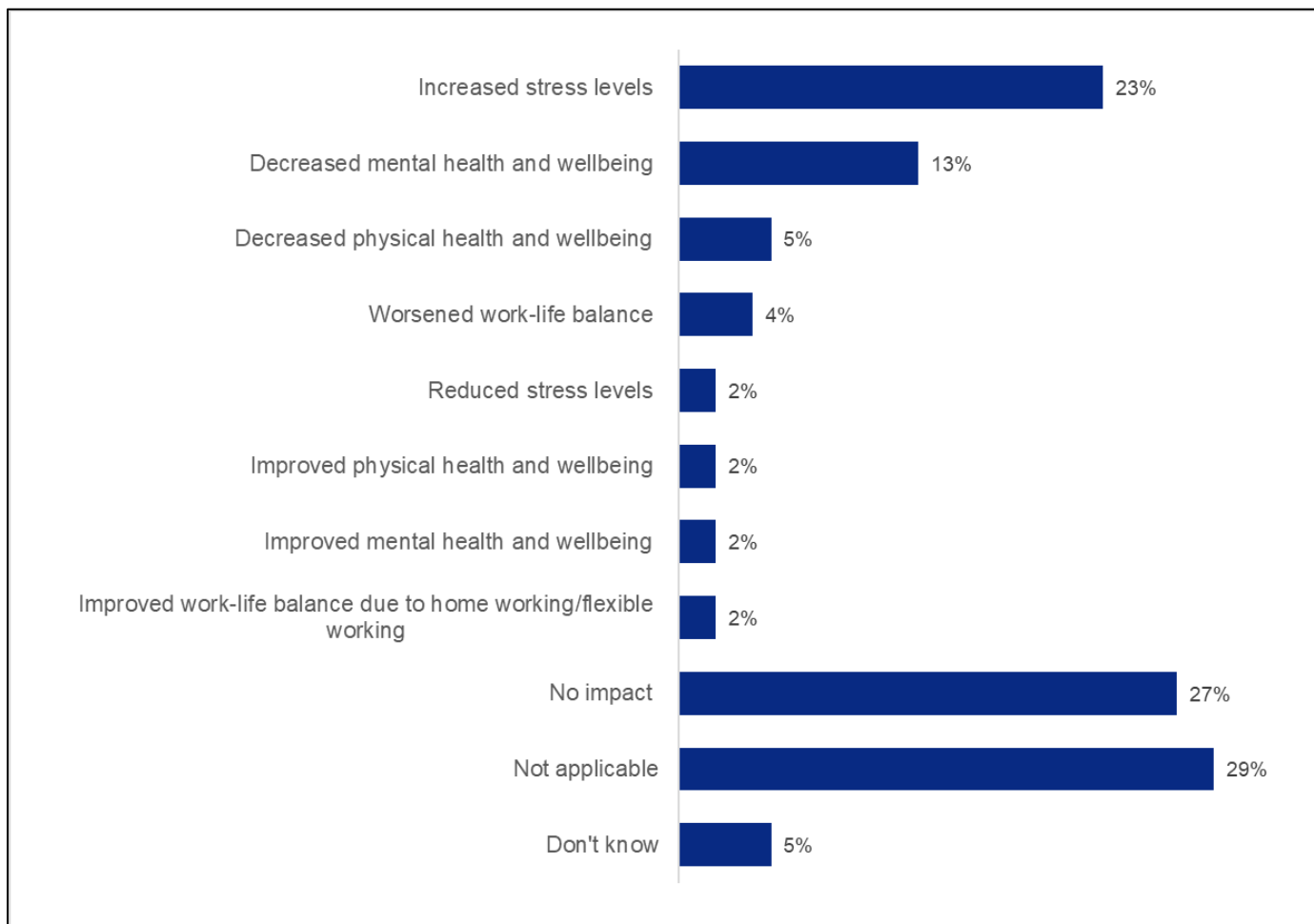
Number of respondents: 501.

Question asked: In what ways, if any, has the Covid-19 impacted on staff wellbeing? Note: Respondents could select more than one answer.

Section 7: Infrastructure

Key Findings:

- Almost three-fifths of businesses (56%) said that they expect their operations to stay the same over the next 3 years, whereas a third of businesses (35%) expected an increase in their operations.

- Around three quarters of businesses gave positive ratings to catering and restaurant facilities and greenspace/openspace being accessible to employees. These were also the top two infrastructure aspects in the 2020 Business Infrastructure Survey, when around eight-in-ten businesses rated greenspace/openspace being accessible to employees "good" (77%) and 71% rated the catering and restaurant facilities "good".

- Cycle and walking routes were also positively rated (66%).

- 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 24% of businesses. Around one in six businesses mentioned the availability of car parking (16%).

- 16% and 12% of businesses mentioned improving the local road network and traffic alleviation and reducing business rates respectively, as actions that the council and its partners should do to help grow the economy in Bracknell Forest. Reducing business rates was the most frequently mentioned action in the 2020 Business Infrastructure Survey, when 20% had mentioned it, followed closely by improving the local road network and traffic alleviation, which was mentioned by 19%.

Introduction

7.1.   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.

Reasons for being located in Bracknell Forest

7.2.   Above three-fifths of businesses (62%) said that the main reason for their organisation being located in Bracknell Forest was that the owner lives locally. This was also the most common reason mentioned in the 2020 Business Infrastructure Survey.

**Figure 7.1: Reasons for being located in Bracknell Forest**
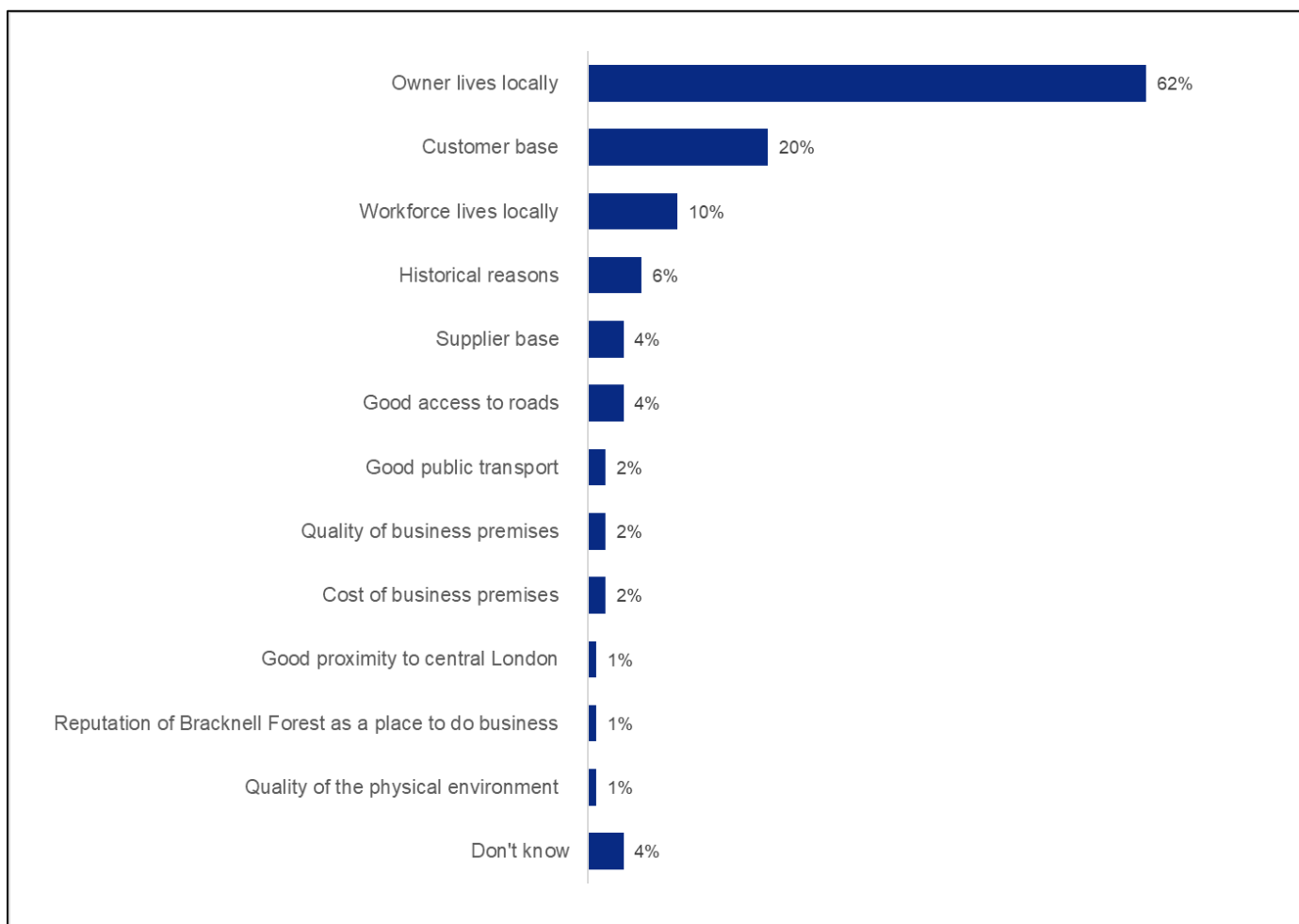
Number of respondents: 496.

Question asked: What are the main reasons for your organisation being located in Bracknell Forest? Note: Respondents could select more than one answer.

Expected business operations in Bracknell Forest

7.3.   Almost three-fifths of businesses (56%) said that they expect their operations to stay the same over the next 3 years, whereas a third of businesses (35%) expected an increase.

7.4.   Of those that expect their business to increase, most said they expected to increase turnover and staff. Of the small number that said they expected to decrease operations, most said they expect to close or decrease the scale of operations as they get older and start to consider winding down the business.

7.5.   In the 2020 Business Infrastructure Survey, a comparable 87% of businesses had expected operations to either stay the same or increase.

**Figure 7.2: Expected size and scale of operations in Bracknell Forest over the next 3 years**
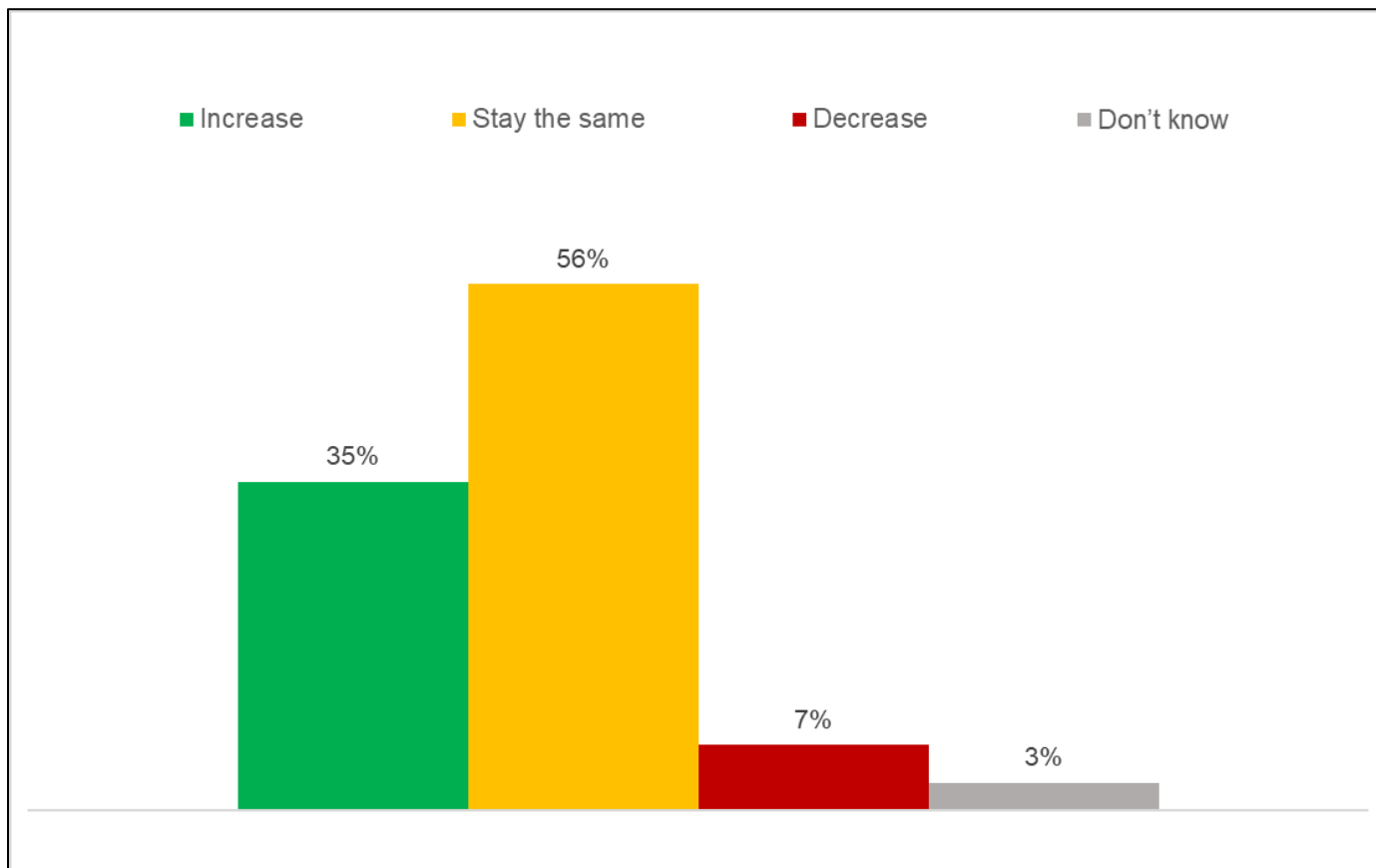
Number of respondents: 503.

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?

Ratings of the local infrastructure

7.6.   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.

7.7.   Businesses gave predominantly positive ratings to catering and restaurant facilities and greenspace/openspace being accessible to employees, with around three-quarters of businesses rating each of them "good" (76% and 72%, respectively).

7.8.   These were also the top two infrastructure aspects in the 2020 Business Infrastructure Survey, when around eight-in-ten businesses rated greenspace/openspace being accessible to employees "good" (77%) and 71% rated the catering and restaurant facilities "good".

7.9.   Businesses were also generally positive about the cycle and walking routes, with two-thirds of businesses rating it "good" (66%). In the 2020 Business Infrastructure Survey, businesses were also positive about the cycle and walking routes, with six-in-ten businesses rating it "good" (60%).

7.10.   Views on the educational facilities tended to also be positive on balance; 54% felt it was "good".

7.11.   Views on the broadband tended to also be positive on balance; 50% felt it was "good", although around a fifth (18%) rated it as "poor".

7.12.   Views on hotels and the major road network were also generally positive on balance; around four-in-ten businesses in each case felt it was "good" (44% and 43%, respectively), although 15% and 22% rated them "poor", respectively.

7.13.   Ratings of the local road network were mixed; 38% felt the local road network was "good" but 24% felt this was "poor".

7.14.   35% of businesses rated the rails services as "good", while 13% rated it as "poor".

7.15.   Ratings of housing were also mixed. Just over a third (35%) felt housing in their location was "good", but a fifth (20%) felt it was "poor".

7.16.   33% of businesses rated the business premises as "good", while 12% rated it as "poor".

7.17.   20% of businesses rated the bus services as "good", while 14% rated it as "poor". A half (51%) were not able to provide a rating for bus services.

7.18.   Businesses were less likely to provide a positive rating for electric charging points; 7% felt electric charging points were "good", while 41% felt these were "poor". This is similar to the figures seen in the 2020 Business Infrastructure Survey, when 7% felt electric charging points were "good" and 39% felt these were "poor". Above a third (36%) were not able to provide a rating for electric charging points.

Figure 7.3: Ratings of aspects of the local infrastructure
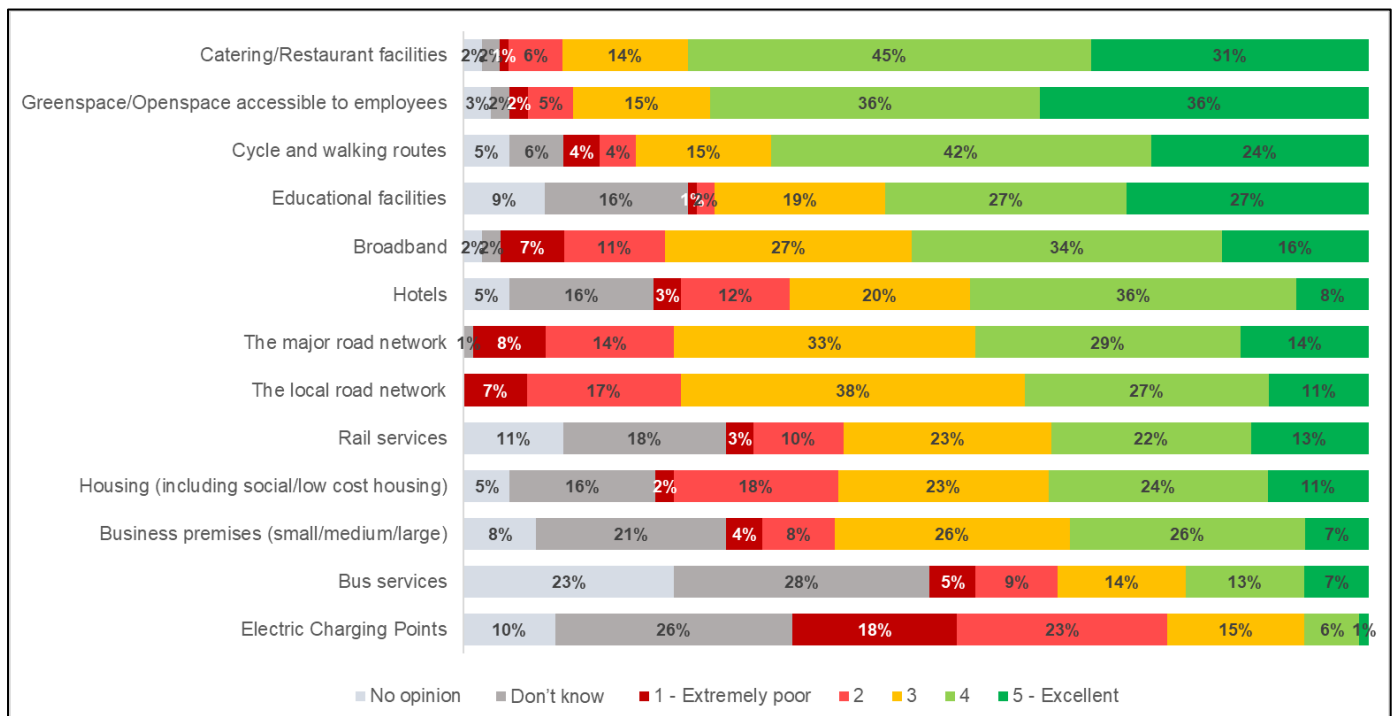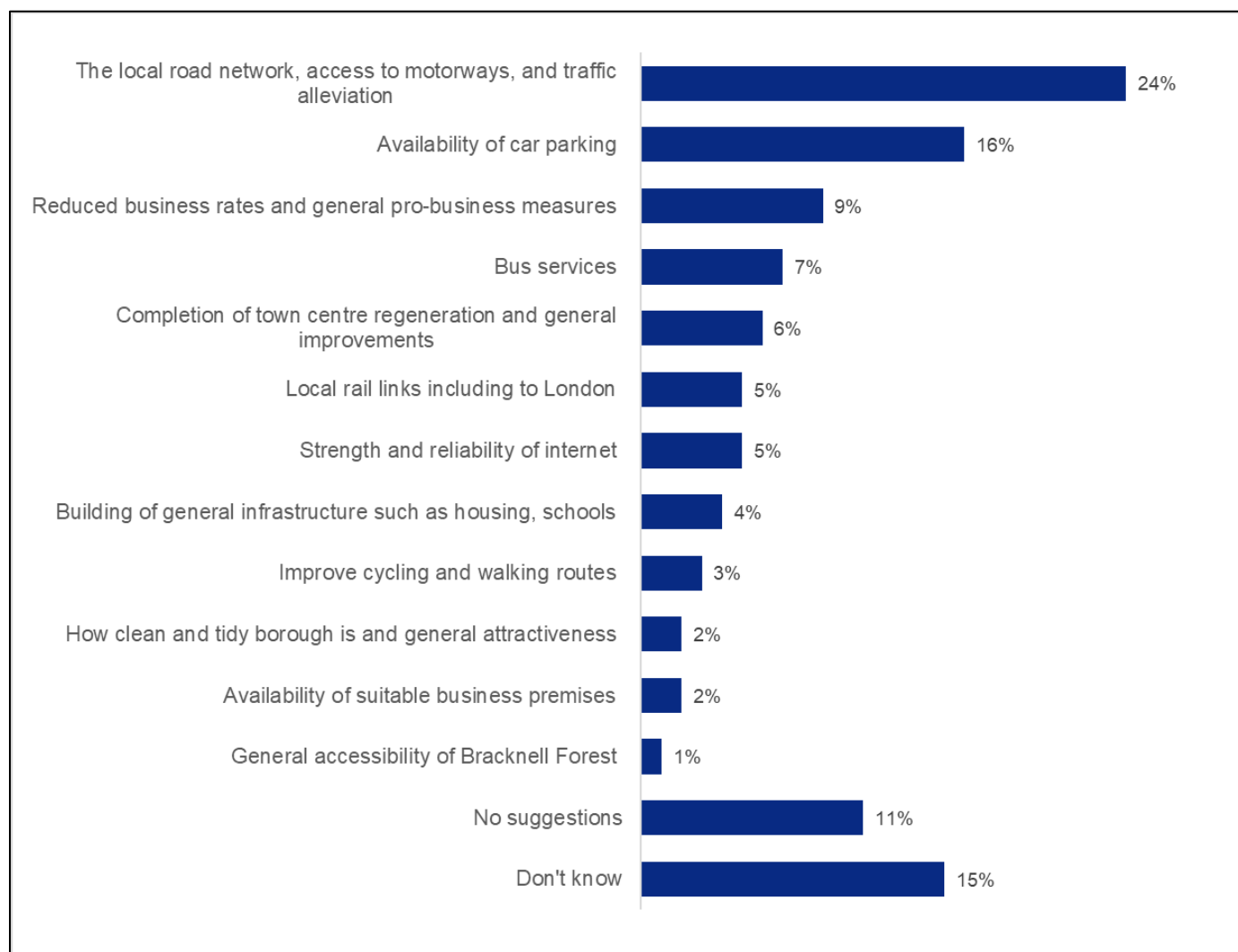

Number of respondents: 504.

Question asked: How would you rate the following in Bracknell Forest? Please tell me on a 5 point scale, where 5 is excellent and 1 is extremely poor.

Most important aspect of local infrastructure in Bracknell Forest to improve

7.19. The most common aspect, mentioned by around a quarter, was the local road network, access to motorways, and traffic alleviation (24%). This reflects the relatively low ratings given to "the local road network" above, although it is a lower proportion than that seen in the 2020 Business Infrastructure Survey, when around two-fifths mentioned the local road network, access to motorways, and traffic alleviation (39%). Around one in six businesses mentioned the availability of car parking (16%). This was mentioned by around one in ten businesses in the 2020 Business Infrastructure Survey (11%).

7.20. Around one in ten businesses mentioned reduced business rates and general pro-business measures (9%).

**Figure 7.4: Most important aspect to improve**

Number of respondents: 487. 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

7.21. Improving the local road network and traffic alleviation and reducing business rates were the most frequently mentioned actions (16% and 12% respectively). Reducing business rates was the most frequently mentioned action in the 2020 Business Infrastructure Survey, when 20% had mentioned it, followed closely by improving the local road network and traffic alleviation, which was mentioned by 19%.

7.22. More available car parking was mentioned by 10% of businesses (5% in the 2020 Business Infrastructure Survey).

7.23. Around a tenth (8%) mentioned general pro-business measures and support for small businesses, in line with the 9% seen in the 2020 Business Survey.

7.24. A similar proportion mentioned improving the availability of suitable and affordable business premises (6%), which was mentioned by 13% in the 2020 Business Infrastructure Survey.

7.25. Support to recover from the pandemic, improving the strength and reliability of internet, building of affordable housing and other infrastructure and completion of town centre regeneration were mentioned by 4% each.

Figure 7.5: Actions Council and partners could take to grow the Bracknell Forest economy
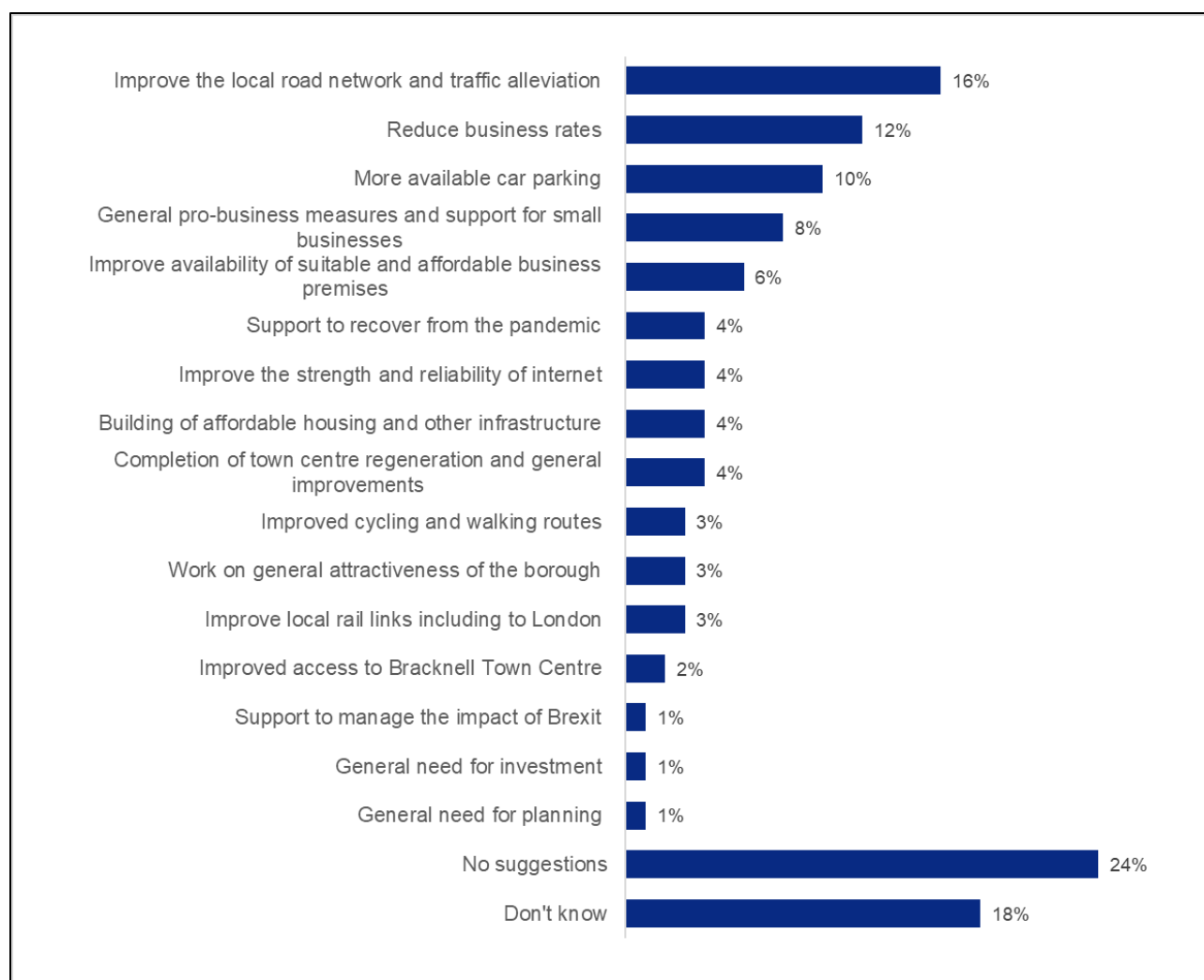
Number of respondents: 487. Thinking specifically about infrastructure (things like roads and transport, premises and buildings and the availability of broadband and housing and the local environment), is there anything that the council and its partners could do to help grow the economy in Bracknell Forest and attract more business to the borough?

Note: Respondents could select more than one answer.

Section 8: Broadband

Key Findings:

- Most businesses were not aware of Superfast Berkshire, as was the case in 2020.

- Above two fifths of businesses have access to superfast broadband and a similar proportion do not have access.

- 73% of businesses said superfast broadband is "important". This proportion was 79% in 2020.

- The majority of businesses (58%) felt their internet connection was adequate. This is similar to the 59% seen in 2020. 26% said it was excellent, with overall 84% stating that their internet is connection is at least adequate.

- 87% of businesses were not aware of the grants to install superfast broadband. 7% were aware of them in their area and 3% were aware of them, but not that they may be available in their area, with overall 10% stating that they are aware of the grants.

- 77% of businesses were not aware of the Building Digital UK Gigabit project and 19% were aware of it.

- 67% of businesses said that having Gigabit capable broadband is important to their business. 16% said it was not important.

- 76% of businesses said that they were not aware of Smart Cities.

- 81% of businesses said that they had not changed their broadband to support the way they do business due to Covid-19.

- 28% of businesses said that their staff had sufficient broadband to enable effective home/remote working and 60% of businesses said that this was not applicable to them as they do not do home or remote working.

Introduction

8.1.   This section covers businesses' usage and perceptions of broadband.

Awareness of Superfast Berkshire

8.2. The majority of businesses were not aware of Superfast Berkshire.[6] Two-in-ten businesses (19%) are aware of it, comparable to the 21% who said they were aware in the 2020 Business Infrastructure Survey.

**Figure 8.1: Awareness of Superfast Berkshire**
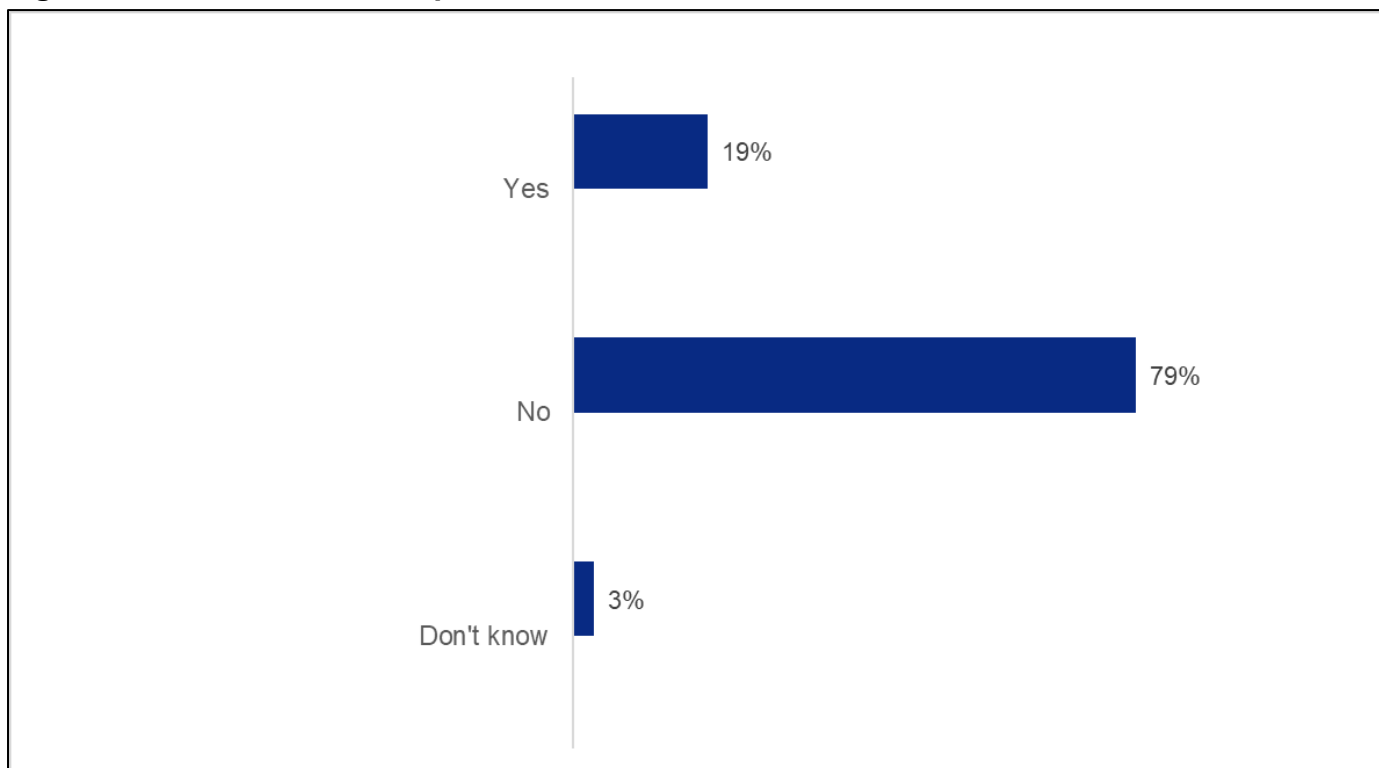
Number of respondents: 500. Question asked: Bracknell Forest Council is involved with a programme to improve broadband throughout Berkshire called Superfast Berkshire, which aims to ensure that 96% of Bracknell Forest have access to superfast broadband. Were you aware of this?

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[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.

Access to superfast broadband

8.3.   Above two fifths of businesses have access to superfast broadband and a similar proportion do not have access. This is comparable to the proportions seen in the 2020 Business Infrastructure Survey, when two-fifths of businesses said they had access to superfast broadband and an equal proportion did not have access.

8.4.   Businesses that are aware of Superfast Berkshire were more likely to say they have access to superfast broadband (56% said they had access) compared with businesses that were not aware (40% had access). This highlights the importance of increasing awareness of Superfast Berkshire.

**Figure 8.2: Access to superfast broadband**
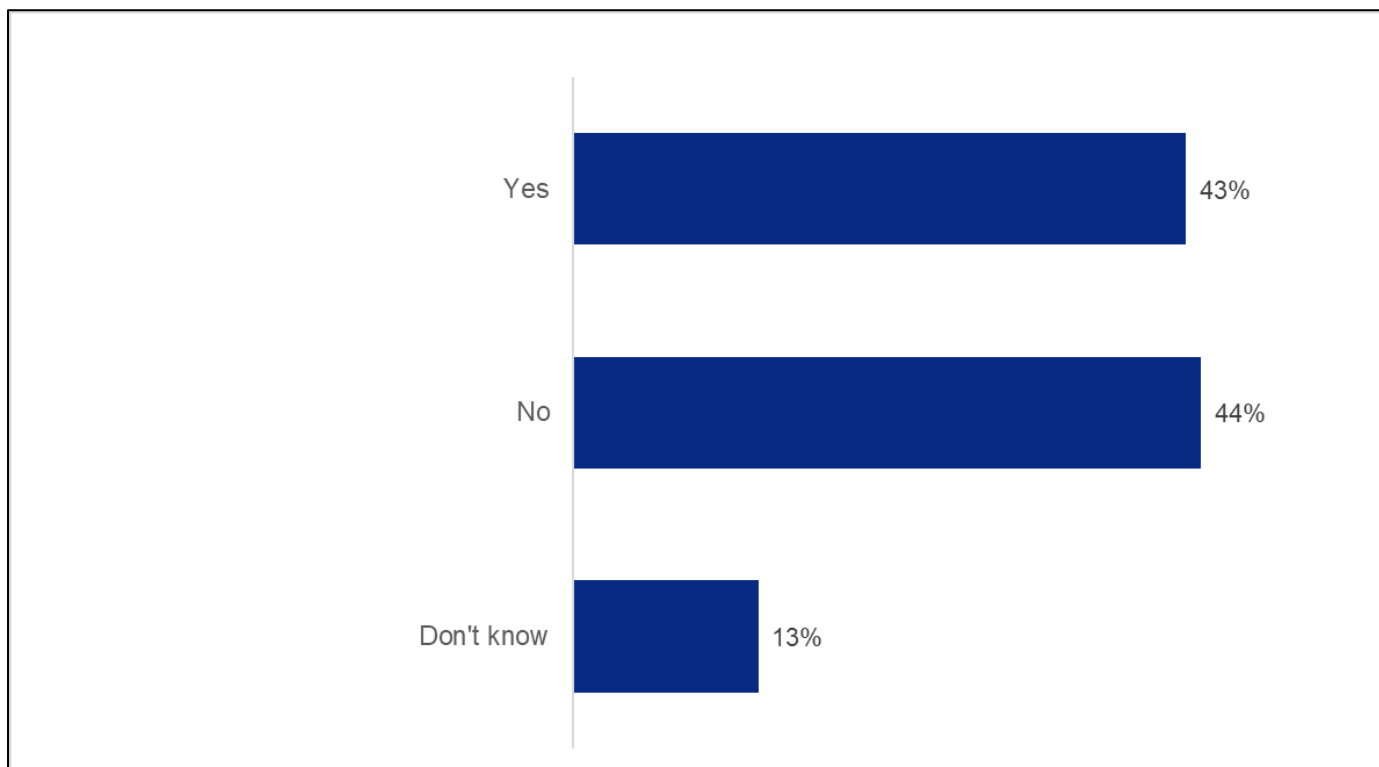
Number of respondents: 495.

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

Importance of superfast broadband to business in Bracknell Forest

8.5. Around three-quarters of businesses (73%) said superfast broadband is "important". This proportion was 79% in the 2020 Business Infrastructure Survey.

8.6. Businesses with 5 or more employees were more likely to say it is important (84% said it is important), compared with 69% of smaller businesses.

**Figure 8.3: Importance of superfast broadband to business in Bracknell Forest**
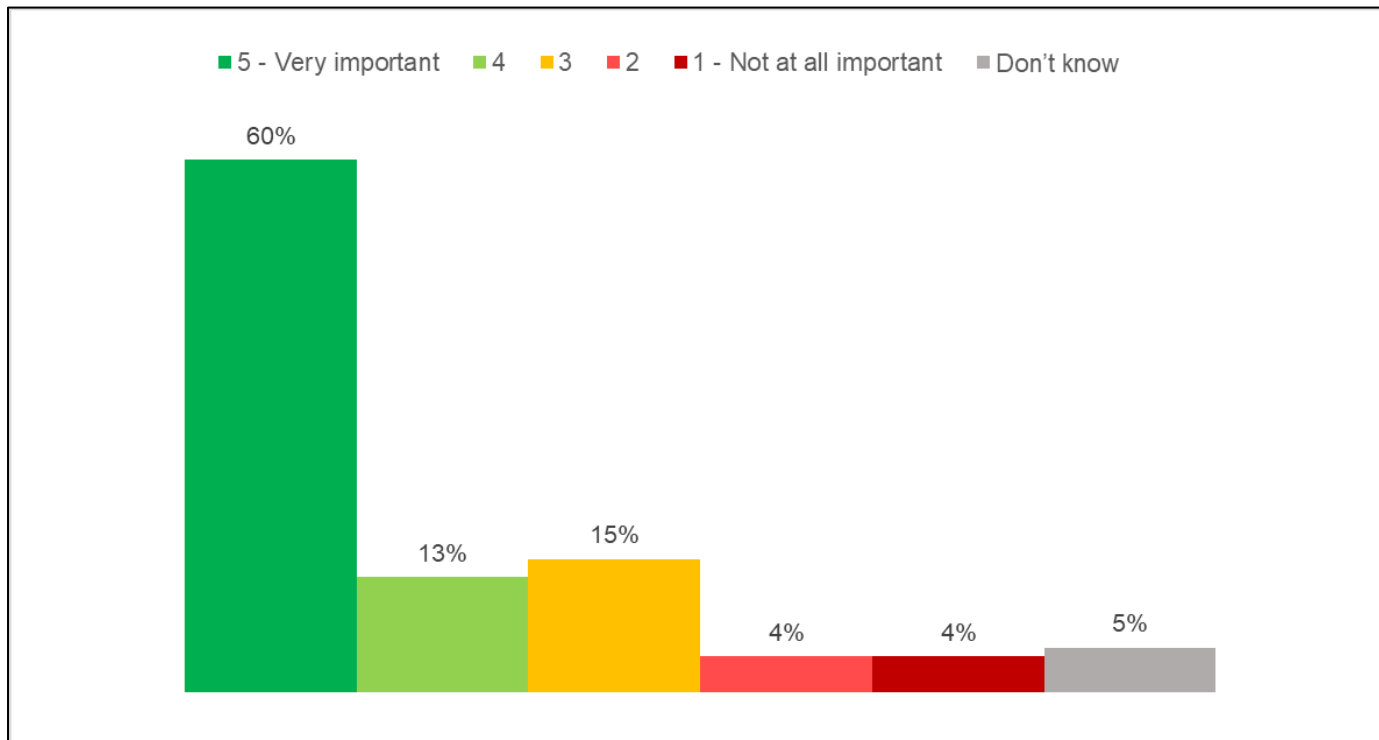
Number of respondents: 501.

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

Rating of internet connection

8.7. Almost two fifths of businesses (58%) felt their internet connection was adequate. This is similar to the 59% seen in the 2020 Business Infrastructure Survey. 26% said it was excellent (30% in the 2020 Business Infrastructure Survey), with overall 84% stating that their internet connection is at least adequate.

8.8. Businesses with 10 or more staff were more likely to say that their internet connection was excellent, with 35% of businesses with 10 or more staff stating that their internet connection is excellent, compared with 25% of businesses with 0-4 staff and 19% of businesses with 5-9 staff.

**Figure 8.4: Rating of business's internet connection**
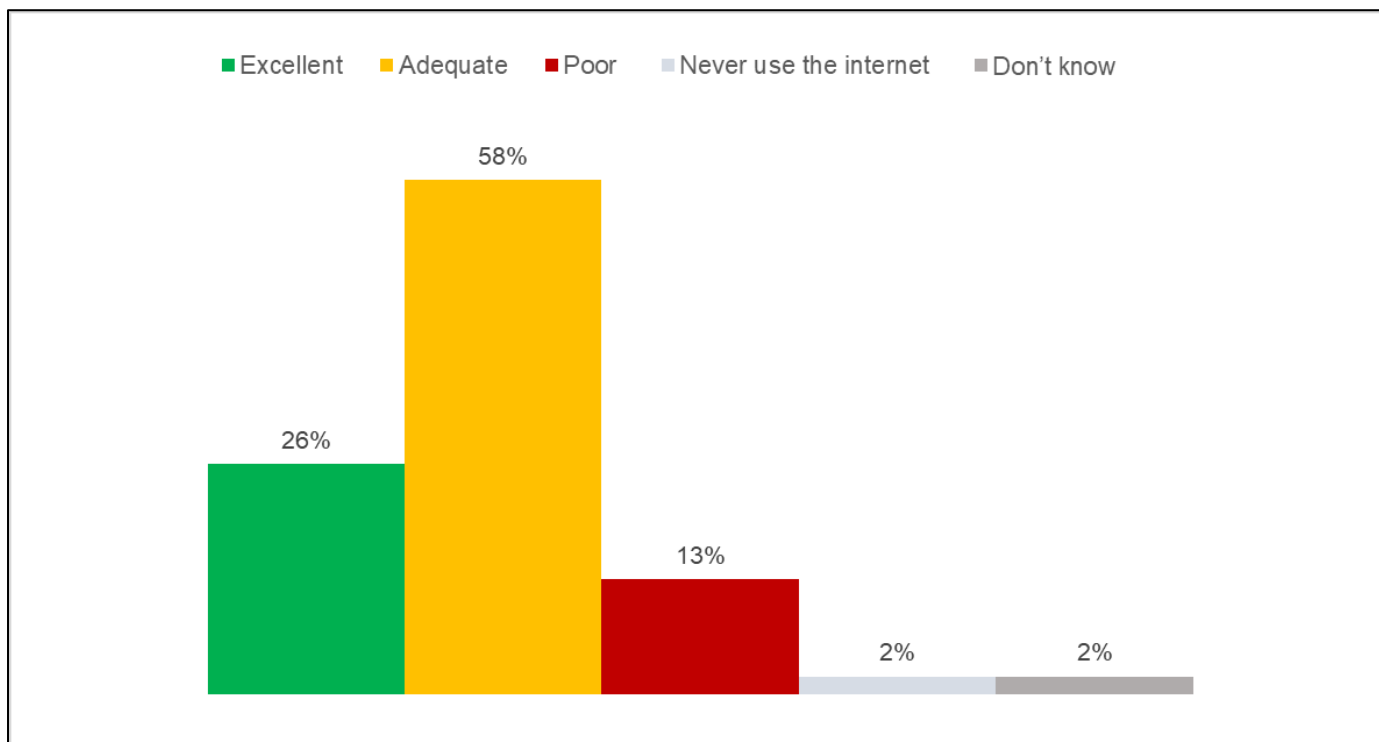
Number of respondents: 501.

Question asked: How would you rate your business's current internet connection? Would you say it's….

Awareness of grants to install superfast broadband

8.9.   The majority of businesses (87%) were not aware of the grants to install superfast broadband. 7% were aware of them in their area and 3% were aware of them in general, but not that they may be available in their area, with overall 10% stating that they are aware of the grants.

**Figure 8.5: Awareness of grants to install superfast broadband**
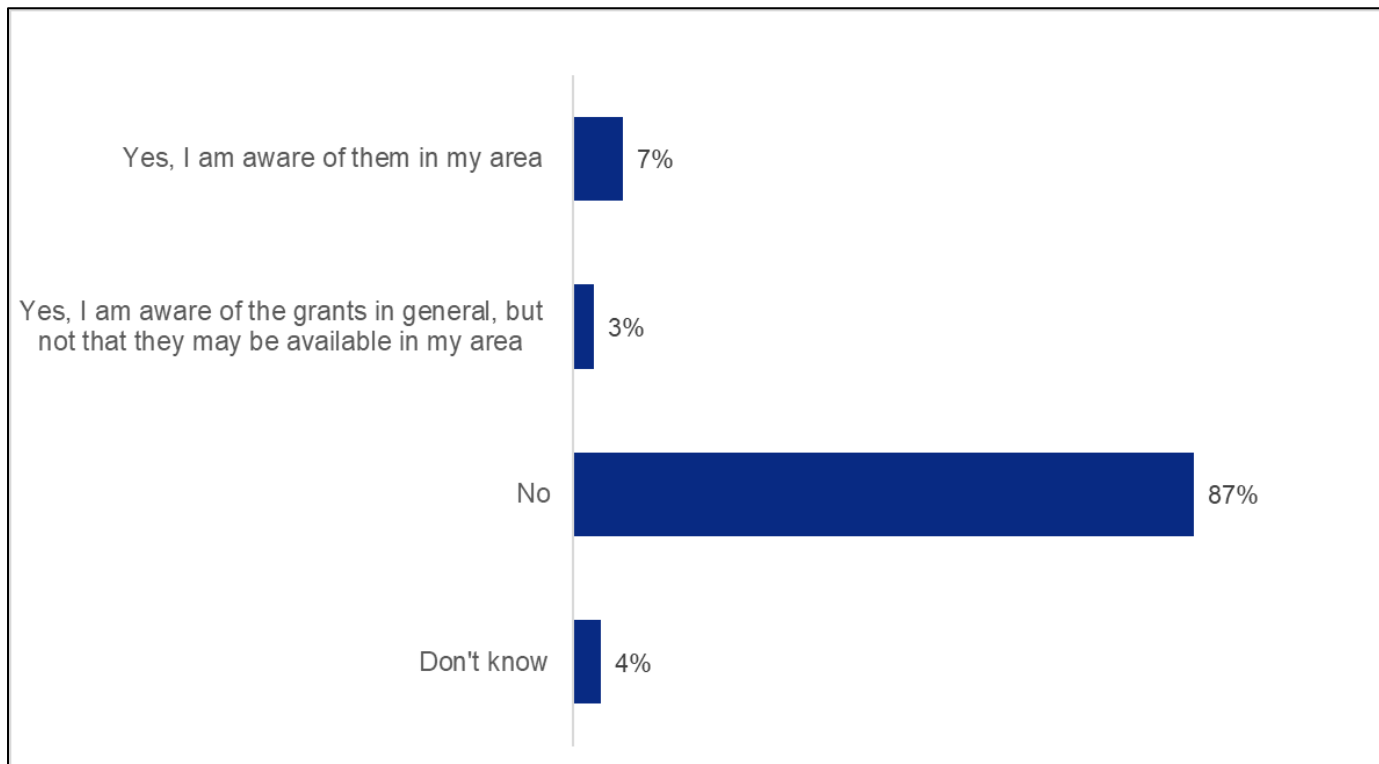
Number of respondents: 498.

Question asked: Are you aware of grants to install superfast broadband in your local area?

Awareness of the Building Digital UK Gigabit project

8.10.   The majority of businesses (77%) were not aware of the Building Digital UK Gigabit project. 19% were aware of it.

Figure 8.6: Awareness of the Building Digital UK Gigabit project to improve connectivity to 85% coverage by 2025
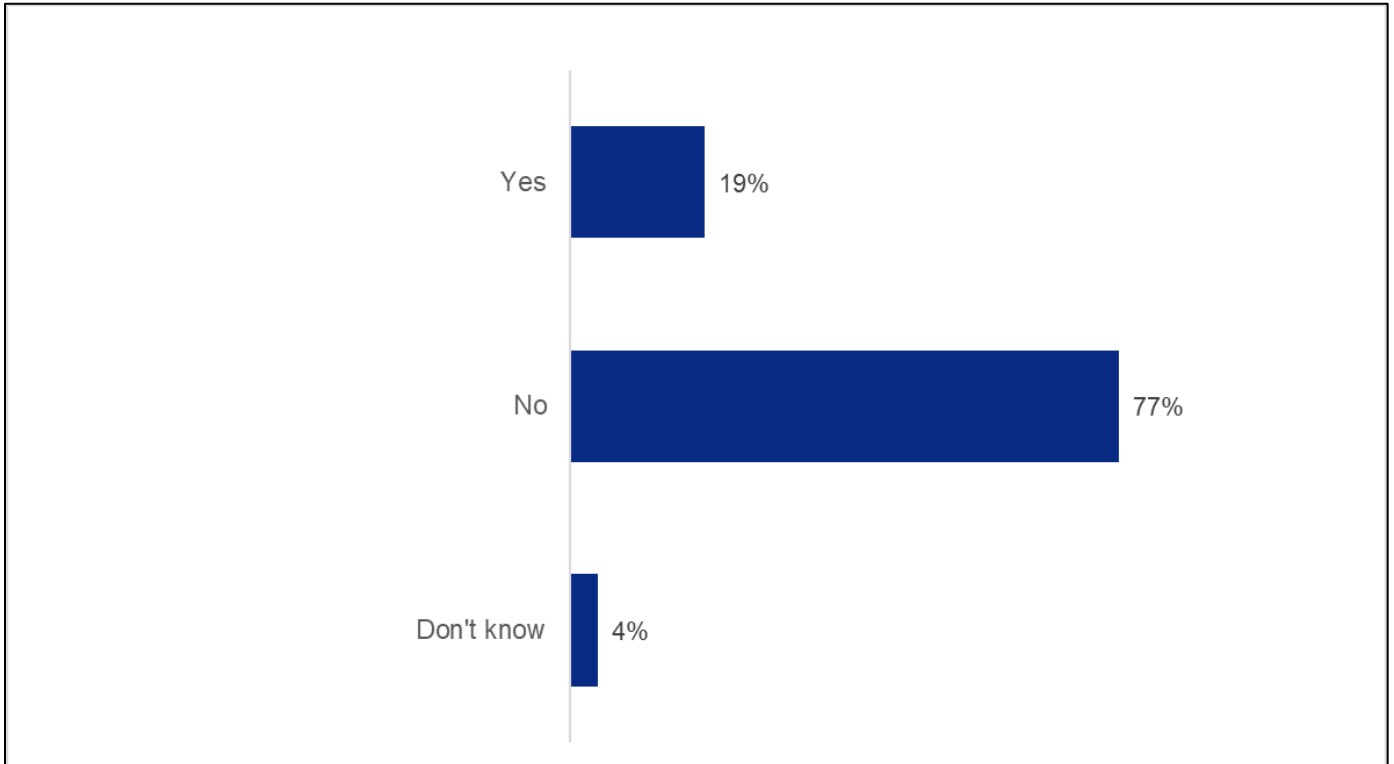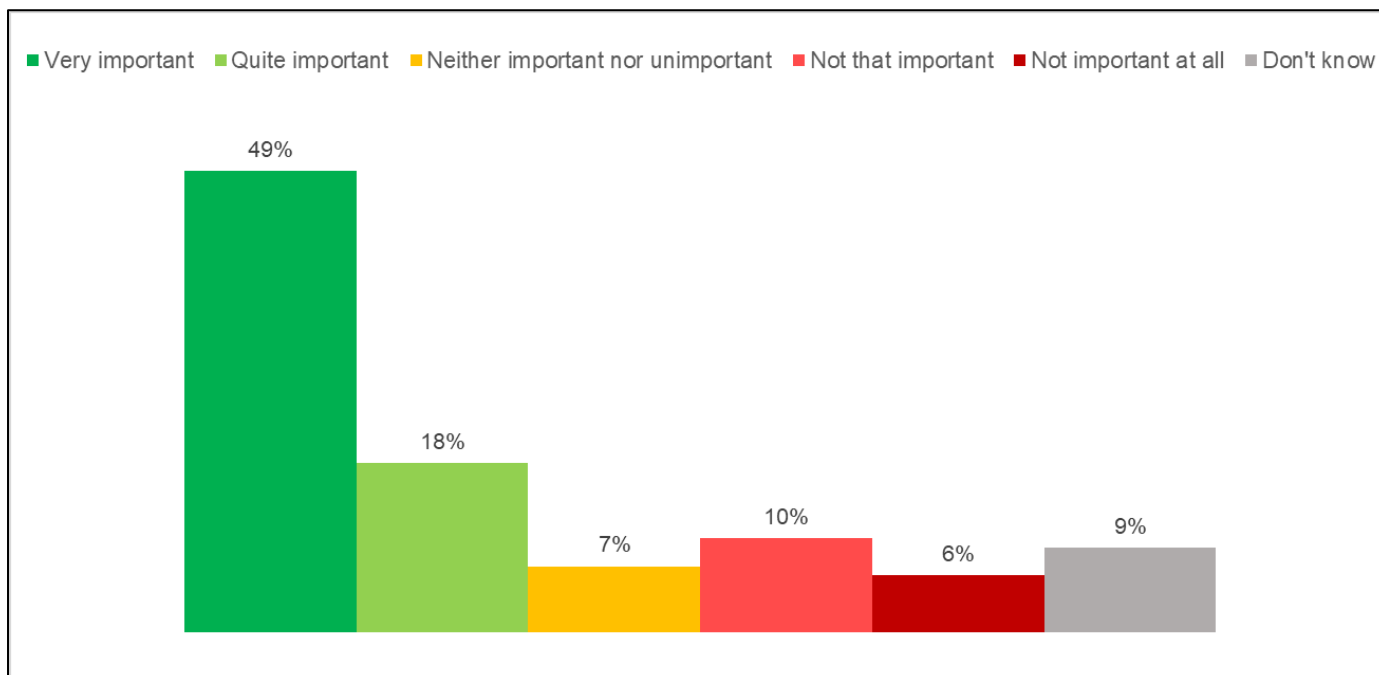

Number of respondents: 497.

Question asked: Are you aware of the Building Digital UK Gigabit project to improve connectivity to 85% coverage by 2025?

Importance of having Gigabit capable broadband

8.11. Over two thirds of businesses (67%) said that having Gigabit capable broadband is important to their business. 16% said it was not important.

8.12. Businesses with 5 or more staff were more likely to say that having Gigabit capable broadband is 'very important' to their business, with 63% and 62% of businesses with 5-9 staff and 10 or more staff respectively saying that having Gigabit capable broadband is 'very important' to their business, compared to 45% of businesses with 0-4 staff.

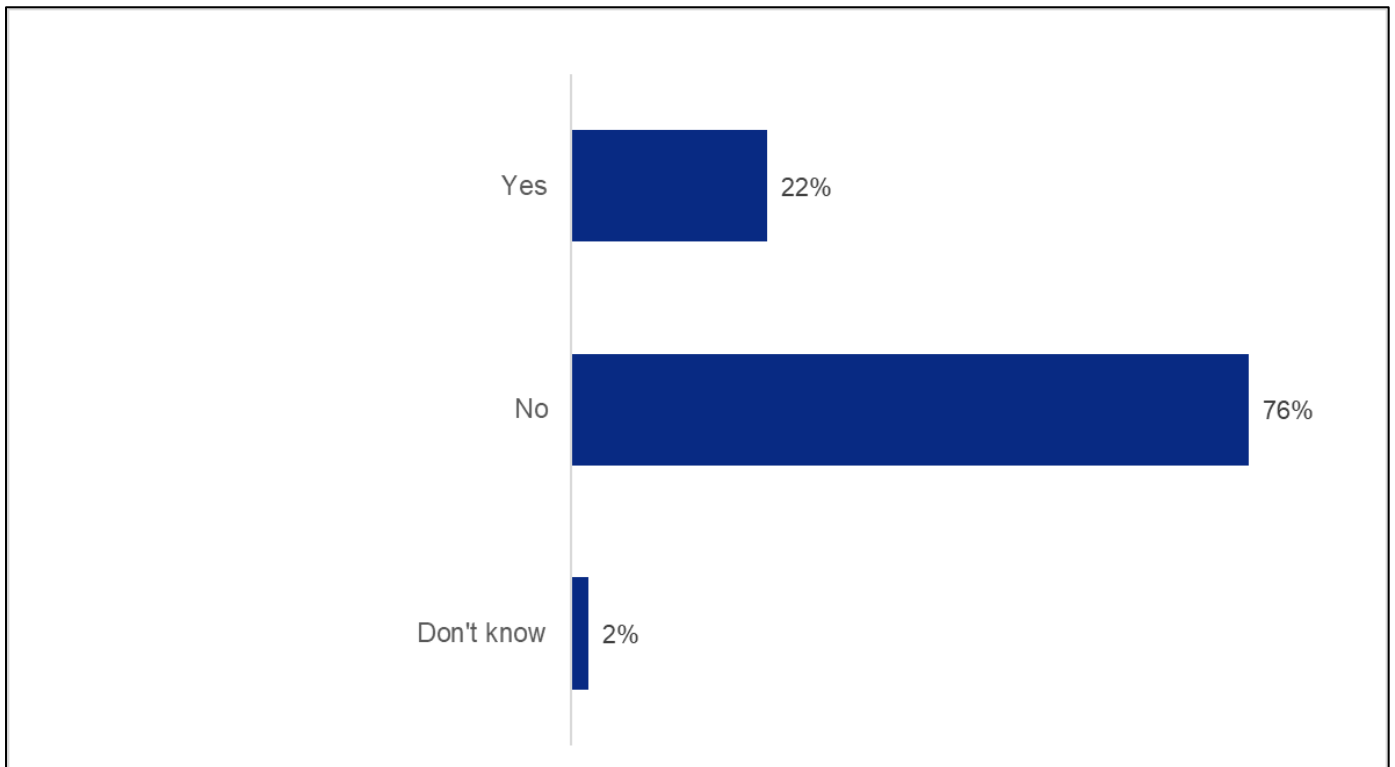**Figure 8.7: Importance of having Gigabit capable broadband to businesses**

Number of respondents: 501.

Question asked: How important is having Gigabit capable broadband to your business?

Awareness of Smart Cities

8.13. The majority of businesses (76%) said that they were not aware of Smart Cities.[7] 22% said they were aware.

Figure 8.8: Awareness of Smart Cities

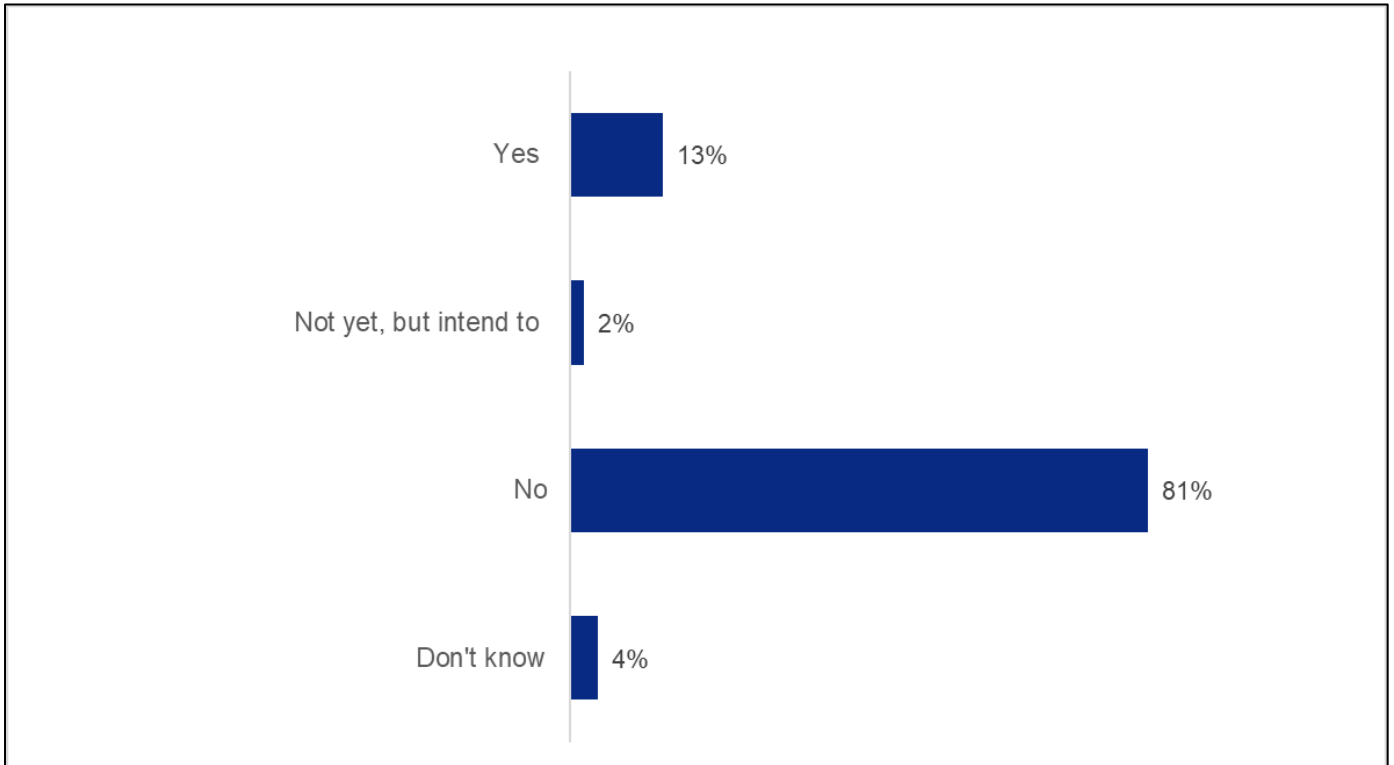

Number of respondents: 493.

Question asked: Have you heard of Smart Cities?

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[7] The smart city concept integrates information and communication technology ('ICT'), and various physical devices connected to the Internet of things ('IoT') network to optimize the efficiency of city operations and services and connect to citizens.

Whether businesses changed their broadband to help support the way they do business due to Covid-19

8.14. The majority of businesses (81%) said that they had not changed their broadband to support the way they do business due to Covid-19. 13% said they had changed their broadband and 2% said they were intending to.

Figure 8.9: Whether businesses changed their broadband to help support the way they do business due to Covid-19
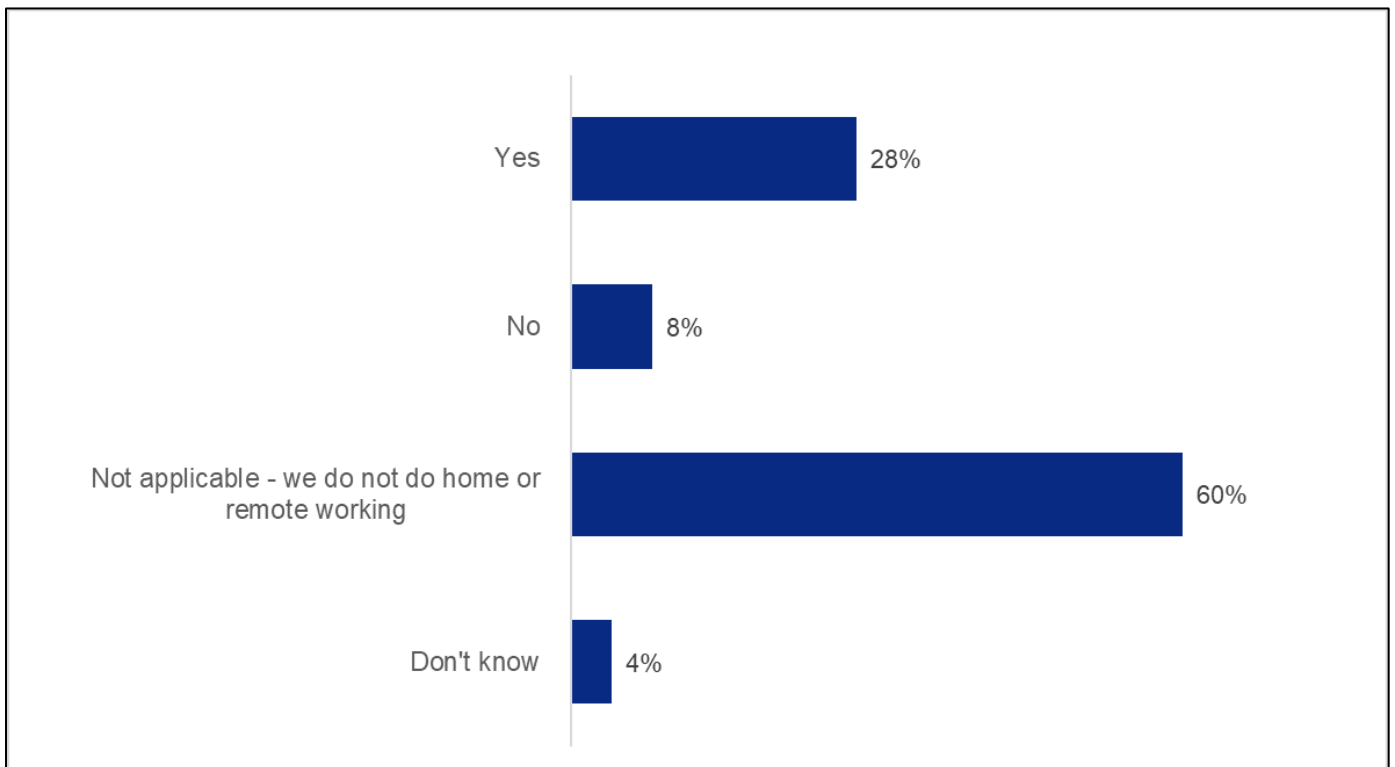

Number of respondents: 500.

Question asked: Have you changed your broadband to help support the way you do business due to Covid-19?

Whether staff have sufficient broadband to enable effective home/remote working

8.15. Almost three-in-ten businesses (28%) said that their staff had sufficient broadband to enable effective home/remote working. Three-fifths of businesses (60%) said that this was not applicable to them as they do not do home or remote working. Only 8% said it is an issue.

8.16. Larger businesses were more likely to say that their staff had sufficient broadband to enable effective home/remote working. 33% of businesses with 5-9 staff and 37% of businesses with 10 or more staff said so, compared with 25% of businesses with 0-4 staff.

Figure 8.10: Whether staff have sufficient broadband to enable effective home/remote working

Number of respondents: 499.

Question asked: Do your staff have sufficient broadband to enable effective home/remote working?

Section 9: Awareness of key local business support/improvement organisations

> **Key Findings:**
> - 16% of businesses were aware of the Thames Valley Berkshire LEP. In 2020, a quarter of businesses said they were aware.
> - 22% of businesses were aware of the Thames Valley Berkshire Growth Hub. This proportion was 14% in the 2020 Business Infrastructure Survey.
> - 11% of businesses were aware of the Bracknell Business Improvement District.

Introduction

9.1. This section covers businesses' awareness of the Thames Valley Berkshire Local Enterprise Partnership (TVB LEP) and the Bracknell Business Improvement District.

Awareness of the Thames Valley Berkshire LEP

9.2. 16% of businesses were aware of the LEP, whereas 82% were not aware. In the 2020 Business Infrastructure Survey, a quarter of businesses were aware of the LEP, while 72% were not aware.

9.3. Businesses with 5 to 9 staff were less aware (4% aware), compared with 18% of businesses with under 5 staff and 16% of businesses with 10 or more staff.

Figure 9.1: Awareness of the Thames Valley Berkshire LEP
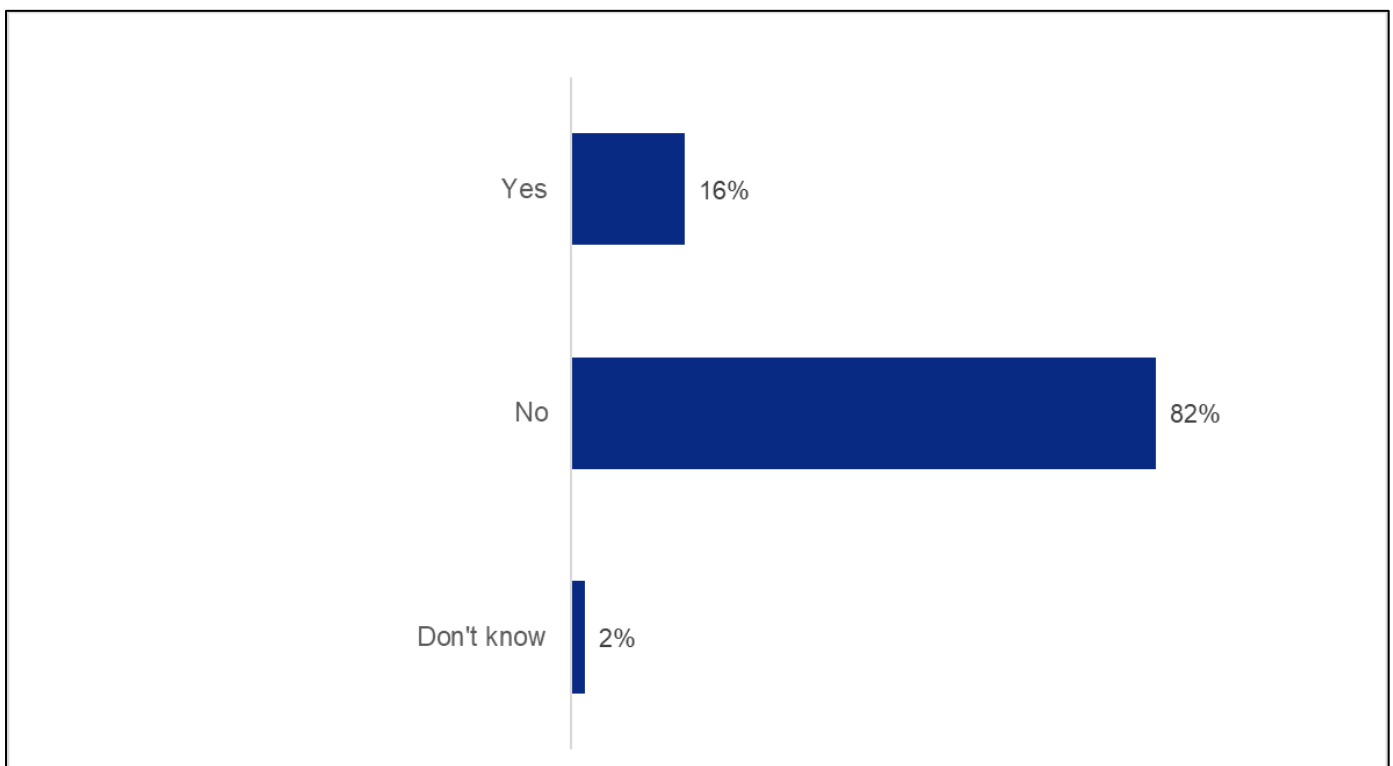
Number of respondents: 498. Question asked: The Thames Valley Berkshire Local Enterprise Partnership, also known as the TVB LEP, brings together business, local authorities, education and the community sector to drive the local economy. Have you heard of the LEP?

Awareness of Thames Valley Berkshire Growth Hub

9.4.   Overall, 22% of businesses were aware of the Thames Valley Berkshire Growth Hub. This proportion was 14% in the 2020 Business Infrastructure Survey.

9.5.   Businesses with 5-9 staff were less aware (9% aware), compared with 24% of businesses with 0-4 staff and 25% of businesses with 10 or more staff.
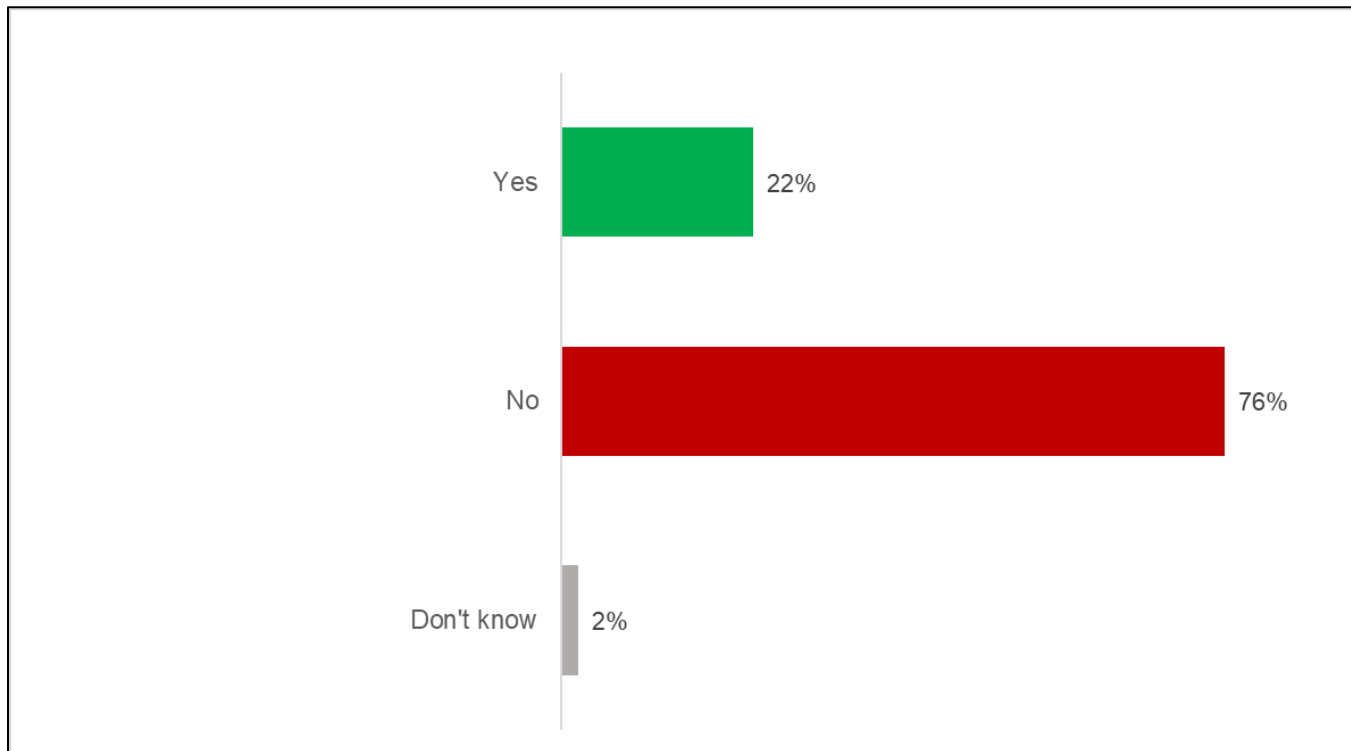
Figure 9.2: Awareness of Thames Valley Berkshire LEP Growth Hub

Number of respondents: 499.

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

Awareness of the Bracknell Business Improvement District

9.6.   Overall, 11% of businesses were aware of the Bracknell Business Improvement District.

9.7.   Larger businesses were more likely to be aware. For example, 29% of businesses with 10 or more staff were aware, compared with 7% of businesses with 0-4 staff.

Figure 9.3: Awareness of the Bracknell Business Improvement District (BID)
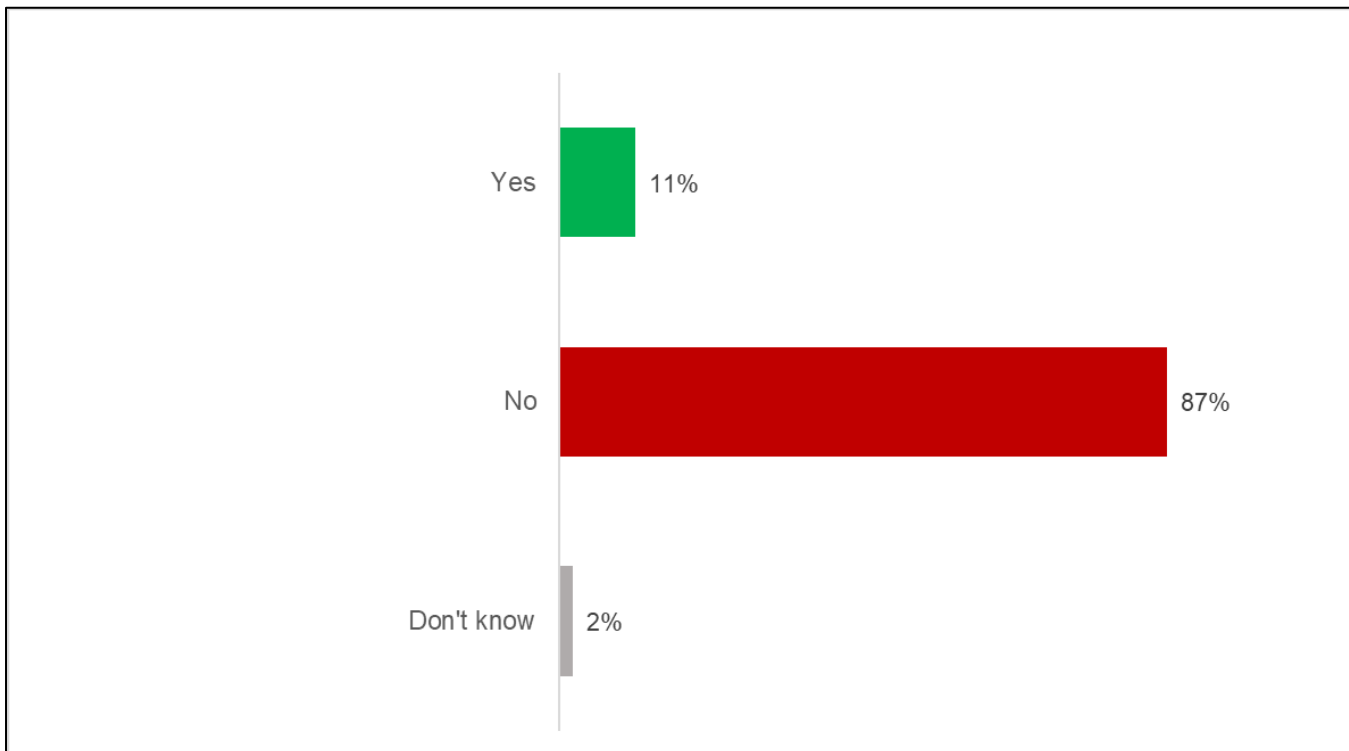
Number of respondents: 497.

Question asked: Have you heard of the Bracknell Business Improvement District (BID)?

Section 10: The Green Agenda

Key Findings:

- Whilst 51% of businesses have the intention of being more environmentally friendly, just 12% have a specific target or aim to achieve net-zero and just 5% have set a deadline to this commitment.

- The most common actions being taken by businesses were measuring their carbon footprint (14%) and sourcing sustainable materials (13%). Supporting staff to work at home or remotely and reviewing energy efficiency in the buildings were also commonly mentioned.

- The key barrier to doing more to reduce businesses' carbon footprint is a lack of knowledge, closely followed by lack of availability of suitable alternatives, and lack of finance or grants.

Introduction

10.1. The Bracknell Forest Business Survey included questions about businesses' intentions of achieving net-zero and reducing their carbon footprint. This section looks at the commitments made, the actions being taken and barriers to reducing businesses' carbon footprint.

Commitment to net-zero

10.2. Half of businesses (51%) have made some commitment to becoming more environmentally friendly. 12% have a specific target or aim to become net-zero.

10.3. However, just 5% of businesses have put a deadline on this commitment (of 2030) (which is the date generally attached to Governmental net-zero targets).

10.4. Two-fifths (39%) have not set any targets but are committed to being more environmentally friendly.

10.5. Four-in-ten (40%), however, have not made any commitment nor given much thought to it.

10.6. Larger businesses are more likely to have some sort of commitment towards net zero – only 23% of businesses with 10+ staff said it is not something they're committed to, compared to 42% of other businesses.

Figure 10.1: Whether made a commitment to become net-zero
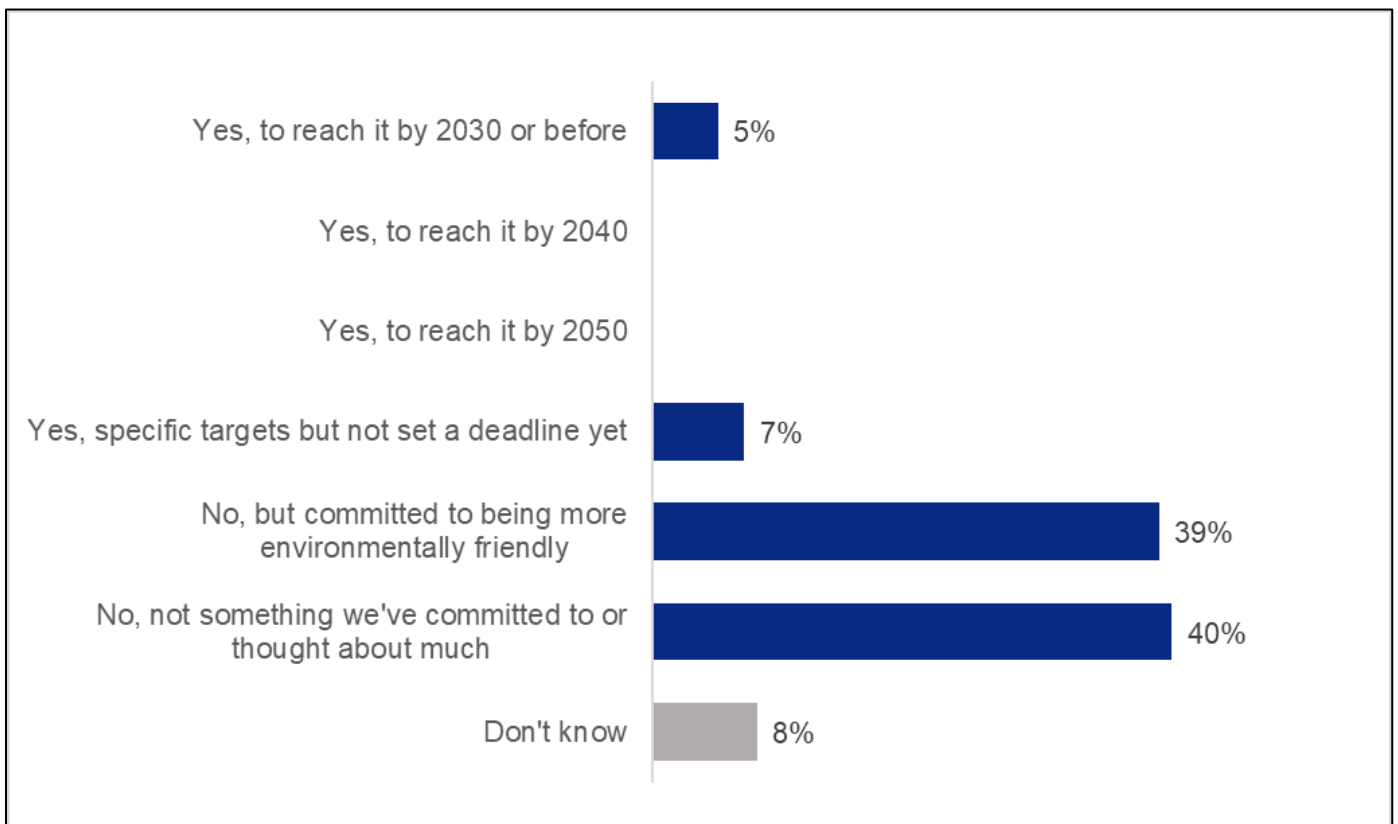
Number of respondents: 497.

Question asked: Has your organisation made a commitment to become net-zero, and if so by when?

10.7. Businesses who had actively committed to net-zero were asked what actions they were taking to achieve this.

10.8. Most commonly businesses were measuring their carbon footprint (14%) and sourcing sustainable materials (13%).

10.9. 7% were supporting their staff to work at home or remotely more and 6% were reviewing energy efficiency in their buildings.

10.10. In addition, about a third provided a range of 'other' comments. These include about 10% of respondents mentioning recycling and a similar proportion mentioning using renewable sources of energy.

10.11. 31% said they 'do not know', which reflects the general vagueness in commitment highlighted in the previous question.

Figure 10.2: Actions towards becoming net-zero
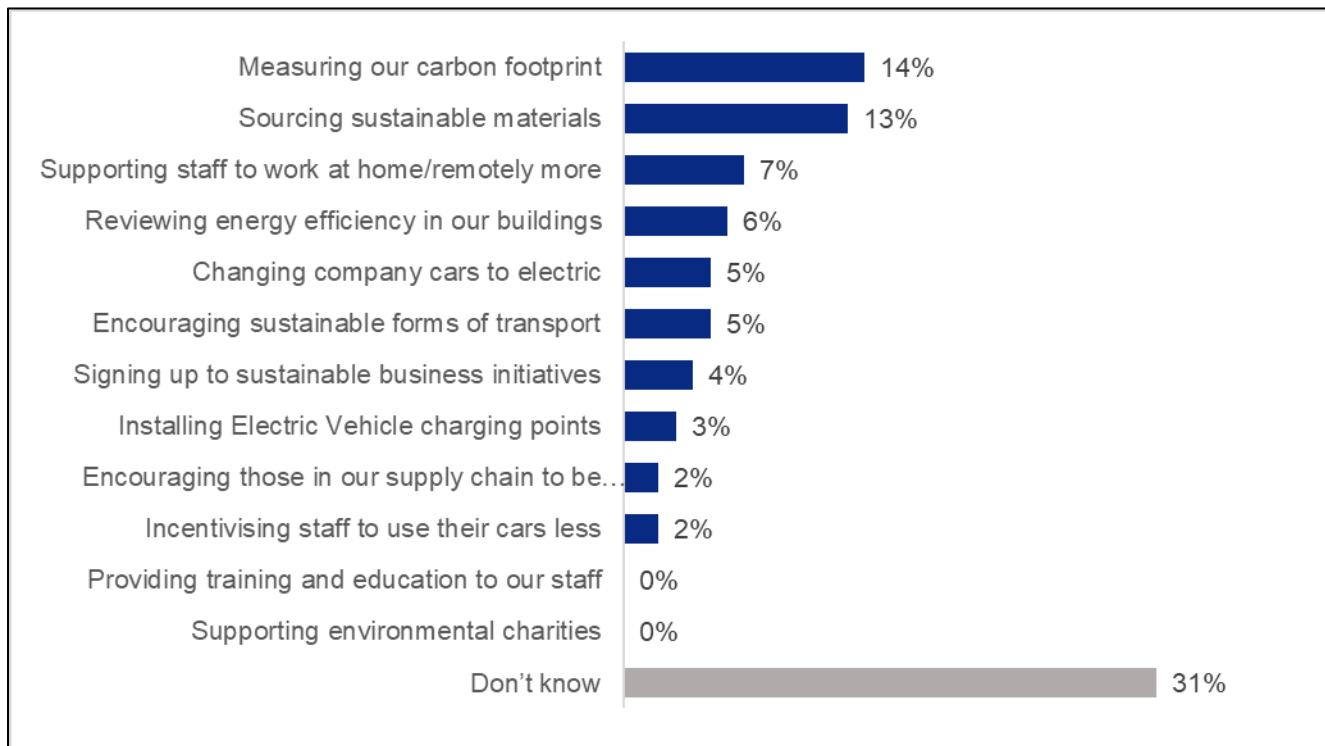
Number of respondents: 375 (only asked to those committed in some way).

Question asked: What is your organisation doing to become net zero?

Note: Respondents could select more than one answer.

Barriers to reducing carbon footprint

10.12. The most commonly cited barrier businesses gave to reducing the carbon footprint of their business was the lack of knowledge (16%).

10.13. Financial barriers were common, with 14% mentioning the availability or cost of low carbon alternatives, 13% mentioning a lack of capital or finance and 12% a lack of grants.

10.14. 7% mentioned a lack of Electric Vehicle charging points.

Figure 10.3: Barriers to reducing businesses' carbon footprint
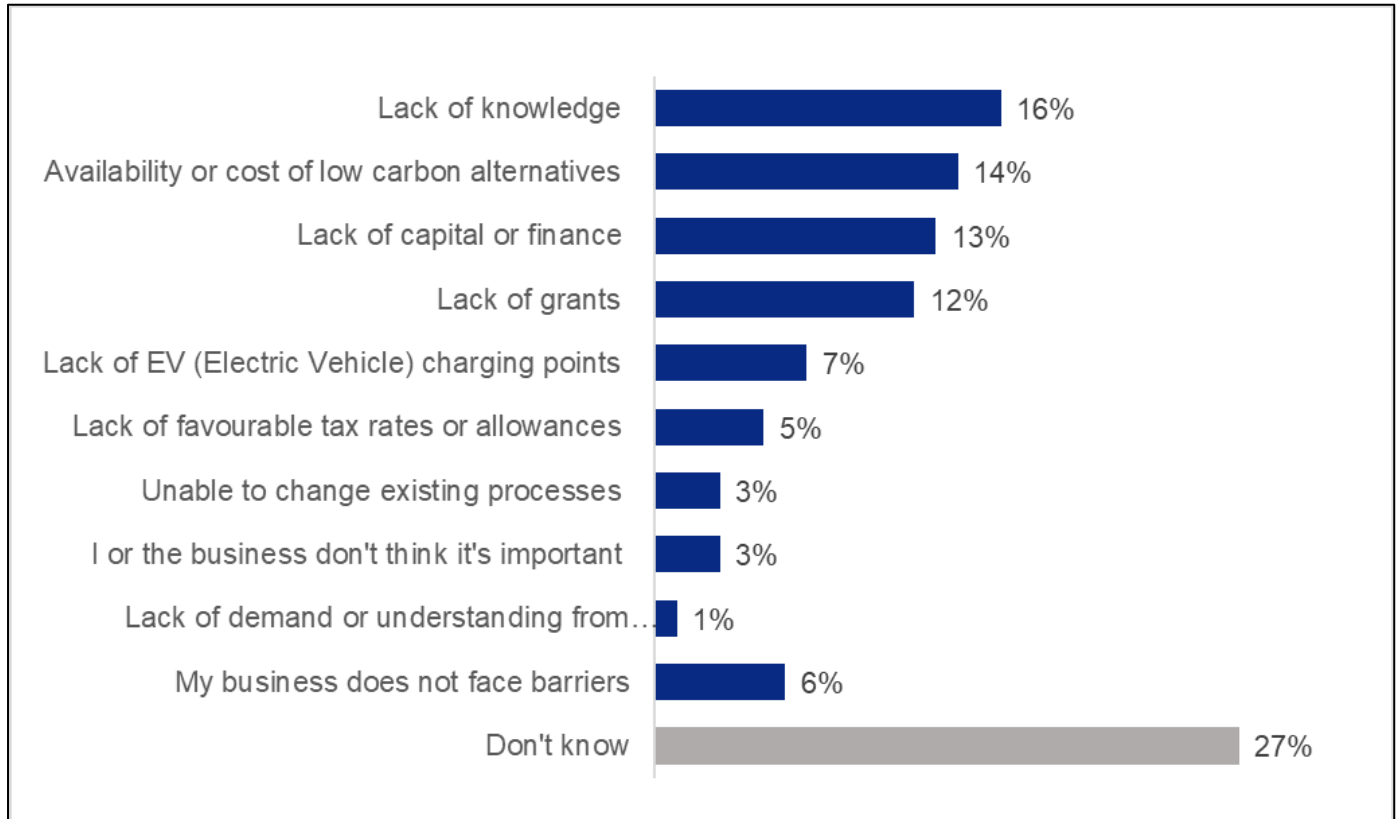
Number of respondents: 477.

Question asked: What do you consider, if anything, is a barrier to reducing your business's carbon footprint?

Note: Respondents could select more than one answer.

Appendix: Questionnaire

Bracknell Forest Business Survey 2021

Section 1: Business information

Q1. How many people are employed by your organisation in Bracknell Forest? Note to interviewer: 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+

Q2. How would you describe your company from the following list? Note to interviewer: 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

Q3. How would you describe your company status? Note to interviewer: Prompt from list below and Single code.

- ○ Sole Trader
- ○ Partnership
- ○ Private Limited Company (LTD) (by guarantee)
- ○ Public Limited Company (PLC) (by shares)
- ○ Franchise
- ○ Social Enterprise
- ○ Community Interest Company Limited by Guarantee (CIC)
- ○ Community Interest Company Limited by Shares (CIC)
- ○ Charitable Incorporated Organisation (CIO)
- ○ Co-operative Models: IPS – Industrial Provident Society; Bencom – Employee owned
- ○ Other
- ○ Don't know

If 'other', please specify:

Section 2: The Covid-19 pandemic

Note to interviewer: Ask respondents to think about the situation now, relative to the pandemic and before i.e. we're not worried about the ups and downs during the pandemic itself, just how they are currently faring in light of the pandemic.

Q4. **What has been the impact of Covid-19 on your businesses' turnover?** Note to interviewer: Read out and select one answer only.

- ○ Substantially higher than normal
- ○ Slightly higher than normal
- ○ Slightly lower than normal
- ○ Substantially lower than normal
- ○ No affect on turnover
- ○ Unsure/don't know

Q5. **Compared to pre-pandemic levels, do you expect the proportion of your workforce working from home to decrease, stay the same or increase in the next 6 months?** Note to interviewer: Select one answer only.

- ○ Decrease
- ○ Stay the same
- ○ Increase

Q6. **Ask to those where home working has increased** **What impact has increased homeworking had on the productivity of your staff?** Note to interviewer: Read out response options and select one answer only.

- ○ Decreased productivity
- ○ Productivity stayed the same
- ○ Productivity increased

Q7. **Ask to those where home working has increased** **What impact has increased homeworking had on the demand for commercial office and meeting space?** Note to interviewer: Read out response options and select one answer only.

- ○ Decreased demand
- ○ Demand will stay the same
- ○ Increased demand

Q8. **Over the next 12 months do you expect your business performance to generally improve, remain stable, or deteriorate?** Note to interviewer: Select one answer only.

- ○ Improve
- ○ Remain stable
- ○ Deteriorate

Q9. What, if any, have been positive impacts of Covid-19 on your business? Note to interviewer: Ask unprompted and select all relevant answers.

- ☐ New or different services or products offered
- ☐ Delivering services or products in a different or new way
- ☐ More remote or flexible working
- ☐ New ways of working
- ☐ Implemented efficiencies
- ☐ Reduced over-heads
- ☐ Increased business resilience
- ☐ Improved staff engagement
- ☐ Increased productivity
- ☐ Increased turnover
- ☐ Increased profitability
- ☐ Increased general performance
- ☐ Increased customer/client base
- ☐ Increased skills of workforce
- ☐ Increased size of workforce
- ☐ Other
- ☐ No positive impacts
- ☐ Don't know

If 'other', please specify:

Q10. What, if any, have been negative impacts of Covid-19 on your business? Note to interviewer: Ask unprompted and select all relevant answers. Interviewer: To help you navigate the long list of response options, those in red are related to productivity/operational issues, those in blue are financial issues, those in green are staffing issues.

- [ ] Difficulties performing our business due to social distancing measures and travel restrictions
- [ ] Reduced productivity
- [ ] Site premises closed
- [ ] Lack of access to overseas customers
- [ ] Lack of access to domestic customers
- [ ] Supply chain problems i.e. lack of supplies required to conduct business due to lack of goods or the ability to transport to/from customers and suppliers
- [ ] Loss of income/reduced turnover
- [ ] Less profitability
- [ ] Cash flow issues and/or lack of cash reserves
- [ ] Unable to pay bills, invoices, rent, loans or tax
- [ ] Lack of access to finance
- [ ] Had to take on increased debt to maintain the business
- [ ] Had to use company reserves to maintain the business
- [ ] Had to make staff redundant
- [ ] Had to put staff on furlough
- [ ] Had to reduce staff hours or pay
- [ ] Had to ask staff to take leave (paid or unpaid)
- [ ] Used less freelancers, temporary staff or zero-contract hour staff
- [ ] Delayed recruiting or on-boarding new staff
- [ ] Delayed recruitment of entry-level or apprenticeship roles
- [ ] Difficulties adapting to home working
- [ ] Lack of availability of staff due to illness/isolation or unwillingness to work
- [ ] Difficulties recruiting staff with the appropriate skills
- [ ] Difficulties retaining staff
- [ ] Emotional distress due to business challenges and/or concerns about health and wellbeing of staff or customers
- [ ] Had to cease trading
- [ ] Other
- [ ] No issues
- [ ] Don't know

If 'other', please specify:

[   ]

Q11. Have you accessed (or are you planning to access) any of the Government's business support schemes? Note to interviewer: Ask unprompted initially and please select all relevant answers (read out if need be to prompt/clarify).

- ☐ Small Business Grant Funding
- ☐ Business rates holiday
- ☐ Cash Grants for retail, hospitality and leisure
- ☐ Cash grants for nursery providers
- ☐ Job Retention Scheme (covering salaries of furloughed employees and workers)
- ☐ Self-employment Income Support Scheme (SEISS)
- ☐ Coronavirus Business Interruption Loan Scheme (CBILS)
- ☐ Coronavirus Bounce Back Loan
- ☐ Defer VAT
- ☐ Defer PAYE Income Tax and other tax payments
- ☐ Use HMRC's Time to Pay scheme
- ☐ Claim back statutory sick pay
- ☐ Accessed Kickstart scheme
- ☐ Other
- ☐ None

If 'other', please specify:

_____

Q11. a1 Have you experienced any difficulties when trying to access any of the above?

- ○ Yes
- ○ No
- ○ Don't know

If 'Yes', please outline what support you had difficulty accessing and why?:

_____

Q12. How have you changed, if at all, the way your business works over the longer term as a result of Covid-19? Ask unprompted and select all relevant answers.

- ☐ Introduced new services or products
- ☐ Increased digital delivery of service/products
- ☐ Led to improvement in broadband/internet access to accommodate increased digital requirements of business
- ☐ Entered new markets
- ☐ Delivered services or products in a different or new way
- ☐ Increased pricing
- ☐ Invested in sales and marketing
- ☐ Introduced sales/promotions
- ☐ Introduced flexible or remote working
- ☐ Introduced social distancing measures
- ☐ Reduced staffing costs
- ☐ Reduced other costs
- ☐ Made other efficiencies
- ☐ Increased debt/sought financial support
- ☐ Sought new funding/investment
- ☐ Other
- ☐ No changes made

If 'other', please specify:

[   ]

Q13. What employment and workplace measures have you taken, if any, to help keep your business, staff and customers safe? Note to interviewer: Ask unprompted and select all relevant answers.

- ☐ Adjusted working practices (e.g. staggered working hours, working in fixed teams)
- ☐ Coronavirus (COVID-19) vaccinations
- ☐ Covid-19 on-site testing
- ☐ Hygiene measures
- ☐ Personal Protective Equipment (PPE)
- ☐ Social distancing
- ☐ Temperature checks
- ☐ Covid-19 risk assessments
- ☐ Remote working/working from home
- ☐ Reduced business travel
- ☐ Other
- ☐ None of the above
- ☐ Don't know

If 'other', please specify:

[   ]

Q14. What, if anything, would help your business and the local economy to recover from the impact of Covid-19? Note to interviewer: Ask unprompted and select all relevant answers. Note to interviewer: the categories below are quite broad and based on our assumptions currently. Feel free to also use the 'other' response box to capture anything outside of these categories or nuances not covered in the suggested response options to provide us with greater detail and insight.

- ☐ Business information, support or advice (such as advice about business recovery, resilience or growth)
- ☐ Access to finance (such as grants, affordable finance and loans)
- ☐ Support to reduce costs (such as debt relief, loan, mortgage, rent or rate holidays or subsidies, deferral of tax payments)
- ☐ Access to Government support programmes (such as job retention, statutory sick pay schemes)
- ☐ Access to employment and skills support (including training and development programmes for staff, good employer practice guidance, support to employers to recruit skilled staff or local staff, access to apprenticeship programmes)
- ☐ Investment to improve the local infrastructure and area to encourage business and economic growth (such as improved travel, broadband, high streets, public spaces, premises, reduced crime and asb)
- ☐ Other
- ☐ No changes or help required
- ☐ Don't know

If 'other', please specify:

_____

Section 3: Brexit

Q15. Overall, what do you think has be the impact on your business, if any, of the UK leaving the European Union? Note to interviewer: Select one answer only.

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

Q16. What have been the main <u>negative impacts</u>, if any, you have seen on your business of the UK leaving the EU? Note to interviewer: Do not read out but probe if necessary. 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
- ☐ Supply chain problems i.e. lack of supplies required to conduct business due to lack of goods or the ability to transport to/from customers and suppliers
- ☐ Cost of Brexit planning
- ☐ No negative impacts
- ☐ Other

If 'Other', please specify:

[   ]

Q16 What have been the positive impacts, if any, on your business of the UK leaving the EU?
a1 Please list below:

[   ]

Section 4: Recruitment, Skills and Retention

Q17. <u>Ask all:</u> **Have you had any vacancies in the last 12 months?** Select one answer only.

○ Yes

○ No

Q18. <u>Ask those that said 'Yes' to previous question:</u> **Have you had any vacancies in the last 12 months that you have found hard to fill?** Select one answer only.

○ Yes

○ No

Q19. <u>Ask all:</u> **Thinking about recruiting staff in Bracknell Forest, how easy or difficult would you say it is to recruit employees with the right skills, giving your answer on a 5 point scale, where 5 is very easy and 1 if very difficult?** Read out and Select one answer only.

○ 5 – Very easy

○ 4

○ 3

○ 2

○ 1 – Very difficult

○ Never recruited

○ Don't know

Q20. <u>**Ask those that have recruited:**</u> **Why would you say that your organisation is experiencing, or has experienced, difficulties finding recruits with the right skills?** Ask unprompted and Select all relevant answers.

- ☐ Too much competition from other sectors
- ☐ Not enough people interested in doing this type of job
- ☐ Low number of applicants with the required skills
- ☐ Low number of applicants with the required attitude, motivation or personality
- ☐ Low number of applicants with the required qualifications
- ☐ Low number of applicants with the necessary work experience
- ☐ Limited availability of training for required skills
- ☐ High staff turnover, so need to recruit regularly
- ☐ Salary not competitive enough
- ☐ Job requirements
- ☐ Expectations from applicants are too high
- ☐ Our poor recruitment strategy
- ☐ Not enough or unsociable hours
- ☐ Low wages or high living costs
- ☐ The economy
- ☐ The impact of the Covid-19 pandemic
- ☐ The impact of the UK leaving the EU
- ☐ Other (only select if can't fit into other categories)
- ☐ None or not applicable
- ☐ Don't know

If 'other', please specify:

_____

Q21. Ask all: Thinking about your current workforce in Bracknell Forest do you feel that there are gaps in the skills base of your current staff? Select one answer only.

- ○ Yes
- ○ No
- ○ Don't know
- ○ Not applicable - do not have any staff

Q22. Ask those with skills gaps: In general, why would you say you are experiencing skills gaps amongst your current workforce? Note to interviewer: Ask unprompted and select all relevant answers.

- ☐ Too much competition from other sectors
- ☐ Not enough people interested in doing this type of job
- ☐ Low number of applicants with the required skills
- ☐ Low number of applicants with the required attitude, motivation or personality
- ☐ Lack of work experience the company demands
- ☐ Lack of qualifications needed for the sector
- ☐ Limited availability of training
- ☐ High staff turnover
- ☐ Difficult to keep up with change in this industry/sector
- ☐ Costs and wages
- ☐ Due to the job requirements
- ☐ Expectations from applicants are too high
- ☐ Costs of training and up skilling
- ☐ Low wages or high living costs
- ☐ No time to be able to up skill staff
- ☐ Difficulties retaining staff due to the Covid-19 pandemic
- ☐ Difficulties retaining staff due to the UK leaving the EU
- ☐ Other (only select if can't fit into other categories)
- ☐ Don't know

If 'other', please specify:

_____

Q23. Ask all: How would you rate your ability to retain staff in Bracknell Forest, where 5 means it is very easy and 1 means it is very difficult? Read out and Select one answer only.

- ○ 5 – Very easy
- ○ 4
- ○ 3
- ○ 2
- ○ 1 – Very difficult
- ○ Don't know
- ○ Not applicable - don't have any staff

Section 5: Training and Development

Q24. Generally, would your workforce in Bracknell Forest benefit from training to improve their skills? Select one answer only.

○ Yes

○ No

○ Don't know

○ Not applicable - don't have staff

Q25. <u>Ask all:</u> Which of the following does your organisation offer? Read out and Select all relevant answers.

☐ Apprenticeships

☐ Unpaid, or expenses only, work experience or work placements/trials

☐ Internships

☐ Specialist workplace training

☐ None

☐ Don't know

Section 6: Wellbeing

Q26. Which of the following does your organisation offer to employees? Read out and Select all relevant answers.

- [ ] A childcare scheme, such as a crèche or vouchers scheme
- [ ] A leisure or sports scheme, such as discounted gym membership
- [ ] Access to professional emotional support or counselling
- [ ] Healthcare schemes
- [ ] Well-being schemes such as counselling, fitness or healthy eating strategies
- [ ] Flexible working
- [ ] Home working
- [ ] Active travel schemes e.g. cycle to work scheme
- [ ] None
- [ ] Don't know
- [ ] Not applicable

Q27. Do you measure or monitor staff wellbeing levels (e.g. through employee surveys or appraisals)? Note to interviewer: Ask unprompted and select one answer only.

- ○ Yes
- ○ No
- ○ Don't know

Q28. In what ways, if any, has the Covid-19 impacted on staff wellbeing? Note to interviewer: Ask unprompted and select all relevant answers.

- [ ] Improved work-life balance due to home working/flexible working
- [ ] Improved mental health and wellbeing
- [ ] Improved physical health and wellbeing
- [ ] Reduced stress levels
- [ ] Worsened work-life balance
- [ ] Decreased mental health and wellbeing
- [ ] Decreased physical health and wellbeing
- [ ] Increased stress levels
- [ ] Other
- [ ] No impact
- [ ] Don't know
- [ ] Not applicable

If 'other', please specify:

Section 7: Infrastructure

Q29. What are the main reasons for your organisation being located in Bracknell Forest? Note to interviewer: 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:

[   ]

Q30. 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? This might include changes to business premises, employee numbers or outputs. Select one answer only.

- ○ Increase
- ○ Decrease
- ○ Stay the same
- ○ Don't know

Q31. If said 'Increase' to previous question: In what ways?

[   ]

Q32. If said 'Decrease' to previous question: In what ways?

[   ]

Q33. How would you rate the following in Bracknell Forest? Please tell me on a 5 point scale, where 5 is excellent and 1 is extremely poor. Read out each element and select one answer for each.

	1 – Extremely poor	2	3	4	5 – Excellent	No opinion	Don't know
Rail services	○	○	○	○	○	○	○
Bus services	○	○	○	○	○	○	○
The major road network	○	○	○	○	○	○	○
The local road network	○	○	○	○	○	○	○
Broadband	○	○	○	○	○	○	○
Housing (including social/low cost housing)	○	○	○	○	○	○	○
Greenspace/ Openspace accessible to employees	○	○	○	○	○	○	○
Catering/Restaurant facilities	○	○	○	○	○	○	○
Hotels	○	○	○	○	○	○	○
Cycle and walking routes	○	○	○	○	○	○	○
Educational facilities	○	○	○	○	○	○	○
Business premises (small/medium/large)	○	○	○	○	○	○	○
Electric Charging Points	○	○	○	○	○	○	○

Q34. 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

☐ Improve cycling and walking routes

☐ No suggestions

☐ Other

☐ Don't know

If other, please specify:

Q35. 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
- ☐ Support to recover from the pandemic
- ☐ Support to manage the impact of Brexit
- ☐ Improved access to Bracknell Town Centre
- ☐ Improved cycling and walking routes
- ☐ No suggestions
- ☐ Other
- ☐ Don't know

If other, please specify:

Section 8: Broadband

Q36. 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

Q37. Does your business currently have access to superfast broadband? Select one answer only.

○ Yes

○ No

○ Don't know

Q38. How important is having superfast broadband to your business in Bracknell Forest? Note to interviewer: Read out and select one answer only.

○ 1 – Not at all important

○ 2

○ 3

○ 4

○ 5 - Very important

○ Don't know

Q39. How would you rate your business's current internet connection? Would you say it's.... Note to interviewer: Read out and select one answer only.

○ Excellent

○ Adequate

○ Poor

○ Never use the internet

○ Don't know

Q40. Are you aware of grants to install superfast broadband in your local area? Note to interviewer: Ask unprompted and select one answer only.

○ Yes, I am aware of them in my area

○ Yes, I am aware of the grants in general, but not that they may be available in my area

○ No

○ Don't know

Q41. Are you aware of the Building Digital UK Gigabit project to improve connectivity to 85% coverage by 2025? Note to interviewer: Ask unprompted and select one answer only.

○ Yes

○ No

○ Don't know

Q42. How important is having Gigabit capable broadband to your business? Note to interviewer: Read out response options and select one answer only.

- ⊙ Very important
- ⊙ Quite important
- ⊙ Neither important nor unimportant
- ⊙ Not that important
- ⊙ Not important at all
- ⊙ Don't know

Q43. Have you heard of Smart Cities? Note to interviewer: Ask unprompted and select one answer only.

- ⊙ Yes
- ⊙ No
- ⊙ Don't know

Q44. Have you changed your broadband to help support the way you do business due to Covid-19? Note to interviewer: Ask unprompted and select one answer only. Note to interviewer: This question is trying to explore if a business has had to improve their broadband to accommodate increased digital ways of working - either in terms of delivering their services/products and/or working remotely/from home

- ⊙ Yes
- ⊙ Not yet, but intend to
- ⊙ No
- ⊙ Don't know

Q45. Do you staff have sufficient broadband to enable effective home/remote working? Note to interviewer: Ask unprompted and select one answer only.

- ⊙ Yes
- ⊙ No
- ⊙ Not applicable - we do not do home or remote working
- ⊙ Don't know

Section 9: Awareness of key local business support/improvement organisations

Q46. 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? Note to interviewer: Select one answer only.

- ○ Yes
- ○ No
- ○ Don't know

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

- ○ Yes
- ○ No
- ○ Don't know

Q48. Have you heard of the Bracknell Business Improvement District (BID)? Note to interviewer: Select one answer only.

- ○ Yes
- ○ No
- ○ Don't know

Section 10: Green agenda

Q49. Has your organisation made a commitment to become net-zero, and if so by when? Note to interviewer: Ask unprompted, but clarify if required. Select one answer only.

○ Yes, to reach it by 2030 or before

○ Yes, to reach it by 2040

○ Yes, to reach it by 2050

○ Yes, we have specific targets or aims to become net-zero, but we have not set a deadline yet

○ No, we have not set a target, but we are committed to being more environmentally friendly

○ No, it is not something we've committed to or thought about much

○ Don't know

Q50. What is your organisation doing to become net zero? (only ask to those that are actively committed - this is automated on line) Note to interviewer: Ask unprompted. Select all relevant answers.

☐ Incentivising staff to use their cars less

☐ Encouraging sustainable forms of transport

☐ Supporting staff to work at home/remotely more

☐ Reviewing energy efficiency in our buildings

☐ Providing training and education to our staff

☐ Sourcing sustainable materials

☐ Encouraging those in our supply chain to be more environmentally friendly

☐ Measuring our carbon footprint

☐ Signing up to sustainable business initiatives

☐ Supporting environmental charities

☐ Installing Electric Vehicle charging points

☐ Changing company cars to electric

☐ Other

☐ Don't know

If 'Other', please specify:

Q51. What do you consider, if anything, is a barrier to reducing your business's carbon footprint?
Note to interviewer: Ask unprompted. Select all relevant answers.

- ☐ Availability or cost of low carbon alternatives
- ☐ Lack of grants
- ☐ Lack of capital or finance
- ☐ Lack of favourable tax rates or allowances
- ☐ Unable to change existing processes
- ☐ Lack of knowledge
- ☐ Lack of demand or understanding from customers
- ☐ Lack of understanding from employees
- ☐ Lack of EV (Electric Vehicle) charging points
- ☐ My business does not face barriers
- ☐ I or the business don't think it's important
- ☐ Don't know
- ☐ Other

If 'Other', please specify:

_____

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 or in the New Year.

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